



Brazil Manufacturing

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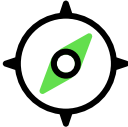
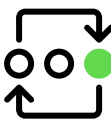
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Manufacturing Commercial Operations

The#ServiceNow® Manufacturing Commercial Operations (MCO) enables you to optimize sales, support, and service operations to enhance operational efficiency, lower costs, and improve productivity.

<div>Explore</div> <div></div> <div>Learn how Manufacturing Commercial Operations can help you with its key features and benefits.</div>	<div>Configure</div> <div></div> <div>Plan and customize Manufacturing Commercial Operations to meet your specific needs.</div>	<div>Integrate</div> <div></div> <div>Extend Manufacturing Commercial Operations capabilities by integrating with other applications.</div>
<div>Use</div> <div></div> <div>See how manufacturers, dealers, and consumers can use Manufacturing Commercial Operations to manage manufacturing ecosystems.</div>	<div>Reference</div> <div></div> <div>Get additional information about Manufacturing Commercial Operations use cases and components.</div>	<div>Data Model</div> <div></div> <div>Framework for workflow integration.</div>
	<div>Automate</div> <div></div> <div>Use generative AI skills and agentic workflows to automate manufacturing tasks</div>	

Additional resources

- Learn more about what's new and changed at <https://www.servicenow.com/docs/access?context=manufacturing-commercial-operations-rn&version=brazil&pubname=brazil-release-notes&ft:locale=en-US> .
- Log in to your ServiceNow® account and find additional information about implementing and deploying Manufacturing Commercial Operations features at the [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 [ServiceNow Impact](#) .
- Connect with other Manufacturing Commercial Operations users at [Now Community](#) .

Exploring Manufacturing Commercial Operations

The Manufacturing Commercial Operations helps your organization accelerate revenue, improve customer experiences, and reduce operational costs.

Overview of MCO

The Manufacturing Commercial Operations product offers a single platform to manage your sales, support, and service operations. You can manage the end-to-end life cycle of your products, promotions, and services. Key benefits of the Manufacturing Commercial Operations include:

Sales promotion campaign management

Create and manage sales promotion campaigns. Process and resolve related claims for channel partners and dealers.

Recall campaign management

Create, launch, and track product recall campaigns. Manage and resolve recall-related claims.

Repair (recall and warranty) claims

Submit and approve repair claims for warranty and recall campaigns. Streamline post-sales service across warranty claims and recall operations.

Pre-authorization request

Submit and approve pre-authorization requests to verify the coverage of specific parts, fees, or repairs under an existing warranty or service contract.

Dealer portal

Access real-time information about the ongoing and upcoming product recall and sales promotions. Engage dealers and channel partners more effectively through the dealer portal.

Optimize lead-to-cash operations

Manage leads and opportunities from initial contact to close using order management and configurable catalogs. Launch complex products and services fast with configurable catalogs.

Quality issue management

Drive measurable quality and cost improvements by enabling structured issue intake, faster resolution, and help prevent recurring quality issues across the product life cycle.

Improve agility and savings with automated exception and dispute workflows

Automate the order exception and invoice dispute management processes by fusing customers, ServiceNow® Original Equipment Manufacturers (OEMs), channels, and partners with one system of engagement and action.

MCO users

MCO core roles

Role	Persona	Internal name	Description
Admin	Manufacturing Operations Admin	[sn_mfg_cmn.manufacturing_operations_admin]	Manage all OEM and dealer operations and configurations.
OEM	Sales Promotion Manager	[sn_sales_prm_mgmt.sales_promotion_manager]	Create, read, update, and cancel a sales promotion.
OEM	Claims Agent	[sn_claim_cmn.claims_agent]	View, approve, recall, and reject claims.
OEM	Recall Manager	[sn_rcl_claim_mgmt.recall_manager]	Create, read, and update a recall campaign claim.
OEM	Recall Phase Owner	[sn_rcl_claim_mgmt.recall_phase_owner]	Update, publish, close, and cancel a recall campaign phase or sub-phase.
OEM	Warranty Specialist	[sn_claim_cmn.warranty_specialist]	View, approve, return, or reject pre-authorization requests.
Dealer	Dealer Sales Agent	[sn_dealer_mgmt.dealer_sales_agent]	Create, view, update, and cancel a sales promotion claim case.
Dealer	Dealer Operations Admin	[sn_dealer_mgmt.dealer_operations_admin]	Create, read, update, or cancel all claims.
Dealer	Dealer Service Advisor	[sn_dealer_mgmt.dealer_service_advisor]	Create, view, update, and cancel repair claim cases.

Quality roles

Role	Persona	Internal Name	Description
Admin	Quality Issue Management Admin	[sn_mfg_qm.admin]	Full access to all Quality Issue Management (QIM) features, tables, and configuration.
OEM	Product Non-conformance Triager	[sn_mfg_qm.triager]	Review new submissions, check completeness, determine priority and severity, assign to

Quality roles (continued)

Role	Persona	Internal Name	Description
			resolvers, and update triage information.
OEM	Product Non-conformance Resolver	[sn_mfg_qm.resolver]	Work the full PNCC playbook: correction, impacted assets, containment, and closure. Create Quality Investigations.
OEM	Product Quality Investigation Member	[sn_mfg_qm.investigation_member]	Participate in PQI activities: create RCA tasks, classify causes, and create CAPA actions.
OEM	Product Quality Investigation Lead	[sn_mfg_qm.investigation_lead]	Create, view, update, and cancel a quality investigation and related records. Sign off the investigation and move it to closure.
OEM	Remediation Plan Approver	[sn_mfg_qm.remediation_plan_approver]	Approve or reject remediation action plans before they are enacted.
OEM	Finance Approver	[sn_mfg_qm.finance_approver]	Approve Cost of Poor Quality (COPQ) financial requests and expense lines.
Dealer	Product Non-conformance Submitter	[sn_mfg_qm.submitter]	Create, view, update, and cancel a non-conformance case. Create a correction action and add expense lines to it.

Manufacturing Commercial Operations workflow

The Manufacturing Commercial Operations applications combined with ServiceNow® workflows help organizations manage sales, support, and service operations effectively.

Manufacturing Commercial Operations unifies operational domains on a single platform, enabling organizations to achieve:

- End-to-end visibility across all operations
- Automated workflows that reduce manual intervention
- Proactive service delivery through predictive insights
- Seamless collaboration between dealers, service providers, and customers
- Revenue optimization by converting service events into sales opportunities

Benefits

The MCO delivers measurable benefits across sales promotions, warranty and recall claims, quality issue resolution, and dealer engagement. The following table maps each benefit to its supporting feature and the personas who use it.

MCO core and quality

Benefit	Feature	Persona
Create, manage, and resolve sales promotion campaigns. Support bulk uploads for dealer collaboration.	Sales promotion claims	Sales Promotion manager Dealer Sales Agent
Manage warranty claims with dealers. Support dealers to submit, edit, and track claims. Streamline resolution for both dealer service advisors and OEM claims agents.	Repair claim	Claims Agent Dealer Operations Admin
Create, manage, and track recall campaigns to closure.	Recall campaign	Recall Manager Recall Phase Owner
Reduce quality costs and accelerate issue resolution. Build customer trust through proactive quality management.	Quality issue management	Product Non-conformance Triage Product Non-conformance Resolver Product Quality Investigation Member Product Quality Investigation Lead
Provide dealers a unified experience to submit, edit, and track claims through the dealer portal.	Dealer landing page	Dealer Sales Agent Dealer Operations Admin

Extended capabilities

MCO works with other ServiceNow modules to extend your operational capabilities.

Supported features

Benefit	Feature
Resolve customer issues and requests. Use a proactive service approach to increase customer satisfaction and retention.	Extended capabilities
Manage order to cash operations. Launch new services and subscriptions. Capture up-sell and cross-sell revenue.	Order to cash operations See Extended capabilities
Provide self-service capabilities and support requests for products, subscriptions, and services. Use Service Model Foundation (SMF) to define organization hierarchies and customer relationships.	Channel Support Operations See Extended capabilities

What to explore next

- [What is Manufacturing Commercial Operations \(MCO\)?](#) 
- [Configure Manufacturing Commercial Operations](#)
- [Using Manufacturing Commercial Operations](#)
- [Reference](#)

Manufacturing Commercial Operations core features

Manufacturing Commercial Operations (MCO) enables you to manage sales promotions, recall campaigns, warranty and repair claims, and pre-authorization requests.

MCO core features

Features	Description
Sales promotion claims	Create and manage sales promotions to reach customers with targeted offers and campaigns.
Recall campaign	Initiate and manage recall campaigns to address product defects or issues after distribution.
Repair claim	Process warranty and repair claims by documenting customer-reported issues and managing reimbursement requests from dealers.
Pre-authorization	Request pre-authorization to obtain approval before initiating repair or warranty claim activities.

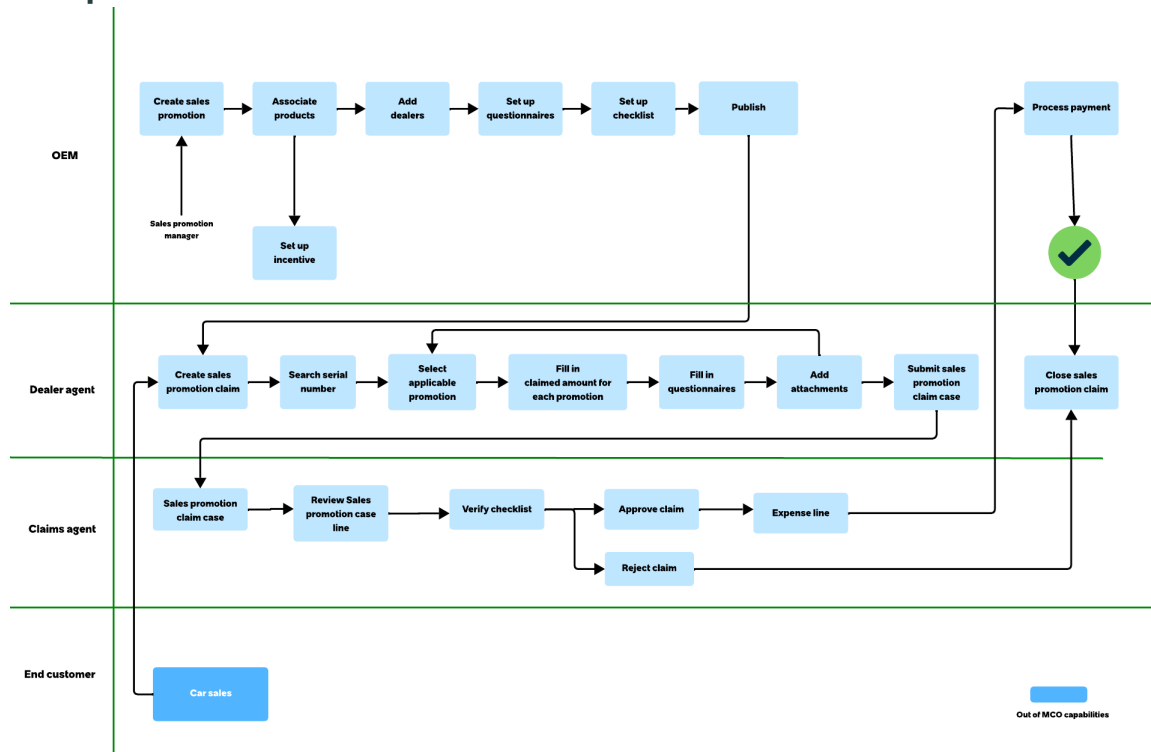
Sales promotion claims

OEMs create sales promotions and target them to specific criteria or customers. The dealers or channel partners extend these promotions to end customers and submit reimbursement claims to the OEM.

The sales promotion framework enables OEMs to publish and manage the promotional campaigns, and enables dealers to submit reimbursement claims. The dealer portal enables dealers to submit claims for reimbursement post product sales transactions. Sales promotion includes three main phases:

- Creation of sales promotion by the OEM.
- Creation of claim against the promotion by the dealer.
- Review and reimbursement for the claim by the OEM.

Sales promotion workflow



What to explore next

To learn more about configuring and using sales promotion, see:

- [Sales promotion campaign data model](#)
- [Install Manufacturing Commercial Operations](#)
- [Implement a sales promotion setup](#)
- [Sales promotion for the dealer](#)
- [Sales promotion](#)

Sales promotion campaign use case

Use case scenarios demonstrate when and how to use the Sales Promotion application to create and manage a promotion campaign. This example shows how to streamline promotion setup, claim processing, and dealer visibility.

Scenario

Alectri wants to promote 2024 Epsilon EV sales in the U.S. through a loyalty discount program. Sales teams managing promotions and dealers processing claims must address these challenges:

- **Process inefficiency:** Disconnected systems and lack of standardization lead to inconsistent execution.
- **Visibility gaps:** Limited insight into active promotions and dealer claims.
- **Approval delays:** Missing information and incomplete documentation slow processing cycles.
- **Dealer friction:** Dealers struggle to access promotions and submit claims efficiently.

Solution

Create and manage the promotion using the Sales Promotion application through four key workflow phases:

- 1. Create:** Configure promotion timeline, type, eligible products, dealer scope, and discount amounts.
- 2. Configure:** Build questionnaire template with required fields (loyalty number, vehicle details, customer info) and validation checklist with documentation requirements.
- 3. Target:** Select eligible products (2024 Epsilon EV) and dealer regions (North America dealerships).
- 4. Publish and Monitor:** Publish campaign to dealers via portal and track claims and approvals in real-time.

The [Sales promotion](#) workspace provides real-time visibility into active promotions, claims, and approval status.

Benefits

Compare the impact of using the Sales Promotion application:

Sales promotion benefits

Without MCO	With MCO Sales Promotion
Manual, error-prone setup	Standardized templates verify complete configuration.
Slow claim processing	Required fields and checklists reduce delays.
Limited dealer access	Portal enables self-service claim submission.
No unified visibility	Single dashboard for promotions, claims, and approvals.

Outcome

Alectri creates and manages a loyalty discount promotion across North America. Validation checklists verify complete claims, reducing processing time and enabling dealer self-service claim submission.

Sales promotion claim submission use case

Use case scenarios demonstrate when and how to use the Dealer portal application to submit a sales promotion claim. It provides practical examples of common sales promotion management situations.

Scenario

Sophie, a dealer sales agent, must submit sales promotion claims for vehicles sold at the dealership. The claims include a Senior Citizen Promotion (\$1,500) and a Trade-In Promotion (\$2,500). Dealers submitting sales promotion claims might encounter some of the following challenges:

- Manual processes: Disconnected systems and scattered documentation cause delays and errors.
- Claim complexity: Single vehicles qualifying for multiple promotions requires careful tracking.
- Data quality: Missing or incorrect information leads to rejections and resubmissions.
- Lack of visibility: Limited access to claim status after submission.

Solution

Sophie uses the Manufacturing Commercial Operations (MCO) Dealer Portal to submit sales promotion claims efficiently:

1. Access: Opens the Dealer Portal and navigates to Sales Promotion Claims.
2. Upload: Downloads the bulk upload template (promotion ID, external ID, sale price, currency, asset serial number) and completes it with both vehicle details.
3. Review: Submits the file and reviews auto-filtered eligible promotions for each vehicle.
4. Select: Chooses Senior Citizen Promotion and Trade-In Promotion from eligible options.
5. Configure: Enters claim amounts within defined ranges (\$2,500 for trade-in, \$1,500 for senior citizen).
6. Complete: Fills structured questionnaires with auto-populated dealer information and required details using preconfigured drop-downs. Example: customer age and SSN for Senior Citizen; vehicle serial number, make, model, year, trim for Trade-In.
7. Document: Uploads required supporting documents (vehicle title) within the claim form.
8. Track: Submits the claim and monitors status in real-time, views OEM comments, or cancels if needed.

The [Using the dealer portal](#) reduces manual effort and improves accuracy.

Benefits

Sales promotion benefits

Without MCO	With MCO Sales Promotion
Manual claim submission for each vehicle	Bulk upload submits multiple claims in one action.
Uncertainty about eligible promotions	Auto-filtered promotions display only valid options.

Sales promotion benefits (continued)

Without MCO	With MCO Sales Promotion
Incomplete information causes rejections	Structured questionnaires and validation ensure complete data.
No visibility into claim status	Real-time tracking shows claim progress and OEM feedback.
Scattered documentation across systems	Centralized file uploads keep all documents with the claim.
Range and validation errors	Value-range validation prevents overages and data inconsistencies.

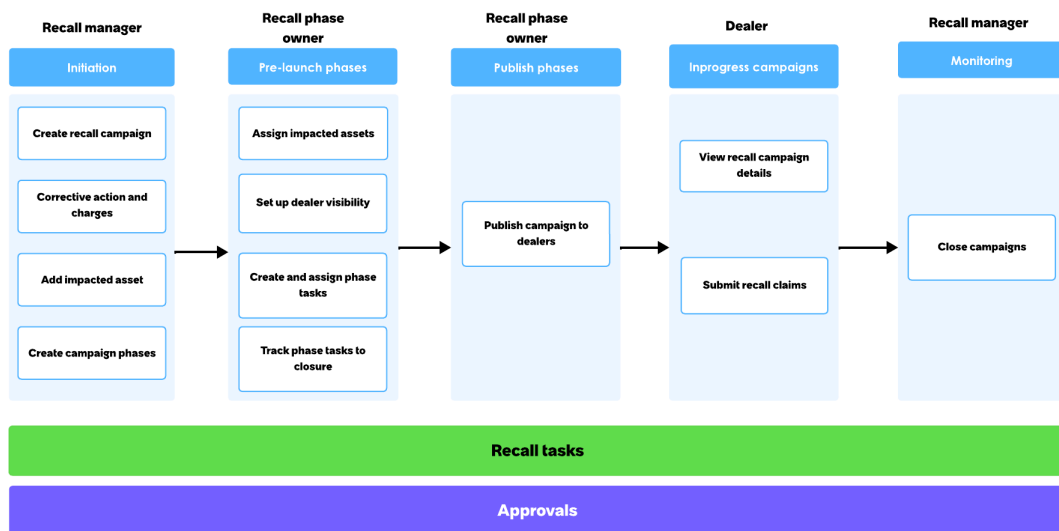
Outcome

Sophie submits a complete claim with two incentives. Bulk upload, automated filtering, and structured questionnaires reduce preparation time and rejection risk, enabling faster processing and reimbursement.

Recall campaign

A recall process is a structured procedure launched by Original Equipment Manufacturers (OEM) to fix defects or issues in their manufactured products that are sold to the customers. Dealers can submit repair claims for work performed as part of recall campaigns, while OEM assessors benefit from a playbook-guided experience that simplifies and standardizes claim resolution.

Recall campaign workflow



Phases and sub-phases

The MCO agent portal enables manufacturers to manage recall campaigns through a structured workflow. The portal provides capabilities to create campaign phases and sub-phases, select target assets for recall, launch campaigns, and notify affected dealers.

What to explore next

To learn more about configuring and using recall campaign, see:

- [Recall campaign data model](#)
- [Recall management](#)

Recall campaign use case

Use case scenarios demonstrate when and how to use the Recall Campaign application to create a recall campaign. It provides practical examples of common recall management situations.

Use case: Multi-Region product recall

Scenario

Alectri, an automotive OEM, identified a defect in airbags installed in 2024 vehicles and must launch a coordinated recall campaign across the Americas and Europe. Managing global recalls across multiple regions and dealer networks creates several challenges:

- **Visibility gaps:** Limited visibility into active campaigns and claims across regions.
- **Coordination bottlenecks:** Coordinating tasks across departments and regions causes delays and rework.
- **Manual tracking:** Tracking multiple corrective actions per recall is error-prone and time-consuming.
- **Cost inconsistency:** Cost estimation inconsistencies lead to claim delays and denials.
- **Dealer friction:** Dealers lack timely access to campaign information and submission tools.
- **Regional complexity:** Regional coordination complexity slows recall execution and visibility.

Solution

Chloe, the Global Recall Manager at Alectri, uses Manufacturing Commercial Operations (MCO) to manage the recall through four key workflow phases:

- 1. Create:** Configure campaign with name, issue number, priority, and quality system traceability.
- 2. Define:** Add corrective actions (airbag replacement, sensor replacement, software updates) with predefined labor and parts charges.
- 3. Target:** Use asset filters to isolate affected vehicles (2024 models with defective airbags) and create regional phases with local owners and timelines.
- 4. Publish and Monitor:** Validate phases, publish to dealer portal, and track claims and corrective actions in real-time.

The [Recall management](#) provides real-time visibility into all campaigns, claims, and affected assets throughout the recall life-cycle.

Benefits

Compare the impact of using the Recall Campaign application:

Recall campaign benefits

Without MCO	With MCO Recall Campaign
Limited visibility into campaigns and regions	Centralized dashboard for all campaigns, claims, and affected assets.
Manual, error-prone corrective action tracking	Multiple corrective actions tracked within one campaign with predefined charges.
Inconsistent cost estimation and claim denials	Standardized pricing reduces claim delays and rework.
Cross-department bottlenecks and coordination delays	Task management and phased rollouts with regional owners eliminate bottlenecks.
Dealers lack timely campaign information	Portal access provides claim submission and campaign details self-service.

Outcome

Alectri successfully launches a coordinated multi-region recall campaign with clear corrective actions, standardized costs, and precise vehicle targeting. Regional phases enable phased rollout across markets, and dealers have immediate access to campaign information through the portal, enabling smooth claim processing across the OEM-dealer ecosystem.

Recall claim submission use case

Use case scenarios demonstrate when and how to use the Dealer portal application to submit a recall claim. It provides practical examples of common recall management situations.

Scenario

James, a service advisor at an Alectri dealership, completes a recall repair on a 2023 Alectri Voltar VS and must submit a recall claim for OEM reimbursement. Dealers face several claim submission challenges:

- Data entry errors: Manual entry creates delays and increases mistake rates.
- Campaign discovery: Difficulty locating correct campaigns and corrective actions slows the submission process.
- Incomplete submissions: Missing mandatory information leads to claim rejections.
- Visibility gaps: Lack of real-time claim status visibility hinders proactive management.

Solution

James uses the MCO Dealer Portal to submit the recall claim through four key steps:

- 1. Select:** Choose the vehicle from the dealership asset list and enter repair details.
- 2. Configure:** Select Recall as the repair type and pick the corrective action from the pre-populated list.
- 3. Review:** Check auto-populated details including problem description, required tools, parts, quantities, and labor codes.
- 4. Submit and Track:** Submit the complete claim and monitor status in real time via the activity stream.

The [Using the dealer portal](#) enables completeness and compliance before submission.

Benefits

Compare the impact of using the MCO Dealer Portal for recall claims.

Recall claim submission benefits

Without MCO	With MCO Dealer Portal
Manual campaign and action lookup	Auto-populated campaigns and corrective actions.
Error-prone data entry	Auto-populated parts, labor codes, and charges minimize mistakes.
Incomplete claim submissions	Alerts and validation ensure all mandatory actions are included.
No visibility into claim status	Real-time status tracking and activity stream enable proactive management.
High rejection rates	Validation checks catch missing information before submission.

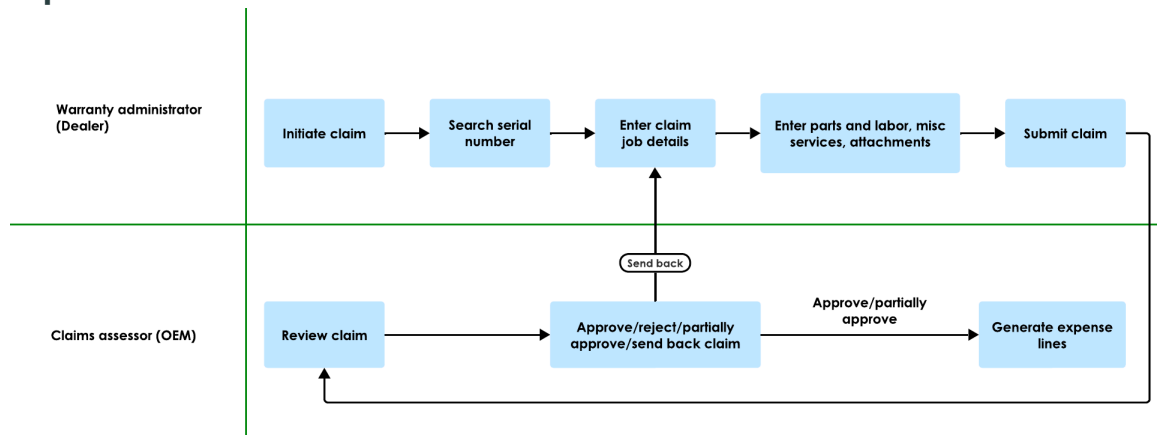
Outcome

James submits a complete recall claim with all required corrective actions in minutes. The guided experience with auto-population and mandatory validation reduces processing time and minimizes rejection risk, enabling faster OEM reimbursement.

Repair claim

In the Repair claims workflow, the customer approaches the dealer with issues related to one or more products. The dealer diagnoses and fixes the issue and raises the reimbursement for the repair work performed.

Repair claim workflow



What to explore next

To learn more about configuring and using repair campaign, see:

- [Repair claims data model](#)
- [Install Manufacturing Commercial Operations](#)
- [Implement a repair claim set up](#)

- [Repair claim for the dealer](#)
- [Repair claim](#)

Repair claim submission use case

Use case scenarios demonstrate when and how to use the Dealer portal application to submit a repair claim. It provides practical examples of common repair or warranty management situations.

Scenario

James, a dealer service advisor, completed a warranty repair on customer Ken's 2023 Alectri Voltar VS and must submit a claim for OEM reimbursement. Service advisors submitting warranty claims face critical challenges:

- **Manual entry:** Part and labor codes entered manually create errors and delays.
- **Fragmented systems:** Multiple platforms required to manage claims and track status.
- **Documentation gaps:** Incomplete or missing documents cause claim rejections.
- **Calculation errors:** Manual cost calculations increase processing time and dispute risk.

Solution

Submit the warranty repair claim using the MCO Dealer Portal through a guided experience:

- 1. Access:** Open the unified Dealer Portal and navigate to warranty repair claim submission.
- 2. Populate:** Select vehicle by asset number or VIN, dealership location, and repair date. System auto-populates asset details.
- 3. Capture:** Enter parts details (number, quantity, unit cost) and select pre-populated labor codes with hours. System automatically calculates all costs and taxes.
- 4. Complete:** Upload supporting documents (work orders, repair photos) and submit for OEM review.

Benefits

Compare the impact of using MCO warranty claim submission.

Warranty claim submission benefits

Without MCO	With MCO Warranty Claims
Manual part and labor code lookups	Pre-populated codes reduce data entry errors.
Error-prone manual calculations	Automatic cost and tax calculations ensure accuracy.
Incomplete documentation causes rejections	Guided workflow verifies all required fields and documents.
Limited visibility into claim status	Single portal tracks submitted claims in real-time.
Extended OEM processing cycles	Structured data capture accelerates OEM review and reimbursement.

Outcome

James submits a complete, accurate warranty repair claim for Ken's 2023 Alectri Voltar VS with verified parts, labor, and supporting documentation. The guided portal experience reduces claim preparation time and eliminates rejection risk, enabling faster OEM processing and dealer reimbursement.

Repair claim review and approval use case

Use case scenarios demonstrate when and how to use the repair claim application to review and approve the claims. It provides practical examples of common repair or warranty management situations.

Scenario

Angela, a warranty claim agent at Alectri needs to review and approve pending warranty claims submitted by dealers. Claims teams managing warranty approvals face several challenges:

- **Process inefficiency:** Disconnected systems and manual amount entry increase processing time and error risk.
- **Data quality issues:** Inconsistent claim data and missing documentation cause review delays and bottlenecks.
- **Limited flexibility:** All-or-nothing approvals limit granular, line-level decision-making.
- **Communication gaps:** Limited feedback mechanisms create miscommunication and resubmission cycles.

Solution

Angela, a warranty claim reviewer, uses the MCO workspace to streamline claim review and approval through four key workflow phases:

- 1. Review:** Access the centralized workspace to view all submitted and pending claims in a single location with full claim details.
- 2. Adjudicate:** Select a pending claim and evaluate job line items (part numbers, unit prices, quantities, claimed amounts). Use line-level review to approve valid items (Alectri Airbag Module) and reject invalid items (miscellaneous charges not covered under warranty).
- 3. Approve:** Choose from four adjudication options: **Approve All**, **Reject All**, **Partially Approve**, or **Send Back with Comments**. The system automatically populates approved amounts for streamlined processing.
- 4. Provide Feedback:** Send structured feedback with specific comments when additional documentation is needed (for example, proof of trade-in records). Dealers receive instant notification and can resubmit the updated claim without delay.

After James, the dealer, adds required attachments and resubmits, Angela approves all line items. MCO provides instant feedback visibility to the dealer, eliminating delays and miscommunication.

Benefits

Compare the impact of using the MCO Repair Claims application.

Repair claim review benefits

Without MCO	With MCO Repair Claims
Manual review across disconnected systems	Centralized workspace with all claims in one location.
Missing documentation requires manual follow-up	Structured feedback workflow enables targeted document requests.
All-or-nothing approval decisions	Line-level adjudication supports precise partial approval.
Manual amount entry increases error risk	Auto-populated approved amounts reduce data entry and processing time.
Dealers unaware of claim status or rejection reasons	Real-time feedback improves transparency and reduces resubmission cycles.
Slow processing cycles delay dealer payments	Streamlined workflow with instant feedback accelerates approval and closure.

Outcome

Angela successfully reviews and approves the warranty claim after James provides missing documentation. The line-level adjudication capability, automated amount population, and transparent feedback loop reduce processing time and improve decision accuracy, ensuring fair and timely claim resolution for dealers.

Pre-authorization

A pre-authorization request is a process to confirm the approval before initiating activities, such as repairs, material procurement, or labor costs that are included under warranty or service agreements. This procedure confirms that all required inspections and criteria are satisfied and authorized by the Warranty Specialist. When a claim is created, approved pre-authorization requests can be used to generate claim jobs, avoiding reentering of claim details. This streamlines approval workflows and reduces processing delays.

Use case: Warranty pre-authorization request and approval

Scenario

James, a dealer warranty administrator, must obtain approval before a technician repairs a customer vehicle's air conditioning system. High-cost warranty repairs require pre-authorization, but manual processes create friction:

- System disconnection: Disconnected systems cause delays and incomplete data entry
- Data inconsistency: Inconsistent labor codes and missing cost details require rework
- Visibility gap: Limited request visibility frustrates both dealers and OEMs
- Operational friction: Approved data must be re-entered when creating repair claims

Solution

MCO streamlines pre-authorization through a unified portal and guided workflow.

James uses the MCO Dealer Portal to submit a pre-authorization request.

Angela, a warranty specialist, uses the MCO workspace to review and approve the request.

- **Dealer Submission:** James accesses the MCO Dealer Portal. Auto-loaded vehicle assets and a guided playbook assist with the submission. He enters vehicle details (VIN, work order, issue), adds warranty claim jobs (parts, labor, miscellaneous costs), and submits for approval.
- **OEM Review:** Angela, a warranty specialist, reviews pending requests in the MCO workspace. She can approve, partially approve with line-level edits, or reject with feedback. All actions create audit trails for compliance.
- **Claim Creation:** Once approved, James converts the pre-authorized request to a repair claim without re-entering information.

Benefits

Compare the workflow improvement:

Pre-authorization request benefits

Without MCO	With MCO Pre-Authorization
Manual multi-system data entry	Single portal with auto-loaded assets and guided templates
Inconsistent labor codes and costs	Standardized labor codes and complete cost capture in one place
Slow approval cycles with back-and-forth	Real-time visibility and line-level partial approval with feedback
Full data re-entry for repair claims	Pre-approved requests convert directly to claims—no re-entry

Outcome

James submits a complete pre-authorization request for high-cost air conditioning repair. Angela reviews and approves with transparent feedback. After repair completion, James converts the approved request to a repair claim instantly, reducing processing time and ensuring compliance.

Related topics

[Pre-authorization requests](#)

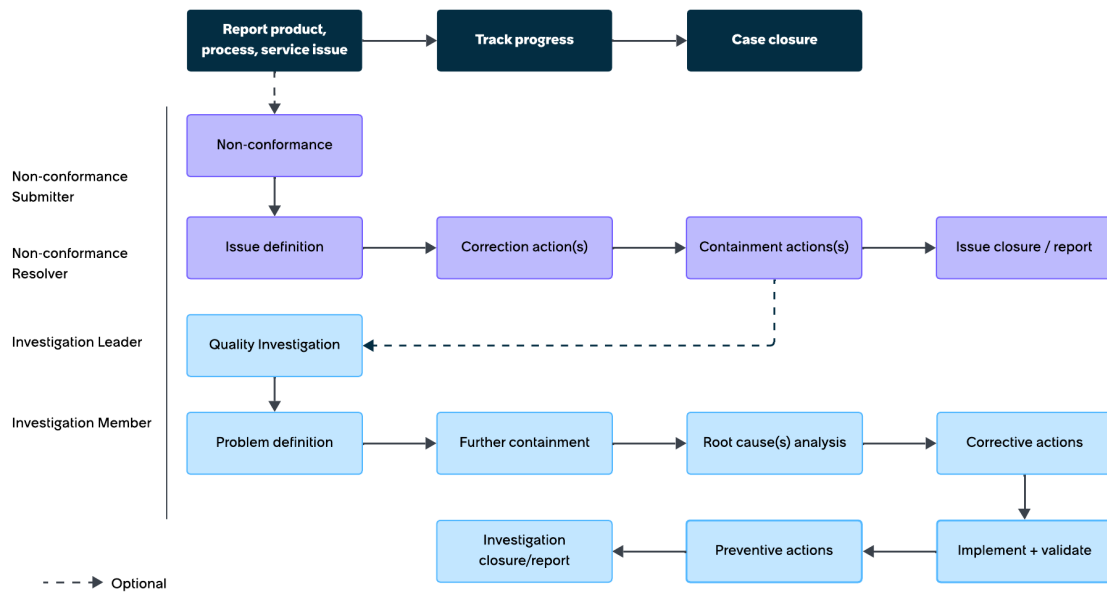
Quality issue management

Quality issue management (QIM) application enables manufacturers to capture, track, and resolve non-conformance and quality investigations using structured, end-to-end workflows.

Quality Issue Management (QIM) comprises two integrated applications that work together to support your quality management needs.

Manufacturing quality management enables teams to track and resolve Non-Conformances (NCs) and Quality Issues (QIs) across products, assets, and operations. It does this by capturing problems, coordinating investigations, and fostering stakeholder collaboration.

