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# Brazil Sales Customer Relationship Management

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# Sales Customer Relationship Management

ServiceNow® Sales Customer Relationship Management (Sales CRM) applications enables organizations to manage the product sales life cycle. Your agents can use these applications to generate pre-sales leads and opportunities, provide sales quotes, capture and fulfill orders, work with contracts and entitlements, and manage the customer order workflow for changes.

| | | |
|---|---|---|
| **Explore**<br><br>Learn how you can use the Sales CRM applications. | **Configure**<br><br>Plan and configure your Sales CRM implementation. | **Use**<br><br>Use the Sales CRM applications as an agent. |
| **Integrate**<br><br>Extend capabilities in Sales CRM by integrating with other applications. | **Reference**<br><br>Get details about components such as fields, tables, and properties. | **Automate**<br><br>Improve customer, agent, and partner productivity and user experience with AI#powered tools and workflows. |

## Additional resources

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

# Exploring Sales Customer Relationship Management

Whether you're starting or expanding a Sales Customer Relationship Management (Sales CRM) implementation, learn more about its available applications and workflows. These support pre-sales engagement, order capture and fulfillment, order to cash operations, and post-sales activities.

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## Overview of Sales CRM

The Sales CRM applications enable you to manage the product sales life cycle in your organization. This includes pre-sales leads and opportunities, sales quote generation, order capture, order fulfillment, order and invoice cases, and post-sales order changes and contract renewals.

To support the product sales life cycle, Sales CRM provides the following features and applications.

### Sales CRM high-level workflow

## Benefits

With the Sales CRM applications, your organization can improve sales and order processes as well as agent productivity by managing the lead to renewal life cycle on one platform. The applications fuse front, middle, and back-office teams with one system of engagement and action. By connecting existing applications and adding ServiceNow workflows, Sales CRM helps increase organizational efficiency, speed order fulfillment, and both accelerate and boost revenue.

### Sales automation

| Benefits | Application or key feature | Persona |
|---|---|---|
| Create and manage leads for potential customers and product sales. | Lead Management | Sales agent and account executive |
| Create automated and manual activities to engage with leads | Customer Engagement Sequences | Sales agent, sales operations team, sequences admin |

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### Sales automation (continued)

| Benefits | Application or key feature | Persona |
|---|---|---|
| and customers at every stage of their relationship with your business. | | |
| Unify customer stakeholders across an account by representing all roles involved in a product#family purchase and persisting before, during, and after an opportunity. | Buying Group | Sales agents, account executives, sales development representatives, sales managers |
| Create pre-sales opportunities that identify and track potential sales based on customer needs. | Opportunity Management | Sales agent and account executive |
| Project your future sales volumes and revenue based on data from opportunities. | Sales Forecasting | Sales manager and sales representative |
| Organize sales efforts by territory. Divide CRM entities such as accounts, leads, opportunities, and consumers into manageable segments to promote efficient coverage and accountability. | Sales Territory Management | Sales territory administrator and manager |
| Streamline customer interactions by enabling teams to plan, execute, capture, and track engagement across channels and key touchpoints throughout the customer lifecycle. | Activity Management | Sales agents, account executives, sales development representatives, sales leadership |

### Configure, price, quote

| Benefits | Application or key feature | Persona |
|---|---|---|
| Streamline the process of configuring and pricing customizable products that are added to Sales Customer Relationship Management transactions. | CPQ Configurator | Sales and order agent, admin to set up |
| Quickly configure and price opportunities, quotes, and orders for simple and complex product offers. | Configurator | Sales and order agent, admin to set up |
| Get intelligent recommendations for products to offer to customers | Product Offering Recommendations | Sales agent, admin to set up |