Quality management workflow



Product non-conformance (PNC) management

The Product non-conformance (PNC) workspace provides a streamlined way to capture and address deviations when they occur.

The PNC workspace supports:

- Review and route: assign issues to the appropriate stakeholders.
- Correction actions: implement measures to resolve non-conformance.
- Containment actions: avoid further impact while corrective actions are in progress.
- Closure reporting: document resolution and formally close the issue.

Product quality investigation (PQI) management

Product quality investigation (PQI) provides an organized method to find, examine, and address problems with a product or service, including defects, non-conformances, or customer complaints. QIs require comprehensive investigation with multiple stakeholders.

The PQI workspace supports:

- Root cause analysis: identify the underlying causes of defects.
- Long-term resolution: implement corrective and preventive actions.
- Continuous improvement: enhance processes to avoid recurrence.

Remediation core

The Remediation core enables organizations to identify root causes and implement structured remediation plans for both operational and financial issues. It supports quick fixes and long-term solutions to resolve issues efficiently and sustainably.

What to explore next

To learn more about configuring and using quality management, see:

- [Quality issue management data model](#)
- [Install Manufacturing Commercial Operations](#)
- [Product non-conformance](#)
- [Product quality investigation](#)
- [Remediation action plans](#)

Product non-conformance use case

Use case scenarios show how to resolve product non-conformance issues, from triage through escalation.

Airbag sensor defect escalation

Alectri receives multiple dealer reports of unexpected airbag warning lights in 2024 Voltar VS vehicles. The quality team must triage, contain affected inventory, and escalate to deeper investigation — while facing these challenges:

- Ownership: no clear ownership for initial triage and assignment
- Visibility across network: difficulty identifying all impacted vehicles across the dealer network
- Cost tracking: lack of visibility into containment costs and actions per vehicle
- Asset linkage: no structured link between containment to specific assets
- Escalation path: unclear escalation path to broader quality investigations

Solution

Triage and Assignment: James, the quality triager, receives the non-conformance case.

1. Triage and Assign: Quality triager James reviews the dealer report and assigns the case to Sophie, the Product Non-Conformance Case (PNCC) Resolver, with clear accountability.
2. Investigate and Document: Sophie reviews case details, confirms the issue pattern, and identifies 47 impacted vehicles across 12 dealerships.
3. Contain and Track: Sophie creates a containment action (disable system, provide loaner vehicles) and links it to each impacted asset. She records containment costs (quarantine, diagnostics, loaner fees).
4. Correct and Escalate: Sophie applies corrective actions (sensor replacement, firmware updates), closes the case, and escalates to Quality Investigation for cross-functional pattern analysis.

The [Product non-conformance](#) workspace provides guided setup to resolve the issue.

Benefits

Compare the impact of using the Product Non-Conformance application.

Non-conformance management benefits

Without MCO	With MCO Non-Conformance
Unstructured triage; unclear ownership	Guided assignment and accountability from day one

Non-conformance management benefits (continued)

Without MCO	With MCO Non-Conformance
Manual tracking of affected vehicles; high error risk	Asset-level traceability with systematic containment linking
Cost visibility scattered across systems	Centralized expense tracking per asset and action
Ad hoc escalation paths; delayed investigations	Structured escalation to quality investigations with full context

Outcome

James triages with clear ownership. Sophie resolves the airbag issue across 47 impacted vehicles — documenting containment, repairs, firmware updates, and costs with full audit trail. The structured workflow enables rapid response while the escalation path ensures broader quality patterns are investigated systematically.

Related topics

[Report an issue manually](#)

[Product non-conformance](#)

Product quality investigation use case

Use case scenarios demonstrate when and how to use the Product non-conformance application to create a product quality investigation report. It provides practical examples of common product quality investigation situations.

Scenario-Airbag sensor defect investigation

This use case is a follow-up use case from Product non-conformance, see [Product non-conformance use case](#).

Alectri detects airbag sensor defects affecting 2024 Voltar VS vehicles. Quality teams must conduct a comprehensive investigation with cross-functional coordination, structured root cause analysis, and financial governance. Key challenges include:

The quality investigation team encounters some challenges:

- Communication silos: fragmented communication across engineering, quality, and finance teams
- RCA methodology: lack of structured root cause analysis methodology.
- Cost visibility: missing visibility into total quality costs.
- Approval authority: No clear governance for remediation action approval.

Solution

Manage the quality investigation through four key workflow phases:

1. Investigate: Able Tutor (Quality Lead) opens the investigation case and creates analysis tasks (sensor calibration, manufacturing process, supplier controls).
2. Analyze: Emily Cooper (Investigation Member) performs 8D analysis with Fishbone methodology to identify root causes and define corrective and preventive actions.

3. Coordinate: Establish RACI roles across Engineering, Supplier Quality, Manufacturing, and Dealer teams. Review impacted assets and create remediation actions.
4. Approve: Finance Lead reviews line-level charges for parts, labor, and process improvements, then approves remediation costs with full traceability.

The [Product quality investigation](#) provides real-time visibility into investigation status, root causes, and cost of quality (CoPQ) tracking across all remediation activities.

Benefits

Compare the impact of using the Product Quality Investigation application.

Quality investigation benefits

Without MCO	With MCO Quality Investigation
Uncoordinated root cause analysis	Structured 8D methodology with Fishbone analysis identifies underlying issues.
Scattered corrective actions	Linked corrective and preventive actions with clear ownership and timelines.
Hidden quality costs	CoPQ tracking provides visibility across containment, remediation, and prevention activities.
Manual approval workflows	Line-level approval authority maintains cost governance and end-to-end traceability.

Outcome

Alectri completes the airbag sensor defect investigation with cross-functional coordination and structured analysis. Emily identifies root causes through 8D methodology, develops corrective and preventive actions, and raises a financial request for remediation. Finance approves line-level charges, maintaining cost governance. The investigation establishes preventive measures and provides end-to-end traceability from root cause identification through remediation completion.

Extended capabilities

Manufacturing Commercial Operations supports additional features to enhance the product capabilities.

Additional feature list

Feature	Description
Customer Service Management	The Customer Service Management provides service and support to external customers. Customers can communicate and receive support through the web, email, chat, telephone, and social media.
Order to cash operations	Order to cash operations for Manufacturing Commercial Operations streamlines the lead-to-cash cycle. This feature enables manufacturers to:

Additional feature list (continued)

Feature	Description
	<ul style="list-style-type: none"> • Launch complex products and services with configurable catalogs. • Manage leads & opportunities from start to finish and map customer needs to the best offers. • Configure and price quotes and convert to orders to speed up revenue. • Automate order fulfillment across front, middle, and back-office teams. • Manage post-sale changes, upgrades, and renewals.
Channel Support Operations	<p>Channel Support Operations for Manufacturing Commercial Operations enables:</p> <ul style="list-style-type: none"> • Automate after-sales support processes (for example, product & service issues, warranty claims, recalls) • Save costs by resolving poor quality, non-conformance, and warranty issues • Provide tech support agents with a 360° view of customers, products, entitlements, and channels • Increase deflection with tailored self-service portal and workspace • Improve OEM-channel collaboration with proactive communications and automated channel workflows (for example, vehicle handover, service delivery)

Related topics

[Customer Service Management](#) 

[Order management](#) 

Manufacturing Commercial Operations landing page (CSM/FSM configurable workspace)

Use the Manufacturing Commercial Operations workspace to manage warranty claims, pre-authorizations, and campaigns. View personalized dashboards, filter records by status, and take action based on AI-suggested dispositions.

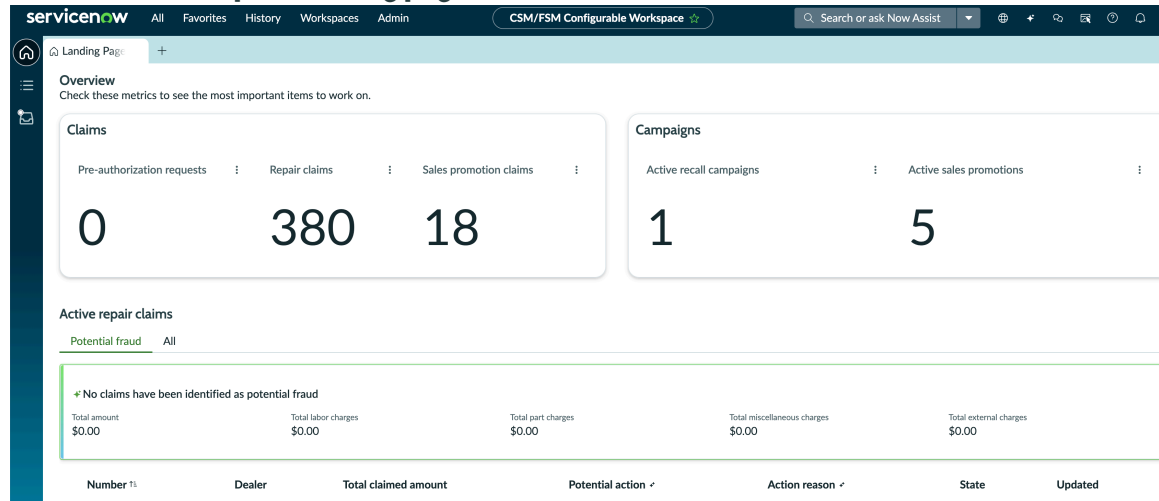
MCO workspace capabilities

The Manufacturing Commercial Operations workspace provides role-based landing pages that display personalized dashboards, case summaries, and performance metrics. Use the workspace to:

- Review and approve repair claims with AI-suggested dispositions
- Process pre-authorization requests from dealers
- Manage sales promotion and recall campaigns
- Filter claims and campaigns by status and risk level
- Toggle between gallery and list views

Note: Users without AI plugins installed can view the non-AI experience.

CSM/FSM workspace landing page



The agent workspace landing page includes different sections and components. It has the following capabilities:

- Toggle between gallery view and list view.
- View the isolated view of each module by selecting **View all**
- Create records.

Components of the agent workspace landing page

Tabs/Fields	Description
Active claims	Number of active repair and sales promotion claims.
Active pre-authorization requests	Number of active pre-authorization requests received from the dealers.
Active campaigns	Number of active recall and sales promotion campaigns published by OEMs.

Repair claim

The Repair Claims list displays warranty repair claims and their AI-suggested dispositions. Use the filter pills to narrow the list by disposition category.

Repair claim list

Filters	Description
Suggested for Approval	Displays claims that have passed all validation checks and are within the approved threshold.
Suggested for Rejection	Displays claims flagged for rejection based on validation failures.
Suggested for Review	Displays claims that require manual review before a decision can be made.
Potential fraud	Displays claims flagged as potentially fraudulent by the AI agent.
All	Displays all repair claims regardless of disposition.

When the Suggested for Approval filter is active, an AI-generated summary displays the total number of claims that have passed all checks and are within the approval threshold, along with a breakdown of the following amounts:

Fields	Description
Total amount	Combined total of all charges across the filtered claims.
Total labor charges	Total labor costs across the filtered claims.
Total part charges	Total parts costs across the filtered claims.
Total miscellaneous charges	Total miscellaneous costs across the filtered claims.
Total external charges	Total external costs across the filtered claims.

Each claim card in the list displays the claim number, current state, and suggested action reason.

Sales promotion claim case

The Sales promotion claim case list displays all claim cases submitted by dealers for active sales promotions.

Sales promotion claim case list

Filters	Description
All	Displays all claim cases.
Approved	Displays claim cases approved for reimbursement.
Rejected	Displays claim cases that were declined.
Pending Review	Displays claim cases awaiting review.

Fields	Description
Number	Unique identifier for the claim case.

Fields	Description
Short description	Brief description of the claim.
Dealer	Dealer that submitted the claim.
Total claimed amount	Total amount submitted for reimbursement.
State	Current status of the claim case.

Pre-authorization request

The pre-authorized repair request list displays all pre-authorization requests submitted by dealers.

Pre-Authorised repair request list

Filters	Description
All	Displays all pre-authorization requests regardless of status.
Approved	Displays requests that have been approved.
Rejected	Displays requests that have been declined.
Pending Review	Displays requests that are awaiting review.

Each request displays the following information:

Field	Description
Number	Unique identifier for the pre-authorization request.
State	Current status of the request.
Dealer	Dealer that submitted the request.
Updated	Date and time the request was last updated.

Use the Filter, Sort by, and Group by controls to refine and organize the list.

Recall campaign

Displays all recall campaigns accessible to the logged-in user. Use the filter to narrow the list by campaign status.

Recall campaign list

Filters	Description
All	Displays all the recall campaign regardless of status.
Approved	Displays campaigns that have been approved.
Rejected	Displays campaigns that have been declined.
Pending Review	Displays campaigns that are awaiting review.

Sales promotion

Displays all sales promotions accessible to the logged-in user. Use the filter to narrow the list by promotion status.

Sales promotion list

Filters	Description
All	Displays all the sales promotion campaign regardless of status.
Approved	Displays campaigns that have been approved.
Rejected	Displays campaigns that have been declined.
Pending Review	Displays campaigns that are awaiting review.

Fields	Description
Number	Unique identifier for the sales promotion.
State	Current status of the promotion.
Description	Brief description of the promotion.
Promotion Type	Type of promotion associated with the record.
Owner	User responsible for the promotion.

What to explore next

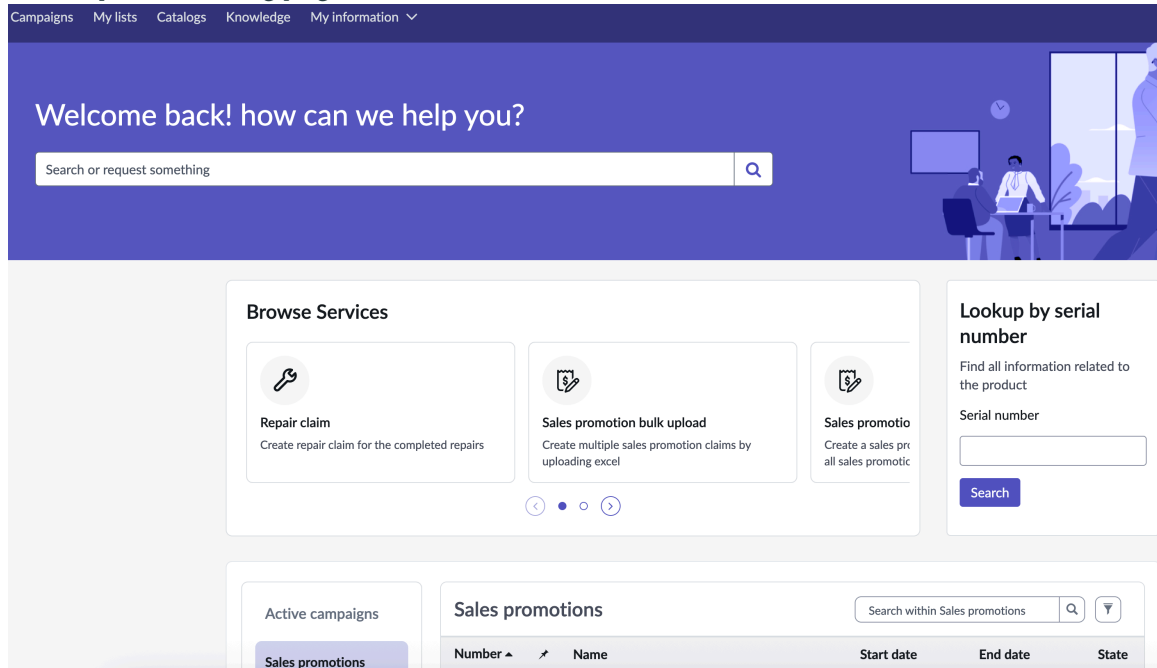
To learn more about configuring and using MCO, see:

- [Set up Manufacturing Commercial Operations](#)
- [Using MCO workspace](#)

Dealer landing page

The dealer portal supports post-sales service for OEMs and dealers, who submit claims, manage recalls, and view real-time insights for informed decisions.

Dealer portal landing page



The Dealer Portal landing page includes different sections and components.

Components of the dealer portal landing page

Tabs/Fields	Description
Campaigns	Displays the campaigns created for sales promotion and recall.
My lists	Displays the list of claims that includes: <ul style="list-style-type: none"> • Sales promotion claims • Sales promotion bulk upload • Repair claims • Report an issue • All Cases
Catalogs	Displays the categories under the dealer catalog: <ul style="list-style-type: none"> • Customer Operations • Support & Services
Knowledge	Knowledge bases contain articles that provide users with information such as self-help and task resolution.
My information	Displays the dealer information. <p>Note: Here, dealer refers to a business location.</p>
Search or request something	Enter the information that you're looking for. The search option helps you easily and quickly find the information you need.
Browse Services	Lists all the features supported by MCO.

Components of the dealer portal landing page (continued)

Tabs/Fields	Description
Lookup by serial number	Enables you to search the claims records based on the serial or asset number.
Active campaigns	Displays the list of all campaigns that are in active state.
My active claims	Displays the list of active claims that are created by the logged-in user.
User Profile	Displays user profile information. To learn more about user profile, see User Profile widget  .

What to explore next

To learn more about configuring and using the dealer portal, see:

- [Dealer data model](#)
- [Using the dealer portal](#)

AI in Manufacturing Commercial Operations

Use ServiceNow Otto for Manufacturing Commercial Operations application to create the corrective actions and charges information for the dealers.

ServiceNow Otto brings generative AI skills and agentic workflows to Manufacturing Commercial Operations. Managers, dealers, agents, and submitters can spend less time on manual summarization.

Within MCO, ServiceNow Otto capabilities fall into two categories:

- Skills
- Agentic workflows

Most skills and workflows are available directly on the relevant record page, and can also be started conversationally from the ServiceNow Otto panel. For more information about the panel, see [ServiceNow Otto panel](#) . To activate the panel, see [Activate the ServiceNow Otto panel standard chat](#) .

Role required: admin. Most skills are inactive by default.

To activate a skill, follow the general procedure in [Activate an AI skill](#) , selecting the **MCO** workflow group.

To edit a skill's prompt, duplicate and edit it directly in AI Skill Kit. See [Clone and edit a ServiceNow skill](#) .

ServiceNow Otto skills for Manufacturing Commercial Operations

Review the generative AI skills available for Manufacturing Commercial Operations, what each one does, and where to use it.

The following skills are available for Manufacturing Commercial Operations. Skills are generated on the record page and, where activated, in the ServiceNow Otto panel.

Otto skills for MCO

Skill	What it does	Reference
Recall corrective actions	Helps warranty reviewers understand fraud and pricing check results with clear findings, per-charge reasoning, and next-step guidance.	Create recall corrective actions using ServiceNow Otto for MCO
Summarize fraudulent claim detection	Identifies fraudulent warranty claims by detecting duplicate or similar claims, reused dealer images, mismatched or incomplete supporting documents, inconsistent usage data, and abnormal spikes in claim volume.	Summarize fraudulent claim detection using agents
Quality case summarization	Generates short and detailed summaries of quality cases. Summaries capture root cause, corrective and containment actions, their effectiveness, and deadline compliance.	Resolve a product non-conformance case playbook
Recommend quality assignment and actions	Finds similar resolved quality issues and uses them to recommend the right owner, corrective actions, and containment steps for a new issue.	Resolve a product non-conformance case playbook

Using agentic workflows in ServiceNow Otto for Manufacturing Commercial Operations

Use the MCO AI agents within an agentic workflow to extract relevant data from repair documents, enabling the generation of corrective actions and associated charges.

Available agentic workflow for MCO agent collection

Agentic workflow name	Description	Available AI agents
Execute recall campaigns faster	This workflow enhances the efficiency of recall execution by automatically creating corrective action records and corresponding charge line items using repair documents. The elimination of manual data entry and validation processes reduces cycle time, minimizes errors, and promotes consistency throughout recall operations.	<p>Create recall corrective actions AI agent</p> <p>Plan and execute recall campaign phases and subphases AI agent</p>

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](#) .

Important: By default, all agent workflow and AI agent records are read-only.

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

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. The triggers for each agentic workflow must be unique. If you prefer to invoke it manually, activating the trigger isn't necessary.

Related topics

[Explore AI agents](#) 

[Create recall corrective actions using ServiceNow Otto for MCO](#)

[Large language models on the ServiceNow AI Platform](#) 

Execute recall campaigns faster agentic workflow

Use MCO AI agents agentic workflow to generate the corrective actions and charges for the required repair documents quickly and efficiently.

Execute recall campaigns faster overview

The Execute recall campaigns faster workflow uses the Create Recall Corrective Actions AI agent to streamline recalls by automatically extracting information from uploaded repair documents. This agent systematically identifies and gathers all relevant data from the repair instructions, reducing the need for manual input. As a result, corrective actions are created efficiently, and related charges are calculated accurately. This automation speeds up the process and helps minimize human error.

The recall manager can initiate a recall campaign and associate repair instruction documents with the campaign record. When prompted to add documents, the AI agent requests you to select from the available attachments. You can select the relevant documents. Also, you can upload the additional documentation necessary for implementing corrective actions.

The asset applicability criteria specify which corrective actions apply to a specific subset of the affected asset.

Execute recall campaigns faster agentic workflow

Leverage the outcomes from the faster recall campaigns to produce a recommended course of action for the human agent.

To access the agentic workflow:

1. Navigate to **All > AI Agent Studio > Create and manage**.
2. Select **Execute recall campaigns faster**.

AI agents and their roles in the Execute recall campaigns faster agentic workflow

AI agent	AI agent role
Create recall corrective actions	The Create recall corrective actions AI agent extracts information from repair documents, identifies relevant data, and generates corrective actions with corresponding charges.
Plan and execute recall campaign phases and subphases	The Plan and execute recall campaign phases and subphases AI agent plans and executes recall campaigns through phases and sub-phases. It generates phase plans considering parts availability, asset location, operational readiness, and regulatory approvals, then supports creation, modification, approval, and asset assignment.

Plan and execute recall campaign phases and sub-phases using ServiceNow Otto

Plan and execute recall campaign phases and sub-phases AI agent enables product recall campaigns to generate and manage phase.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

About this task

The Plan and Execute Recall Campaign Phases AI agent generates and manages recall campaign phase plans based on user inputs, asset and parts data, and regulatory conditions. It supports plan creation, updates, approvals, execution, and knowledge graph integration for phases and sub-phases.

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > Phases & Sub-phases**.
2. Select the ServiceNow Otto icon  to launch the ServiceNow Otto panel.
3. Submit a request to create phases for my recall campaign.
The orchestrator activates the Plan and Execute Recall Campaign Phases and Subphases AI Agent, prompting you to proceed with the creation of the phases and subphases.
4. The agent prompts you to choose one of the **In progress recall campaigns** for which require phases and subphase planning.
5. The agent reviews the recall campaign, which is selected.
The agent displays existing phases and sub-phases on the recall campaign. It prompts you to confirm whether draft phases should be cancelled and their associated assets included in the new plan.
The agent checks if a plan exists. Also, it provides the list on what basis the phases can be organized.
6. Submit the list on which you want to organize the phases.
The agent validates the request. The agent prompts you to confirm the request. The agent provides the phase plan options.
7. Select a plan from the options to add a subphase level plan.

You can modify phase plans by adding sub-phases, merging phases, or removing phases. Once you approve the plan, the system creates the phases and sub-phases and assigns eligible impacted assets to the newly created phases.

The recommendation score shows how well the option matches your requirements. The agent generates a phased roll-out list with phases and subphases. All phases and subphases are displayed.

Related topics

[Recall a campaign phase](#)

Configure Manufacturing Commercial Operations

Set up Manufacturing Commercial Operations to enable manufacturers to manage the end-to-end lifecycle of your manufacturing products.

MCO installation and configuration

Before you begin, review the Manufacturing Commercial Operations packaging and licensing requirements.

To configure MCO, complete the following foundational installation and configuration steps before configuring core features.

MCO install and configuration

Tasks	Description
Install Manufacturing Commercial Operations	As an admin, activate the MCO plugin. This plugin includes demo data and activated related plugins.
Plugins installed with Manufacturing Commercial Operations	List of MCO plugins that are activated.
Assigning roles in Manufacturing Commercial Operations	Assigning MCO user roles.

- Work with an implementation specialist to streamline your manufacturing setup process. To learn more, see the [Customer Success Center](#) .
- Join the ServiceNow[®] [Manufacturing Community](#)  to share knowledge, collaborate, and network with peers around the globe who are addressing the same industry challenges and opportunities.

Install Manufacturing Commercial Operations

Install the Manufacturing Commercial Operations Core application with 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](#) .

Role required: admin

About this task

The following items are installed with Manufacturing Commercial Operations:

- Roles
- Tables
- Plugins
- ServiceNow Store applications

For details about the plugins, see [Plugins installed with Manufacturing Commercial Operations](#).

Note: Installing a plugin from the store also installs its dependent hidden store applications automatically. The MCO Integrations plugin is an exception: it doesn't install with the core apps. You must search for and install it separately.

Procedure

1. Navigate to **All > System Application > All Available Applications > All**.
2. Find the Manufacturing Commercial Operations application 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. Select **Install**.

In the Application installation dialog box, review the application dependencies.

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, select the **Load demo data** check box to install it. 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

[Assigning roles in Manufacturing Commercial Operations](#)

Plugins installed with Manufacturing Commercial Operations

With the ServiceNow® Manufacturing Commercial Operations main plugin, you can install all the dependent plugins that a customer is entitled to with Manufacturing Commercial Operations.

Install the Manufacturing Commercial Operations applications in the following order. All required supporting components are included and install automatically with each application.

Manufacturing Commercial Operations Plugins

Feature	Plugins	Description
Warranty Claims	Manufacturing labor common	Manage all the entities related to labor management within MCO.

Manufacturing Commercial Operations Plugins (continued)

Feature	Plugins	Description
	[sn_labr_cmnm]	
Manufacturing Common	Manufacturing Core [sn_mfg_cmnm]	Manage and maintain common components for MCO.
Manufacturing Dealer Common	Manufacturing dealer management [sn_dealer_mgmt]	Manage all the entities related to dealer management within MCO.
Claim Common	Common Claim [sn_claim_cmnm]	Manage all entities related to Base Claims within MCO.
Anomaly Detection Rule	Anomaly Detection Rule [sn_anomaly-detection]	Automatically flags suspicious warranty claims before they are approved and reimbursed by identifying duplicate submissions, mismatched parts, reused images, and unusual claim patterns.
Manufacturing Repair Claim Management	Manufacturing repair claim management [sn_repr_claim_mgmt]	Manage all the entities and flows related to Repair Claims within MCO.
Manufacturing Repair Claim Management Advanced	Manufacturing repair claim management advanced [sn_rep_clm_mgt_adv]	Provides playbook experience and manage workflows and all major functionalities related to Repair Claims within MCO.
Manufacturing Recall Claim Management	Manufacturing recall claim management [sn_rcl_claim_mgmt]	Manage all entities and flows related to Recall Campaigns and Claims within MCO.
Manufacturing Sales Promotion Management	Sales promotion management [sn_sales_prm_mgmt]	Manage all the entities and flows related to sales promotion within MCO.
Manufacturing Sales Promotion Management Advanced	Sales promotion claim management advanced [sn_sls_prm_clm_adv]	Provides playbook experience and manages workflows and all major functionalities related to Sales Promotion Claims within MCO.
Integrations for Manufacturing Commercial Operations	Integrations for Manufacturing Commercial Operations [sn_mco_integ]	Provides integration functionality for all features.
Manufacturing Quality Management	Manufacturing Quality Management	Helps to identify product issues, create quality investigations to perform

Manufacturing Commercial Operations Plugins (continued)

Feature	Plugins	Description
	[sn_mfg_qm]	root cause analysis, and implement corrective and preventive actions (CAPA) to resolve issues and prevent recurrence.
Remediation Core	Remediation Core [sn_rm_core]	Enables organizations to systematically identify root causes, plan and execute remediation actions, and track the cost of poor quality (CoPQ) to enhance improved accountability, efficiency, and continuous improvement.
Manufacturing Gen AI	Now Assist for Manufacturing Commercial Operations (MCO) [sn_mfg_gen_ai]	Now Assist for Manufacturing Commercial Operations (MCO) brings ServiceNow's agentic AI capabilities to purpose-built manufacturing workflows.

Extended setup

You can setup the additional configurations to active Customer Service Management and Order to cash operations capabilities.

Applications	Tasks	Description
Customer Service Management	<ul style="list-style-type: none"> • Create an internal organization • Add staff members to an internal organization • Assign responsibilities 	Customer Service Management capabilities for Manufacturing Commercial Operations are automatically installed with the MCO plugins.
Order Management	<ul style="list-style-type: none"> • Configuring Order Management • Configuring product offerings and catalogs • Configuring product pricing with Pricing Management application 	Order Management capabilities for Manufacturing Commercial Operations are automatically installed with MCO plugins.

Assigning roles in Manufacturing Commercial Operations

Assign roles to control access to features, capabilities, and data in the Manufacturing Commercial Operations Core application.

Before you begin

Set the application scope to Manufacturing Commercial Operations using the application picker. For more information, see [Application picker](#).

Role required: admin or sn_mfg_cmn.manufacturing_operations_admin

About this task

User with the roles listed in the following table can use the Manufacturing Commercial Operations.

Manufacturing Commercial Operations roles

Role	Description	Contains roles
sn_mfg_cmn.manufacturing_operations_admin	Administer who can access sensitive data by restricting how users acquire roles in the Manufacturing Commercial Operations applications.	<ul style="list-style-type: none"> • sn_sls_prm_clm_mgt.bulk_upload_admin • sn_sales_prm_mgmt.sales_promotion_manager • sn_mfg_cmn.input_set_writer • sn_labr_cmn.labr_admin • sn_repr_claim_mgmt.claim_admin • sn_sls_prm_clm_mgt.sales_promotion_claim_admin • sn_rcl_claim_mgmt.adminsn_prd_pm.product_admin • sn_sales_prm_mgmt.sales_promotion_admin • sn_prm.enterprise_partner_admin • sn_dealer_mgmt.dealer_admin • sn_customerservice_manager • sn_claim_cmn.claims_agent • sn_prm.partner_ui • sn_repair_claim_mgmt.repair_pre_auth_admin
sn_claim_cmn.claims_agent	View, approve, recall, and reject claims.	<ul style="list-style-type: none"> • sn_sales_prm_mgmt.sales_promotion_viewer • sn_prm.enterprise_partner_agent • sn_rcl_claim_mgmt.campaign.viewer • sn_customerservice_agent • sn_dealer_mgmt.dealer_viewer • sn_repr_claim_mgmt.navigation_menu • sn_prd_pm.product_catalog_viewer • sn_repr_claim_mgmt.claim_writer • sn_sls_prm_clm_mgt.sales_promotion_claim_admin • sn_mfg_cmn.navigation_menu • sn_repair_claim_mgmt.charge_creator • financial_mgmt_user • sn_repair_claim_mgmt.repair_pre_auth_viewer • sn_repr_claim_mgmt.pre_auth_navigation_menu
sn_dealer_mgmt.dealer_service_center	Create, view, update, and cancel repair claim cases.	<ul style="list-style-type: none"> • sn_repr_claim_mgmt.claim_creator • sn_rcl_claim_mgmt.campaign.viewer

Manufacturing Commercial Operations roles (continued)

Role	Description	Contains roles
		<ul style="list-style-type: none"> • sn_customerservice.customer_case_manage • sn_prd_pm.external_product_viewer • sn_dealer_mgmt.dealer_viewer • sn_customerservice.requester • sn_prm.external_partner_associate • sn_repair_claim_mgmt.repair_pre_auth_admin • sn_repr_claim_mgmt.pre_auth_navigation_m
sn_dealer_mgmt.dealer_sales_agent	Create, view, update, and cancel a sales promotion claim case.	<ul style="list-style-type: none"> • sn_dealer_mgmt.dealer_viewer • sn_prm.external_partner_associate • sn_sls_prm_clm_mgt.bulk_upload_creator • sn_sales_prm_mgmt.sales_promotion_viewer • sn_sls_prm_clm_mgt.sales_promotion_claim • sn_customerservice.case_contributor_creator • sn_customerservice.requester
sn_rcl_claim_mgmt.recall_manager	Create, read, and update a recall campaign claim.	sn_rcl_claim_mgmt.campaign.creator
sn_sales_prm_mgmt.sales_promotion_manager	Create, read, update, and cancel a sales promotion.	<ul style="list-style-type: none"> • sn_sales_prm_mgmt.sales_promotion_creator • sn_sls_prm_clm_mgt.sales_promotion_claim • sn_customerservice.csm_workspace_user • sn_mfg_cmnnavigation_menu
sn_dealer_mgmt.dealer_operations_manager	Create, read, update, or cancel all claims.	<ul style="list-style-type: none"> • sn_prm.external_partner_manager • sn_sls_prm_clm_mgt.bulk_upload_admin • sn_dealer_mgmt.dealer_sales_agent • sn_dealer_mgmt.dealer_service_advisor
sn_rcl_claim_mgmt.recall_phase_manager	Update, publish, close, and cancel a recall campaign phase or sub-phase.	sn_rcl_claim_mgmt.campaign_phase.writer
sn_claim_cmnn.warranty_specialist	View, approve, return, or reject pre-authorization requests.	<ul style="list-style-type: none"> • sn_customerservice_agentsn_dealer_mgmt.c • sn_repr_claim_mgmt.navigation_menu • sn_prd_pm.product_catalog_viewer • sn_mfg_cmnnavigation_menu • financial_mgmt_user

Manufacturing Commercial Operations roles (continued)

Role	Description	Contains roles
		<ul style="list-style-type: none"> • sn_repair_claim_mgmt.repair_pre_auth_write • sn_repair_claim_mgmt.repair_pre_auth_charge • sn_repair_claim_mgmt.claim_viewer • sn_repr_claim_mgmt.pre_auth_navigation_m
sn_mfg_qm.admin	Full access to all Quality Issue Management (QIM) features, tables, and configuration.	<ul style="list-style-type: none"> • sn_mfg_qm.product_quality_investigation_le • sla_admin • sn_mfg_qm.finance_approver • sn_mfg_qm.product_non_conformance_case
sn_mfg_qm.triager	Review new submissions, check completeness, determine priority and severity, assign to resolvers, and update triage information.	<ul style="list-style-type: none"> • sn_mfg_qm.prq_qi_viewer • sn_mfg_qm.product_non_conformance_subr • sn_mfg_qm.prq_ncc_task_creator
sn_mfg_qm.resolver	Work the full PNCC playbook: correction, impacted assets, containment, and closure. Create Quality Investigations.	<ul style="list-style-type: none"> • sn_mfg_qm.prq_qi_creator • sn_rm_core.cause_action_creator • sn_rm_core.rca_task_creator • sn_customerservice.case_contributor_viewer • sn_rm_core.issue_cause_creator • sn_mfg_qm.impacted_asset_creator • sn_rm_core.copq_fin_req_creator • sn_align_core.apw_user • sn_rm_core.rem_action_creator • sn_mfg_qm.product_non_conformance_case • sn_rm_core.copq_planned_line_charge_crea • sn_rm_core.copq_exp_line_creator • sn_rm_core.correction_action_creator • sn_rm_core.containment_action_creator • sn_rm_core.rem_action_plan_creator • sn_rm_core.task_cause_association_creator • sn_rm_core.cause_action_plan_creator • sn_mfg_qm.impacted_asset_action_creator
sn_mfg_qm.investigation_member	Create, view, update, and cancel a quality investigation and related records.	<ul style="list-style-type: none"> • sn_rm_core.copq_exp_line_creator • sn_mfg_qm.impacted_asset_creator • sn_mfg_qm.impacted_asset_action_creator

Manufacturing Commercial Operations roles (continued)

Role	Description	Contains roles
	Sign off the investigation and move it to closure.	<ul style="list-style-type: none"> • sn_rm_core.corrective_action_creator • sn_rm_core.correction_action_viewer • sn_rm_core.rca_task_creator • sn_rm_core.issue_cause_creator • sn_customerservice.csm_workspace_user • sn_rm_core.preventive_action_creator • sn_mfg_qm.prd_qi_writer • sn_mfg_qm.prd_qi_task_writer • sn_rm_core.rem_action_creator • sn_rm_core.cause_action_plan_creator • sn_mfg_qm.prd_ncc_viewer • sn_mfg_qm.prd_ncc_task_viewer • sn_rm_core.copq_planned_line_charge_creator • sn_align_core.apw_user • sn_rm_core.task_cause_association_creator • sn_mfg_qm.stakeholder_viewer • sn_rm_core.rem_action_plan_creator • sn_rm_core.cause_action_creator • sn_customerservice.case_contributor_viewer • sn_rm_core.containment_action_creator • sn_rm_core.copq_fin_req_creator
sn_mfg_qm.remediation_plan_approver	Approve or reject remediation action plans before they are enacted.	<ul style="list-style-type: none"> • sn_rm_core.copq_exp_line_creator • sn_customerservice.csm_workspace_user • sn_mfg_qm.prd_ncc_viewer • sn_rm_core.cause_action_plan_viewer • sn_mfg_qm.stakeholder_viewer • sn_mfg_qm.prd_qi_task_viewer • sn_install_base.install_base_viewer • sn_rm_core.cause_action_viewer • sn_rm_core.rca_task_viewer • sn_rm_core.rem_action_plan_viewer • sn_rm_core.copq_fin_req_viewer • sn_rm_core.issue_cause_viewer • sn_mfg_qm.prd_ncc_task_viewer • sn_mfg_qm.prd_qi_viewer

Manufacturing Commercial Operations roles (continued)

Role	Description	Contains roles
		<ul style="list-style-type: none"> • sn_mfg_qm.impactted_asset_action_viewer • sn_rm_core.copq_planned_line_charge_view • sn_mfg_qm.impactted_asset_viewer • sn_rm_core.task_cause_association_viewer
sn_mfg_qm.finance_approver.	Approve Cost of Poor Quality (COPQ) financial requests and expense lines.	<ul style="list-style-type: none"> • sn_rm_core.containment_action_viewer • sn_rm_core.preventive_action_viewer • sn_mfg_qm.impactted_asset_viewer • sn_rm_core.copq_fin_req_viewer • sn_rm_core.rem_action_viewer • sn_rm_core.copq_planned_line_charge_view • sn_customerservice.csm_workspace_user • sn_mfg_qm.prn_ncc_task_viewer • sn_rm_core.corrective_action_viewer • sn_mfg_qm.prn_qi_task_viewer • sn_rm_core.issue_cause_viewer • sn_rm_core.rem_action_plan_viewer • sn_rm_core.cause_action_plan_viewer • sn_mfg_qm.impactted_asset_action_viewer • sn_mfg_qm.prn_qi_viewer • sn_rm_core.correction_action_viewer • sn_mfg_qm.stakeholder_viewer • sn_mfg_qm.prn_ncc_viewer • sn_install_base.install_base_viewer • sn_rm_core.copq_exp_line_viewer • sn_rm_core.task_cause_association_viewer • sn_rm_core.rca_task_viewer • sn_rm_core.cause_action_viewer
sn_mfg_qm.submitter.	<p>Create, view, update, and cancel a non-conformance case.</p> <p>Create a correction action and add expense lines to it.</p>	<ul style="list-style-type: none"> • sn_customerservice.case_contributor_creator • sn_dealer_mgmt.dealer_viewer • sn_customerservice.csm_workspace_user • sn_mfg_qm.prn_ncc_creator • sn_customerservice.service_organization_co • sn_rm_core.correction_action_creator • playbook.agentic_workflow_user

Manufacturing Commercial Operations roles (continued)

Role	Description	Contains roles
		<ul style="list-style-type: none"> • sn_customerservice.requester • sn_customerservice.customer_data_viewer • sn_prm.external_partner_associate • sn_mfg_ai_agents.submitter_ai_playbooks • sn_rm_core.copq_exp_line_creator

Procedure

Assign roles to users and groups using the ServiceNow AI Platform user administration feature.

- To assign a role to a user, see [Assign a role to a user](#) .
- To assign a role to a group, see [Assign a role to a group](#) .

Related topics

[Set up Manufacturing Commercial Operations](#)

Granular roles and entities

Module-level granular roles have been added to facilitate defining and configuring the responsibility framework. These roles enable tasks to be performed without creating custom access control lists (ACLs) on the target table when a responsibility ACL exists. This update aims to provide a more direct and declarative migration process.

Granular roles and related entities

The granular role provides Create, Read, and Update (CRU) access across entities, based on the access permissions defined for each responsibility.

Granular roles	Description
Recall Claim Management Creator [sn_rcl_claim_mgmt.campaign.creator]	View, write, and create Recall Campaign tables.
Recall Claim Management Viewer [sn_rcl_claim_mgmt.campaign.viewer]	View all Recall Campaign tables.
Recall Claim Management Writer [sn_rcl_claim_mgmt.campaign.writer]	View and write all Recall Campaign tables.
Campaign Phase Writer [feature role] [sn_rcl_claim_mgmt.campaign_phase.writer]	Read access on all Recall Campaign related tables. It has write access on Recall Campaign Phase, Impacted Finished Good & Phase Task tables. It has create access on Phase Task and Impacted Finished.
Pre-authorization admin [sn_repair_claim_mgmt.repair_pre_auth_admin]	Create, update, and delete the pre-authorization request.
Repair Claim Management Viewer [sn_repair_claim_mgmt.repair_pre_auth_viewer]	View all Repair Claim Pre-authorization tables.

Granular roles and related entities

The granular role provides Create, Read, and Update (CRU) access across entities, based on the access permissions defined for each responsibility.

(continued)

Granular roles	Description
Pre-authorization navigator [sn_repr_claim_mgmt.pre_auth_navigation_menu]	Access to related list menu for pre-authorization in workspace.
Warranty specialist [sn_claim_cmnm.warranty_specialist]	View and update pre-authorization request. Also, can view Repair claim. This role is for user who can approve/reject/send-back pre-authorization request.
Product Non-conformance Submitter [sn_mfg_qm.product_non_conformance_submitter]	Create, view, update, and cancel a non-conformance case. They can also create a correction action and add expense lines to it.
Product Non-conformance Case Resolver [sn_mfg_qm.product_non_conformance_case_resolver]	Create, view, update across all non-conformance related tables.
Quality Investigation Member [sn_mfg_qm.product_quality_investigation_member]	Ability to edit product quality investigation and product quality investigation tasks. Can create remediation action plan, actions, and financial requests.
Quality Investigation Lead [sn_mfg_qm.product_quality_investigation_lead]	Create, view, update, and cancel quality investigation and all its related tables. This user also will sign off the investigation and move it to closure.
Product Non-conformance Case Triager [sn_mfg_qm.product_non_conformance_case_triager]	New non-conformance submissions, validates completeness, sets priority/severity, and routes to the right resolver. Limited to triage updates; does not execute remediation.
Finance Approver [sn_mfg_qm.finance_approver]	Approve, Reject, Send Back Financial Request, Planned Line Charge, and Expense Line records.
Remediation Plan Approver [sn_mfg_qm.remediation_plan_approver]	Review the proposed action plan and can record approval decisions and comments on the plan.
Quality Issue Management Admin [sn_mfg_qm.quality_issue_mgmt_admin]	Default access to all quality management features and tables.

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 through the responsibility framework.

Feature set	Granular roles	Supported entities
Recall campaign	sn_rcl_claim_mgmt.campaign.creator sn_rcl_claim_mgmt.campaign.viewer sn_rcl_claim_mgmt.campaign.writer	sn_rcl_claim_mgmt_ca Corrective action charges

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 through the responsibility framework.

(continued)

Feature set	Granular roles	Supported entities
	sn_rcl_claim_mgmt.campaign_phase.writer	sn_rcl_claim_mgmt_ca_charges
		sn_rcl_claim_mgmt_rcp
		sn_rcl_claim_mgmt_phase_task
		sn_rcl_claim_mgmt_rcp_phase
Recall campaign phase	sn_rcl_claim_mgmt.campaign_phase.writer	sn_rcl_claim_mgmt_rcp_phase
	sn_rcl_claim_mgmt.campaign.viewer	sn_rcl_claim_mgmt_phase_task
Product Non-conformance	sn_mfg_qm.product_non_conformance_submitter	sn_customerservice.case_contributor_creator
	sn_mfg_qm.product_non_conformance_case_resolver	sn_dealer_mgmt.dealer_viewer
	sn_mfg_qm.product_non_conformance_case_triager	sn_customerservice.csm_workspace_user
		sn_mfg_qm.prn_ncc_creator
		sn_customerservice.service_organization_creator
		sn_rm_core.correction_action_creator
		playbook.agentic_workflow_user
		sn_customerservice.requester
		knowledge
		sn_customerservice.customer_data_viewer
		sn_prm.external_partner_associate
		sn_mfg_ai_agents.submitter_ai_playbook
		sn_rm_core.copq_exp_line_creator
		sn_rm_core.issue_cause_creator
		sn_mfg_qm.impactted_asset_creator
		sn_align_core.apw_user
		sn_rm_core.rem_action_creator
		sn_mfg_qm.product_non_conformance_case_resolver
		sn_rm_core.copq_planned_line_charge_creator
		sn_rm_core.copq_exp_line_creator
		sn_rm_core.containment_action_creator

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 through the responsibility framework.

(continued)

Feature set	Granular roles	Supported entities
		sn_rm_core.rem_action_plan_creator personalize_choices sn_rm_core.task_cause_association_creator sn_rm_core.cause_action_plan_creator sn_mfg_qm.impactted_asset_action_creator sn_mfg_qm.prd_qi_viewer
Quality Issue Management	sn_mfg_qm.product_quality_investigation_member sn_mfg_qm.product_quality_investigation_lead sn_mfg_qm.quality_issue_mgmt_admin	sn_rm_core.copq_exp_line_creator sn_mfg_qm.impactted_asset_creator sn_mfg_qm.impactted_asset_action_creator sn_rm_core.corrective_action_creator sn_rm_core.correction_action_viewer sn_rm_core.rca_task_creator sn_rm_core.issue_cause_creator sn_customerservice.csm_workspace_user sn_rm_core.preventive_action_creator knowledge sn_mfg_qm.prd_qi_writer sn_mfg_qm.prd_qi_task_writer sn_rm_core.rem_action_creator sn_rm_core.cause_action_plan_creator sn_mfg_qm.prd_ncc_viewer sn_mfg_qm.prd_ncc_task_viewer sn_rm_core.copq_planned_line_charge_creator sn_align_core.apw_user sn_rm_core.task_cause_association_creator sn_mfg_qm.stakeholder_viewer sn_rm_core.rem_action_plan_creator

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 through the responsibility framework.

(continued)

Feature set	Granular roles	Supported entities
		sn_rm_core.cause_action_creator sn_customerservice.case_contributor_viewer sn_rm_core.containment_action_creator sn_rm_core.copq_fin_req_creator sn_mfg_qm.prd_qi_task_creator sn_mfg_qm.stakeholder_creator sn_mfg_qm.prd_qi_creator sn_mfg_qm.product_quality_investigation_men sn_mfg_qm.remediation_plan_approver sn_mfg_qm.product_quality_investigation_lead sla_admin sn_mfg_qm.finance_approver sn_mfg_qm.product_non_conformance_case_r

System roles containing granular responsibility roles

System roles and related granular roles

System roles	Granular roles
Recall Manager [sn_rcal_claim_mgmt.recall_manager]	sn_rcl_claim_mgmt.campaign.creator sn_rcl_claim_mgmt.campaign.viewer sn_rcl_claim_mgmt.campaign.writer sn_rcl_claim_mgmt.campaign_phase.writer
Recall Phase Owner [sn_rcl_claim_mgmt.recall_phase_owner]	sn_rcl_claim_mgmt.campaign_phase.writer sn_rcl_claim_mgmt.campaign.viewer
Warranty Specialist [sn_claim_cmnm.warranty_specialist]	financial_mgmt_user sn_customerservice_agent sn_dealer_mgmt.dealer_viewer sn_mfg_cmnm.navigation_menu sn_prd_pm.product_catalog_viewer

System roles and related granular roles (continued)

System roles	Granular roles
	sn_prm.enterprise_partner_agent
	sn_repr_claim_mgmt.claim_viewer
	sn_repr_claim_mgmt.navigation_menu
	sn_repr_claim_mgmt.pre_auth_navigation_menu
	sn_repr_claim_mgmt.repair_pre_auth_charge_creator
	sn_repr_claim_mgmt.repair_pre_auth_writer

MCO initial setup

Configure the basic settings and organizational structure required before using Manufacturing Commercial Operations features.

Before you can use Manufacturing Commercial Operations (MCO) features, you must complete initial setup tasks. These tasks establish your organizational structure, user roles, and system prerequisites.

What to explore next

To learn more about MCO configuring and implementation, see:

- [Set up Manufacturing Commercial Operations](#)
- [Implement a sales promotion setup](#)
- [Implement a recall campaign set up](#)
- [Configure dealer portal](#)
- [Set up inbound DMS integration](#)

Configure product model

Create and activate product models for finished products, parts, and components in Manufacturing Commercial Operations (MCO).

Before you begin

Role required: Model Manager (model_manager role)

About this task

You can define and manage both finished products and their individual parts or components as separate product model records. For example:

- Product: Alectri Lumora VX 2025 (Car)
- Component/Part: Alectri Airbag 65-77-91

Each of these entities is treated as a product model in the system.

Procedure

1. Navigate to **All > Workspaces > CRM Workspace**.
2. Select the List icon.

3. Navigate **MCO Setup > Product Models**.

4. Select **New**.

5. Enter the product name.

For example, enter "Alectri Lumora VX 2025" for a finished product.

6. Select the product type of models.

For example, select a type such as "Component" for "Alectri Airbag 65-77-91".

7. Select **Save**.

Result

The product model is created and ready for use in MCO processes such as warranty claims, recall campaigns, and quality investigations.

Configure install base item

Create and configure install base item records to track sold products and assets associated with customer accounts.

Before you begin

Role required: admin or sn_customerservice_manager

About this task

Install base items represent the products and assets sold to customers. Each install base item links to a corresponding asset record and maintains critical customer and service organization information. Setting up accurate install base items enables proper asset tracking and service delivery.

Procedure

1. Navigate to **All > Workspaces > CRM Workspace**.

2. Select the List icon.

3. Navigate to **MCO Setup > Install Base Items**.

4. Select **New**.

5. On the Install base item form, fill in the fields.

For a description of the field values, see [Install based item form](#).

6. Select **Save**.

The Sold Products, Entitlements, and Cases related lists are displayed.

7. 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.
Entitlements	List of entitlements that are associated with an install base item. Add an entitlement for the install base item by selecting New .

Related list	Description
	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 .

For more information on the related lists, see [Related list for an install base item](#).

8. Select **Update**.

For more information on importing install base items, see [Import install base items with guided setup](#).

Result

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.

Related topics

[Install base items](#)

Configure assets

An asset is a specific product or instance that is supported for a customer.

About this task

Assets in MCO represent equipment, software, facilities, and consumables deployed across dealer. Configuring individual assets allows you to maintain detailed records of ownership, location, maintenance history, and deployment status. This is foundational for warranty claims processing, recall management, and dealer operations.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Customer Service > Products > Assets**.
2. Select **New**.
3. Select the type of asset to create:
 - Hardware
 - Software License
 - Consumable
 - License
 - Facility
4. Complete the asset form with the following information:

Asset form

Field	Description
Name	A descriptive name for the asset (for example, "Dell Laptop Model 5490" or "Windows 11 Enterprise License").

Field	Description
Asset Tag	A unique identifier assigned by your organization for tracking and inventory purposes.
Serial Number	The manufacturer's serial number for the asset.
Location	The physical location or dealer facility where the asset is deployed.
Model	The product model or version.
Warranty Start	The date warranty coverage begins.
Warranty End	The date warranty coverage expires.
Cost	The acquisition or replacement cost of the asset.

5. Select **Submit**.

For more information on importing assets, see [Import assets with guided setup](#) .

Result

The new asset is created and is set to be available in the MCO system. The asset can now be linked to install base items, associated with dealer, tracked through repair claims, and included in recall campaigns. You can view asset details, update maintenance records, and monitor deployment status from the assets list.

What to do next

Consider these next steps:

- Link the asset to an install base item to associate it with a customer or dealer.
- For bulk asset creation, use the asset import feature instead of creating assets individually.

Set up Manufacturing Commercial Operations

Manufacturing Commercial Operations requires initial configuration of key components before users can begin managing manufacturing operations. Configure warranty contracts, labor codes, product models, assets, install base items, and dealer relationships in the following table.

MCO basic setup

Create labor code	Configure labor codes to track and categorize work performed by service agents.
Modify product model	Configure product models to define each product's attributes and specifications.
Viewing assets for Manufacturing Commercial Operations	Configure assets to track equipment and resources for each account or customer.
Configure install base item	Configure install base items to record product instances deployed for an account or customer.

Create labor code

Define a labor code for the different tasks or work performed by the service agents.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Procedure

1. Navigate to **All > Workspaces > CRM Workspace**.
2. Select the List icon.
3. Navigate to **MCO Setup > Labor code**.
4. Select **New**.
5. On the form, fill in the fields.

Labor code form

Field	Description
Name	Labor code name.
Active	Option to indicate if the labor code is active or not.
Description	Description for the labor code.

6. Select **Save**.

Result

The labor code is generated.

Modify product model

Modify a product record that your company sells and supports. The product record maintains all the product information used across customer issue management, quality investigations, service requests, warranty claims, and dealer collaboration workflows.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Note: To create the install base items, you need admin role (sn_customerservice_manager).

About this task

Product models provide dealers and manufacturers with a detail of the products being used by a particular customer.

Procedure

1. Navigate to **All > Workspaces > CRM Workspace**.
2. Select the List icon.
3. Navigate to **MCO Setup > Product Models**.
4. Select a product model that you want to edit.
5. Select **Edit**.
6. Select **Update**.

Result

The product model is updated with the latest information.

Related topics

[Product data](#) 

Viewing assets for Manufacturing Commercial Operations

An asset is a specific product or instance that is supported for a Manufacturing Commercial Operations to manage the asset details.

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.

Manufacturers must have their assets details, such as:

- Where those assets are located
- Who is using those assets
- How often those assets are used
- How much those assets cost

Advanced view

You can use the Advanced view filter to filter the assets based on your requirements.

Select the filter icon or menu. Select **Advanced view**.

Select any field from the root table that you want to filter the data by.

To learn how to configure assets, see [Configure assets](#) .

Set up dealer

Agents workspace enables the OEMs to create the dealers and assign the roles.

Create channel partner

Create a channel partner to streamline and help manage the sales process of a product or a service for an enterprise.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Workspaces > CRM Workspace**.
2. Select the List icon.
3. Navigate to **Partner Relationship Management > Channel Partners**.
4. Select **New**.
5. On the Channel partner form, fill in the fields.
For a description of the field values, see [Channel partner form](#).
6. Select **Save**.

Related topics

[Register Partner Staff on workspace](#) 

[Create Channel Partner record](#) 

Create 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

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.

Note: Only internal users can be added as managers for internal business locations.

Procedure

1. Navigate to **All > Customer Service > Service Organizations > Internal Business Locations**.
2. Select **New** on the Internal Business Locations list.
3. On the Internal business location form, fill in the fields.
For a description of the field values, see [Internal business location form](#).
4. Select **Submit**.
The location is added to the Internal Business Locations list.

After creating an internal business location, you can add staff members to the location and create relationships between staff members and accounts, households, and consumers. You can track the list of customers serviced by a business location.

Related topics

[Add staff members to a business organization](#) 

Create dealer

Create a dealer role to provide access to MCO capabilities and enable dealers to manage their assigned manufacturing and commercial operations activities.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Procedure

1. Navigate to **All > Workspaces > CRM Workspace**.
2. Select the List icon.
3. Navigate to **MCO Setup > Dealer**.
4. Select **New**.
5. On the form, fill in the fields.

Dealer form

Fields	Description
Number	<p>Automatically generated number of the dealer.</p> <p>Note: By default, dealer numbers start with the prefix DLR.</p>
External code	Identifier or reference value from an external system that maps to a corresponding record, process, product, issue type, or transaction. It helps to maintain consistency and traceability when data is exchanged between MCO and third-party systems such as ERP or CRM.
Outbond soap message	Integration mechanism used to send structured SOAP-based requests from MCO to an external system. It typically carries manufacturing or quality-related data—such as issues, investigations, customer complaints, or product records—to another enterprise application for processing, synchronization, or follow-up action.
SOAP message function	Defines the specific web service operation used to send data to an external system and process the response.
Service organization	Service organization that includes internal business locations or channel partners.
Business functions	<p>Business functions of the dealer:</p> <ul style="list-style-type: none"> ○ Sales ○ Sales and service ○ Service only

Result

The dealer is created.

Set up sales promotion

A sales promotion setup enables the manufacturers to configure the sales promotion details. It includes the promotion name, start and end date of the promotion, sales promotion type, and incentive details.

Task	Description
Create promotion type	Configure different promotion type that is applicable to the customers.
Create promotion questionnaire	Configure the MCO input set. Define the grouping for input attributes.

Task	Description
Create a checklist template	Create a checklist template applicable to user group or user.

Create promotion type

As a OEM or manufacturer, create a sales promotion type that is applicable to a specific set of promotions.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or sales promotion manager (sn_sales_prm_mgmt.sales_promotion_manager)

Procedure

1. Navigate to **All > Workspaces > CRM Workspace**.
2. Select the List icon.
3. Navigate to **Sales Promotion Setup > Promotion Types**.
4. Select **New**.
5. On the form, fill in the fields.

Promotion Type form

Field	Definition
Name	Name of the promotion type.
Input set	MCO input set. This field contains a set of questionnaires. To create an input set, see Create promotion questionnaire .
Description	Short description of the sales promotion type.

6. Select **Save**.

Create promotion questionnaire

Create a promotion questionnaire. Configure the MCO input set.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Procedure

1. Navigate to **All > Workspaces > CRM Workspace**.
2. Select the List icon.
3. Navigate to **Sales Promotion Setup > Promotion Questionnaires**.
4. Select **New**.
5. On the form, fill in the fields.

MCO Input Set form

Field	Definition
Name	Name of the MCO input set.
Application	Configuration record details. You can't edit the application.  Note: To learn more about the Application file, see Application files  .

6. Select **Save**.

Create an MCO input attribute

Create the MCO input attributes for a sales promotion campaign.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Sales Promotion Setup > Promotion Questionnaire > MCO Input Attributes**.
2. Select **New**.
3. Fill in the fields on the [MCO input attributes form](#) form, as appropriate.
4. Select **Save**.

Create a checklist template

Create a checklist template. Manufacturers can use the checklist template to create checklists for verification.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Procedure

1. Navigate to **All > Workspaces > CRM Workspace**.
2. Select the List icon.
3. Navigate to **Sales Promotion Setup > Checklist Template**.
4. Select **New**.
5. On the form, fill in the fields.

Checklist Template form

Field	Definition
Group	Group for which you want to create the checklist template.
User	User role for which you want to create the checklist template.
Template	Template JSON that has name and order for each checklist.

Field	Definition
Name	Template name.

6. Select **Save**.

Related topics

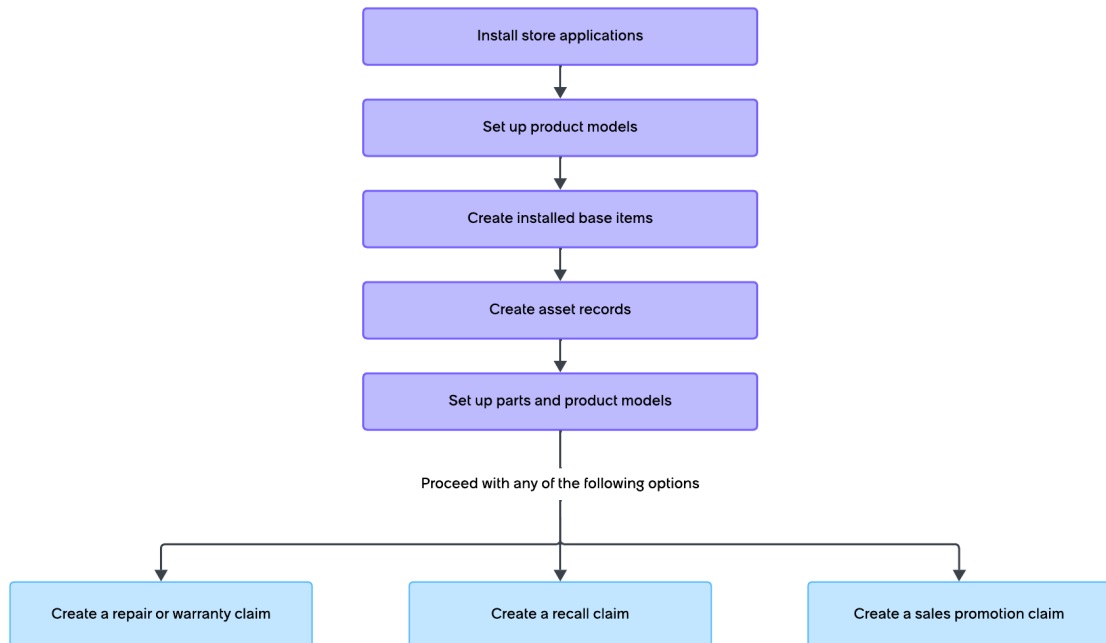
[Create a checklist template](#)

Manufacturing Commercial Operations core implementation

Configure the baseline settings that establish Manufacturing Commercial Operations in your instance.

This implementation provides the foundation for configuring Manufacturing Commercial Operations core applications.

MCO core implementation



Implement a sales promotion setup

Set up sales promotions in your environment by installing the required application, configuring product models, assets, dealers, and roles, and then managing promotion campaigns and claims.

Before you begin

Role required: admin or sn_sales_prm_mgmt.sales_promotion_manager

Procedure

1. Review the entities and relationships within the [Sales promotion campaign data model](#) application, including tables added or modified by the sales promotion plugin.
2. Configure the sales promotion: Complete the following tasks to set up sales promotion in your environment.

- a. Install Sales promotion claim management [sn_sls_prm_clm_mgt]: [Install Manufacturing Commercial Operations](#).
- b. Set up product models and parts: [Configure product model](#).
- c. Set up assets and install base items: [Configure assets](#) and [Configure install base item](#).
- d. Set up dealers: [Set up dealer](#).
- e. Assign recall roles: [Assigning roles in Manufacturing Commercial Operations](#).
- f. [Create promotion type](#). [Create promotion questionnaire](#) [Create a checklist template](#)
3. Work with sales promotion (OEM): Use the Agents (CSM/FSM) workspace to create and manage sales promotion campaigns and review claims.
 - o [Create a sales promotion claim using playbook](#)
 - o [Sales promotion management](#)
 - o [Sales promotion claim management](#)
4. Work with sales promotion (Dealer): Use the Dealer portal to submit and track sales promotion claims.
 - o [Submit a sales promotion claim](#)
 - o [Upload a bulk sales promotion claim](#)

Implement a recall campaign set up

Set up a recall campaign to define corrective actions, identify impacted assets, create tracking phases, and control dealer visibility throughout the recall lifecycle.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager or admin

Procedure

1. Review the entities and relationships within the [Recall campaign data model](#), including tables added or modified by the recall claim plugin.
2. Configure recall campaign: Complete the following tasks to set up the recall campaign in your environment.
 - a. Install Manufacturing recall claim management [sn_rcl_claim_mgmt]: [Install Manufacturing Commercial Operations](#).
 - b. Set up product models and parts: and [Configure product model](#).
 - c. Set up assets and install base items: [Configure assets](#) and [Configure install base item](#).
 - d. Set up dealers: [Set up dealer](#).
 - e. Assign recall roles: [Assigning roles in Manufacturing Commercial Operations](#).
3. Work with recall campaign (OEM): Use the Agents (CRM) workspace to create and manage recall campaigns, phases, and claims.
 - a. Create a recall campaign: [Create a campaign](#).
 - b. Define corrective action and charges: [Corrective actions](#).
 - c. Import impacted asset: [Importing impacted assets](#).
 - d. Create and manage campaign phases: [Recall a campaign phase](#).
 - e. Create phases and sub-phases: [Create a phase and sub-phase in a recall campaign](#).
4. Work with recall campaign (Dealer): Use the Dealer portal to submit and track recall claims.

Implement a repair claim set up

Configure the Manufacturing repair claim system to manage product repairs, dealer submissions, and claim approvals across your OEM and dealer network.

Before you begin

Role required: admin or sn_claim_cmn.warranty_specialist

About this task

Use this task to set up the repair claim system in Manufacturing Commercial Operations. The system manages repair claims submitted by dealers and tracked by OEM administrators. Complete these setup steps to enable repair claim functionality across your environment.

Procedure

1. Review the entities and relationships within the [Repair claims data model](#), including tables added or modified by the repair claim plugin.
2. Configure repair claims: Complete the following tasks to set up the repair claims in your environment.
 - a. Install Manufacturing repair claim management [sn_repr_claim_mgmt]: [Install Manufacturing Commercial Operations](#).
 - b. Set up product models and parts: [Configure product model](#).
 - c. Set up assets and install base items: [Configure assets](#) and [Configure install base item](#).
 - d. Set up dealer hierarchy: [Create channel partner](#) and [Create internal business location](#).

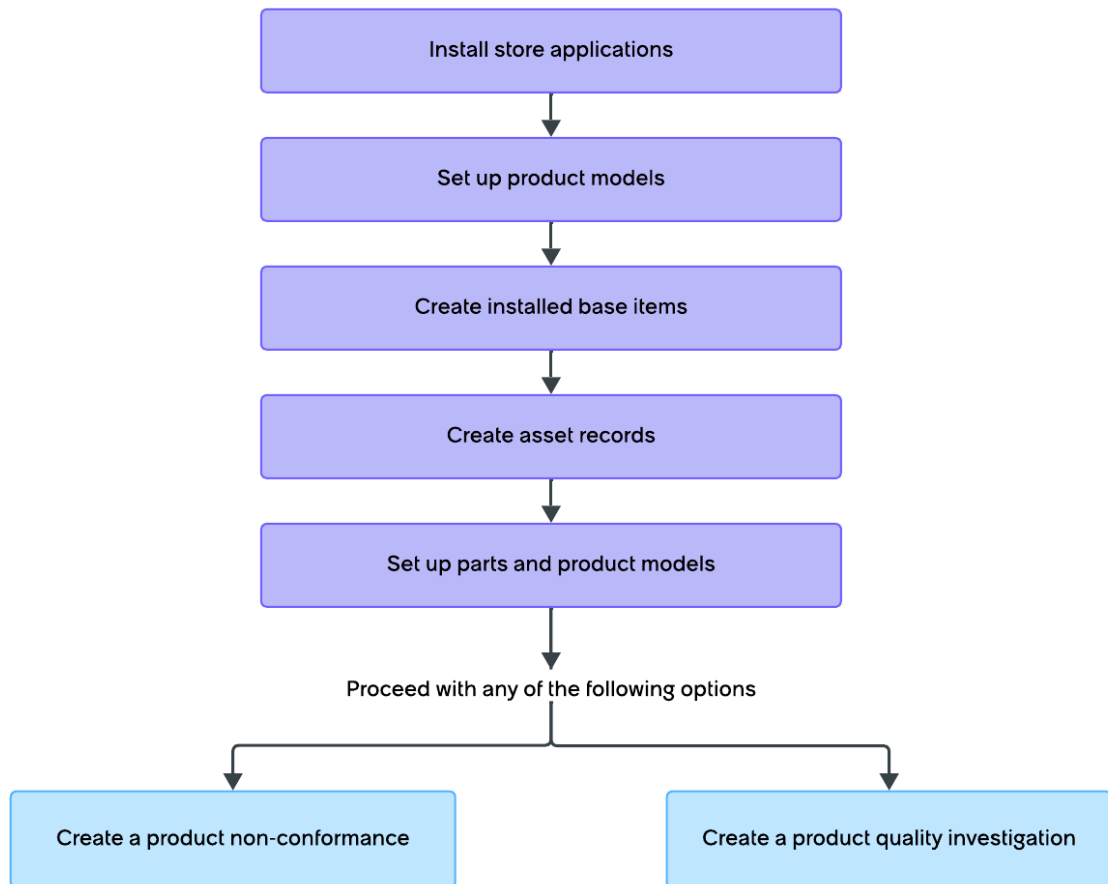
Note: Use the Partner Relationship Management data model to set up channel partners (external entities) and dealers (external trading partners to the OEM). Model company-owned dealer outlets as internal service organizations using the Service Model Foundation.
 - e. Set up dealers: [Create dealer](#).
 - f. Assign repair claim roles: [Assigning roles in Manufacturing Commercial Operations](#).
3. Work with repair claims (OEM): Use the Agents (CRM) workspace to create and manage repair campaigns, phases, and claims.
 - a. Create a repair claim: [Create a repair claim using playbook](#).
 - b. Review repair claims: [Reviewing and approving repair claims](#).
4. Work with repair claim (Dealer): Use the Dealer portal to submit and track repair claims: [Repair claim for the dealer](#).

Quality implementation

A product non-conformance case (PNCC) captures a reported quality issue, and a product quality investigation (PQI) analyzes its root cause for resolution.