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### Configure, price, quote (continued)

| Benefits | Application or key feature | Persona |
|---|---|---|
| based on their preferences and purchase history during the quote process. | | |
| Set the pricing for your products through price lists, contextual price controls, and if needed, pricing from external systems. | Pricing Management | Pricing administrator or manager |
| Create and manage sales quotes, which are formal offers for products or services that agents propose to customers. | ServiceNow Quote Experience | Sales agent |
| Define workflows for approving Sales Customer Relationship Management entities, such as customer quotes, in your sales organization. | Advanced Approval Management | Sales or business operation managers, members of sales, finance, and legal teams, sales representatives |
| Create and manage contracts and entitlements from the initial offer to contract finalization. | Customer Contracts and Entitlements | Agent |
| Create and manage binding agreements between your sales organization and buyers, with specified items, quantities, prices, terms, and effective periods. | Sales Agreement Management | Sales and order agent |

### Order management

| Benefits | Application or key feature | Persona |
|---|---|---|
| Capture and fulfill product and service orders to create a seamless ordering experience for your customers. | Order management | Order agent, fulfillment agent, agent manager, and fulfillment manager |

### Order operations

| Benefits | Application or key feature | Persona |
|---|---|---|
| Create and manage cases for customer orders and invoices. | Order Operations Case Management | Order case, invoice case, and customer service agent |
| Empower sales teams by providing a consolidated view of all critical sales data and activities. | Lead-to-Cash Process Management | Sales manager |

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### Order operations (continued)

| Benefits | Application or key feature | Persona |
|---|---|---|
| Manage return, replacement, or refund cases for installed products. | Return Merchandise Authorization | Agent |

### Post-sales engagement

| Benefits | Application or key feature | Persona |
|---|---|---|
| Support change management and commercial workflows (move, add, change, and disconnect) for sold products. | Customer Life Cycle Management Workflows | Agent |

### Partner relationship management

| Benefits | Application or key feature | Persona |
|---|---|---|
| Hire and engage channel partners to sell your products and services, helping you to grow and improve your business. | Partner Relationship Management | Channel partners |

### Lead-to-cash foundation

| Benefits | Application or key feature | Persona |
|---|---|---|
| Create and manage product catalogs for commercial and technical product offerings. Commercial catalogs can be used by your agents to create opportunities, quotes, and orders. | Product Catalog Management | Product catalog administrator or manager |
| Create the workflows for your organization and configure the metadata for your various Sales Customer Relationship Management entities. | CRM Core | Agent, admin to configure |

### Business Portal

| Benefits | Application or key feature | Persona |
|---|---|---|
| Support your business-to-business customers by enabling self-service capabilities through the Business Portal to create and manage orders, submit order issues, and requests. | Customer self-service for Sales Customer Relationship Management | Customer, admin for set up |

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### What to explore next

- Configuring Sales Customer Relationship Management applications
- Using sales automation applications
- Using Order Management

### Request apps on the Store

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

## AI capabilities in Sales CRM

Sales CRM includes generative and agentic AI capabilities that helps you automate sales workflows and enables sales teams to work more efficiently within your CRM environment.

### AI plugins for Sales CRM

ServiceNow AI Platform and the following ServiceNow Otto plugins together provide AI capabilities for Sales CRM workflows:

- ServiceNow Otto for Sales Automation (sn_som_gen_ai)
- ServiceNow Otto for Configure, Price, Quote (CPQ) (sn_som_gen_ai_cpq)
- ServiceNow Otto for Order Management (sn_som_gen_ai_om)

These plugins are included in the existing Sales CRM products, bringing AI-powered automation through three licensing tiers each reflecting a different level of automation maturity:

- Foundation: Default AI assistance for simple sales processes.
- Advanced: Agentic workflows and multi-step automation.
- Prime: Custom AI agent development.

Each ServiceNow Otto plugin packages the individual AI plugins and required dependencies.