This implementation provides the foundation for configuring Manufacturing Commercial Operations quality management applications.

Quality management implementation



The infographic shows the quality workflow. A submitter or resolver creates a PNCC, and a resolver triages and assigns it. For recurring defects, a PQI Lead or PQI Member opens a PQI to analyze the root cause and drive CAPA (Corrective, Containment, and Preventive Action).

Product non-conformance

A product non-conformance case (PNCC) is the customer and dealer-facing record for a reported product quality issue. It extends the complaint case hierarchy (sn_complaint_case → sn_customerservice_case → task). A resolver works the PNCC through a staged playbook in the Customer Service Management (CSM) Configurable Workspace.

A PNCC can be created in two ways:

- By a submitter (dealer or field technician) through the Dealer Portal record producer
- Directly by a resolver in the CSM/Field Service Management (FSM) Configurable Workspace

Submitter users can only see and create non-conformances (NCs) on install base items (IBIs) that are linked to their assigned account or service organization. Each submitter is scoped to their organizational unit — they can't access or report issues on other accounts' assets.

What submitters can see:

- Install base items linked to their account
- Install base items linked to their service organization (if assigned)

What submitters can log:

- New NCs on any IBI they have visibility to
- NCs automatically scoped to the account or service organization of the selected IBI

When a submitter creates and submits an NC (Draft → New state), the system assigns a resolver to triage and work the case. Triage is the process of categorizing the NC by priority, assigning it to the right resolver, and preparing it for investigation.

PQI implementation

A product quality investigation (PQI) is the internal record where a PQI Lead or PQI Member analyzes the root cause of a defect. The PQI Lead or PQI Member then drives CAPA.

A single PQI can consolidate many related PNCCs, so a recurring defect is investigated once.

A PQI can be created in two ways:

- Resolver using the **Create Quality Investigation** action on a PNCC — the PNCC is automatically linked to the new PQI
- PQI Lead using the workspace for systemic issues

Configure dealer portal

Configure the dealer portal in MCO to enable dealers to access recalls, submit claims, and manage self-service workflows.

Before you begin

Role required: admin

About this task

Dealers require portal access to view recall campaigns, submit warranty claims, and access reporting dashboards. The portal environment must be configured before you grant user access.

Procedure

1. Enable the dealer portal in MCO setup.
In the MCO module, navigate to **MCO Setup** and activate the dealer portal feature flag.
2. Configure the dealer portal theme and branding.
Customize the portal appearance to match your organization's brand guidelines. Upload logos, set color schemes, and configure the header and footer content.
3. Set up dealer user accounts and access permissions.
Create user accounts for dealers and assign roles based on their responsibilities. Define permission levels for claim submission, recall access, and reporting views.
4. Configure portal navigation and menu items for dealer self-service.
Organize the portal menu to surface key dealer workflows such as recall campaign access, claim submission, and dashboard views. Hide or disable menu items not relevant to dealers.
5. Verify dealers can access recall campaigns and submit claims.
Log in as a dealer user and confirm that recall campaigns are visible and the claim submission form is accessible from the portal.
6. Test the dealer claim submission workflow.
Submit a test claim through the portal and verify that the workflow progresses through approval states, notifications are sent, and data is captured correctly.
7. Configure dealer portal notifications and messaging.

Set up email notifications for claim status updates, new recall announcements, and portal messages. Customize notification templates with relevant dealer-facing language.

8. Set up dealer reporting and dashboard access.

Configure dashboards and reports that dealers need to monitor claim status, warranty data, and recall progress. Assign dashboard views based on dealer roles and responsibilities.

9. Test end-to-end dealer portal functionality.

Run a complete test cycle with dealer user accounts to verify portal navigation, claim submission, approvals, notifications, and dashboard access work as expected.

Result

The dealer portal is configured and ready for dealer users. Dealers can now access recall campaigns, submit warranty claims, receive status notifications, and view relevant reporting dashboards.

Integrating Manufacturing Commercial Operations with other applications

Extend the capabilities of Manufacturing Commercial Operations and connect with other departments to assist with quality issue management by integrating with other applications.

DMS integration

Integration with Dealer Management Systems (DMS) enables automatic retrieval of repair order data to streamline claim creation and processing in MCO.

Dealer Management Systems (DMS) are the system of record for repair orders, capturing repair details, part codes, and labor codes used to automate claim creation in MCO. The automotive industry uses the STAR (Standards for Technology in Automotive Retail) API standard for DMS-OEM integration, but some OEMs use non-STAR standards. MCO supports a flexible integration framework for both STAR and custom configurations, extendable to other systems used by industrial OEMs.

This integration automates claim and pre-approval creation from repair order data, reducing errors and effort in claim submission. It also updates claim status back to the DMS after assessment in MCO, so dealers can continue using the DMS as their primary interface.

Key capabilities:

- Connects to STAR-based and custom DMS configurations across automotive and industrial OEMs.
- Extracts repair order data, including part codes and labor codes, for claim processing.
- Maps repair order fields to populate claim and pre-approval records automatically.
- Synchronizes assessment outcomes back to the DMS in real time.
- Preserves the dealer's existing DMS workflow without requiring a separate login.

Related topics

[Set up inbound DMS integration](#)

[MCO Integration APIs](#)

Set up inbound DMS integration

Route dealer records, orders, and updates from the dealer management system (DMS) into the original equipment manufacturer (OEM) instance (DMS to OEM ServiceNow instance) for processing.

Before you begin

Repair Claim Management plugin must be installed.

Role required: admin

About this task

Integrating your DMS with MCO enables real-time synchronization of warranty and repair claim data. This integration streamlines claim creation, status tracking, and data validation across both systems, reducing manual data entry and improving claim accuracy.

Procedure

1. Install the integration application, MCO Integration (sn_mco_integ).
This application provides the STAR (Standards for Technology in Automotive Retail)-compliant SOAP integration layer. It is used to exchange repair order and service advisory information with external dealer systems.
2. Create the integration user.
Create a dedicated integration user for the DMS provider or integration middleware. Assign only the roles required to access the SOAP endpoint and the repair claim tables used by the integration.
3. Assign the role sn_repr_claim_mgmt.soap_integration_repair_claim to the integration user.
4. Configure authentication and access.
Work with the DMS provider to configure the required authentication method, credentials, network allowlists, and any certificate or security requirements for inbound and outbound SOAP traffic.
5. Share the WSDL endpoint details with the dealer's DMS.
Provide the DMS provider with the Warranty Claims SOAP API WSDL, endpoint URL, supported operation details, and sample request and response payloads for the target MCO instance.
6. Map STAR XML payloads to MCO records.
Review the configuration-driven adapters and confirm how STAR repair order fields map to the Repair Claim Case, Repair Claim Case Line, and Repair Claim Case Line Charge tables.
7. Validate reference data.
Confirm that incoming values from the DMS match the corresponding reference data in MCO. Values to check include dealer identifiers, repair order numbers, VIN or serial numbers, labor codes, parts, and charge types.
8. Test claim submissions.
Send a sample STAR-compliant repair order from the DMS or test client. Verify that MCO creates the warranty or repair claim case with the expected case lines and line charges.
9. Test claim status updates.
Process the claim in MCO and verify that approval, rejection, return, adjudication, or service advisory responses are generated and returned to the DMS as expected.
10. Review error handling.
Test missing, invalid, and unmatched data scenarios to confirm that SOAP faults, validation errors, and integration logs provide sufficient information for troubleshooting.
11. Migrate the configuration to production.
After successful end-to-end testing, update production endpoint details, rotate credentials if required, and monitor the first set of live transactions.

Related topics[Set up outbound DMS integration](#)[MCO Integration APIs](#)**Set up outbound DMS integration**

Send claims, approvals, and status updates from the OEM instance to the connected Dealer Management System (DMS).

Before you begin

Role required: admin

Procedure

1. Get the WSDL (Web Services Description Language) endpoint for the dealer's DMS.
2. Get the credentials for the dealer's DMS.
3. Create outbound SOAP (Simple Object Access Protocol) message in the sys_soap_message table on the OEM ServiceNow instance for this WSDL.
4. Configure the corresponding SOAP function.
5. Open the corresponding dealer record from the sn_dealer_mgmt_dealer table.
6. Update the **Outbound SOAP Message** field with the newly created SOAP message.
7. Update the **SOAP Message Function** field with the newly created SOAP function.
8. Verify the business rule conditions that invoke the outbound integration payload on the sn_repair_claim_mgmt_case table.
An outbound integration business rule is invoked on the Repair Claim Case table when:
 - Source = DMS
 - Claim state changes to a supported adjudication state

The business rule prepares the outbound payload.
9. Test claim submissions.
10. Review errors.
11. Push the following changes to the production instance.
 - Outbound SOAP message
 - SOAP function
 - Business rule, if modified
 - Dealer record changes

Dealer and OEM support STAR API

Use case scenario demonstrating dealer and OEM support for warranty claims using the STAR API.

Scenario

Alectri, an automotive OEM, relies on its dealer network to submit repair order details for warranty claims. A customer brings a vehicle to a dealership for a covered repair. The service advisor then creates a repair order in the dealer management system (DMS) for a technician to investigate. The technician identifies the parts and labor required, fixes the vehicle, and updates the repair order in the DMS with the labor and parts used.

Turning that repair order data into a claim, across a dealer network where each dealer's DMS captures the data differently, creates several challenges:

- Manual data submission: Dealers manually submit repair order details to the OEM to create each claim.
- Manual claim creation: The OEM manually creates the claim from the submitted repair order details.
- Fragmented dealer network: Dealers on different DMS platforms submit repair order data in inconsistent formats.

Solution

Alectri configures the STAR API in the Dealer Integration Framework to retrieve repair order details directly from each dealer's DMS. MCO for Warranty Claims uses this data to automatically create the resulting claims. The integration follows four phases:

1. Configure: Set up the STAR API configuration in the Dealer Integration Framework using the STAR-compliant SOAP endpoint.
2. Retrieve: Pull repair order details from the DMS, including repair performed, part codes used, labor codes used, and external services used.
3. Create: Automatically create a claim in MCO using the retrieved repair order details.
4. Monitor: Track claim creation and status in real time as repair order data arrives from each dealer.

The [Set up inbound DMS integration](#) describes how to set up the STAR API configuration and map STAR XML payloads to MCO records.

Benefits

Compare the impact of using MCO DMS integration.

DMS integration benefits

Without MCO	With MCO DMS integration
Dealer submits repair order details to the OEM to create a claim.	The STAR API configuration built in the Dealer Integration Framework retrieves the repair order details.
OEM creates the claim from the submitted repair order details.	MCO automatically creates the claim using the retrieved repair order details.
OEM builds and maintains a separate custom integration for each dealer's DMS.	OEM uses the STAR API, a standard supported across the dealer network.

Outcome

After the technician updates the repair order in the DMS, Alectri's STAR API configuration in the Dealer Integration Framework retrieves the repair order details. MCO then automatically creates the claim using the retrieved details, without manual submission or a separate custom integration for each dealer.

Dealer and OEM support custom API

Use case scenario demonstrating dealer and OEM support for warranty claims using a custom API.

Scenario

Alectri, an automotive OEM, relies on its dealer network to submit repair order details for warranty claims. A customer brings a vehicle to a dealership for a covered repair. The service advisor then creates a repair order in the dealer management system (DMS) for a technician to investigate. The technician identifies the parts and labor required, fixes the vehicle, and updates the repair order in the DMS with the labor and parts used.

Turning that repair order data into a claim, across a dealer network that doesn't share one DMS setup, creates several challenges:

- Manual data submission: Dealers manually submit repair order details to the OEM to create each claim.
- Manual claim creation: The OEM manually creates the claim from the submitted repair order details.
- Integration rigidity: A fixed integration standard doesn't accommodate every dealer's DMS setup.

Solution

Alectri configures a custom API in the Dealer Integration Framework to retrieve repair order details directly from each dealer's DMS. MCO for Warranty Claims uses this data to automatically create the resulting claims. The integration follows four phases:

1. Configure: Build the custom API configuration in the Dealer Integration Framework to match the dealer's DMS setup.
2. Retrieve: Pull repair order details from the DMS, including repair performed, part codes used, labor codes used, and external services used.
3. Create: Automatically create a claim in MCO using the retrieved repair order details.
4. Monitor: Track claim creation and status in real time as repair order data arrives from each dealer.

The [Set up inbound DMS integration](#) describes how to set up the custom API configuration and map STAR XML payloads to MCO records.

Benefits

Compare the impact of using MCO DMS integration.

Without MCO	With MCO DMS integration
Dealer submits repair order details to the OEM to create a claim.	The custom API configuration built in the Dealer Integration Framework retrieves the repair order details.
OEM creates the claim from the submitted repair order details.	MCO automatically creates the claim using the retrieved repair order details.

DMS integration benefits (continued)

Without MCO	With MCO DMS integration
OEM is limited to a fixed integration standard regardless of their DMS setup.	OEM configures the API to match their own Dealer Integration Framework setup.

Outcome

After the technician updates the repair order in the DMS, Alectri's custom API configuration in the Dealer Integration Framework retrieves the repair order details. MCO then automatically creates the claim using the retrieved details, without manual submission or a fixed integration standard.

FSM integration

Quality Issue Management (QIM) integrates with Field Service Management (FSM) to support quality actions that require on-site intervention. Non-conformance (NC) and quality issue (QI) records that require field verification, containment, or corrective repair can trigger a FSM work order directly from within QIM.

Key capabilities:

- Create FSM work orders from NC and QI action plans, including containment and correction actions
- View FSM-specific fields within the correction and containment action forms in QIM
- Monitor real-time FSM work order status from the QIM record
- View field progress and completion details without leaving QIM
- Avoid premature closure of QIM records when linked FSM work orders are incomplete

Use this integration when a quality issue requires physical on-site activity to resolve. Examples include field inspections to confirm a defect, containment actions at a customer or production site, and corrective repair or replacement work performed by field technicians.

Integrate with Field Service Management

Manufacturing Commercial Operations provides an integration with the Field Service Management application. This integration enables you to view work order and work order task information from a report.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Definitions > Plugins**.
2. Enter Field Service Management plugin **com.snc_work_management** in the Search field.
3. Select **Install**.

For more information, see [Activate a plugin](#) .

Result

After the plugin is installed, Field Service Management application is integrated with Manufacturing Commercial Operations.

Related topics[Create a work order](#)

Using Manufacturing Commercial Operations

Learn how Manufacturing Commercial Operations enables you to manage the end-to-end life-cycle of your products, subscriptions, and services.

Using the dealer portal

The dealer portal enables you to manage the repair, recall, and sales promotion claims.

Tasks	Description
Look up an asset or claim by its serial number	View asset or claim details.
Repair claim for the dealer	Submit a repair claim for warranty and recall.
Sales promotion for the dealer	Submit a sales promotion claim.
Quality issue management for the dealer	Submit a product non-conformance issue report.

Look up an asset or claim by its serial number

Look up the serial number of the asset or claim details in the dealer portal. View the item for recall and sales promotion claims.

Before you begin

Role required: sn_dealer_mgmt.dealer_service_advisor

Procedure

1. Navigate to **Dealer Portal > Lookup by serial number**.

2. Enter the serial number.

3. Select **Search**.

The page displays the claim details of that serial number. It includes **Submitted claims**, **Active recalls**, and **Details**.

4. View the relevant details.

- To view the claims submitted for that product or asset, select **Submitted claims**.
- To view a recall performed on the product or asset, select **Active recalls**.
- To view the install base form view, select **Details**.

Submit a pre-authorization request

Confirm whether certain parts, fees, or repairs are covered under a warranty or service contract before submitting a claim.

Before you begin

Role required: sn_dealer_mgmt.dealer_service_advisor

You can only submit a repair claim while the pre-authorization is valid. If the pre-authorization has expired, the system blocks the submission and displays an error message.

Procedure

1. Navigate to **Dealer Portal > Catalogs > Customer operations > Pre-authorization**.
2. On the Submit claim case form, fill in the fields.
For a description of the field values, see [Pre-authorization form](#).
3. Select **Continue**.
The Pre-authorization request number is generated.
4. Select **Add claim jobs**.
5. Set **Type** as one of the following:
 - Warranty: Repair, replacement, or service that is covered under the warranty.
 - Goodwill: Repair services that may be free or discounted at the manufacturer's discretion.
6. On the Claim jobs form, fill in the fields.
For a description of the field values, see [Pre-authorization job details form](#).
7. Select **Save**.
8. Select **Submit**.

Result

You have successfully submitted your claim for review.

Note: The claim is available in the Agents portal for review and approval. After the warranty advisor approves the claim, the **Create claim** option is enabled. For more information about create claim, see [Repair claim for the dealer](#).

Repair claim for the dealer

The dealer portal enables the dealers to raise a claim request for the repair work that was performed for a product. The repair could have been done either under warranty or after the recall of the product.

You can perform the [Submit a repair claim for warranty](#) task for repair claim on the dealer portal:

Submit a repair claim for warranty

Create a warranty claim and submit it for approval.

Before you begin

Role required: admin

Procedure

1. Navigate to **Dealer Portal > Catalogs > Customer operations > Repair claim**.
2. On the Claim details form, fill in the fields.
For a description of the field values, see [Claim details form](#).
3. Select **Continue**.
The Claim jobs form appears.
4. Select **Add claim jobs**.
5. Set **Type** to **Warranty** or **Recall**.
6. On the Claim jobs form, fill in the fields.
For a description of the field values, see [Repair claim form](#).
7. Select **Submit**.
The **claim review** is enabled.

Result

The Claim job is successfully submitted for review and approval.

Related topics

[Repair claim](#)

[Repair claim](#)

Sales promotion for the dealer

The dealer portal enables the dealers to view the sales promotions campaign created by OEMs. Dealers can also raise a claim request on the sales promotion.

Task	Description
Submit a sales promotion claim	Submit a single sales promotion claim case.
Upload a bulk sales promotion claim	Bulk upload the sales promotion claims.

Submit a sales promotion claim

As a dealer, submit a single sales promotion claim request.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or dealer sales agent (sn_dealer_mgmt.dealer_sales_agent)

Procedure

1. Navigate to **Dealer Portal > Catalogs > Customer operations > Sales promotion single claim.**
2. On the form, fill in the fields.

Sales details form

Fields	Description
Asset	Asset or product on which sales promotion is applicable.
Requested by	User who is raising the sales promotion claim request.
Consumer	Customer of the sale. The consumer information is auto-populated based on the install base.
Dealer	Dealer who is raising the sales promotion claim request.
Sale Price	Sale price of the sold product for which you're raising the sale promotion claim.

3. Select **Continue**.
The Incentive details form appears.
4. Select the incentives.
5. Enter the incentive percentage.
6. Select **Submit**.

Result

The Sales promotion claim is successfully submitted for review and approval.

Upload a bulk sales promotion claim

Upload a template file containing multiple sales promotion claims to submit them together.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or dealer sales agent (sn_dealer_mgmt.dealer_sales_agent)

Procedure

1. Navigate to **Dealer Portal > Catalogs > Customer operations > Sales Promotion Bulk Upload**.
2. Select **Download template**.
3. On the Sales promotion bulk upload form, fill in the fields.
For a description of the field values, see [Sales promotion bulk upload form](#).
4. Select **Dealer**.
5. Select **Add attachments** to upload the updated template.
6. Select **Submit**.

Quality issue management for the dealer

The dealer portal enables dealers to view the product non-conformance issues they requested. Dealers can also submit the product non-conformance issue reports.

Report an issue

Use the Dealer portal to submit non-conformance issues with AI-guided workflows for duplicate detection, assessment, and cost tracking.

Before you begin

Role required: Quality Issue Management Admin or Product Non-conformance Submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Dealer Portal > Report an issue**.
2. In the Create New Product Non-conformance Case, select the **Quick start** activity.
 - a. Select **Install Base** from the list.
 - b. Select **Continue**.
The system retrieves the Account/Service organization/Consumer name for the selected install base item.
 - c. Select **Continue**.
3. In the **Describe the issue** field, enter the issue description in your own words.
The description is evaluated for 5W2H – what, where, when, who, why, and how – based on the information provided.
 - a. Select **Suggestions for improvement** to get assistance from ServiceNow Otto ✨.
 - b. Select + to add the supporting document and work orders.

- c. Select **Save**.
 - d. Select **Continue**.
4. Proceed without entering the details in the **Follow-up** activity.
 - ServiceNow Otto  analyzes the issue description and attachments to auto-populate answers to the follow-up questions.
 - You can edit the auto-populated answers by selecting the form fields and **Continue**.
 5. In the **Identify duplicate** activity, check if there's any existing non-conformance case (PNCC) for the same install base item.
 The system searches the existing PNCCs in the same install base, compares short description and description, and returns the top match based on confidence score. Confidence score is the matching percentage between the existing PNCC and the new submission.
 - Yes, this is a duplicate: The report exits the flow and this draft is closed as a duplicate. You're redirected to the existing parent PNCC.
 - No, continue with the new PNCC: The draft report continues.
 6. In the **Add correction action** activity, update whether the correction action is already applied to resolve the issue.
 - No: It enables you to continue to **Review and Submit**. You can select this option anytime before selecting **Continue**. It deletes the new correction details that you added.
 - Yes: **Add correction details** and **Expense line** are enabled.

Field	Description
Add Correction details	
Short description	Short description of the correction.
Description	Detailed description of the correction.
Expense line	
Description	Short description of the expense line
CoPQ type	Cost of poor quality type.
Asset	Type of asset.
Amount	Cost of the labor or administrative, or cost incurred to procure a new item.

Add multiple correction actions by selecting **Add**.

7. Select **Continue** to save your changes.
8. In the Review and submit section, review all the 5W2H details, correction actions, and the expense lines tagged to the correction actions.
 Review and edit any values. Add additional information if needed, then select **Submit**.
 The system generates an issue reference number for the submitted case.
9. Check the notification for PNCC updates from the resolver.
 - If the resolver requests more information, review the record and update the information in the activity stream. The product non-conformance case (PNCC) state changes from Awaiting info to In Progress. The SLA pauses when the state changes to "Awaiting info" and resumes once the state returns to "In progress"
 - If the resolver proposes a correction, review the correction actions for the case.

- Select **Accept Solution**, **Reject Solution**, or **Cancel**
 - **Auto Accept** — automatically accepts the proposed correction after 5 days without submitter action and the case will be moved to In progress.
 - **Accept Solution** — moves the case to the In Progress state and logs a comment that the submitter accepted the solution.
 - **Reject Solution** — prompts you for a reason, returns the case to the resolver, and logs a comment with the rejection reason. The existing SLA is completed and new SLA is created.
 - **Cancel** — cancel the case.
- **Auto Accept** — if a submitter does not accept a solution, the system will automatically change the PNC state from "correction proposed" to "in progress" after five days.

Report a product non-conformance using the catalog

Report a product non-conformance case using the catalog to describe the issue, identify duplicates, and add correction actions.

Before you begin

Role required: Quality Issue Management Admin or Product Non-conformance Submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Dealer Portal > Catalogs > Categories > Quality issues > Report a product non-conformance**.
2. Select **Quick start**.
 - a. Select **Install Base**.
The Buyer organization associated with the install base item is displayed.
 - b. Select **Continue**.
3. Select **Describe the issue**.
 - a. Enter the **Issue description**.
 - b. Select **Add file** to add supporting documents.
 - c. Select **Continue**.
4. Select **Follow-up**.
 - a. On the Issue details form, fill in the following fields.

Issue details form

Field	Description
What is the problem?	Description of the problem or incident in clear, concise terms.
Where is the problem observed?	Location of the issue.
When did this problem happen or get identified?	Timeline of the issue. This includes when it was first detected, when it occurred, and the duration of its impact.
Who is involved, responsible, or affected by the problem?	Details of the customer facing the problem.

Field	Description
Why is this problem important?	Underlying causes of the issue.
How will the problem be resolved?	Details of how the issue is resolved.
How much will it cost to fix the problem?	Number of parts or customers affected.

b. Select **Back** to return to the previous form.

c. Select **Save**.

d. Select **Continue**.

5. Select Identify duplicate.

The system displays duplicate non-conformance details. You can open the record and verify whether the record is a duplicate. If the record is confirmed as a duplicate, then it is marked as **Closed Duplicate**.

Select **Submit**.

6. Select Add correction action.

a. Select **Log or select a correction** to add a correction action.

i. Select **Recommend corrections**.

The correction action recommendations are displayed.

ii. Select **Add**.

iii. In the **Add correction details** form, fill in the following details.

Add correction details form

Field	Description
Short description	Short note.
Description	Detailed description of the correction action.

iv. Select **Add Expense**.

v. In the **Expense line** form, fill in the following details.

Expense line form

Field	Description
Description	Short note on the expense line.
CoPQ type	Cost of poor quality (CoPQ) type: <ul style="list-style-type: none"> Part Labor Service

Field	Description
	<ul style="list-style-type: none"> Material Rework
Amount	Amount of CoPQ expense line.
Asset	Identification number of the asset associated with the expense line.

Note: You can add multiple expense lines.

vi. Select **Save** to save the expense line.

vii. Select **Back** to return to the previous form.

viii. Select **Continue**.

b. Select **Create remediation action plan**.

Note: If you have already created a correction action for this case, a notification prompts you to remove it.

i. Select **Add**.

ii. In the **Remediation action plan details** form, fill in the following details.

Remediation action plan details form

Field	Description
Plan name	Name of the remediation action plan.
Description	Detailed description of the remediation action plan.

iii. Select **Add planned line charges**.

Add planned line charges form

Field	Description
CoPQ type	CoPQ type: <ul style="list-style-type: none"> Part Labor Service Material Rework
Quantity	Number of units.
Unit cost	Cost per unit.
Product model	Model of the product to use.
Unit of measure	Unit used to measure the quantity.

Field	Description
Planned cost	Planned cost is auto-calculated based on the quantity * unit cost * unit of measure.

Note: You can add multiple planned line charges.

iv. Select **Save**.

v. Select **Continue**.

c. Select **No action at this time**.

Note: If you have already created a correction action or a remediation action plan for this case, a notification prompts you to remove it.

Select **Continue**.

7. Select **Review and Submit**.

On the Review and submit form, review all the details.

Note: You can edit any activity if it is pending.

Review issue details and support document provides all the required information for this case.

8. Select **Submit**.

The product non-conformance case (PNCC) is submitted for review.

9. Check the notification for PNCC updates from the resolver.

- If the resolver requests more information, review the record and update the information in the activity stream. The product non-conformance case (PNCC) state changes from Awaiting info to In Progress. The SLA pauses when the state changes to "Awaiting info" and resumes once the state returns to "In progress"
- If the resolver proposes a correction, review the correction actions for the case.
- Select **Accept Solution**, **Reject Solution**, or **Cancel**
 - **Auto Accept** — automatically accepts the proposed correction after 5 days without submitter action and the case will be moved to In progress.
 - **Accept Solution** — moves the case to the In Progress state and logs a comment that the submitter accepted the solution.
 - **Reject Solution** — prompts you for a reason, returns the case to the resolver, and logs a comment with the rejection reason. The existing SLA is completed and new SLA is created.
 - **Cancel** — cancel the case.
- **Auto Accept** — if a submitter does not accept a solution, the system will automatically change the PNC state from "correction proposed" to "in progress" after five days.

Report an issue manually

Create an issue report for the product non-conformance.

Before you begin

Role required: Product Non-conformance Submitter
(sn_mfg_qm.product_non_conformance_submitter)

About this task

This task appears only when ServiceNow Otto Otto capabilities are not available.

Procedure

1. Navigate to **Dealer Portal > Catalogs > Categories > Quality issues > Report a product non-conformance**.
2. On the Report a product non-conformance form, fill in the fields.
For a description of the field values, see [Report a product non-conformance](#).
3. Select **Choose a file**, to upload any available documents or images.
4. Select **Submit**.
5. In the **Correction actions** tab, **Correction action** can be viewed.

Using MCO workspace

The workspace portal or the agent workspace enables the OEM or the manufacturers to create, view, and approve claims.

Tasks	Description
Repair claim	The OEM can create, view, and approve repair claims.
Sales promotion management	The OEM can create sales promotion for the customers based on the required criteria.
Sales promotion claim management	The OEM can create, view, and approve sales promotion claims.
Pre-authorization requests	The OEM can create, view, and approve pre-authorization request.
Product non-conformance	The OEM can create and view product non-conformance cases.
Product quality investigation	The OEM can create and view product quality investigation cases.
Remediation action plans	The OEM can create and view remediation action plans.

Repair claim

The Agents workspace enables the OEMs to create, view, review, and approve the repair claims.

Tasks	Description
Create a repair claim manually	Create repair claim case.
View a repair claim case	View the required repair claim cases.
Reviewing and approving repair claims	Different types of approval.

Create a repair claim using playbook

Create a repair claim for the products under warranty or recall using the playbook experience.

Before you begin

Role required: Manufacturing operations admin

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace > List > Create Repair Claim Case > All > New**.

The guided Repair claim case playbook displays.

2. Claim details

- a. On the Enter claim details form, fill-in the [Claim details form](#) details.
- b. Select **Continue**.

3. Claim jobs

- a. Select **Add claim jobs**.
- b. Set **Type** as **Warranty** or **Recall**.
- c. On the Repair claim jobs form, fill in the [Repair claim form](#) details.
- d. Select **Save**.
- e. Select **Submit**.

4. Claim review

The claim job is successfully submitted for review and approval.

5. Review & approve

The claim analysis and claim jobs summary are generated. Multiple claims jobs summary can be viewed by selecting **Show more**.

Select an action from the following table.

Review and approve actions

Action	Description
Approve all	Select Approve all from the list. All claims are approved. The Next steps details are provided.
Reject all	Select Reject all from the list. All claims are rejected. The suggested action will be provided.
Partially approve	Select Partially approved . Approve, reject, or delete individual jobs, or enter a lesser approved amount for any job. The Suggested action will be provided.
Send back	Select Send back . The claim is returned to the dealer for additional information. The Suggested action will be provided.

6. Select **Submit**.

Create a repair claim manually

Create a repair claim for the products under warranty or recall.

Before you begin

Role required: Manufacturing operations admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Repair**.

Note: Select any **Case** from the list.

2. Select **New**.

3. On the Claims details form, fill in the fields.

For a description of the field values, see [Claim details form](#).

4. Select **Continue**.

The Claim jobs form appears.

5. Select **Add claim jobs**.

6. Set **Type** as **Warranty** or **Recall**.

7. On the Repair claim jobs form, fill in the fields.

For a description of the field values, see [Repair claim form](#).

8. Select **Submit**.

Result

The claim job is successfully submitted for review and approval.

View a repair claim case

View the repair claim cases.

Before you begin

Role required: claim agent or manufacturing operations admin

Procedure

1. Navigate to **All > Repair Claims**.

2. Choose a list of cases to view.

- My Cases: Cases assigned to them
- All: Cases that belong to that business location.
- Open: All the open cases.
- Unassigned: Unassigned cases and assign them to the available agent.
- Escalated: Cases that are escalated and need attention.

Reviewing and approving repair claims

Agents portal or workspace enables you to review and approve the claims submitted by a dealer.

1. Navigate to **Workspaces > CRM Workspace > Lists > Repair**.

Note: To create and navigate to the Review & approve form, see [Create a repair claim manually](#).

2. From **Activities**, select **Review & approve**

3. Select the required action from the following table.

Review and approve repair claims

Action	Description
Approve all	Select Approve all from the drop-down. All claims are approved. View the summary in Claim Summary.
Reject all	Select Reject all from the drop-down. All claims are rejected. View the summary in Claim Summary.
Partially approve	Select Partially approved . Approve, reject, or delete individual jobs, or enter a lesser Approved amount for any job. View the summary in Claim Summary.
Send back	Select Send back . The claim is returned to the dealer for additional information.

Summarize fraudulent claim detection using agents

Automatically detect fraudulent claims by identifying duplicates, similar claim patterns, reused dealer images, mismatched or incomplete supporting documents, usage inconsistencies, and abnormal claim spikes.

Before you begin

Role required: admin

Enable the skill before use. It is inactive by default:

1. Navigate to **All > ServiceNow Otto Admin > Skills**.
2. Select **Customer**.
3. Select **MCO**.
4. Activate the skill **Detect Claim Anomaly**.

About this task

The App Anomaly Detection Rule [com.sn_anomaly_detect] framework identifies fraudulent claims. The Agents portal displays fraudulent repair claims submitted from the dealer portal using these rules.

- **Similar claim:** Identifies the similar claims submitted for the same customer across multiple assets or vehicles.
- **Duplicate claims:** Automatically identifies claims that match previously processed claims for the same vehicle, part, or repair.
- **Image reuse:** Detects claims that reference the same picture as a prior submission.
- **Configurable detection parameters:** Allows administrators to tune detection sensitivity and time windows to match their operational policies.
- **Product usage mismatch detection:** Compares product usage data between the current claim and historical claim records to flag inconsistencies.
- **Dealer claim spike:** Surfaces similar claims submitted by the same dealer within a configurable time window.
- **Document mismatch:** Detects claims with mismatched or incomplete supporting documents.

- **Threshold based approval:** Detects repair claims that exceed threshold limits that have been specified for the causal parts.
- **Inflated claim:** Detects if the claim amount is significantly greater than the average claim amount for similar claims.
- **Cross validation:** Compares a repair claim's charges against the pre-authorization request or recall campaign it originates from. Claims that fall outside the configured tolerance are flagged for manual review.

Use case 1: Dealer submits repair claim with image.

To submit the report in the Dealer portal, see [Submit a repair claim for warranty](#).

The repair claim appears in the Agents portal with Reject status.

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Repair**.
2. Select the repair claim record that you want to review.

Note: Choose the record that has the **Potential action** as Reject/Suggested.

3. Select **Review & approve**, to view the claim analysis generated by ServiceNow Otto ✨.

Recall management

Recall management enables the OEMs to identify and remove or replace the faulty products sold to the customers.

Tasks	Description
Create a campaign	Displays all the recall campaign that are assigned to the person logged in to the workspace.
View All campaigns	Displays all the recall campaign that are created by the OEM.
Create My campaign phases	Displays all the recall campaign phases that are assigned to the person logged in to the workspace.
Recall a campaign phase	Displays all the recall campaign phases that are created by the OEM.

Create a campaign

Create a recall campaign and also view the list of campaigns claims assigned to the person who has logged in to the workspace.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns**.
2. Select **New**.

3. On the Recall campaign form, fill in the fields.
For a description of the field values, see [Recall campaign form](#).

4. Select **Save**.
The recall campaign record is created.

The following actions are displayed:

- Import Impacted Assets: To import impacted assets, refer [Importing impacted assets](#)
- Initiate Recall Campaign: To change the recall campaign state from draft to in-progress, you must have at least one corrective action marked as In use. Only then can the campaign progress beyond the draft stage.
- Cancel Campaign: To cancel the recall campaign.