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

### ServiceNow Otto for Sales Automation benefits

| Benefit | Feature | Store plugin | Used with |
|---|---|---|---|
| Manage the lead life cycle using an agentic workflow. | Nurturing leads using agentic workflow | Sales Development AI Agents (com.sn_sd_ai_agents) | Lead Management |
| Retrieve, update, create, and delete opportunity records and related CRM data from ServiceNow Otto and an MCP client using natural language. | CRM conversational query | Opportunity Management AI Features (com.sn_opty_mgmt_ai) | Opportunity Management |

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| Benefit | Feature | Store plugin | Used with |
|---|---|---|---|
| Get an immediate view of key details, customer needs, recent activity, and risks about an opportunity without reviewing multiple records. | Summarize opportunities | Opportunity Management AI Features (com.sn_opty_mgmt_ai) | Opportunity Management |
| Score opportunities, surface risk signals, and deliver qualitative insights that help sellers and leaders make faster, more confident decisions using machine learning. | View opportunity scores and insights | Opportunity Management ML (sn_opty_mgmt_ml) | Opportunity Management |
| Associate sales emails with CRM records using AI-powered workflow. | AI sales activity association | AI sales activity association (com.sn_act_assoc_agent) | Activity Management |

## ServiceNow Otto for CPQ

| Benefit | Feature | Store plugin | Used with |
|---|---|---|---|
| Generate a consolidated report of a quote record to quickly understand the quote without manually reviewing multiple fields, line items, or related records. | Summarize a quote using quote summarization | Summarization for Quote Management (com.sn_qut_sum_skill) | Quote Experience |
| Automate and streamline the sales quote creation and modification process by using AI to detect quote needs from triggers like opportunity stage changes and keywords. | Manage quotes using the Quote AI Agent | Summarization for Quote Management (com.sn_qut_sum_skill) | Quote Experience |
| Enable agents to submit quotes for approval and approvers to take action on approval requests directly from their MCP client, such as the Claude Desktop application. | Advanced Approval Management AI | Advanced Approval Management AI (sn_adv_apr_mgt_ai) | Advanced Approval Management |

## ServiceNow Otto for Order Management benefits

| Benefit | Feature | Store app | Used with |
|---|---|---|---|
| Make more accurate and faster decisions and improve customer responsiveness by generating order summaries for complex orders. | Summarize orders | Summarization for Order Management (com.sn_ord_sum_skill) | Order Management |
| Improve productivity of order agents by enabling them to update order and order line details in bulk. | Manage order updates | Assist Order Management AI Agent (com.sn_order_cap_aias) | Order Management |
| Enable B2B customers to request changes to orders via chat and voice options. | Manage order operations | Manage Order Operations (com.sn_ord_ops_aias) | Business Portal |

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| Benefit | Feature | Store app | Used with |
|---|---|---|---|
| Enable B2B customers to dispute invoices using chat and voice options. | Manage invoice operation | Manage Invoice Operations (com.sn_inv_ops_aias) | Business Portal |

**Important:**

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

## What to do next

Install and configure the AI plugins to enable generative and agentic AI features that support Sales CRM workflows. For more information, see Configuring AI capabilities in Sales CRM.

## Troubleshoot and get help

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

### AI limitations

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

### Data processing

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

### Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

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# Sales automation

ServiceNow® sales automation applications support your sales life cycle from capturing leads to forecasting revenue. Explore each module to streamline engagement, optimize territory coverage, and drive conversion.

## Get started

Select a link from the following table to learn about key features and benefits of an application and how it can be used by the user personas in your sales organization.

**Sales automation applications**

| Application | Description |
|---|---|
| Lead Management | Capture, qualify, and nurture potential customers. |
| Customer Engagement Sequences | Automate and personalize outreach strategies. |
| Buying Group | Create solution-specific buying groups, assign stakeholder roles, and link to opportunities. |
| Opportunity Management | Track and advance sales opportunities through the pipeline. |
| Sales Forecasting | Predict revenue and plan resources with confidence. |
| Sales Territory Management | Define and manage sales regions for better coverage. |
| Activity Management | Plan, execute, capture, and track customer interactions across multiple channels throughout the customer life cycle. |

## What to explore next

Configure the sales automation applications, so your agents can use them in their sales workflows. For more information, see Configuring the sales automation applications.

## Lead Management

The Lead Management application enables your sales agents and sales development representatives to create leads and nurture them into opportunities.

In a sales cycle, prospective customers express their interest through various channels, such as website forms, social media, or events. With the information captured through these channels, the sales agent creates a lead. After a lead is created, it goes through multiple processes to get converted into an opportunity.

The processes include:

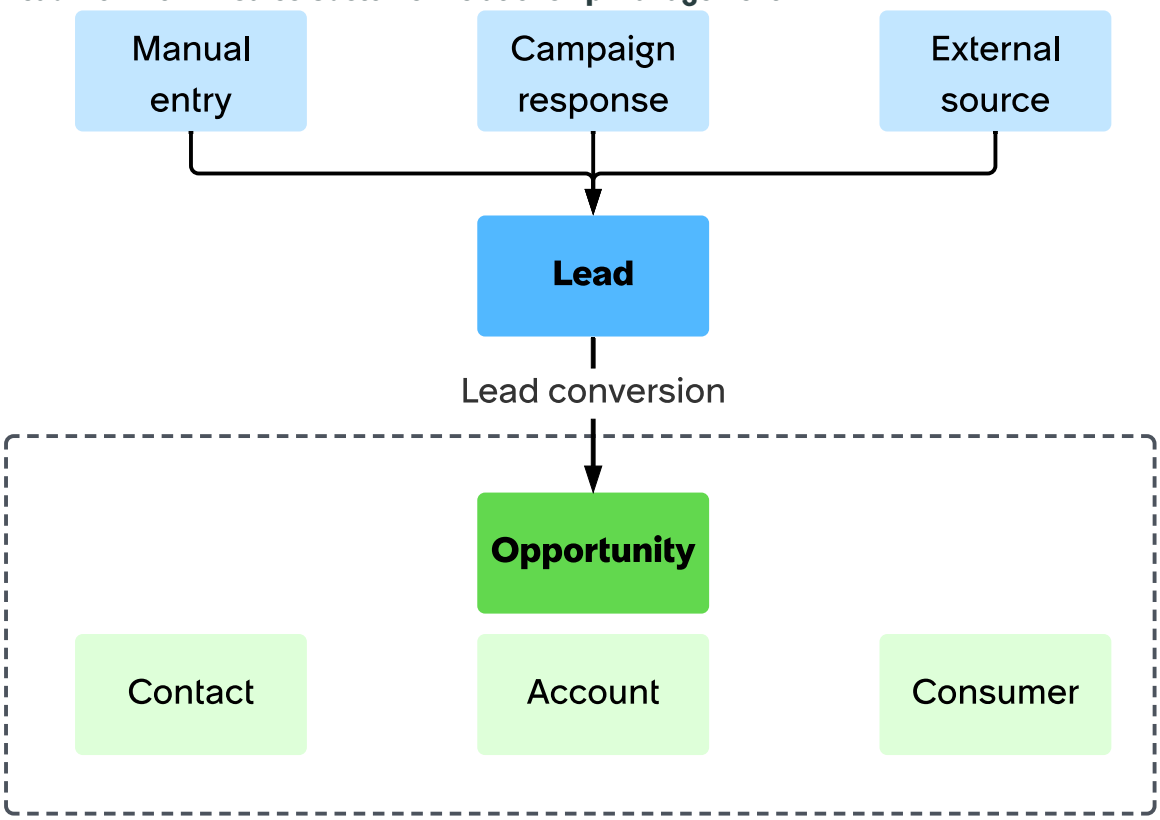
- Lead scoring: Prioritizing leads based on predefined criteria for more focused attention.
- Lead qualification: Determining if a lead meets certain criteria to be considered a sales-qualified lead.
- Lead assignment: Assigning leads to the correct sales development representative to follow up.

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- Lead nurturing: Engaging with leads until they become sales-ready.
- Lead segmentation: Categorizing leads based on industry, behavior, or other parameters for targeted marketing.

As sales agents move through the lead workflow and recognize interest from customers in buying products, it becomes essential to qualify or convert the lead. This process includes linking the lead to specific accounts and establishing lead qualification, which ultimately generates product orders.

**Lead workflow in Sales Customer Relationship Management**




## What to explore next

To learn about setting up Lead Management, see Configuring Lead Management.

## Customer Engagement Sequences

Customer Engagement Sequences is a playbook that consists of a series of automated and manual activities that can be set up to engage with leads and customers at every stage of their relationship with your business through various channels.