What to do next

1. Create [Corrective actions](#).
2. Create [Corrective action charges](#).
3. Select **Initiate Recall Campaign** to enable Recall Campaign Phases and Phase & Sub-phases.

Importing impacted assets

Recall campaign management enables you to import the impacted assets.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns**.
2. Choose the recall campaign record where you want to import the affected asset.
3. Select **Import Impacted Assets**.
4. On the form, fill in the fields.

importing impacted assets form

Fields	Description
Import set table	Select Existing table. Choose sn_rcl_claim_mgmt_impacted_asset_import table from the option.
Source of the import	Select the source of import from the option: <ul style="list-style-type: none"> ○ File ○ Data source

5. Select **File**.
6. Select **Choose file**.
7. Choose Import Impacted Assets Template.
The template consists of Serial number and Recall campaign number.

Serial numbers help manufacturers and dealers identify products, track assets, handle claims, and manage recalls or promotions throughout a product's life-cycle. For a vehicle, VIN (Vehicle Identification number) will be its serial number.

If the install base item or the asset record is missing, the import process throws an error for that serial number.

8. Select **Open**.

9. Select **Submit**.

The impacted assets data is uploaded.

10. Select **Run Transform**.

Note: Transform job should be run. If it isn't set to run automatically, perform manually.

11. Select **Transform**.

12. Select **Transform History**, to view logs.

Campaign tasks

As an OEM, plan, manage, and execute a promotional effort.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns > Campaign Tasks**.
2. Select **New**.
3. On the Campaign tasks form, fill in the fields.
For a description of the field values, see [Campaign tasks form](#).
4. Select **Save**.

Create recall corrective actions using ServiceNow Otto for MCO

Create recall corrective actions AI agent extracts the information available in the repair documents. The AI agent identifies and collects all relevant data contained within the repair documents and generates the corrective action and the corresponding charges.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management**.
2. Create a recall campaign record.
3. Select the ServiceNow Otto icon  to launch the ServiceNow Otto panel.
4. Submit a request to initiate a corrective action.
The orchestrator activates the Create Recall Corrective Actions AI Agent, prompting you to proceed with the creation of the corrective action.
5. The agent prompts the user to upload the repair documents required for generating the corrective actions.
6. The agent reviews the uploaded documents.

Note: If information is missing, the agent displays an error message and provides clear instructions for resolution.

This process is repeated until all the required information is provided.

7. The agent generates the corrective action and associated charges.

All the corrective actions are generated along with the different charges (labor, part, miscellaneous, and external services).

Related topics

[Create a campaign](#)

[Activate an agentic workflow template](#) 

[Duplicate an agentic workflow](#) 

[Modify an agentic workflow](#) 

Corrective actions

Corrective action enables you to address the asset issue, either by eliminating or replacing the asset.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns**.
2. Select the corresponding campaign record in which you want to create a corrective action.
3. Select **Corrective Actions**.
4. Select **New**.
5. On the corrective action form, fill in the fields.
For a description of the field values, see [Corrective action form](#).
6. Select **Save**.
Ready to use option is displayed.

 **Note:** At least one "In use" corrective action is required to initiate the recall campaign to In-progress.

Corrective action must contain at least one action charge line to move it to In use.

Corrective action charges

Create correction action charges to enable the expenses incurred to address a non-conformance and implement measures to help prevent its recurrence.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns > Corrective Actions > Corrective Action Charges**.
2. Select **New**.
3. On the corrective action charges form, fill in the fields.
For a description of the field values, see [Corrective action charges form](#).
4. Select **Save**.

Ready to use option is displayed.

Note: At least one "In use" corrective action is required to initiate the recall campaign to In-progress.

Generate a part requirement

Capture all the part requirements at the campaign level.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns > Corrective Action**.
2. Select the corresponding campaign record in which you want to generate the part requirements.
3. Move the corrective action to **Ready for use**.
4. Select the corrective action record to generate part requirements.
If the Corrective action charges with **Type** is set to **Part** and the **Status** is set to **In Use**, then the following fields are automatically populated.

Parts requirements form

Fields	Description
Number	Parts requirement number that is automatically generated. The number starts with RCPPR.
Part	Part name to be replaced.
Quantity required	Quantity of the item required. It is based on the number of assets, impacted asset on which the corrective action charges are applicable.
Unit of measure	Unit of measure. Available options are: <ul style="list-style-type: none"> ○ Box ○ Bundle ○ Carton ○ Case ○ Days ○ Each ○ Kit ○ Month ○ Pack ○ Year

Note: When corrective action status changes to Draft, part details in part requirements are reset to 0.

Create a parts availability

Track current part availability and expected availability dates for required parts.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns**.
2. Select the corresponding campaign record in which you want to generate the part requirements.
To generate the part requirement, see [Generate a part requirement](#).
3. Select **Parts requirements**.
4. Select the corresponding part requirement record in which you want to create the part availability.
5. Select **Recall Campaign Part Availability**.
6. Select **New**.
The Recall Campaign Part Availability form displays.
7. On the form, fill in the following fields.

Parts availability form

Field	Description
Number	Parts availability number that is automatically generated. The number starts with RCPA.
Earliest available	Date and time when parts will be available.
Quantity available	Quantity of the item available.
Quantity allocated	Quantity reserved for use.
Recall campaign part requirement	Name of the recall campaign part requirements for which the part availability is created.

8. Select **Save**.

Create an impacted asset

Identify an impacted asset that must be replaced or recalled.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns > Impacted asset**.
2. Select **New**.
3. On the form, fill in the fields.

impacted asset form

Fields	Description
Recall campaign	Name of the recall campaign.
Recall campaign phase	Recall campaign phase that you want to recall.
Repair claim case	Repair claim case number.
Asset	Asset that you want to recall.
Install base	Install base item.

4. Select **Save.****Recall a campaign phase**

Create a recall campaign for a specific geography or a dealership.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns > Recall Campaign Phases**.
2. Select **Create phase**.
3. On the required recall campaign form, fill in the fields.
For a description of the field values, see [Recall campaign phase form](#).
4. Select **Save**.

Assign an impacted asset

Assign an impacted asset to the recall campaign.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns > Recall Campaign Phases**.
2. Select **Assign**.
3. Select the asset from the list.
4. Select **Assign**.

Adding a phase task

Agents workspace enables the manufacturers to add the phase task details for the recall campaigns.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaign > Recall Campaign Phases > Phase tasks.**
2. Select **New**.
3. On the Phase task form, fill in the fields.
For a description of the field values, see [Phase task form](#).
4. Select **Submit**.

Adding a sub-phase

Create a sub-phase for a parent phase.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns > Recall Campaign Phases.**
2. Select **Create Sub-phase**.
3. On the recall campaign phases form, fill in the fields.
For a description of the field values, see [Recall campaign phase form](#).

Assign or unassign impacted assets

Create a impacted asset list and assign or unassign it to a phases or sub-phases.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns > Impacted asset.**
2. Select **New**.
3. On the form, fill in the fields.

Assign or unassign an impacted asset form

Fields	Description
Recall campaign	Name of the recall campaign.
Recall campaign phase	Recall campaign phase that you want to recall.
Repair claim case	Repair claim case number.
Asset	Asset to assign or unassign to a phase or sub-phase.
Install base	Install base item.

4. Select **Save**.

Create a phase and sub-phase in a recall campaign

Create a set of phases and sub-phase within a recall campaign to enable detailed segmentation, improving tracking, and management at each stage of the process.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns**

2. Select the corresponding campaign record in which you want to create the phases and sub-phases.

3. Select **Phases & Sub-phases**.

The page displays the following:

- Total impacted assets: The total number of impacted assets associated with the campaign.

For example: Total impacted assets = campaign assets (which includes phase assets + sub-phase assets).

- Assigned impacted assets: The total number of impacted assets in a given leaf-level phase or sub-phase.

For example, assigned impacted assets = phase assets (leaf) + sub-phase assets (leaf).

- Unassigned impacted assets: The total number of impacted assets that are associated with phases or sub-phases that aren't at the leaf-level.

For example: Unassigned impacted assets = phase assets (non-leaf) + sub-phase assets (non-leaf).

Note: Unassigned assets on a parent phase are the assets that are assigned to the parent phase but not to any leaf phase.

4. Select **Add phase**.

5. On the required recall campaign phase form, fill in the fields.

For a description of the field values, see [Recall campaign phase form](#).

6. Select **Save**.

Related list for phases & sub-phases

Related list	Description
Assign an impacted asset	Assign an impacted asset to the recall campaign.
Adding a phase task	Agents workspace enables the manufacturers to add the phase task details for the recall campaigns.
Adding a sub-phase	Create a sub-phase for a parent phase.

7. Add a sub-phase by selecting the plus icon (+).

The Recall Campaign Phase window is displayed.

8. On the recall campaign phases form, fill in the fields.

For a description of the field values, see [Recall campaign phase form](#).

9. Select **Submit**.

Create a phase part allocation

Create an allocation entry for a required part.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Note: Phase part allocation can only be created for leaf phases.

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns > Recall Campaign Phases**.
2. Select a leaf phase.
3. Select **Recall Phase Part Allocations**.
4. Select **New**.
5. On the form, fill in the following fields.

Recall phase part allocation form

Field	Description
Number	Recall phase part allocation number that is automatically generated. The number starts with RCPHPA.
Recall campaign part requirement	Part required for the recall phase campaign.
Source	Campaign part availability record.
Quantity allocated	Quantity.
Recall campaign phase	Recall campaign phase for which the recall phase part allocation is created.

6. Select **Save**.

View All campaigns

View a recall campaign using the All campaigns form.

Before you begin

Role required: admin

Procedure

1. **Workspaces > CRM Workspace > Lists > Recall Management > All Campaigns**
2. Select **New**
3. For information on how to create recall campaigns, see [Create a campaign](#).

Create My campaign phases

Display the claims assigned to the person who has logged in to the workspace.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure**1. Workspaces > CRM Workspace > Lists > Recall Management > All Campaigns**

Note: A recall campaign must be in an In-progress state before creating a recall campaign phases.

2. Select **New**, to [Create a campaign](#).
3. Select the corresponding campaign record in which you want to create phases and sub-phases.
4. On the Recall campaign phases form, fill in the fields.
For a description of the field values, see [Recall campaign phase form](#).
5. Select **Save**.

Merge two or more phases

Merge phases and sub-phases to reorganize and transfer assets.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Recall Management > My Campaigns**.
2. Select the Recall campaign phase and open it in details view.
3. Select **Merge and Cancel phase**.
All the active campaign phases that are in either the Draft state or the Pre-launched state can be merged.

The Merge assets to another phase and cancel current phase window displays.
4. Select **Move assets to phase or sub-phase** from the list.
5. Select **OK**.

Note: Only phases or sub-phases without a child phase can be merged.

Result

The current phase or sub-phase state is canceled, and all associated assets are transferred to the target phase.

Sales promotion

Sales Promotion Management enables manufacturers to create, manage, and track promotional programs across their dealer and distributor networks. Use it to configure promotion types, define eligibility criteria, and set discount structures. Integration with dealer operations ensures promotions are visible and claimable at the point of sale.

Create a sales promotion claim using playbook

Create the sales promotion claim using the guided playbook.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)
or dealer sales agent (sn_dealer_mgmt.dealer_sales_agent)

Procedure

1. Navigate to **All > Sales Promotion Claim Management > All**.

The guided Sales promotion claim case playbook displays.

2. Sales details

a. Enter the sales details.

On the form, fill in the fields.

Fields	Description
Asset	Asset for the claim.
Requested by	Logged in user or member of the logged in user's service organization.
Consumer	Consumer is associated with the install base.
Dealer	Business location.
Sales price	Sale price of the product sold. Select the required currency from the list

b. Select **Continue**.

3. Incentive details

a. Select **Select incentives**.

The list of incentive types are displayed.

b. Select the incentive type applicable for your claim case.

c. Enter the incentive details.

On the form, fill in the fields.

Fields	Description
Claimed amount	Enter the incentive claim amount.
Trade in make	Brand of the vehicle.
Trade in year	Year of manufacture.
Trade in serial number	Serial number of the vehicle.
Trade in model	Model of the vehicle.
Trade in trim	Variant of the vehicle.

d. Select **Add file**, to attached the document.

e. **Total claimed amount** is auto calculated based on the claimed amount.

f. Select **Submit**.

4. Claim review

a. Enter **Comment**.

b. Select **Complete review**.

Activity	Description
Claim in review	The claim is successfully submitted for re view.
Review and approve	Review the claim and approve. Enter the amount that you want to approve.
Claim summary	View the summary of the sales promotion claims.

Claim is reviewed and approved.

Sales promotion management

The Agent workspace enables the OEMs to create the promotion campaign for a specific set of customers.

Tasks	Description
My promotions	Displays all the sales promotion claims that are assigned to the person logged in to the workspace.
View all promotions	Displays all the sales promotion claims.

My promotions

Agents workspace enables OEM to create the sales promotions campaigns. OEM agent can view all the sales promotion campaign created by them.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or sales promotion manager (sn_sales_prm_mgmt.sales_promotion_manager)

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Sales Promotion Management > My Promotion**.
2. Select **New**.
3. On the My Promotion form, fill in the fields.
For a description of the field values, see [My promotions form](#).
4. Select **Save**.
5. Select **Create checklist**.

For further instruction, see [Create a checklist template](#).

6. Select Publish.

Published promotions cannot be modified.

7. To reuse the sales promotion details, select Copy.

Create a checklist template

Agents workspace enables the manufacturer to create a checklist for verification.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or sales promotion manager (sn_sales_prm_mgmt.sales_promotion_manager)

Procedure

1. Navigate to Workspaces > CRM Workspace > Lists > Sales Promotion Management > My Promotion.

2. Select Create checklist.

The Create a checklist template appears.

3. Enter the Name of the checklist template.

4. Work on the checklist as needed.

- To add a checklist item, select **Add checklist item**.

Note: These checklist items are displayed on the case line.

- To delete a checklist item, select 

5. Select Create.

Result

A checklist template is created.

What to do next

To duplicate a checklist, do the following:

1. Select Edit checklist.

2. Select Duplicate.

Related topics

[Create a checklist template](#)

Create an applicable product

An applicable product specifies the products to which the sales promotion is applied.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or sales promotion manager (sn_sales_prm_mgmt.sales_promotion_manager)

Procedure

1. Navigate to Workspaces > CRM Workspace > Lists > Sales Promotion Management > My Promotions > Applicable Product.

2. Select New.

- On the form, fill in the fields.

Applicable product form

Field	Description
Applicable product table	The applicable product table on which the condition is applied.
Applicable product condition	Condition builder for the applicable product table.
Sales promotion	The sales promotion reference for the applicable product table.

- Select **Save**.

Create a visibility criteria

Agents workspaces enables the manufacturers to create the visibility criteria. Manufacturer can filter the dealer name for which the target sales promotion is applicable.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or sales promotion manager (sn_sales_prm_mgmt.sales_promotion_manager)

Procedure

- Navigate to **Workspaces > CRM Workspace > Lists > Sales Promotion Management > My Promotions > Visibility Criteria**.
- Select **New**.
- On the form, fill in the fields.

Visibility criteria form

Fields	Description
Sales promotion	Sales promotion for the visibility criteria.
Condition	Required service organization condition. To learn more about the Service Organization Criteria, see Create the criteria for a service organization .

- Select **Save**.

Related topics

[Associate service organizations with a service](#)

Create a sales promotion claim case

Create a sales promotion claim case to claim the reimbursement or discount.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or dealer sales agent (sn_dealer_mgmt.dealer_sales_agent)

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Sales Promotion Management > My Promotions > All Claims**.
2. Select **New**.
3. On the form, fill in the fields.

Sales promotion claim case form

Field	Description
Asset	Asset for the claim.
Requested by	Logged-in user or member of the logged-in user's service organization.
Consumer	Consumer tagged to install base.
Dealer	Business location.
Sale price	Sale price of the product sold. Select the required currency from the list

View all promotions

View all the promotions you created as an OEM agent.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or claims agent (sn_claim_cmn.claims_agent).

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Sales Promotion Management > My Cases**.
2. Select **New**.
3. On the My Promotion form, fill in the fields.
For a description of the field values, see [All promotion form](#).
4. Select **Save**.
5. Select **Create checklist**.
To learn how to create a checklist, see [Create a checklist template](#).
6. Select **Publish**.

Note: **Copy** enables you to copy the sales promotion details.

Sales promotion claim management

A sales promotion claim case tracks a promotional claim from creation through approval.

Tasks	Description
Create a sales promotion claim case	Create a sales promotion claim case.
View sales promotion claim cases	View all the sales promotion claim cases.
Approve all claims	Approve a sales promotion claim case.

Create a sales promotion claim case

Submit a sales promotion claim case to request incentive amounts for a completed sale.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)
or dealer sales agent (sn_dealer_mgmt.dealer_sales_agent)

Procedure

1. Navigate to **All > Sales Promotion Claim Management > All**.
2. Select **New**.
3. On the form, fill in the fields.

Sales details form

Field	Description
Asset	Asset for the claim.
Requested by	Logged in user or member of the logged in user's service organization.
Consumer	Consumer is associated with the install base.
Dealer	Business location.
Sales price	Sale price of the product sold. Select the required currency from the list

4. Select **Continue**.
5. On the form, fill in the fields.

Incentive details form

Field	Description
Select incentives	Applicable promotion, claimed amount, and other required fields for the claim.

6. Select **Continue**.
7. Process the claim in one of the following ways.

Activity	Description
Claim in review	Submit the claim for review.
Review and approve	Review the claim and approve. Enter the amount to approve.
Claim summary	View the summary of the sales promotion claims.

Result

Sales promotion claim case is created.

Related topics

[Use the Activity Stream](#) 

View sales promotion claim cases

View the sales promotion claim cases.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or claims agent (sn_claim_cmn.claims_agent)

Procedure

1. Navigate to **All > Sales Promotion Claim Management**.
2. Select the list that you want to view.
 - My Cases: Cases assigned to the agents.
 - All: All the cases that belong to that business location.
 - Open- All the open cases.
 - Unassigned- Unassigned cases and assign them to the available agent.
 - Escalated: Cases that are escalated and need attention.

Reviewing and approving the sales promotion claims

Agents workspace enables a claims agent to review and approve the sales promotion claims submitted by the dealer.

i Note: Review and approve activity is visible to the claims agent. All other activities are performed by the dealer sales agent.

Approve all claims

As an OEM claims agent, approve all the claim request raised by the dealer.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or claims agent (sn_claim_cmn.claims_agent)

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Sales promotion**.

i Note: To create and navigate to the Review & approve form, see [Create a sales promotion claim case](#).
2. Select **Review & approve** from **Activities**.
3. Select ✓
4. Add **Notes**.

All the claims are approved and **Claim Summary** activity is displayed.
5. Select **Complete**.
6. View the sales promotion claim summary details by selecting **Claim Summary**

Reject a claims

Reject a claims that was raised by the dealer.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or claims agent (sn_claim_cmn.claims_agent)

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Sales promotion**.

Note: To learn how to create and navigate to the Review & approve form, see [Create a sales promotion claim case](#).

2. Select **Review & approve** from **Activities**.
3. Reject the claims by selecting **X**.
4. Add **Notes**.
5. Select **Complete**.
6. view the sales promotion summary details by selecting **Claim Summary**.

Partially approve a claims

Partially approve a sales promotion claim by updating the approved amount, which is less than the claimed amount.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or claims agent (sn_claim_cmn.claims_agent)

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Sales promotion**.

Note: To learn how to create and navigate to the Review & approve form, see [Create a sales promotion claim case](#).

2. Select **Review & approve** from **Activities**.
3. Set the **Claim amount** to the number that you want to approve.
4. Add **Notes**.
5. Select **Complete**.
The sales promotion claim is partially approved.
6. View the sales promotion summary details by selecting **Claim Summary**.

Pre-authorization requests

Dealer Service advisors submit pre-authorization requests to verify warranty or service contract coverage for parts or charges. The Warranty Specialist reviews and either approves, rejects, returns, or partially approves the request. Approved requests are used by advisors to create repair claims or link them to relevant jobs.

Create a pre-authorization request

Create a pre-authorization request to check if certain parts or charges are covered under warranty or service contracts.

Before you begin

Role required: sn_claim_cmn.warranty_specialist

Procedure

1. Navigate to **Workspaces > CRM Workspace > Lists > Pre-authorization requests > All**.
2. Select **New**.
3. On the Create New Pre Authorized Repair Request form, fill in the fields.
For a description of the field values, see [Pre-authorization form](#).
4. Select **Continue**.
5. Select **Job details**.
6. Select **Add claim jobs**.
7. Set **Type** as one of the following: *Warranty* *Goodwill*.
 - Warranty: Repair, replacement, or service that is covered under the warranty.
 - Goodwill: Repair services that may be free or discounted at the manufacturer's discretion.
8. On the Repair claim jobs form, fill in the fields.
For a description of the field values, see [Pre-authorization job details form](#).
9. Select **Save**.
10. **Optional:** If you need to add additional claims, select **Add claim job**.
11. Select **Submit**.
The Pre-authorization in review window is displayed.
12. Select **Pre-authorization review**, and then either approve, reject, or return the request.
For more information on pre-authorization review tasks, see [Review and approve a pre-authorization request](#).
13. Select **Assign to me** to assign the case to yourself.

Review and approve a pre-authorization request

Review and approve the pre-authorization request submitted by a dealer.

Before you begin

Role required: sn_claim_cmn.warranty_specialist

Procedure

1. Select **Review & approve jobs**.
2. From the list, select one of the following tasks.

Task	Description
Approve all	Approve all job claim expenses.
Reject all	Reject all job claim expenses.
Partially approved	Partially approve the job claim expenses.
Send back	Send back the claim for additional information.

3. Select **Submit**.
4. Enter **Submit claim** comments.
5. Select **Confirm**.

Product non-conformance

The Agents workspace enables you to create and view product non-conformance cases.

Resolve a product non-conformance case playbook

Use the guided product non-conformance case playbook to create a case, apply corrections, manage batch containment, and close the case with a resolution.

Before you begin

Role required: Quality Issue Management Admin or Product Non-conformance Resolver (sn_mfg_qm.product_non_conformance_resolver)

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case > All > New**.

The guided Product Non Conformance Case playbook displays.

2. Create a non-conformance case

- a. Select **Install Base**.

The account associated with the install base item is displayed.

- b. Select **Continue**.

3. Understand the issue

- a. Examine the product details

- i. On the **Product Details** form, fill in the fields.

For a description of the field values, see [Product details form](#).

- ii. Select **Assign to me**, to assign the case to self.

- If the case is assigned to you and is in the New state, select **Accept**. The case moves from New to In Progress state.
- If you need more information from the submitter, select **Request Info**. The Request Information pop-up is displayed and you can add your comments. A notification is sent to the submitter. The case moves to the Awaiting Info state, and the task SLA pauses. It resumes when the state is changed to In Progress.
- If you try to mark the current activity complete while the case is in the Awaiting Info state, a message appears. The message states that a submitter response is required before you can proceed.
- If more information is not needed from the submitter, select **Info Received**. The case moves to the In Progress state, and you can mark the current activity complete.

- iii. Select **Save & continue**.

- b. Manage the issue details

- i. On the **Issue Details** form, fill in the fields.

- ii. Select **Save & continue**.

- c. Manage the documents

i. Select **Add file** and attach the required documents.

ii. Select **Mark complete**.

i Note: You cannot select **Mark complete** for the form if you have requested more (awaiting status) information from the submitter.

4. Apply correction

a. Select **Add**.

b. Select **Edit** to view and edit the correction actions form.

You can add [Correction actions form](#) and [CoPQ expense line form](#) details.

c. Select **Propose Solution**.

i Note: **Propose Solution** is enabled when at least one correction action is added and is in the closed state.

The **State** is updated to Correction Proposed. The PNCC case on the Standard ticket page has two additional options **Accept** or **Reject**.

d. Select **Save**.

5. Complete batch containment

a. Identify the impact.

i. Select **Add**.

1. On the Create New Impact Asset form, fill in the following details.

- **Issue**
- **Status**
- **Asset**
- **Install base**

2. Select **Save**.

ii. Select **Import**.

1. Select the template to download and use.

2. On the Import form, select **Add file**.

3. Select the required XLSX file. It contains the following details:

- Asset (Serial number)
- Status (Optional)

4. Select **Upload**.

5. Select **Import**.

6. Select **Continue**.

i Note: Multiple files can be uploaded. If the same file is re-uploaded without making the changes, then that file is skipped.

The system displays the status of the import and the number of records created or updated.

b. Apply containment

i. Select **Recommend containment.**

The containment actions are displayed. The case moves to the Closed Complete state.

ii. Select **Use as template.**

Select the template based on your required correction action template. You can view the record source details.

iii. Select **Add.**

iv. Select **Edit to view and edit the containment actions form.**

You can add [Correction actions form](#) details.

v. Select the **Create work order activity. On the work order form, add the [Work order form](#) details.**

vi. Select **Add Impacted asset, to add manually.**

vii. Select **Import asset to upload the impact asset XLSX file.**

viii. Select **Save.**

6. Manage outcome

a. Manage the Pre-Closure Checklist activity.

i. Select **Create quality investigation.**

ii. Select **Continue.**

b. Finish the process.

i. Select **State.**

ii. To close, select **Closed Complete.**

iii. Select **Resolution code.**

iv. For the resolution, select **Solved.**

v. Enter your resolution details in the **Resolution notes field.**

vi. Select **Close.**

7. At any point before the case is closed, select **Summarize from the ServiceNow Otto context menu on the case.**

This option is available only in the Workspace view.

The system generates two summaries at the same time:

- A brief summary, displayed in the panel. It includes a title, a short description of the case, and highlights such as when the case was opened, severity, and priority. Select the copy icon to copy the summary text.
- A detailed summary appears in the report section. This summary remains available even after you close the case.

Note: Selecting **Summarize** again regenerates both summaries and overwrites the previous versions. AI-generated summaries may be inaccurate or incomplete. Review the summaries before relying on them.

Product non-conformance

In the workspace, you can use the product non-conformance related list to log the case.

Related list	Description
Create a product non-conformance case	Create a non-conformance case task that has an issue.
Create a root cause analysis	Create a root cause analysis (RCA) of the case.
Associating a task cause	Associate the cause with the RCA for the root cause analysis.
Create a correction action	Create corrective actions.
Create a CoPQ expense line	Create the Cost of Poor Quality (CoPQ) expense line.
Create a containment action	Create containment actions.
Task SLA	Record the task SLA.
Create a parent-child relationship	Track similar or duplicate product non-conformance cases.

Create a product non-conformance case

Create a non-conformance case report for products that had an issue.

Before you begin

Role required: Quality Issue Management Admin or Product Non-conformance Triager (sn_mfg_qm.product_non_conformance_case_triager)

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case**.
2. Select **New**.
3. On the Product Non-conformance Case form, fill in the fields.
For a description of the field values, see [Product details form](#).
4. Select **Save**.
5. Select **Submit**.
The **State** move from Draft to **New**.
6. The **Assignment group** and **Assigned to** are auto-populated.
Assigned to is the manager of the Assignment group. It can be reassigned to any of the available user.
7. On the related list, the **Product Non Conformance Case Tasks** are created.

Note: The PNCC tasks are auto created.

8. On the Product Non Conformance Case task form, fill in the fields.
For a description of the field values, see [Product non-conformance case task form](#).

9. Select **Save**.

10. **Optional:** Select one of the following option.

- Cancel Case
- Close Case
- Update
- Update with Lens
- Assign to me

11. Select **Save**.

Create a root cause analysis

Create a root cause analysis (RCA) to identify the underlying cause of an issue and implement effective, long-term solutions.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance resolver
(sn_mfg_qm.product_non_conformance_case_resolver)

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case > Root Cause Analysis Task**.

2. Select **New**.

3. On the Root Cause Analysis Task form, fill in the fields.
For a description of the field values, see [Root cause analysis task form](#).

4. Select **Save**.

5. **Optional:** Select **Discuss**.
The Start a Sidebar discussion window is displayed.

(Optional) For more information on the sidebar discussion window, see [Create a Sidebar discussion for a record](#) .

6. Select **Save**.

Related topics

[Notes form](#)

[Resolution information form](#)

Associating a task cause

Associate a cause to a RCA for the root cause analysis of the product non-conformance.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case > Root Cause Analysis Task > Task Cause Association**.
2. Select **New**.
3. On the Task Cause Association form, fill in the following fields.

Task cause associations field

Field	Description
Issue	Issue record number.
RCA	RCA record for which this task is being created.
Cause	Cause of the issue.
Type	Type of task cause. <ul style="list-style-type: none"> ○ Possible ○ Probable ○ Root cause ○ Contributing factor

4. Select **Save**.

Create a correction action

Create a correction actions for the non-conformance report.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case > Correction Actions**.
2. Select **New**.
3. On the Correction actions form, fill in the fields.
For a description of the field values, see [Correction actions form](#).
4. Select **Save**.
5. **Optional:** Select **Discuss**.
The Start a Sidebar discussion window is displayed.

(Optional) For more information on the sidebar discussion window, see [Create a Sidebar discussion for a record](#) .
6. Select **Save**.

Related topics

[Notes form](#)

[Resolution information form](#)

[Effectiveness form](#)

Create a CoPQ expense line

Create CoPQ (Cost of Poor Quality) expense line enables you to capture the actual costs incurred due to poor quality. These costs include rework, scrap, warranty claims, or customer returns.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case > Correction Actions > CoPQ Expense Line**.
2. Select **New**.
3. On the CoPQ Expense Line form, fill in the fields.
For a description of the field values, see [CoPQ expense line form](#).
4. Select **Save**.

Impacted asset action

Create the list of assets that are impacted under non-conformance cases.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance resolver (sn_mfg_qm.product_non_conformance_resolver)

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case > Correction Actions > Impacted Asset Action**.
2. Select **New**.
3. On the form, fill in the fields.

Impacted asset form

Field	Description
Impacted asset	Asset that is experiencing an issue.
Remediation action	Remediation action for the CoPQ Expense Line.

4. Select **Save**.

Create a containment action

Create a containment action report to address issues for the impacted assets.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance resolver (sn_mfg_qm.product_non_conformance_resolver)

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case > Containment Action**.
2. Select **New**.
3. On the Containment Action form, fill in the fields.
For a description of the field values, see [Containment action form](#).
4. Select **Save**.
The [Create a CoPQ expense line](#), [Impacted asset action](#), and [Work order form](#) forms are displayed.

Related topics

[Notes form](#)

[Resolution information form](#)

[Effectiveness form](#)

Create a work order

When off-site work is required, create a work order to provide field service agents with the information they must fulfill the request. You can create a work order from scratch or from another existing work order.

Before you begin

Role required: Quality Issue Management Admin, product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter), or product non-conformance resolver (sn_mfg_qm.product_non_conformance_resolver)

About this task

- In the work order, specify the nature of the work required and identify the configuration items (CI) affected.
- To create work orders for common tasks, you can use work order model templates to create all the necessary records automatically.
- Restrict access to work orders and tasks so that users can only view and manage those assigned to their own service organization. This keeps sensitive information securely managed within the appropriate organization.

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case > Correction Actions**.
-  **Note:** Work order can be created from Product Non Conformance tasks, Containment actions, Product Quality Investigation Tasks, Corrective, and Preventive actions.
2. Select the Correction actions record for which you want to create a work order.
3. Select **Work Orders**.
4. Select **New**.
Create New Work Order window is displayed.

5. On the Work Order form, fill in the fields.
For a description of the field values, see [Work order form](#).
6. Select **Save**.

Result

The work order is created and awaits for qualification to create a work order task.

Task SLA

Create one or more Service Level Agreement (SLA) definitions and use them to create an SLA record. This SLA record enables you to use an SLA system for your organization's task.

Before you begin

Role required: Not applicable

Note: Task SLAs are automatically generated by the SLA engine when records from task-based tables (like Incident, Problem, Change Request, etc.) meet the conditions defined in SLA definitions.

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case > Task SLAs**.
2. Select **New**.
For detailed information on Task SLA, refer [Create an SLA definition](#).

Related topics

[Create SLA breakdown definitions](#)

Create a parent-child relationship

Create the relationship between parent and child and assign the type of relationship.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case > Relationships**.
2. Select **New**.
3. On the form, fill in the following fields.

Relationships form

Field	Description
Parent	Record to assign as parent.
Child	Record to assign as child.
Type	Type of relationship between the parent and child.

4. Select **Save**.

Result

The [Create a CoPQ expense line](#) and [Impacted asset action](#) forms are displayed.

Schedule a meeting

Schedule a meeting from PNCC to coordinate follow-up actions with relevant stakeholders.

Before you begin

Role required: admin or product_non_conformance_case_triager

About this task

Quality Review Meetings enable you to discuss and agree on a fix for a product defect or quality investigation. The discussion, summary, and decision history remain attached to the issue, giving the team a clear record to reference later.

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformances > Related items > Meetings**.
2. Select **Create one**.
3. On the Create New Meeting form, fill in the fields.

For a description of the field values, see [Create new meeting form](#) .

4. Select **Save**.

You can also schedule a meeting in PQI with product_quality_investigation_member role.

Related topics

[Schedule a meeting from a touchpoint](#) 

View a product non-conformance

Review submitted product non-conformance cases to track their status and resolution.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Non Conformance Case**.
2. Select a list of cases to view.
 - **My Cases:** Cases assigned to you.
 - **All:** Cases that belong to your business location.
 - **Open:** All the open cases.
 - **Unassigned:** Unassigned cases that you can assign to an available agent.

Product quality investigation

The Agents workspace enables you to create and view product quality investigation cases.

Create a product quality investigation

Create a product quality investigation to document and track a reported product issue.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Quality Investigation**.
2. Select **New**.
3. On the Product Quality Investigation form, fill in the fields.
For a description of the field values, see [Product quality investigation form](#).
4. Select **Save**.
5. Select **Summarize** on the investigation record.
The system generates a high-level summary and a detailed report summary at the same time. The detailed summary appears in the report section. This summary remains available even after you close the investigation.

Related topics

[Create a product quality investigation](#)

[Create a stakeholder](#)

[Add impacted assets](#)

[Create a corrective action](#)

[Create a preventive action](#)

[Create an effectiveness goal](#)

[Notes form](#)

[Schedule a meeting](#)

Create a product quality investigation

Create a non-conformance case task report for products that had an issue.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Quality Investigation > Product Quality Investigation Task**.
2. Select **New**.
3. On the Product Quality Investigation Task form, fill in the fields.
For a description of the field values, see [Product quality investigation task form](#).
4. Select **Save**.

Related topics

[Discuss form](#)

[Notes form](#)

Create a stakeholder

Add a person who is involved in the product quality investigation as a stakeholder.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Quality Investigation > Stakeholder**.
2. Select **New**.
3. On the Stakeholder form, fill in the fields.
For a description of the field values, see [Stakeholder form](#).
4. Select **Save**.

Add impacted assets

Add assets affected by a product quality issue to a Product Quality Investigation record, either individually or by bulk import.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Quality Investigation > Impacted Asset**.
2. Select **New**.
 - a. On the Impacted asset form, fill in the following details:

Impacted asset

Field	Description
Issue	Product quality investigation associated with the impacted asset.
Asset	Asset affected by the product quality issue.
Status	Current status of the impacted asset record.
Install base	Install base record linked to the impacted asset.

- b. Select **Save**.
3. Select **Import** to bulk upload the impacted assets.
 - a. Select the template to download and use.
 - b. On the Import form, select **Add file**.
 - c. Select the required XLSX file.
 - Asset (Serial number)
 - Status
 - d. Select **Upload**.
 - e. Select **Import**.

Create a corrective action

Create a corrective action for the quality investigation case.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Quality Investigation > Corrective Action**.
2. Select **New**.
3. On the Corrective Action form, fill in the fields.
For a description of the field values, see [Corrective action form for PQI](#).
4. Select **Save**.

Related topics

[Create a CoPQ expense line](#)

[Impacted asset action](#)

Create a preventive action

Create a preventive action for product quality issue case.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Quality Investigation > Preventive Action**.
2. Select **New**.
3. On the Preventive Action form, fill in the fields.
For a description of the field values, see [Preventive action form](#).
4. Select **Save**.

Related topics

[Create a CoPQ expense line](#)

[Impacted asset action](#)

Create an effectiveness goal

Create an effectiveness goal from a remediation action or remediation action plan to track the outcome of a fix instead of closing the action without measuring its result.

Before you begin

Role required: admin or sn_mfg_qm.product_quality_investigation_member or sn_mfg_qm.product_non_conformance_case_resolver

About this task

You can create an effectiveness goal from a remediation action, such as a containment, correction, corrective, or preventive action, or from a remediation action plan.

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Quality Investigation**.
2. Open the remediation action or remediation action plan record that you want to measure.
 - On a remediation action plan: visible while the plan is Draft, Pending review, Approved, Rejected, or In progress.
 - On a remediation action: visible while the action is New, In progress, In review, or Review complete.
3. Select **Create effectiveness goal**.

Note: It is visible only while the source record is in a non-closed state.

The system creates an effectiveness goal record that extends the Goals framework table.

4. On the effectiveness goal form, fill in the [Effectiveness goal form](#) fields.
5. To add a sub-goal, select **New** under the **Supporting Goal** related list.
The parent goal field auto-populates with the effectiveness goal you're working from.
6. Select **Qualitative Targets** and add qualitative targets.

The unit of measure you select on a target determines whether the target displays under the qualitative.

7. Select **Quantitative Targets** and add quantitative targets.

The unit of measure you select on a target determines whether the target displays under the quantitative.

8. Select **Save**.

The effectiveness goal can be linked to additional remediation actions. Multiple actions can share a single effectiveness goal through the many-to-many relationship between actions and effectiveness goals.

Create a qualitative target

Create a qualitative target for an effectiveness record to define and track non-numeric success criteria for a product quality investigation.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Quality Investigation > Effectiveness Goals**.
2. Open the effectiveness record that you want to measure.
3. Select **Qualitative Targets**.
4. Select **New**.
5. On the Effectiveness Target form, fill in the details.

For a description of the field values, see [Effectiveness target form](#).

6. Select **Submit**.

Result

The effectiveness qualitative target is created.

Create a quantitative target

Create a quantitative target to define measurable numeric criteria for an effectiveness goal in a product quality investigation.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Quality Investigation > Effectiveness Goals**.
2. Open the effectiveness record that you want to measure.
3. Select **Quantitative Targets**.
4. Select **New**.
5. On the Effectiveness Target form, fill in the details.

For a description of the field values, see [Effectiveness target form](#).

6. Select **Submit**.

Supporting goals**Before you begin**

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Product Quality Investigation > Effectiveness Goals**.
2. Open the effectiveness record that you want to measure.
3. Select **Supporting Goals**.
4. Select **New**.
5. On the Effectiveness Target form, fill in the details.

For a description of the field values, see [Effectiveness target form](#).

6. Select **Submit**.

Remediation action plans

The Agents workspace enables you to create and view remediation action plans.

Create a remediation action plan

Create a remediation action plan for product quality investigation case.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Remediation Action Plan**.
2. Select **New**.
3. On the Remediation Action Plan form, fill in the fields.
For a description of the field values, see [Remediation action plan form](#).
4. Select **Save**.

Create a CoPQ financial request

Create a CoPQ financial request for remediation action plan.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Remediation Action Plan > CoPQ Financial Request**.
2. Select **New**.
3. On the CoPQ Financial Request form, fill in the fields.
For a description of the field values, see [CoPQ financial requests form](#).
4. Select **Save**.

Related topics

[Notes form](#)

[Resolution information form](#)

Create a CoPQ planned line charge

Create a CoPQ planned line charge for CoPQ financial request.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Remediation Action Plan > CoPQ Financial Request > CoPQ Planned Line Charge**.
2. Select **New**.
3. On the CoPQ Planned Line Charge form, fill in the fields.
For a description of the field values, see [CoPQ planned line charge form](#).
4. Select **Save**.

Related topics

[Create a CoPQ expense line](#)

Cause action plans

Create a cause action plan for the remediation action.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces > CRM Workspace > List > Remediation Action Plan > Cause action plan**.
2. Select **New**.
3. On the Cause Action Plans form, fill in the fields.
4. Select **Save**.

Reference

Reference topics provide additional information about Manufacturing Commercial Operations.

Components installed

Several types of components are installed when you install the Manufacturing Commercial Operations application. These components include user roles, tables, plugins, ServiceNow Store applications, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see [Find components installed with an application](#).

Demo data is available for this feature.

Roles installed

The supported use case determines the assigned user roles. For each feature, there are both roles with view-only access and roles with various levels of interactive access.

Manufacturing Commercial Operations Core roles

Role	Description	Contains roles
sn_mfg_cmn.manufacturing_operations_admin	Administers who can access sensitive data by restricting how users acquire roles in the Manufacturing Commercial Operations applications.	<ul style="list-style-type: none"> • sn_sls_prm_clm_mgt.bulk_upload_admin • sn_sales_prm_mgmt.sales_promotion_man • sn_mfg_cmn.input_set_writer • sn_labr_cmnlabr_admin • sn_repr_claim_mgmt.claim_admin • sn_sls_prm_clm_mgt.sales_promotion_clai • sn_rcl_claim_mgmt.adminsn_prd_pm.prod • sn_sales_prm_mgmt.sales_promotion_adm • sn_prm.enterprise_partner_admin • sn_dealer_mgmt.dealer_admin • sn_customerservice_manager • sn_claim_cmncclaims_agent • sn_prm.partner_ui • sn_repair_claim_mgmt.repair_pre_auth_ad

Manufacturing Commercial Operations Core roles (continued)

Role	Description	Contains roles
sn_claim_cmn.claims_agent	View, approve, recall, and reject claims.	<ul style="list-style-type: none"> • sn_sales_prm_mgmt.sales_promotion_viewer • sn_prm.enterprise_partner_agent • sn_rcl_claim_mgmt.campaign.viewer • sn_customerservice_agent • sn_dealer_mgmt.dealer_viewer • sn_repr_claim_mgmt.navigation_menu • sn_prd_pm.product_catalog_viewer • sn_repr_claim_mgmt.claim_writer • sn_sls_prm_clm_mgt.sales_promotion_claims_creator • sn_mfg_cmn.navigation_menu • sn_repr_claim_mgmt.charge_creator • financial_mgmt_user • sn_repair_claim_mgmt.repair_pre_auth_viewer • sn_repr_claim_mgmt.pre_auth_navigation_menu
sn_dealer_mgmt.dealer_service_advisor	Create, view, update, and cancel repair claim cases.	<ul style="list-style-type: none"> • sn_repr_claim_mgmt.claim_creator • sn_rcl_claim_mgmt.campaign.viewer • sn_customerservice.customer_case_manager • sn_prd_pm.external_product_viewer • sn_dealer_mgmt.dealer_viewer • sn_customerservice.requester • sn_prm.external_partner_associate • sn_repair_claim_mgmt.repair_pre_auth_administrator • sn_repr_claim_mgmt.pre_auth_navigation_menu
sn_dealer_mgmt.dealer_sales_agent	Create, view, update, and cancel a sales promotion claim case.	<ul style="list-style-type: none"> • sn_dealer_mgmt.dealer_viewer • sn_prm.external_partner_associate • sn_sls_prm_clm_mgt.bulk_upload_creator • sn_sales_prm_mgmt.sales_promotion_viewer • sn_sls_prm_clm_mgt.sales_promotion_claims_creator • sn_customerservice.case_contributor_creator • sn_customerservice.requester
sn_rcl_claim_mgmt.recall_manager	Create, read, and update a recall	sn_rcl_claim_mgmt.campaign.creator

Manufacturing Commercial Operations Core roles (continued)

Role	Description	Contains roles
	campaign claim.	
sn_sales_prm_mgmt.sales_promotion_manager	Create, read, update, and cancel a sales promotion.	<ul style="list-style-type: none"> • sn_sales_prm_mgmt.sales_promotion_crea • sn_sls_prm_clm_mgt.sales_promotion_clai • sn_customerservice.csm_workspace_user • sn_mfg_cmnnavigation_menu
sn_dealer_mgmt.dealer_operations_admin	Create, read, update, or cancel all claims.	<ul style="list-style-type: none"> • sn_prm.external_partner_manager • sn_sls_prm_clm_mgt.bulk_upload_admin • sn_dealer_mgmt.dealer_sales_agent • sn_dealer_mgmt.dealer_service_advisor
sn_rcl_claim_mgmt.recall_phase_owner	Update, publish, close, and cancel a recall campaign phase or sub-phase.	sn_rcl_claim_mgmt.campaign_phase.writer
sn_claim_cmnn.warranty_specialist	View, approve, return, or reject pre-authorization requests.	<ul style="list-style-type: none"> • sn_customerservice_agentsn_dealer_mgmt • sn_repr_claim_mgmt.navigation_menu • sn_prd_pm.product_catalog_viewer • sn_mfg_cmnnavigation_menu • financial_mgmt_user • sn_repair_claim_mgmt.repair_pre_auth_wri • sn_repair_claim_mgmt.repair_pre_auth_cha • sn_repair_claim_mgmt.claim_viewer • sn_repr_claim_mgmt.pre_auth_navigation_
sn_mfg_qm.admin	Access all Quality Issue Management (QIM) features, tables, and configuration.	<ul style="list-style-type: none"> • sn_mfg_qm.product_quality_investigation_ • sn_mfg_qm.finance_approver • sn_mfg_qm.product_non_conformance_ca
sn_mfg_qm.triager	Review new submissions, check completeness, determine	<ul style="list-style-type: none"> • sn_mfg_qm.prd_qi_viewer • sn_mfg_qm.product_non_conformance_sul • sn_mfg_qm.prd_ncc_task_creator

Manufacturing Commercial Operations Core roles (continued)

Role	Description	Contains roles
	priority and severity, assign to resolvers, and update triage information.	
sn_mfg_qm.resolver	Work the full PNCC playbook: correction, impacted assets, containment, and closure. Create Quality Investigations.	<ul style="list-style-type: none"> • sn_mfg_qm.prd_qi_creator • sn_rm_core.cause_action_creator • sn_rm_core.rca_task_creator • sn_customerservice.case_contributor_viewer • sn_rm_core.issue_cause_creator • sn_mfg_qm.impacted_asset_creator • sn_rm_core.copq_fin_req_creator • sn_align_core.apw_user sn_rm_core.rem_a • sn_mfg_qm.product_non_conformance_ca • sn_rm_core.copq_planned_line_charge_cre • sn_rm_core.copq_exp_line_creator • sn_rm_core.correction_action_creator • sn_rm_core.containment_action_creator • sn_rm_core.rem_action_plan_creator perso • sn_rm_core.task_cause_association_creato • sn_rm_core.cause_action_plan_creator • sn_mfg_qm.impacted_asset_action_creator
sn_mfg_qm.investigation_member	Create, view, update, and cancel a quality investigation and related records. Sign off the investigation and move it to closure.	<ul style="list-style-type: none"> • sn_rm_core.copq_exp_line_creator • sn_mfg_qm.impacted_asset_creator • sn_mfg_qm.impacted_asset_action_creator • sn_rm_core.corrective_action_creator • sn_rm_core.correction_action_viewer • sn_rm_core.rca_task_creator • sn_rm_core.issue_cause_creator • sn_customerservice.csm_workspace_user • sn_rm_core.preventive_action_creator know • sn_mfg_qm.prd_qi_writer sn_mfg_qm.prd_c • sn_rm_core.rem_action_creator • sn_rm_core.cause_action_plan_creator • sn_mfg_qm.prd_ncc_viewer

Manufacturing Commercial Operations Core roles (continued)

Role	Description	Contains roles
		<ul style="list-style-type: none"> • sn_mfg_qm.prd_ncc_task_viewer • sn_rm_core.copq_planned_line_charge_creator • sn_align_core.apw_user • sn_rm_core.task_cause_association_creator • sn_mfg_qm.stakeholder_viewer • sn_rm_core.rem_action_plan_creator • sn_rm_core.cause_action_creator • sn_customerservice.case_contributor_viewer • sn_rm_core.containment_action_creator • sn_rm_core.copq_fin_req_creator
sn_mfg_qm.remediation_plan_approver	Approve or reject remediation action plans before they are enacted.	<ul style="list-style-type: none"> • sn_rm_core.copq_exp_line_creator • sn_customerservice.csm_workspace_user • sn_mfg_qm.prd_ncc_viewer • sn_rm_core.cause_action_plan_viewer • sn_mfg_qm.stakeholder_viewer • sn_mfg_qm.prd_qi_task_viewer • sn_install_base.install_base_viewer • sn_rm_core.cause_action_viewer • sn_rm_core.rca_task_viewer • sn_rm_core.rem_action_plan_viewer • sn_rm_core.copq_fin_req_viewer • sn_rm_core.issue_cause_viewer • sn_mfg_qm.prd_ncc_task_viewer • sn_mfg_qm.prd_qi_viewer • sn_mfg_qm.impacted_asset_action_viewer • sn_rm_core.copq_planned_line_charge_viewer • sn_mfg_qm.impacted_asset_viewer • sn_rm_core.task_cause_association_viewer
sn_mfg_qm.finance_approver	Approve Cost of Poor Quality (COPQ) financial requests and expense lines.	<ul style="list-style-type: none"> • sn_rm_core.containment_action_viewer • sn_rm_core.preventive_action_viewer • sn_mfg_qm.impacted_asset_viewer • sn_rm_core.copq_fin_req_viewer • sn_rm_core.rem_action_viewer • sn_rm_core.copq_planned_line_charge_viewer

Manufacturing Commercial Operations Core roles (continued)

Role	Description	Contains roles
		<ul style="list-style-type: none"> • sn_customerservice.csm_workspace_user • sn_mfg_qm.prd_ncc_task_viewer • sn_rm_core.corrective_action_viewer • sn_mfg_qm.prd_qi_task_viewer • sn_rm_core.issue_cause_viewer • sn_rm_core.rem_action_plan_viewer • sn_rm_core.cause_action_plan_viewer • sn_mfg_qm.impacted_asset_action_viewer • sn_mfg_qm.prd_qi_viewer • sn_rm_core.correction_action_viewer • sn_mfg_qm.stakeholder_viewer • sn_mfg_qm.prd_ncc_viewer • sn_install_base.install_base_viewer • sn_rm_core.copq_exp_line_viewer • sn_rm_core.task_cause_association_viewer • sn_rm_core.rca_task_viewer • sn_rm_core.cause_action_viewer
sn_mfg_qm.submitter	<p>Create, view, update, and cancel a non-conformance case.</p> <p>Create a correction action and add expense lines to it.</p>	<ul style="list-style-type: none"> • sn_customerservice.case_contributor_creator • sn_dealer_mgmt.dealer_viewer • sn_customerservice.csm_workspace_user • sn_mfg_qm.prd_ncc_creator • sn_customerservice.service_organization_creator • sn_rm_core.correction_action_creator • playbook.agentic_workflow_user • sn_customerservice.requester_knowledge • sn_customerservice.customer_data_viewer • sn_prm.external_partner_associate • sn_mfg_ai_agents.submitter_ai_playbooks • sn_rm_core.copq_exp_line_creator

Related topics

[Exploring Manufacturing Commercial Operations](#)

Components installed with additional plugins

Several types of components are installed when you activate the Customer Service Management and Cash to lead, applications.

Components installed

Products	Components installed
Customer Service Management	Components installed with Customer Service Management ↗
Lead-to-Cash Process Management	Components installed with Lead-to-Cash Process Management ↗

Related topics

[Extended capabilities](#)

Data model

Learn about the Manufacturing Commercial Operations application as well as its entitlements and integrations by viewing the data model and integrations architecture diagrams. These diagrams show the relationships between the tables and roles within the application. They provide an overall picture of how the Manufacturing Commercial Operations application operates.

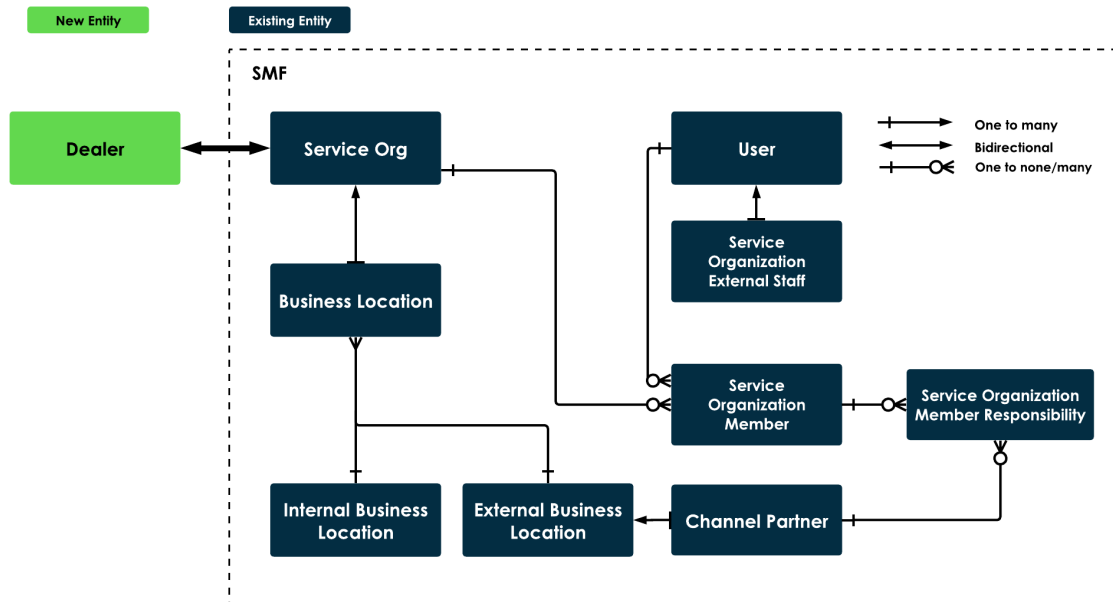
Dealer data model

The dealer framework helps you manage the day-to-day business activities and monitor the real-time data insight.

The dealer portal provides you with a wide range of benefits such as claims management, fostering collaboration between OEM and dealers, service, and support. The Manufacturing Commercial Operations dealer portal enables the dealer sales agent to raise a request for the claim reimbursement for any post sales discounts.

The following diagram shows the entities and their relationships within the Dealer application.

Dealer data model



Dealer tables

The dealer tables in Manufacturing Commercial Operations store dealer, service organization, and channel partner records.

Dealer feature

The dealer [sn_dealer_mgmt] feature adds or modifies the existing tables:

- Service Organization [sn_customer_service_organization]
- Business Location [sn_csm_business_location]
- Internal Business Location [sn_csm_business_location_internal]
- External Business Location [sn_csm_business_location_external]
- Service Organization member [sn_csm_service_organization_member]
- Service Organization External Staff [sn_csm_svc_org_member_responsibility]
- Channel Partner [sn_prm_channel_partner]
- Service Organization External Staff [sn_csm_service_organization_external_staff]
- User [sys_user]

The dealer feature adds the following tables.

Table names for Dealer feature

Table	Description
Dealer [sn_dealer_mgmt_dealer]	Stores the dealership records.
Service Organization [sn_customer_service_organization]	Stores records for service organizations, including business locations and internal business locations.

Table names for Dealer feature (continued)

Table	Description
	<p>A service organization provides the base framework that supports the customer value chain. The chain includes the internal and external service organization.</p> <p>For example, automobile manufacturers with multiple dealerships.</p>
Business Location [sn_csm_business_location]	Stores business location records. A business location is a type of service organization.
Internal Business Location [sn_csm_business_location_internal]	Stores the internal business location records that are involved in providing goods and services. For example, stores and branches.
External Business Location [sn_csm_business_location_external]	Stores the external business location records that are involved in providing goods and services. For example, franchises and dealerships.
Channel Partner [sn_prm_channel_partner]	Stores the channel partner information such as name, contact details.
User [sys_user]	Stores the user records, such as user id and password.
Service Organization member [sn_csm_service_organization_member]	Stores records of the relation between the member and service organization.
Service Organization External Staff [sn_csm_service_organization_external_staff]	Stores records for the users who belong to external service organizations.
Service Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Configure the responsibilities of the staff working at service organizations or its extended entities.

To learn more about the Service Model Foundation, see [Configuring Customer Service Management](#).

Sales promotion campaign data model

A sales promotion is a marketing strategy of implementing new ideas to increase sales, raise brand awareness, and provide discounts to the customers.

Introduction to sales promotion campaign claims

Manufacturers or Original equipment manufacturers (OEMs) announce the sales promotion discounts or offers to the dealers. These promotions are applicable to a set of customers or all the customers based on the OEM marketing strategies. The dealer agents can raise the promotion claims to OEMs for the reimbursement of the discounts or offers provided during the

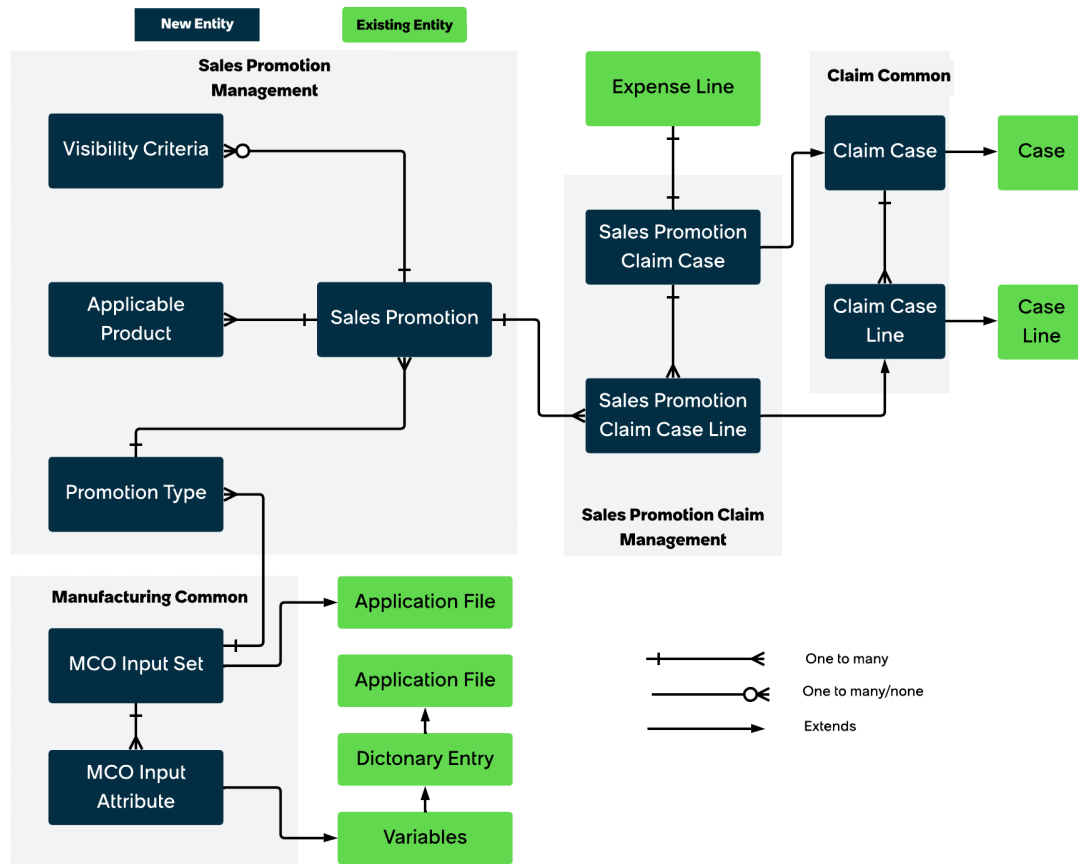
sales process. The sales promotion feature enables the dealer to raise the claims post sales, which can be approved or rejected by the OEM depending on the claim case.

Sales promotion has three main parts:

- Creation of sales promotion by the OEM
- Creation of claim against the promotion by the dealer
- Review and reimbursement of the claim by the OEM

The following diagram shows the entities and their relationships within the Sales promotion campaign claim application.

Sales promotion campaign data model



Bulk Import Sales Promotion claim

The sales promotion supports bulk import functionality, where the dealer sales agents can import a spreadsheet with multiple claims for review and approval. To enable bulk import, you must customize it on the Customer Service Management (CSM) or Business Location Service Portal (BLSP) portals.

To learn more about the Business Location Service Portal, see [Using the Business Organization Support Portal](#).

Sales Promotion Campaign Claim tables

The sales promotion campaign claim tables store the promotion, case, and claim details used to manage sales promotion campaigns in Manufacturing Commercial Operations.

Sales Promotion feature

The sales promotion feature adds or modifies the existing tables:

- Expense Line [fm_expense_line]
- Case [sn_customerservice_case]
- Case Line [sn_case_line]

The sales promotion feature adds the following tables.

Table names for the Sales Promotion feature

Label	Description
Sales Promotion [sn_sales_prm_mgmt_sales_promotion]	Stores the sales promotion details, which include promotion name, start and end date of the promotion, incentive type, and incentive percentage. The checklist template provides the details of the documents required during the approval process.
Promotion Type [sn_sales_prm_mgmt_promotion_type]	Stores the promotion type details. Possible types are the following: <ul style="list-style-type: none"> • trading promotion • senior citizen promotion • veteran promotion
MCO Input Set [sn_mfg_cmn_mco_input_set]	Stores the grouping information for input attributes.
MCO Input Attribute [sn_mfg_cmn_mco_input_attributes]	Stores the attributes or input variables for an input group.
Applicable Product [sn_sales_prm_mgmt_applicable_product]	Stores the product details which are applicable for the target sales promotion campaign. It can be based on the specific model (manufacturer) or asset (lot or serial number) level.
Claim Case [sn_claim_cm_n_case]	Stores the input provided by the dealer to the manufacturer when the claim request is raised. Retrieves this information from the Promotion input table.
Visibility Criteria [sn_sales_prm_mgmt_visibility_criteria]	Stores and displays the dealer name for which the target sales promotion is applicable.
Sales Promotion Claim Case [sn_sls_prm_clm_mgt_case]	Stores the claim case and claim case line progress state information. For example, the claim case can be in the draft, submitted, review, or approved state.
Sales Promotion Claim Case Line	Stores the information about the claim, such as the claim date, amount claimed, status of the claim, and asset.

Table names for the Sales Promotion feature (continued)

Label	Description
[sn_sls_prm_clm_mgt_case_line]	
Expense Line [fm_expense_line]	Automatically populates the short description of expense lines with the work order short description when expense lines are manually created from work orders.
Claim Case Line [sn_claim_cmn_case_line]	Stores the details of the items pertaining to a claim header.
Case [sn_customerservice_case]	Stores the case records created and submitted by the dealer.
Case Line [sn_case_line]	Stores the case line item records.

To learn more about the Case and Case Line, see [Case Lines and Workflows](#) .

Repair claims data model

The repair claims framework enables the dealer to raise a reimbursement claim request for the repair of the equipment or product that is under warranty contract.

When a customer approaches the dealer with an equipment or product issue, the dealer diagnoses the issue and fixes it. The dealer can submit the claim to the manufacturers for reimbursement based on the following scenarios.

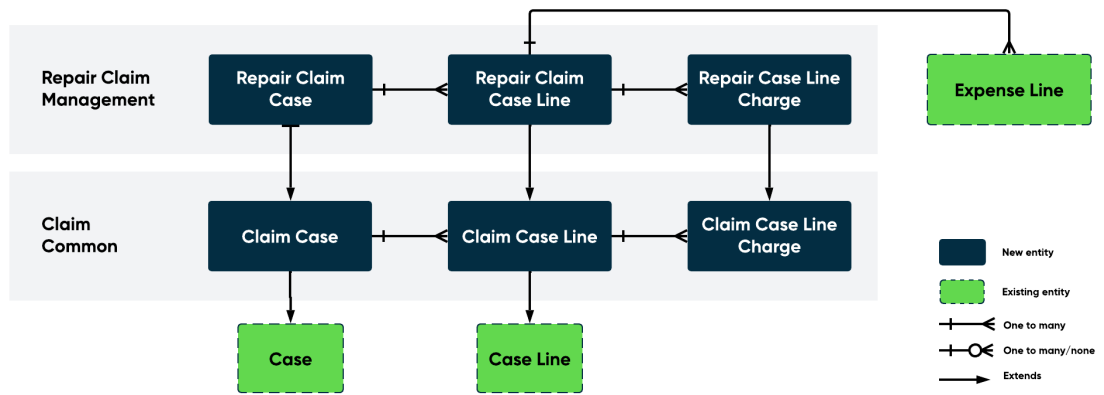
- Repair claim, covered under the warranty
- Recall of the defective products or parts

Note: Good will and Service contracts can be customized based on the customer requirement.

The repair portal facilitates the dealer to submit the repair claims to the manufacturers or OEM agents. The OEM agents can approve, reject, partially approve, or send back the claim case.

The following diagram shows the entities and their relationships within the repair claims application.

Repair claim data model



Repair claims tables

The repair claim tables store data for repair claim requests, expenses, and case details in Manufacturing Commercial Operations.

Repair claim feature

The repair claim feature adds or modifies the existing tables:

- Expense Line [fm_expense_line]
- Case [sn_customerservice_case]
- Case Line [sn_case_line]

The repair claim feature adds the following tables.

Table names for repair claim features

Label	Description
Repair Claim Case [sn_repair_claim_mgmt_case]	Stores the details of the repair claim request submitted for reimbursement.
Repair Claim Case Line [sn_repair_claim_mgmt_case_line]	Stores the repair claim job level details of the customers.
Repair Case Line Charge [sn_repair_claim_mgmt_case_line_charge]	Stores the specific line item that holds the detailed expenses involved for the repair.
Expense Line [fm_expense_line]	Stores the expense information for the approved or partially approved claim jobs.
Claim Case [sn_claim_cm_n_case]	Stores the input provided by the dealer to the manufacturer when the claim request is raised. This information is retrieved from the Promotion input table.
Claim Case Line [sn_claim_cm_n_case_line]	Stores the job level details for the claim

Table names for repair claim features (continued)

Label	Description
Case Line [sn_case_line]	Stores the case line item records that are created for parent cases.
Claim Case Line Charge [sn_claim_cmn_case_line_charge]	Stores the charges incurred for each repair job.

To learn more about the Case and Case Line, see [Case Lines and Workflows](#) .

Recall campaign data model

The recall campaign framework enables you to initiate the reimbursement claim request from the OEM for the recalled products.

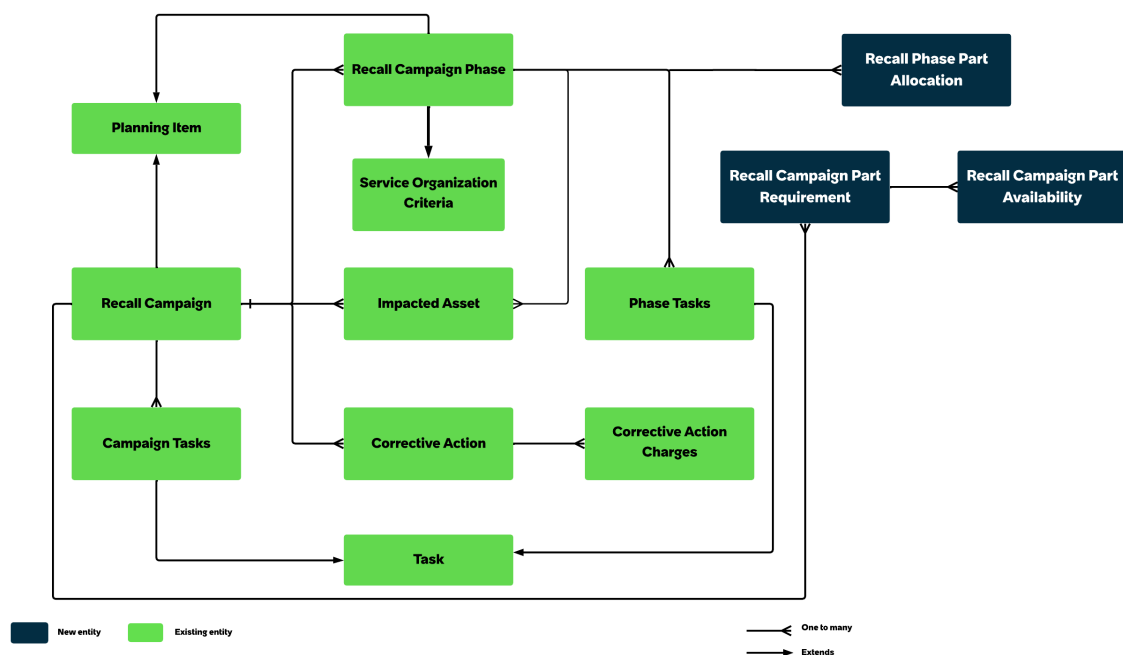
A recall is a measure taken by the manufactures when they identify a safety issue or defect with the product. The recall process launched by the manufacturers or OEM involves the following tasks:

- Identify an issue
- Develop a fix
- Recall planning and preparation (Phase Rollout)
- Recall execution
- Recall claim (Reimbursement for the dealers)

Note: Only Recall Planning and Preparation and Recall Claim are supported.

A recall is initiated when a particular defect impacts a significant number of products. The following diagram shows the entities and their relationships within the recall claims application.

Recall claim data model



Recall campaign tables

The recall claim feature adds and modifies database tables in Manufacturing Commercial Operations for recall campaign management.

Recall claim tables

The recall claim feature adds or modifies the existing tables:

- Planning Item [sn_align_core_planning_item]
- Task [sn_customerservice_task]
- Service Organization Criteria

The recall claim feature adds the following tables.

Recall claim table names

Label	Description
Recall Campaign [sn_rcl_claim_mgmt_rcp]	Stores the recall campaign initiative information as the parent table.
Recall Campaign Task [sn_rcl_claim_mgmt_campaign_task]	Stores the task information that must be fulfilled to complete the Recall Campaign process.
Recall Campaign Phase [sn_rcl_claim_mgmt_rcp_phase]	Stores the information related to the launch of the recall campaign.
Impacted Finished Goods [sn_rcl_claim_mgmt_finished_good]	Stores the asset information for all the assets impacted by a recall campaign.
Corrective Action [sn_rcl_claim_mgmt_ca]	Stores the remedy procedures to resolve the issues mentioned as part of the recall campaign record.
Recall Campaign Phase Task [sn_rcl_claim_mgmt_phase_task]	Stores the tasks related to a recall campaign phase.
Corrective Action Labor Charges [sn_rcl_claim_mgmt_ca_labor_charges]	Stores the details of different types of charges to perform the remedy procedures.
Planning Item [sn_align_core_planning_item]	Stores the new item details.
Recall campaign part requirement [sn_rcl_claim_mgmt_rcp_part_requirement]	Stores the part requirements needed to complete a recall campaign.
Recall campaign part availability [sn_rcl_claim_mgmt_rcp_part_availability]	Stores the availability information for parts required by a recall campaign.

Recall claim table names (continued)

Label	Description
Recall phase part allocation [sn_rcl_claim_mgmt_phase_part_allocation]	Stores the part allocation information for a recall campaign phase.

Quality issue management data model

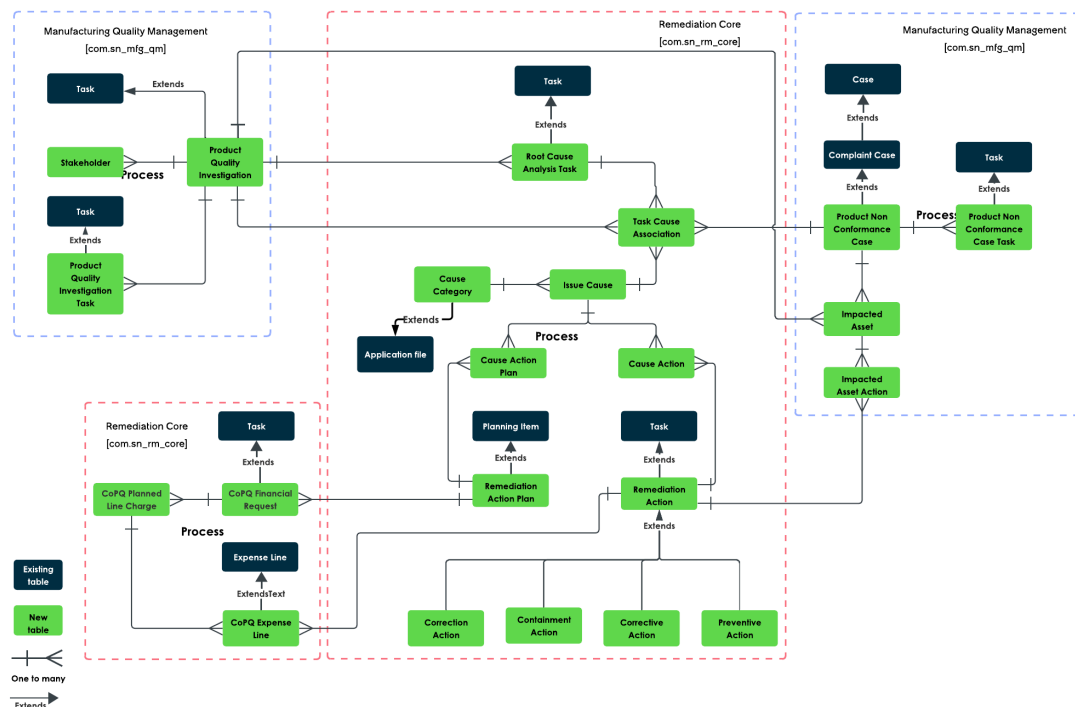
The quality issue management (QIM) framework helps original equipment manufacturers (OEMs) centralize non-conformance data and act on root causes.

The QIM brings together quality data, workflows, and stakeholders into a single system of record. This approach centralizes visibility into issue status, tracks resolution progress, assigns accountability for corrective actions, and supports continuous improvement efforts.

The QIM involves the following tasks:

- Issue detection and logging
- Root cause analysis
- Corrective and preventive actions (CAPA)
- Outcome monitoring
- Documentation

Quality issue management data model



Quality issue management tables

The QIM feature adds and modifies database tables in Manufacturing Commercial Operations for case management and root cause analysis.

QIM tables

The QIM feature adds or modifies the existing tables:

- Task [sn_customerservice_task]
- Planning item [sn_align_core_planning_item]
- Expense line [fm_expense_line]
- Case
- Complaint case [sn_complaint_case]

The QIM feature adds the following tables.

QIM table names

Label	Description
Stakeholder [sn_mfg_qm_stakeholder]	Defines stakeholders for an issue with assigned RACI role and responsibility mapping.
Product Quality Investigation Task [sn_mfg_qm_prd_qi_task]	Creates tasks for performing activities related to studying and gathering further information about the quality issue.
Product Quality Investigation [sn_mfg_qm_prd_qi]	Stores the manufacturing quality issues that require deeper analysis.
Root Cause Analysis Task [sn_rm_core_rca_task]	Captures and manages the individual tasks created as part of a Root Cause Analysis (RCA) process.
Task Cause Association [sn_rm_core_task_cause_assoc]	Associates tasks and RCA records with identified causes, including type classification.
Cause Category [sn_rm_core_cause_category]	Defines hierarchical categories for classifying issue causes.
Issue Cause [sn_rm_core_issue_cause]	Captures cause identified for an issue, with category and external reference.
Cause Action Plan [sn_rm_core_cause_action_plan]	Links a cause to its defined action plan.
Cause Action [sn_rm_core_cause_action]	Associates a cause with the actions addressing it.
Remediation Action [sn_rm_core_rem_action]	Stores the investigation related information.
Correction Action	Captures immediate actions taken to correct an identified issue.

QIM table names (continued)

Label	Description
[sn_rm_core_correction_action]	
Containment Action [sn_rm_core_containment_action]	Tracks short-term measures to contain or limit the impact of an issue.
Corrective Action [sn_rm_core_corrective_action]	Defines long-term actions implemented to eliminate the root cause of an issue.
Preventive Action [sn_rm_core_preventive_action]	Specifies proactive measures to avoid recurrence or future issues.
CoPQ Planned Line Charge [sn_rm_core_copq_planned_line_charge]	Defines planned cost line items for cost of poor quality (CoPQ) financial requests, with unit cost, quantity, and type.
CoPQ Financial Request [sn_rm_core_copq_fin_req]	Manages financial requests for CoPQ, including approvals.
CoPQ Expense Line [sn_rm_core_copq_exp_line]	Captures actual cost entries linked to an action.
Product Non-conformance Case [sn_mfg_qm_prd_ncc]	Stores details of functional deviation/non-conformance of a product.
Product Non-conformance Case Task [sn_mfg_qm_prd_ncc_task]	Creates task for performing activities related to studying and analyzing NC Case.
Impacted Asset [sn_mfg_qm_impacted_asset]	Tracks assets impacted by a reported issue, including their status and linkage to install base records.
Impacted Asset Action [sn_mfg_qm_impacted_asset_action]	Links actions to impacted assets for issue resolution tracking.

MCO Integration APIs

Use ServiceNow APIs to change functionality and add features in the Manufacturing Commercial Operations (MCO) solution.

Warranty Claims SOAP API

The *Warranty Claims* SOAP API handles incoming repair orders from dealer systems and converts them into warranty claims within the Original Equipment Manufacturer (OEM)'s platform.

This API follows [SOAP 1.1 conventions](#) and uses [Standards for Technology in Automotive Retail \(STAR\) XML schemas](#) for interoperability across automotive service systems.

This API enables the exchange of warranty and repair claim information between ServiceNow Manufacturing Commercial Operations (MCO) and a Dealer Management System (DMS). Specifically, it allows users to:

- Create and validate warranty claims in the DMS directly from ServiceNow MCO.
- Query the status of submitted claims, including adjudication and approval outcomes, and retrieve those results back into ServiceNow.
- Manage repair claim data across three core MCO tables:
 - Repair Claim Case [sn_repair_claim_mgmt_case]
 - Repair Claim Case Line [sn_repair_claim_mgmt_case_line]
 - Repair Claim Case Line Charge [sn_repair_claim_mgmt_case_line_charge]
- Support STAR XML message formats through configuration-driven adapters, enabling standards-based integrations without custom code.

This documentation is intended for developers, system integrators, and partners implementing a standards-based SOAP integration.

Standards and conventions

The API adheres to widely used, publicly documented standards.

Item	Standard
SOAP version	SOAP 1.1 (default); 1.2 supported for select partners
WSDL	WSDL 1.1
XML schema	XSD 1.0 (STAR XML)
STAR schema version	5.13.4
Character encoding	UTF-8
Message format	text/xml
Protocols	HTTPS over TLS 1.2+; optional Mutual TLS for STAR partners

Access and authentication

- Basic Auth (username/password)
- Configurable per endpoint for every DMS

Granular roles and entities

This SOAP API requires granular roles to access certain MCO features and responsibilities, provide CRU permissions without custom ACLs, and map directly to supported entities. See [Granular roles and entities](#) for information about supported granular roles.

Endpoint details

The Warranty Claims SOAP API is exposed as a scripted SOAP Web service in ServiceNow MCO.

```
https://<instance_name>.service-now.com/sn_mco_integ_RepairClaim
SOAPHandler.do?SOAP
```

WSDL:

```
https://<instance_name>.service-now.com/sn_mco_integ_RepairClaim
SOAPHandler.do?WSDL
```

The instance name is fixed per OEM environment (sandbox, test, production).

URL part	Description
<instance_name>	The ServiceNow instance hosting MCO (OEM#specific, fixed per OEM).
sn_mco_integ_	MCO integration namespace.
RepairClaimSOAPHandler.do	Scripted SOAP Web service entry point.
?SOAP	SOAP invocation.
?WSDL	WSDL contract for client generation.

API operation

Operation Name: `ProcessRepairOrder`

Processes a repair order payload. The operation performs either a create or update action depending on whether a matching business identifier already exists.

This operation:

- Validates the request against the STAR schema.
- Validates that values in XML are valid in MCO.
- Determines whether the repair claim (document ID) already exists.
- Creates a new record if no match is found.
- Updates an existing record if a match is found.
- Returns a processing status and reference identifier.

Request structure

The request body contains a STAR-conforming `ProcessRepairOrder` message wrapped in a SOAP envelope. Key logical elements include:

- Application metadata (sender, creation time, destination).
- Process verb indicating the requested action.
- Repair order header information.
- Vehicle details.
- Job, labor, parts, and pricing details.
- Warranty claim information.

All elements must conform to the STAR XML schema version indicated in the payload.

Request parameters

Inbound request parameters

Name	Label	Description
Activity status	activity_status	<p>Required. Indicates the current life-cycle status of the repair claim case line and drives playbook execution.</p> <p>Table: Repair Claim Case Line [sn_repair_claim_mgmt_case_line]</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Claim details completed [claim_details_completed] • Claim jobs completed [claim_jobs_completed] • Claim under review completed [claim_under_review_completed] • Claim job edit completed [claim_job_edit_completed] • Claim summary completed [claim_summary_completed] • Close case completed [close_case_completed] <p>Data type: Choice (string)</p>
Actual end	actual_end	<p>Optional. Date and time when the repair activity was completed.</p> <p>Format: YYYY-MM-DDThh:mm:ss</p> <p>Data type: DateTime (string)</p>
Actual start	actual_start	<p>Optional. Date and time when the repair activity started.</p> <p>Format: YYYY-MM-DDThh:mm:ss</p> <p>Data type: DateTime (string)</p>
Asset	asset	<p>Required. Serial number or asset tag of the claim.</p> <p>Table: Asset [alm_asset]</p> <p>Data type: Reference (string)</p>

Inbound request parameters (continued)

Name	Label	Description
Causal part	product_model	<p>Required. Model number of the part identified as the root cause of the issue.</p> <p>Table: Product model [cmdb_model]</p> <p>Data type: Reference (string)</p>
Claimed amount	claimed_amount	<p>Optional. Claimed cost amount for this specific repair claim case line.</p> <p>Data type: Currency (string)</p>
Consumer	consumer	<p>Optional. Consumer or vehicle owner. If consumer ID is unavailable, phone number or email may be provided.</p> <p>Table: Consumer [csm_consumer]</p> <p>Data type: Reference (string)</p>
Correlation ID	correlation_id	<p>Optional. External correlation identifier used to link this request with upstream or downstream systems.</p> <p>Data type: String</p>
Dealer	requesting_service_organization	<p>Required. Reference to the service organization (dealer) submitting the request.</p> <p>Internally resolves to a Service Organization [sn_customer_service_organization] record, matched by Number.</p> <p>Data type: Reference (string)</p>
Deductible amount	deductible_amount	<p>Optional. Deductible amount applicable to the repair claim.</p> <p>Data type: Currency (string)</p>
External Repair order number	external_ro_number	<p>Required. Repair order number from the external dealer or service system.</p> <p>Data type: String</p>

Inbound request parameters (continued)

Name	Label	Description
Fault code	fault_code	Optional. Fault or diagnostic code associated with the reported issue. Data type: String
Install base	install_base	Optional. Identifies the product or asset being serviced and is resolved by matching the provided value to an existing Install Base Item in ServiceNow. Table: Install base [sn_install_base_item] Valid values: <ul style="list-style-type: none"> • asset number • serial number • name Data type: Reference (string)
Part in warranty	in_warranty	Required. Flag that indicates whether the affected part is under warranty. Valid values: <ul style="list-style-type: none"> • <code>true</code>: Affected part is under warranty. • <code>false</code>: Affected part isn't under warranty. Data type: Boolean
Vehicle in warranty	vehicle_in_warranty	Required. Flag that indicates whether the vehicle is under warranty. Valid values: <ul style="list-style-type: none"> • <code>true</code>: Vehicle is under warranty. • <code>false</code>: Vehicle isn't under warranty. Data type: Boolean
Issue Description	short_description	Required. Brief summary of the issue.

Inbound request parameters (continued)

Name	Label	Description
		Data type: String
Parent task	parent_task	<p>Required. Identifier of an existing parent repair claim case or parent task associated with the request.</p> <p>Table: Task [task]</p> <p>Data type: Reference (string)</p>
Pre-auth case line	pre_auth_case_line	<p>Optional. Corresponding pre#authorization repair request, if applicable.</p> <p>Table: Pre-Auth Repair Request Job [sn_pre_auth_repair_request_job], Field: Number</p> <p>Data type: Reference (string)</p>
Product Usage	product_usage	<p>Required. Usage reading of the vehicle at time of repair (for example, kilometers or miles driven).</p> <p>Data type: Number (decimal)</p>
Quantity	quantity	<p>Required. Number of affected or replaced parts.</p> <p>Data type: Number (decimal)</p>
Repair action	repair_action	<p>Required. Action performed to resolve the issue.</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Repair [REPAIR] • Replacement [REPLACEMENT] • Software update [SOFTWARE_UPDATE] <p>Data type: Choice (string)</p>
Repair Claim case	parent_case	<p>Required. Repair claim case associated with this case line.</p> <p>Table: Customer case [sn_customerservice_case]</p>

Inbound request parameters (continued)

Name	Label	Description
Repair Details	details	Required. Detailed description of the issue, diagnostics, and repair performed. Data type: Translated HTML
Replacement part	replacement_part	Conditional. If <i>repair_action= replacement</i> , specifies the name or model number of the replaced part. Table: Product model [cmdb_model]/Name/Model Number Data type: Reference (string)
Reported date	reported_date	Required. Date and time the vehicle arrived at the dealer or service center. Format: YYYY-MM-DDThh:mm:ss Data type: DateTime
Source	source	Optional. Originating system or channel that submitted the repair claim request. Data type: String
Submitted	submitted_at	Required. Date and time the claim was submitted. Format: YYYY-MM-DDThh:mm:ss Data type: DateTime
Total claimed amount	total_claimed_amount	Required. Total claimed amount for the entire repair claim case. Data type: Currency (string)
Type	type	Required. Type of claim being submitted. Valid values:

Inbound request parameters (continued)

Name	Label	Description
		<ul style="list-style-type: none"> • Warranty [Warranty] • Goodwill [Goodwill] • Service contract [Servicecontract] <p>Data type: Choice (string)</p>
Unit of measure	unit_of_measure	<p>Required. Unit of measurement for the product usage. For example, kms or miles.</p> <p>Table: Unit of Measure [sn_prd_pm_uom]</p> <p>Data type: Reference (string)</p>
Work notes	work_notes	<p>Optional. Internal notes or comments related to claim processing.</p> <p>Data type: String</p>

Example SOAP request

Note: Namespaces used in examples follow standard SOAP and STAR conventions.

```
<?xml version="1.0" encoding="UTF-8"?>
<soap:Envelope
  xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/"
  xmlns:oagis="http://www.openapplications.org/oagis/9"
  xmlns:star="http://www.starstandard.org/STAR/5"

  xmlns:tran="http://
www.starstandards.org/webservices/2009/transport"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">

  <soap:Header>
    <!-- Optional header -->
    <tran:payloadManifest>
      <tran:manifest
        contentID="A0"
        element="ProcessRepairOrder"

        namespaceURI="http://www.starstandard.org/STAR/5"
        version="5.13.4.0.0" />
      </tran:payloadManifest>
    </soap:Header>

  <soap:Body>
```

```

        <ProcessRepairOrder
xmlns="http://www.service-now.com/ProcessRepairOrder">
    <payload>
        <![CDATA[
<star:ProcessRepairOrder
    xmlns:star="http://www.starstandard.org/STAR/5"
    xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    releaseID="5.13.4.0.0"
    systemEnvironmentCode="Production">

    <!-- APPLICATION AREA -->
    <star:ApplicationArea>
        <star:Sender>

        <star:CreatorNameCode>DealerManagementSystem</star:CreatorNameC
ode>
            <star:SenderNameCode>DEALER001</star:SenderNameCode>

            <star:URI>https://dealer-system.example.com</star:URI>
            <star:DealerNumberID>98765</star:DealerNumberID>
            <star:StoreNumber>ST-001</star:StoreNumber>
            <star:AreaNumber>REGION-01</star:AreaNumber>
            <star:DealerCountryCode>US</star:DealerCountryCode>
            <star:LanguageCode>en-US</star:LanguageCode>
            <star:SystemVersion>DMS_v6.1.0</star:SystemVersion>
        </star:Sender>

        <star:CreationDateTime>2026-01-09T14:30:45</star:CreationDateTi
me>

        <star:BODID>a1b2c3d4-e5f6-7890-abcd-ef1234567890</star:BODID>

        <star:Destination>

        <star:DestinationNameCode>OEM_MANUFACTURER</star:DestinationNam
eCode>
        </star:Destination>
    </star:ApplicationArea>

    <!-- DATA AREA -->
    <star:ProcessRepairOrderDataArea>
        <star:Process>
            <star:ActionCode>ADD</star:ActionCode>
        </star:Process>

        <star:RepairOrder>
            <star:RepairOrderHeader>
                <star:DocumentIdentificationGroup>
                    <star:DocumentIdentification>

                    <star:DocumentID>RO-2026-987654qwert</star:DocumentID>
                    </star:DocumentIdentification>
                </star:DocumentIdentificationGroup>

```

Example SOAP response (success)

```
<?xml version="1.0" encoding="UTF-8"?>
<SOAP-ENV:Envelope
  xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Body>
    <ProcessRepairOrderResponse>
      <status>success</status>
      <message>Repair order processed successfully</message>
      <data>{"reference":"RPC0001005"}</data>
    </ProcessRepairOrderResponse>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

Example SOAP response (validation error)

```
<SOAP-ENV:Envelope
  xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Body>
    <ProcessRepairOrderResponse>
      <status>error</status>
      <message>
        VALIDATION ERRORS
        payload="[{"field":"asset","message":"Reference
value not found"}]"
      </message>
    </ProcessRepairOrderResponse>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

Error handling

The API uses standard SOAP and HTTP mechanisms to report errors like SOAP faults, custom business errors, and HTTP status codes.

SOAP faults are returned when the request can't be parsed or processed at the protocol level, such as when:

- XML is malformed
- Namespace is incorrect
- Required SOAP envelope structure missing
- Authentication failure
- System-level processing error

Example SOAP Fault:

```
<soap:Fault>
  <faultcode>soap:Client</faultcode>
  <faultstring>Invalid SOAP message</faultstring>
</soap:Fault>
```

Custom business errors

Business validation errors occur after successful SOAP parsing and indicate issues with request data, such as:

- Missing or invalid references
- Duplicate repair orders

- Invalid code values
- Schema or version mismatches

These occur after successful SOAP parsing but during business validation. Errors are returned in the operation response with a status of `error` and a descriptive message. Possible errors:

- MANDATORY_FIELD_MISSING
- MIN_VALUE MAX_VALUE INVALID_REFERENCE
- UNSUPPORTED_VALIDATION_TYPE
- SOAP_ENVELOPE_EMPTY
- IN_WARRANTY_TRANSFORM_FAILED
- VALIDATION_ERRORS
- INVOKE_PROCESSOR_FAILED
- INVALID_DATE_FORMAT
- INVALID_DATE_VALUE
- INVALID_DATETIME_FORMAT
- XML_TO_JSON_FAILED
- INVALID_DATETIME_VALUE
- PAYLOAD_PARSING_FAILED
- EMPTY_PARSED_PAYLOAD
- INVALID_TRANSLATED_HTML_TYPE
- MAX_LENGTH_EXCEEDED
- MAIN_PART_MISSING
- MULTIPLE_MAIN_PARTS

Sample error code:

```
<ProcessRepairOrderResponse>
<status>error</status>
<message>VALIDATION ERRORS |
  payload=" [ {\\"field\\":\\"asset\\",\\"message\\":\\"Reference value
  not found\\"} ] "</message>
</ProcessRepairOrderResponse>
</SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

HTTP Status Codes

HTTP Code	Description
200	OK - Request processed successfully.
400	Bad Request - Invalid or malformed request.
401	Unauthorized - Authentication failure.
403	Forbidden - Access not permitted.
500	Internal Server Error - Unexpected processing failure.

Outbound STAR Integration

This outbound integration sends claim adjudication and payment results from the OEM Now ServiceNow instance to a Dealer Management System (DMS) using STAR-compliant XML messages.

The integration is triggered by a ServiceNow Business Rule on the Repair Claim Case table (sn_repair_claim_mgmt_case) when:

- The claim source is DMS
- The claim state is one of the following:
 - Approved
 - Partially Approved
 - Rejected
 - Awaiting Information

Outbound parameters

Name	Label	Description
Approved amount	approved_amount	Required. Approved amount for this specific repair claim case line after adjudication. Data type: Currency
Correlation ID	correlation_id	Required. Unique identifier used to correlate the outbound response with the original inbound repair claim request. Data type: String
External repair order number	external_ro_number	Required. External repair order number associated with the Repair Claim case, as provided by the dealer system. Data type: String
Dealer ID	dealer_number	Required. Unique identifier of the dealer or service organization that submitted the repair claim. Data type: String
Review action	review_action	Required. Action taken by the claims agent during the claim review. Possible values:

Outbound parameters (continued)

Name	Label	Description
		<ul style="list-style-type: none"> • Approve all [approve_all] • Reject all [reject_all] • Partially approved [partially_approved] • Send back [send_back] <p>Data type: Choice (string)</p>
Review comments	review_comments	<p>Optional. Comments entered by the claims agent during the review and adjudication process.</p> <p>Data type: Translated Text</p>
Service organization	service_organization	<p>Required. Name of the dealer or service organization associated with the repair claim.</p> <p>Data type: String</p>
State	state	<p>Required. Overall adjudication state of the Repair Claim case at the time of response.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • 0 - Draft • 1 - New • 2 - Open • 5 - Pending review • 6 - Awaiting info • 8 - Approved • 9 - Partially approved • 10 - Rejected • 3 - Closed complete • 7 - Closed incomplete • 4 - Closed cancelled <p>Data type: Choice (string)</p>
Total approved amount	total_approved_amount	<p>Required. Total approved amount for the entire Repair Claim case, aggregated across all case lines.</p>

Outbound parameters (continued)

Name	Label	Description
		Data type: Currency

Claim Status Mapping

Status	STAR status code	Decision indicator
AWAITING_INFO	6	R (Rejected)
APPROVED	8	A (Approved)
PARTIALLY_APPROVED	9	A (Approved)
REJECTED	10	D (Denied)

When these conditions are met, ServiceNow generates and sends a STAR ProcessServiceProcessingAdvisory message to the DMS. The outbound STAR message communicates claim adjudication outcomes, not claim submission data. The message includes:

- The repair order or claim reference
- Overall claim status
- Total payable or approved amounts
- Approved amounts at the individual job or operation level

The message conforms to the STAR ProcessServiceProcessingAdvisory structure and enables the DMS to synchronize claim status and financial reconciliation data.

Outbound sample payload:

```
<ns:ProcessServiceProcessingAdvisory
  xmlns:ns="http://www.starstandard.org/STAR/5"
  xmlns:ns1="http://www.openapplications.org/oagis/9"
  languageCode="en-US"
  releaseID="1.0"
  systemEnvironmentCode="Production"
  versionID="1.0">
  <ns:ApplicationArea>
    <ns:Sender>
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```

Logging and diagnostics

Requests and responses are logged by the service for diagnostic and troubleshooting purposes in accordance with standard ServiceNow operational practices.

Related specifications

- STAR XML Specifications
- SOAP 1.1 Specification
- WSDL 1.1 Specification

Refer to the official STAR and W3C documentation for detailed schema and protocol definitions.

Repair form

Includes all the forms related to repair and recall.

Campaign tasks form

Campaign tasks form enables you to add the recall campaign details.

Campaign task form fields

Field	Description
Number	Campaign task number that is automatically generated.
Assigned to	Name of the person to assign the campaign task.
Recall campaign	Recall campaign details that are fetched from Recall campaign form .
Priority	Priority information that is fetched from Recall campaign form .
State	State of the campaign task. Options are: <ul style="list-style-type: none"> • Pending • Open • Work in Progress • Closed Complete • Closed Incomplete • Closed Skipped
Active	Active or inactive state of the campaign task.
Short description	Short description of the campaign task.
Description	Any information that you want to update for next phases.

Channel partner form

Use the fields on the channel partner form to manage and store information related to channel partners.

Channel partner form fields

Field	Description
Number	Automatically generated number of the channel partner. Note: By default, channel partner numbers start with the prefix CHPRTNR.
Name	Name of the channel partner.
Enterprise partner manager	Manager from the enterprise who is associated with the channel partner.
Business function	A commercial function that an external partner performs, such as sales, distribution,

Channel partner form fields (continued)

Field	Description
	implementation, service delivery, or customer support.
External partner manager	Manager from the channel partner that supervises partner member activities.
Status	Status of the channel partner. Options are: <ul style="list-style-type: none"> • Suspended • Terminated.
Parent channel partner	Parent entity of the channel partner.
Partner manager	Select the partner manager from the list.
Type	Select if it is partner group or partner subsidiary.
Company	Company that is associated with the channel partner.
Created	Date when the channel partner is created.
Active	Option to activate the channel partner. By default, this field is active.
Description	Short description.
Revenue per year	Channel partner annual revenue.
Number of employees	Number of employees working for the channel partner.
Supported Industries	Industry to which the channel partner belongs.
Website	Channel partner website details.
Email	Channel partner email address.
Phone	Channel partner phone number.
Company Address	Channel partner company address.
Activity	Updates and information related to the channel partner.

Related topics

[Create channel partner](#)

Corrective action form

The corrective action form enables the OEM to address the asset issue, either by eliminating or replacing the asset.

Corrective action form fields

Field	Description
Number	Corrective action number that is automatically generated. The number starts with CA.
Name	Name of the corrective action.
Affected part	Choose the affected part. This is the part for which the corrective action is being performed.
State	State of the action.
Recall campaign	Recall campaign details that are fetched from Recall campaign form .
Mandatory	Option to set the corrective action as required. If selected, then the technician has to perform corrective action.
Remedy type	Remedy type specifies the corrective action as to what type of correction is being performed. <ul style="list-style-type: none"> • If remedy type is repair: only one corrective action charge is required. • If the remedy type is replacement: add the affected part. In the Corrective action charges form, select the Type as "Part" and the Main part.
Impacted asset applicability	Applying conditions for the impacted assets table on the part of recall campaign.
Details	Brief detail about the corrective actions.

Corrective action charges form

Corrective action charges form include the expenses related to addressing a non-conformance like labor charges.

Corrective action charges form fields

Field	Description
Corrective action	Corrective action number that is automatically generated. The number starts with CA.
Type	Corrective action charges type. Options are: <ul style="list-style-type: none"> • Labor: Labor code is displayed • Part: Part and Main part is displayed • Miscellaneous • External services
Labor code	Name of the labor code.

Corrective action charges form fields (continued)

Field	Description
Quantity	Quantity of the item to be replaced or repaired.
Unit of measure	Unit of measure is configurable. Available options are: <ul style="list-style-type: none"> • Box • Bundle • Carton • Case • Days • Each • Kit • Month • Pack • Year
Unit price	The unit price on the corrective action charges doesn't include taxes and other costs. <p>Note: The unit price is used to determine the base cost for the part (unit cost * quantity). Taxes and other charges are mentioned on the claim.</p>
Impacted asset applicability	List of assets that are impacted.
Description	Brief detail about the corrective actions charges.

Related topics

[Corrective action charges](#)

Claim details form

The Claim details form enables the dealer to enter the claim details for the repair work performed.

Claim details form fields

Field	Description
Asset	Asset or product on which repair action is performed.
Requested by	User who is raising the repair claim request.
Consumer	Customer information that is auto-populated based on the install base.
Description	Short description on the repair claim.

Claim details form fields (continued)

Field	Description
Dealer	Dealer who is raising the repair claim request.
Reported date	Date on which the claim is being raised.
External work order	Claim work order number that is a string value.
Unit of measure	<p>Quantity of assets that are raised for repair claim. Unit of measure is configurable. Available options are:</p> <ul style="list-style-type: none"> • Box • Bundle • Carton • Case • Days • Each • Kit • Month • Pack • Year
Product usage	Enter the number of Asset used. It provides insights into how customers use a product.

Related topics

[Roles and components of Partner Relationship Management](#) 

[Submit a repair claim for warranty](#)

Install based item form

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.

Install Base Item form fields

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	<p>Configuration item that is associated with the install base item.</p> <p>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 .</p>

Install Base Item form fields (continued)

Field	Description
	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 .
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.
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 with the product model appears only on the install base form.
Location	Location that is associated with the product.
Status	Option that determines whether the product is original or a replacement.
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 synchronization 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. If the Active option remains unselected then the State is set to Inactive .
Install date	Date on which the install base becomes active.
Uninstall date	Date on which the install base becomes 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.

Related topics

[Configure install base item](#)

Internal business location form

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.

Internal business location form

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: <ul style="list-style-type: none"> • Business location: Physical location of a business where a business operates • Business group: An organization that may 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: <ul style="list-style-type: none"> • 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. <p>Note: You can create and manage orders and cases by selecting both types of business functions.</p>
Manager	Manager of the internal business location. <p>Note: Only internal users can be added as managers for the internal business locations.</p>
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.

Internal business location form (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: <ul style="list-style-type: none"> • 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.
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. <p>Note: The closed date must not be earlier than the open date.</p>
Status	Current status of the business location whether In progress, Operational, non-operational, or closed.
Description	Description of the business location.

MCO input attributes form

MCO input attributes form.

MCO input attributes form fields

Field	Definition
Label	Label that is used for the input fields for a promotion questionnaire.
Column name	Field name of the column.
Type	Type of attribute. To learn more about the types, see ServiceNow AI Platform[®] field administration .
Model	Model of the product.
Max length	Logical limit for the size of string fields. The length determines how the system displays the string fields in the user interface and how to map them to physical database data types.
Default value	Default value of the field for any new record.

MCO input attributes form fields (continued)

Field	Definition
Order	Number of orders. This field defines the order in which the input fields appear in the UI.
Reference	Reference field that stores a reference to a field on another table.
Choice	Option to enable users to see a list of values.
Application	Name of the application.
Active	Option to set the attribute as active.
Read only	Option to specify whether you can change the field value in the user interface.
Mandatory	Option to specify whether this field must contain a value to save a record.
Display	Option to indicate that this field is the display value for reference fields
Text index	Option to determine whether searches index the text in a table.
Audit	Option to enable auditing for a table.

Phase task form

Phase task form enables you to add the details of the recall phase.

Phase task form fields

Field	Description
Number	Recall campaign phase task number. This field is automatically generated. The number starts with TASK.
Assign to	Name of the person to assign the recall campaign phase task.
Recall campaign phase	Recall campaign phase.
Priority	Priority of the recall phase task. Options are: <ul style="list-style-type: none"> • 1-Critical • 2-High • 3-Moderate • 4-Low • 5-Planning
State	State of the campaign task. Options are: <ul style="list-style-type: none"> • Pending • Open • Work in Progress

Phase task form fields (continued)

Field	Description
	<ul style="list-style-type: none"> • Closed Complete • Closed Incomplete • Closed Skipped <p>By default, Open is displayed.</p>
Active	Active or inactive state of the phase task.
Short description	Short description of the phase task.
Description	Detailed description of the phase task.

Related topics

[Adding a phase task](#)

Recall campaign form

The recall campaign form provides the original equipment manufacturer (OEM) with the required information to initiate a recall campaign.

Recall campaign form fields

Field	Description
Number	Recall campaign unique number. This field is automatically generated. The number starts with RCP.
Campaign name	Name of the campaign.
Planned start date	Start date from which the recall campaign is applicable.
Product issue number	Serial number of the product for which the recall campaign is created.
Minimum parts availability percentage	The minimum percentage of parts that must be available.
State	The recall campaign state. The default is draft.
Recall type	<p>Recall issue type. Options are:</p> <ul style="list-style-type: none"> • Product defect • Regulatory • Safety • Technical service bulletin • Stop drive recall • Park outside advisory • Miscellaneous
Priority	Priority of the recall. Options are:

Recall campaign form fields (continued)

Field	Description
	<ul style="list-style-type: none"> • 1-Critical • 2-High • 3-Moderate • 4-Low • 5-Planning
Assignment group	Group of the recall manager who is responsible for handling the current campaign.
Assigned to	Recall manager from the assignment group who is responsible for handling the current campaign.
Short description	Short description of the product issue.
Recall issue details	Detailed issues for which the product is recalled.
Recall campaign Work notes	Additional notes, if any.

Related topics

[Create a campaign](#)
[View All campaigns](#)

Recall campaign phase form

The recall campaign phase form enables you to add the recall campaign phases details.

Recall campaign phase form fields

Field	Description
Number	Recall campaign phase number is the recall campaign record number for which sub-phase is being created. The number starts with RCPPH.
Name	Recall campaign phase name.
Planned start date	Planned start date of the recall campaign. Note: For sub-phase, start date cannot be before the parent phase start date.
Planned end date	End date of the recall campaign. Note: For sub-phase, end date cannot be later then the parent phase end date.

Recall campaign phase form fields (continued)

Field	Description
Parent phase	<p>Parent phase to which sub-phases (child phases) can be associated.</p> <p>To make the current recall phase as parent phase, leave it empty.</p> <p>If you are creating a sub-phases for a specific phase, then that parent phase name will be displayed.</p>
State	State of the recall campaign phase. This field is automatically set to draft.
Assignment group	Assignment group of the phase owner who is responsible for this Phase.
Assigned to	Name of the person to assign the recall campaign phase.
Dealer visibility	<p>Service organization criteria to whom this recall campaign phase are visible.</p> <p>For sub-phase, dealer visibility criteria will be copied from the parent phase, and it can be modified.</p> <p>Note: For Dealer visibility setup information, see Create the criteria for a service organization.</p>
Description	Brief description about the recall campaign phase.

Related topics

[Create My campaign phases](#)

Repair claim form

The repair claim form enables you to enter the warranty and recall claim details.

Repair claim form fields

Field	Description
Warranty	<p>Note: Fields under the Warranty section are displayed when you select the Warranty claim option type under Add claim jobs.</p>
Pre-auth case line	Displays the repair pre-authorization case lines previously created for the selected repair

Repair claim form fields (continued)

Field	Description
	on this claim case. Only approved and partially approved pre-authorization cases are listed. Note: When you select a pre-authorization from the list, the causal parts and miscellaneous details are automatically populated.
Causal part	Part number of the product that is repaired.
Repair action	Repair action type. Options are: <ul style="list-style-type: none">• Repair• Replacement• Software update
Issue description	Name of the product that has the issue.
Repair details	Short description of the repair details.
Recall	
Note: Fields under the Recall section are displayed when you select the Recall claim option.	
Recall campaign	Recall campaign.
Corrective action	Corrective action that is taken to resolve the issue.
Casual part	Part number. This field is auto-populated from the chosen corrective action.
Remedy type	Remedy procedures to resolve the issues mentioned as part of Recall Campaign Record. This field is auto-populated.
Repair details	Short description of the repair details. This field is auto-populated from the details available on the corrective action but can be modified by the service agent.
Parts	
Part number	Part number that is repaired, replaced, or upgraded.
Causal part replacement	Causal part replacement is enabled only if you select repair action as replacement or if remedy type contains replacement for recall claim job.
Quantity	Quantity of assets that are repaired. Unit of measure includes:

Repair claim form fields (continued)

Field	Description
	<ul style="list-style-type: none"> • Case • Pack • Carton • Kit • Each • Bundle • Box
Base amount	Base amount of the part. It is without tax.
Tax rate	Tax rate.
Claimed amount	<p>Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate.</p> <p>For example: $\text{base amount} * \text{quantity} + \text{tax rate}$.</p>
Labor	
Labor code	Labor code.
Duration	<p>Time required to repair or replace the part or product. Unit of measure includes:</p> <ul style="list-style-type: none"> • Year • Hours • Month • Days
Base amount	Base amount of the labor work performed. It is without tax.
Tax rate	Tax rate.
Claimed amount	<p>Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate.</p> <p>For example: $\text{base amount} * \text{quantity} + \text{tax rate}$.</p>
External services	
Description	Details of the external services taken for the repair or replacement of the part.
Base amount	Base amount of the external service taken. It is without tax.
Tax rate	The tax rate.

Repair claim form fields (continued)

Field	Description
Claimed amount	Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate. For example: $\text{base amount} * \text{quantity} + \text{tax rate}$.
Miscellaneous	
Miscellaneous	Details of the miscellaneous services.
Base amount	Base amount for any miscellaneous services.
Tax rate	Tax rate.
Claimed amount	Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate. For example: $\text{base amount} * \text{quantity} + \text{tax rate}$.
Claimed job amount	Total amount claimed for this job. It includes: <ul style="list-style-type: none"> • Parts claimed amount • Labor claimed amount • External services claimed amount • Miscellaneous claimed amount
Attachments	Attachments that support your claims.

Related topics

[Submit a repair claim for warranty](#)

Pre-authorization form

The pre-authorization form enables you to enter the pre-authorization details.

Submit claim case

Field	Description
Asset	Select the asset.
Requested by	Select the person who raised the request.
Consumer	Select the name of the consumer.
Product usage	Enter the number of Asset used. It provides insights into how customers use a product.
Description	Brief description about the pre-authorization request.
Dealer	Select the dealer.

Submit claim case (continued)

Field	Description
Reported date	Select the date on which pre-authorization claim required is submitted.
External repair order number	Entered by the dealer service advisor when initiating a claim for a completed repair.
Unit of measure	<p>Quantity of assets that are raised for pre-authorization claim. Unit of measure is configurable. Available options are:</p> <ul style="list-style-type: none"> • Box • Bundle • Carton • Case • Days • Each • Kit • Month • Pack • Year

Related topics

[Create a pre-authorization request](#)

Pre-authorization job details form

The pre-authorization job form enables you to enter the warranty, labor, and part details.

Pre-authorization job details form

Field	Description
Warranty	
<p>Note: Fields under the Warranty section are displayed when you select the Warranty claim option type under Add claim jobs.</p>	
Casual part	Part number of the product that is repaired.
Pre-auth case line	<p>Select the required pre-auth case line.</p> <p>Only the approved charge lines are displayed.</p>
Repair action	Repair action type. Options are:

Pre-authorization job details form (continued)

Field	Description
	<ul style="list-style-type: none"> • Repair • Replacement • Software update
Issue description	Name of the product that has the issue.
Proposed repair details	Short description of the repair details.
Parts	
Part number	Part number that is repaired, replaced, or upgraded. It's fetched from the product model.
Casual part replacement	Casual part replacement is enabled only if you select repair action as replacement or if remedy type contains replacement for recall claim job.
Quantity	<p>Quantity of assets that are repaired. Unit of measure is configurable. Available options are:</p> <ul style="list-style-type: none"> • Case • Pack • Carton • Kit • Each • Bundle • Box
Base amount	Base amount of the part. It is without tax.
Tax rate	Tax rate.
Claimed amount	<p>Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate.</p> <p>For example: $\text{base amount} * \text{quantity} + \text{tax rate}$.</p>
Labor	
Labor code	Labor code. It's the main data for implementation.
Duration	<p>Time required to repair or replace the part or product. Unit of measure includes:</p> <ul style="list-style-type: none"> • Year • Hours

Pre-authorization job details form (continued)

Field	Description
	<ul style="list-style-type: none"> • Month • Days
Base amount	Base amount of the labor work performed. It is without tax.
Tax rate	Tax rate.
Claimed amount	<p>Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate.</p> <p>For example: $\text{base amount} * \text{quantity} + \text{tax rate}$.</p>
External services	
Description	Details of the external services taken for the repair or replacement of the part.
Base amount	Base amount of the external service taken. It is without tax.
Tax rate	The tax rate.
Claimed amount	<p>Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate.</p> <p>For example: $\text{base amount} * \text{quantity} + \text{tax rate}$.</p>
Miscellaneous	
Description	Details of the miscellaneous services.
Base amount	Base amount for any miscellaneous services.
Tax rate	Tax rate.
Claimed amount	<p>Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate.</p> <p>For example: $\text{base amount} * \text{quantity} + \text{tax rate}$.</p>
Claimed amount	<p>Total amount claimed for this job. It includes:</p> <ul style="list-style-type: none"> • Parts claimed amount • Labor claimed amount • External services claimed amount • Miscellaneous claimed amount
Attachments	Attachments that support your claims.

Pre-authorization job details form (continued)

Field	Description
Pre-approval requested amount	Total amount claimed includes parts, labor, external services, and miscellaneous items.

Related topics

[Create a pre-authorization request](#)

Sales promotion form

Includes all the forms related to the sales promotion.

All promotion form

The All promotion form enables the manufacturers to enter the promotion campaign and incentive details.

All promotion form fields

Field	Description
Number	Unique number that is displayed for each new record.
Name	Name of the sales promotion.
Start date	Effective start date of the campaign. It can't be less than the current date.
End date	Effective end date of the campaign. It can't be less than the start date.
Owner	Owner responsible for this sales promotion from the list.
State	Current state of the promotion. This field is automatically set to In draft.
Promotion type	Promotion type. Choose an option from the list. To create promotion type, see Create promotion type .
Checklist template	Predefined checklist template. Choose an option from the list. To create checklist template, Create a checklist template
Description	Short description for the sales promotion.
Applicable Discount	
Incentive type	Incentive type. Options are: <ul style="list-style-type: none"> • amount • percentage

All promotion form fields (continued)

Field	Description
Min incentive	Lowest possible incentive for the campaign. This field appears only when amount is selected from Incentive type .
Max incentive	Highest possible incentive for the campaign. This field appears only when amount is selected from Incentive type .
Min percentage	Lowest discount percentage applicable for the campaign. This field appears only when percentage is selected from Incentive type .
Max percentage	Highest discount percentage applicable for the campaign. This field appears only when percentage is selected from Incentive type .

Related topics

[View all promotions](#)

My promotions form

The My promotions form enables the manufacturers to enter the promotion campaign and incentive details.

My promotions form fields

Field	Description
Number	Unique number that is displayed for each new record.
Name	Name of the sales promotion.
Start date	Effective start date of the campaign. It can't be less than the current date.
End date	Effective end date of the campaign. It can't be less than the start date.
Owner	Owner who is responsible for this sales promotion.
State	Current state of the promotion. This field is automatically set to In draft.
Promotion type	Promotion type. Choose an option from the list. To create promotion type, see Create promotion type .
Checklist template	Predefined checklist template. Choose an option from the list. To create checklist template, see Create a checklist template .
Description	Short description for the sales promotion.

My promotions form fields (continued)

Field	Description
Applicable Discount	
Incentive type	Incentive type. Options are: <ul style="list-style-type: none"> • amount • percentage
Min incentive	Lowest possible incentive for the campaign. This field appears only when amount is selected from Incentive type .
Max incentive	Highest possible incentive for the campaign. This field appears only when amount is selected from Incentive type .
Min percentage	Lowest discount percentage applicable for the campaign. This field appears only when percentage is selected from Incentive type .
Max percentage	Highest discount percentage applicable for the campaign. This field appears only when percentage is selected from Incentive type .

Related topics

[My promotions](#)

Sales promotion bulk upload form

Bulk sales promotion upload form.

Bulk upload form fields

Field	Description
Sales promotion number	Sales promotion campaign number.
External id	ID of sales promotion in third-party system.
Sold product cost	Price of the product sold.
Promotion percentage applied	Percentage discount applied for the promotion.
Currency	Currency type.
Promotion value	Discount given for a promotion.
Sold product serial number	Serial number of the sold product.

Quality issue management form

Includes all the forms related to quality issue management.

Cause action plan form

The Cause action plan form enables you to add the cause action details for a remediation plan.

Cause action plan form

Field	Description
Number	Cause action plan number that is automatically generated. The number starts with IC and incremented for every new report.
External id	External id which is used for mapping with external systems or imported data.
Short description	Brief description of the issue cause.
Description	Detailed description of the issue cause.

Containment action form

The containment action form lets you record details of products with quality issues and helps prevent their sale to new customers.

Containment action form

Field	Description
Number	Containment action number that is automatically generated. The number starts with CONT and incremented for every new report.
Remediation action plan	Definition of how to address issues such as non-compliance, process gaps, or contamination with clear steps.
Issue	Record for which the containment action must be performed.
Total actual cost	Total cost.
Implementation date	Date when the correction action must be implemented.
Validated date	Date when the actions were validated.
Priority	Severity of the containment action. Options are: <ul style="list-style-type: none"> • Critical • High • Moderate • Low • Planning
State	State of the containment action: <ul style="list-style-type: none"> • New • In review • In progress • Closed complete

Containment action form (continued)

Field	Description
	<ul style="list-style-type: none"> • Closed canceled • Closed incomplete
Table	Table name for which the containment action must be performed.
Remediation item	Remediation item record associated with the action.
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	User to whom the containment action has been assigned.
Short description	Short note.
Description	Detailed description of the containment action.

CoPQ expense line form

The CoPQ expense line form enables you to enter the expense line details for product non-conformance..

Field	Description
Number	CoPQ expense line number that is automatically generated. The number starts with COPQEXP and incremented for every new report.
Parent	Parent. that is used to build the hierarchical categories.
Source table	Source table (correction action) for which the CoPQ expense line is generated.
Source ID	Record number for which the CoPQ expense line is generated.
Issue	Product non-conformance or product quality investigation issue type.
Short description	Short note on the expense line.
State	State of the CoPQ expense line: <ul style="list-style-type: none"> • Pending • Approved • Rejected • Processed
CoPQ type	CoPQ type:

Field	Description
	<ul style="list-style-type: none"> • Part • Labor • Service • Material • Rework
Summary type	<p>Summary type. Options are:</p> <ul style="list-style-type: none"> • Grow business: Expanding revenue and market reach. • Run business: Streamlining and automating daily sales, support, and service operations for efficiency. • Transform business: Digitally reinventing processes and integrating ecosystems to deliver innovative, agile, and customer-centric manufacturing solutions.
Planned line charge	Planned cost line items for CoPQ financial requests, with unit cost, quantity, and type.
Amount	Amount of CoPQ expense line.
Source	
Asset	Identification number of the asset associated with the expense line, if any.
Fixed asset	Fixed asset that contains the asset in this expense line. A fixed asset is a container that holds one or more individual assets, including hardware or software assets. The system auto-populates this field with the appropriate fixed asset if the named Asset is contained within that fixed asset.
Contract	Identification number (not the contract number) of the contract associated with the Asset, if any.
User	Name of the user associated with the Asset, if any.
Configuration item	Name of the configuration item associated with the expense line, if any.
Task	Identification number of the task associated with the expense line, if any.
Cost center	Cost center financially responsible for the item identified in Source ID, if any.

CoPQ financial requests form

CoPQ financial form enables you to enter the financial requests raised for the remediation plan.

CoPQ financial request form

Field	Description
Number	CoPQ number that is automatically generated. The number starts with COPQFR and incremented for every new report.
Remediation action plan	Remediation action plan from the list.
Issue	Record for which CoPQ action must be performed.
Total actual amount	Actual cost of the CoPQ financial request action.
Total planned amount	Planned cost allocated to address the issue through the request.
State	State of the preventive action: <ul style="list-style-type: none"> • Draft • Pending review • Partially approved • Approved • Rejected • Closed complete • Closed canceled • Closed incomplete
Parent	Parent record.
Priority	Priority of the CoPQ financial requests.
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	User to whom the preventive action has been assigned.
Short description	Short note.
Description	Detailed description of the CoPQ financial requests.

CoPQ planned line charge form

The CoPQ planned line charge form contains fields for defining planned costs on a CoPQ financial request.

CoPQ planned line charge form

Field	Description
Number	CoPQ planned line charge number that is automatically generated. The number starts with PLC and is incremented for every new report.
State	State of the planned line charge:

CoPQ planned line charge form (continued)

Field	Description
	<ul style="list-style-type: none"> • New • On hold • In progress • Closed complete • Closed canceled • Closed incomplete
Financial request	Financial request that links planned line charge to the parent CoPQ financial request.
CoPQ type	CoPQ type that categorizes the cost as material/part-related or labor-related.
Product model	Model type.
Quantity	Quantity of the item/service planned.
Unit of measure	Number of product quantities.
Unit cost	Cost of each product.
Planned cost	Planned cost allocated to address the issue through the request.
Actual cost	Actual cost incurred for the CoPQ request.

Corrective action form for PQI

The corrective action form enables you to add the details for PQI.

Corrective action form

Field	Description
Number	Corrective actions number that is automatically generated. The number starts with CRTV and incremented for every new report.
Remediation action plan	Remediation action plan from the list.
Issue	Record for which corrective action must be performed.
Total actual cost	Actual cost of the corrective action.
Implementation date	Date when the corrective action must be implemented.
Validated date	Date when the actions were validated.

Corrective action form (continued)

Field	Description
Priority	Severity of the corrective action from the options: <ul style="list-style-type: none"> • Critical • Major • Moderate • Minor
State	State of the corrective action: <ul style="list-style-type: none"> • New • On hold • In progress • Closed complete • Closed canceled • Closed incomplete
Table	Table name for which corrective action must be performed.
Remediation item	Remediation item record associated with the action.
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	User to whom the corrective action has been assigned.
Short description	Short note.
Description	Detailed description of the corrective action.

Correction actions form

The Correction action form enables you to enter the correction action details for the issue.

Correction actions form

Field	Description
Number	Correction actions number that is automatically generated. The number starts with CORR and incremented for every new report.
Remediation action plan	Remediation action plan.
Issue	Record for which Correction action must be performed.
Total actual cost	Actual cost of the correction action.

Correction actions form (continued)

Field	Description
Implementation date	Date when the correction action must be implemented.
Validated date	Date when the actions were validated.
Priority	Severity of the correction action. Options are: <ul style="list-style-type: none"> • Critical • Major • Moderate • Minor
State	State of the correction action: <ul style="list-style-type: none"> • New • On hold • In progress • Closed complete • Closed canceled • Closed incomplete
Table	Table name for which the correction action must be performed.
Remediation item	Remediation item record associated with the action.
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	User to whom the correction action has been assigned.
Short description	Short note.
Description	Detailed description of the correction action.

Effectiveness target form

The Qualitative targets form enables you to add the qualitative target details, such as name, goal, progress, ownership, and target values.

Qualitative targets form

Field	Description
Name	Name of the qualitative target.
Goal	Parent effectiveness goal that the target contributes to.
Description	Free-text description of the qualitative target.

Qualitative targets form (continued)

Field	Description
State	Current lifecycle state of the target, such as Draft, In progress, Approved, Complete, Pending, Achieved, or Not achieved.
Progress	Percentage progress toward the target, calculated from the start value, final target value, and actuals to date.
Owner	User responsible for the target, set to the current user by default.
Status	Health indicator of the target, such as Green, Yellow, or Red.
Impact on goal	Weight of the target relative to its sibling targets, ranging from No impact to Maximum.
Contributors	Users who contribute to achieving the target.
Unit of measure	Unit used to measure progress toward the target.
Start value	Starting qualitative value of the target.
Type	Nature of the target — Maximize, Minimize, or Milestone — indicating whether the tracked value increases or decreases over time.
Final target value	Planned qualitative value the target must reach by the end of its duration.
Actuals to date	
Check-in frequency	
Remark	
Check-in due date	

Preventive action form

The preventive action form captures the remediation plan, cost, priority, and status details for a quality issue (QI).

Preventive action form

Field	Description
Number	Preventive action number that is automatically generated. The number starts with PREV and is incremented for every new report.
Remediation action plan	Remediation action plan.
Issue	Record for which preventive action must be performed.
Total actual cost	Actual cost of the preventive action.
Implementation date	Date when the preventive action must be implemented.

Preventive action form (continued)

Field	Description
Validated date	Date when the actions were validated.
Priority	Severity of the preventive action. Options are: <ul style="list-style-type: none"> • Critical • Major • Moderate • Minor
State	State of the preventive action: <ul style="list-style-type: none"> • New • On hold • In progress • Closed complete • Closed canceled • Closed incomplete
Table	Table name for which the preventive action must be performed.
Remediation item	Remediation item record associated with the action.
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues.
Assigned to	User to whom the preventive action has been assigned.
Short description	Short note.
Description	Detailed description of the preventive action.

Report a product non-conformance

The report a product non-conformance form enables you to add the issue details.

Report a product non-conformance form

Field	Description
Install Base	Install base item that has the issue.
Issue severity	Severity of the non-conformance case from the options: <ul style="list-style-type: none"> • Critical • Major • Moderate • Minor

Report a product non-conformance form (continued)

Field	Description
Issue type	Category of the non-conformance case, which helps classify the nature of the issue for accurate tracking and resolution. <ul style="list-style-type: none"> • Design • Process • Supplier • Material • Logistics • Documentation
Priority	Priority of the non-conformance case.
Complaint type	Complaint type. <ul style="list-style-type: none"> • Product • Location • Service • Delivery • Warranty • Installation
Short description	Short description on the non-conformance case.
Issue description	Issue description of the non-conformance case.
What is the problem about?	Description of the problem or incident in clear, concise terms.
Why is solving the problem important?	Outcome of solving the problem.
When did it occur and how often?	Timeline of the issue: When it was first detected, when it occurred, and the duration of its impact.
Where did it occur?	Location of the issue.
Who first reported the problem?	Individuals or teams involved in the issue or affected by it.
How many parts/units/customers are affected?	Number of parts or customer affected by this issue.
How was the problem first detected?	How the problem was detected.
Additional comments and changes	Additional notes, if any.

Product details form

The Product non-conformance details form enables you to add the case details.

Product non-conformance case form fields

Field	Description
Number	Product non-conformance case task number that is automatically generated. The number starts with PNCC and incremented for every new report.
Issue severity	Severity of the non-conformance case from the options: <ul style="list-style-type: none"> • Critical • Major • Moderate • Minor
Priority	Priority of the non-conformance case.
Install Base	Install base item that has the issue.
Asset	Impacted asset.
Requesting Service Organization	Select the service organization, business unit, or department on whose behalf this case record is being submitted.
State	State of the non-conformance case. <ul style="list-style-type: none"> • Draft • New • In progress • Closed complete • Closed canceled • Closed incomplete • Closed duplicate
Complaint type	Complaint type. <ul style="list-style-type: none"> • Product • Location • Service • Delivery • Warranty • Installation
Issue type	Category of the non-conformance case, which helps classify the nature of the issue for accurate tracking and resolution. <ul style="list-style-type: none"> • Design • Process

Product non-conformance case form fields (continued)

Field	Description
	<ul style="list-style-type: none"> • Supplier • Material • Logistics • Documentation
Total estimated cost	Total estimated cost of the non-conformance case.
Total actual cost	Total actual cost of the non-conformance case.
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues. It is auto-populated.
Assigned to	User to whom the non-conformance case has been assigned. It is auto-populated based on the Assignment group owner, but you can reassign it to available user.
Product quality investigation candidate	Option to display Product quality investigation .
Product quality investigation	Product quality investigation.
Short description	Short description on the non-conformance case.
Complaint details	Complaint details, if any.

Related topics

[Resolve a product non-conformance case playbook](#)

Product non-conformance case task form

The Product non-conformance case task form enables you to add the case task details.

Product non-conformance case task form fields

Field	Description
Number	Product non-conformance case task number that is automatically generated. The number starts with "PNCCT" and incremented for every new report.
Parent	Parent that is used to build the hierarchical categories.
Account	Account.
Consumer	Consumer name.
State	State of the non-conformance case task.

Product non-conformance case task form fields (continued)

Field	Description
	<ul style="list-style-type: none"> • Pending • Open • Work in progress • Closed complete • Closed skipped • Closed incomplete
Priority	Severity of the non-conformance case task. Options are: <ul style="list-style-type: none"> • Critical • Major • Moderate • Minor
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	User to whom the non-conformance case task has been assigned.
Visible to customer	Option to make the information visible to the customer.
Subject	Primary area of focus.
Description	Short description.

Product quality investigation form

The PQI form enables you to add the investigation details.

Product quality investigation form

Field	Description
Number	Product quality investigation case task number is automatically generated. The number starts with PQI and incremented for every new report.
Issue severity	Choose the severity of the product quality investigation from the options: <ul style="list-style-type: none"> • Critical • Major • Moderate • Minor

Product quality investigation form (continued)

Field	Description
Issue type	<p>Choose the category of the product quality investigation, which helps classify the nature of the issue for accurate tracking and resolution.</p> <ul style="list-style-type: none"> • Design • Process • Supplier • Material • Logistics • Documentation
Owner	Select the user responsible for the product quality investigation.
Product model	Select the product model.
Problem solving methodology	<p>Select the type of methodology to solve the problem:</p> <ul style="list-style-type: none"> • 8D: A comprehensive, team-based approach for complex issues (plan, team, describe, contain, root cause, correct, prevent, recognize) • 4D: A phased approach for solving issues (Describe, contain, correct, close) • Other
State	<p>Choose the state of the PQI.</p> <ul style="list-style-type: none"> • Draft • New • In progress • Closed complete • Closed canceled • Closed incomplete
Priority	Choose the priority of the PQI.
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues.
Assigned to	User to whom the non-conformance case has been assigned.
Total estimated cost	Enter the total estimated cost of the PQI case.
Total actual cost	Enter the total actual cost of the PQI case.
Short description	Enter a short description on the PQI case.

Product quality investigation form (continued)

Field	Description
Description	Enter the detailed description of the PQI.
Escape point	Identify the escape point, which is the nearest stage in the process where the root cause could have been detected but was overlooked.
Report summary	Enter the summary of the PQI report.

Related topics

[Create a product quality investigation](#)

Product quality investigation task form

Product quality investigation task form enables you to add the investigation case task details.

Field	Description
Number	Product quality investigation case task number is automatically generated. The number starts with PQIT and incremented for every new report.
Parent	Select the parent. It's used to build the hierarchical categories (parent>child).
Priority	Choose the severity of the non-conformance case task from the options: <ul style="list-style-type: none"> • Critical • Major • Moderate • Minor
Due date	Select the end date for quality investigation case task.
Short description	Enter a short note.
Description	Enter a detailed description of the product quality investigation.
State	Choose the state of the non-conformance case task. <ul style="list-style-type: none"> • Pending • Open • Work in progress • Closed complete • Closed skipped • Closed incomplete

Field	Description
Assignment group	Select the organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	Select the user to whom the non-conformance case task has been assigned.

Related topics

[Notes form](#)

Remediation action plan form

The Remediation action plan form enables you to add the remediation details.

Remediation action form

Field	Description
Number	Remediation action plan number is automatically generated. The number starts with RAP and incremented for every new report.
Name	Name of the remediation action.
Type	Remediation action type.
Issue	Issue record for which remediation action plan is created.
Planned start date	Remediation action start date.
Planned end date	Remediation action end date.
State	State of the RAP. <ul style="list-style-type: none"> • Draft • Pending review • Approved • Rejected • In progress • Closed complete • Closed canceled • Closed incomplete
Priority	Priority of the RAP.
Actual start date	Actual start date.
Actual end date	Actual end date.
Total estimated cost	Total estimated cost of the RAP case.
Total actual cost	Total actual cost of the RAP case.
Description	Detailed description of the RAP.

Root cause analysis task form

Root cause analysis task form enables you to enter the root cause of the product non-conformance.

Root cause analysis task form

Fields	Description
Number	Root cause analysis task number that is automatically generated. The number starts with RCA and incremented for every new report.
Table	Table name for which RCA must be performed.
Target id	Record for which RCA must be performed.
Parent	Parent that is used to build the hierarchical categories.
Short description	Short note.
Description	Detailed explanation of the issue.
State	State of the RCA expense line: <ul style="list-style-type: none"> • New • On hold • In progress • Closed complete • Closed cancelled • Closed incomplete
Priority	Severity of the RCA task. Options are: <ul style="list-style-type: none"> • Critical • Major • Moderate • Minor
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	User to whom the RCA has been assigned.

Stakeholder form

The stakeholders form enables you to add the stakeholder details involved in the issue.

Stakeholders form

Field	Description
Issue	Product quality investigation number for which the stakeholder is associated.

Stakeholders form (continued)

Field	Description
Stakeholder	User involved in solving the issue.
Responsibility	Responsibility of the stakeholder.
RACI	Role of the stakeholder involved in the issue. <ul style="list-style-type: none"> • None • Responsible • Accountable • Consulted • Informed

Work order form

Create and track field service work orders for on-site correction, containment, or repair activities linked to a QIM record.

Work order form

Field	Description
Number	Work order number that is automatically generated. The number starts with WO and incremented for every new report.
Company	Company for which the work order was opened. The lookup list shows only those companies designated as Customers in their company record.
Contact	Person that requires the work. The lookup list shows only users associated with the selected Company.
Requestor service organization	Represents the requestor service organization that has initiated creation of the work order. Note: The Requestor Service Organization field appears only when the Service Organization (com.snc.service_organization) plugin is installed.
Asset	The asset tag number or the serial number of the asset involved in this case. If there are multiple assets, provide the details of the primary asset and add the rest under Affected Products in the Related Links panel.
Affected CI	Primary item that requires work, such as a broken laptop or a printer that needs ink. Configuration Item lookup lists are based on the selected Company. If more than one item

Work order form (continued)

Field	Description
	requires work, add them to the Affected CIs related list.
Location	Geographical area (physical location) where the work must be done. Location field is automatically populated with the location that is mapped with the selected Provider Service Organization .
Template	Template for creating this work order (optional).
Opened	Date and time the work order was opened.
Priority	Precedence of the work order, based on severity of the impact, number of users affected, or other factors. The SLA applied to this work order is determined by the priority selected in this field.
State	Current stage of the work order in the work order life cycle.
Provider Service Organization	Represents the fulfiller service organization. Note: The Provider Service Organization field appears only when the Service Organization (com.snc.service_organization) plugin is installed.
Qualification group	Group that can specify the technical details of the work order. The lookup list shows only the qualification groups associated with the selected Location. If no qualification groups exist for the location, all qualifications groups are listed and any can be selected.
Initiated from	Record number of the original problem, incident, change request, or other work order from which the work order was created.
Billable	Option for issuing a statement of fees or charges for the work order. This is useful for running reports on billable work orders.
Short description	Short description is auto fetched from the correction action.
Description	Detailed information describing the work to be performed. Initiators create work orders, but qualifiers should add as much detail about the work to be performed as possible to avoid extra communication with the caller.

Work order form (continued)

Field	Description
Work notes	Information about the work order and how it was completed. This field is not visible to customers. Work notes are added throughout the work order life cycle to help users who work on it to communicate useful information.
Additional comments (Customer visible)	Add any additional notes, if required.
Parent	Select the parent record from the list.
Scheduling	
Scheduled start	Date and time when the earliest task is scheduled to start.
Estimated end	Estimated date when all tasks will be completed.
Actual work start	Date and time when the earliest task actually started.
Actual work end	Date and time when the last task actually ended.
Requested due by	Estimated date when the latest task will be completed. The Lead Time for the maintenance schedule is subtracted from the Requested due by date for the work order to determine this date.
Latest completion date	Date when the previous work order for the schedule occurrence was completed.

Related topics

[Create a work order](#)

Effectiveness goal form

The effectiveness goal form captures the fields used to track and measure a remediation action or action plan's outcome against defined targets.

Effectiveness goal fields

Field	Description
Name	Name of the effectiveness goal.
Parent goal	Parent effectiveness goal, used to support goal hierarchies.
Start date	Date on which tracking begins.
Effectiveness result	Outcome of the effectiveness review.
Effectiveness reason code	Reason code associated with the effectiveness result.
State	State of the effectiveness goal's lifecycle.
Owner	User assigned to the effectiveness goal.

Effectiveness goal fields (continued)

Field	Description
End date	Date on which tracking for the effectiveness goal ends.
Target review date	Date on which the effectiveness goal's targets are reviewed.
Effectiveness notes	Add notes.
Comments	Add comments.

Related topics

[Create an effectiveness goal](#)

Supporting goals form

The Supporting goals form enables you to add the supporting goal details, such as name, parent goal, owner, start date, end date, and target review date.

Supporting goal fields

Field	Description
Name	Name of the effectiveness goal.
Parent goal	Parent effectiveness goal, used to support goal hierarchies.
Start date	Date on which tracking begins.
State	State of the effectiveness goal's lifecycle.
Owner	User assigned to the effectiveness goal.
End date	Date on which tracking for the effectiveness goal ends.
Target review date	Date on which the effectiveness goal's targets are reviewed.

General form

General forms used in MCO.

Effectiveness form

This form enables you to add the effectiveness information.

Field	Description
Effectiveness result	Outcome of effectiveness review.
Effectiveness review date	Date on which the action plan's effectiveness is formally reviewed.
Effectiveness reason code	Reason why the plan was not fully effective (if applicable).
Effectiveness notes	Additional notes on review result, failures, or supporting evidence.

Discuss form

The Start a Sidebar discussion form enables you to start a discussion.

Discuss form

Field	Description
Record number	Enter the record number on which you want to initiate the discussion.
Subject	Enter the primary area of discussion.
Add participants	Add user who should be part of the discussion.
Include a brief message for participants	Enter a brief note.
Private discussion	Select this option to make the discussion private. Start private discussion option is enabled.

Notes form

Notes form enables you to add the watch list details.

Field	Description
Watch list	Add names of users who receive notifications and can view the case task.
Watch notes list	Add names of users who receive notifications and can view the work notes of the case task.
Work notes (Private)	Enter the work notes.
Additional comments (Customer visible)	Enter additional comments for customer, if any.

Resolution information form

This form enables you to add the report closing details.

Field	Description
Closed by	Select the user who closed the report.
Closed	Select the date on which the report is closed.
Close notes	Enter note, if necessary.

Domain separation for MCO

Domain separation is supported for Manufacturing Commercial Operations. 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 the users who can see and access data.

Support level: Standard

- Includes all aspects of **Basic** level support.
- Application properties are domain-aware as needed.
- Business logic: The service provider (SP) creates or modifies processes according to customer. The use cases reflect proper use of the application by multiple SP customers in a single instance.
- The instance owner must configure the minimum viable product (MVP) business logic and data parameters according to the tenant as expected for the specific application.

Sample use case: An admin must be able to comment when a record closes for one tenant, but not for another.

For more information on support levels, see [Application support for domain separation](#) .

Domain separated tables

 **Note:** All Manufacturing Commercial Operations tables support domain separation.