## Customer Engagement Sequences overview

Use ServiceNow® Customer Engagement Sequences to provide structured plans to sales representatives for prospects, which helps ensure consistent messaging and effective objection-handling. Standardizing repetitive tasks means representatives can focus on high-value actions.

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## Customer Engagement Sequences users

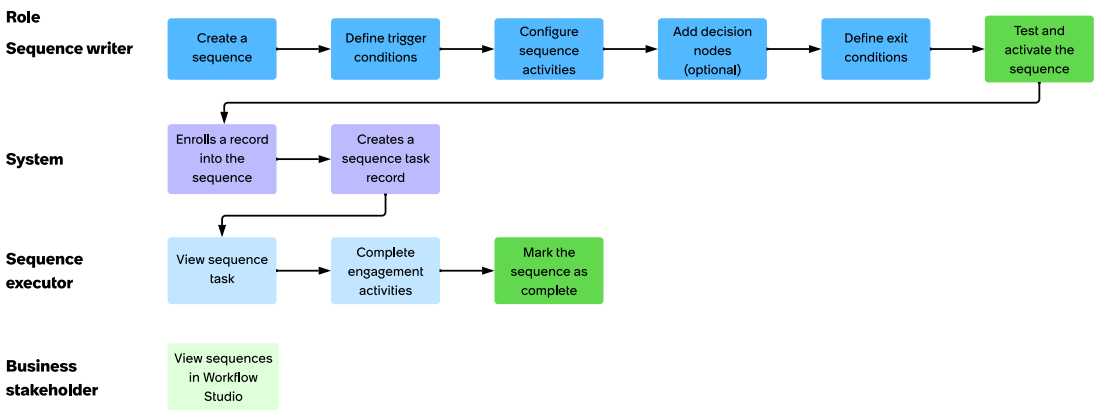
### Users

| User | Description |
|---|---|
| Sequence admin, sequence writer<br><br>(For example, Sales admin, Sales Development Manager (SDM)) | Creates multi-step sequences using Workflow Studio and defines triggers (start conditions), activities (for example, call or email attempts), and exit conditions. |
| Sequence executor<br><br>(For example, Sales Development Representative (SDR), account executive, customer success manager, telesales representative) | Views sequence tasks that are assigned to them and executes targeted outreach strategies, often using a combination of emails, phone calls, and social media, to engage prospects and move them through the initial stages of the sales funnel using the predefined sequence steps. |
| Business stakeholder<br><br>(For example, sales operations manager) | Views sequences in Workflow Studio to identify and share high-performing workflows across territories, driving process optimization, consistency, and improved sales performance. |

## Customer Engagement Sequences workflow

The following illustration describes the tasks involved in configuring and using Customer Engagement Sequences.

### Creating and using Customer Engagement Sequences




1. As a sequence writer, create a customer engagement sequence such as a lead-nurturing sequence from the CRM Workspace.
2. Define the sequence parameters:
   - Single or multi-trigger conditions (for example, when a new lead is created)
   - Sequence steps (for example, call, follow-up, email)

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- Delay between steps (for example, wait three days between two call attempts)
- Exit conditions (for example, lead conversion or disqualification)

3. Test and activate the sequence.
4. Every record that meets the trigger condition is added to the sequence, and a sequence task associated with the record is created. For example, when a new lead record is created in the system, the sequence is run, and it generates a sequence task.
5. As a sequence executor, view the assigned sequence task and complete the series of predefined activities that are part of it. For example:
   - Day 1: Call the prospect
   - Day 4: Make a follow-up call and use a questionnaire to gather more information
6. The sequence task moves to closed state when all sequence steps have been completed or the predefined exit condition is met.
7. Business stakeholders with sequence reader role can view the sequences in Workflow Studio to suggest process improvements to the SDMs and share high-performing sequences with other sales teams situated in different territories.

## Customer Engagement Sequences benefits

### Customer Engagement Sequences benefits

| Benefit | Feature | Users |
|---|---|---|
| • Configure sequences using Workflow Studio to reduce dependency on developers.<br>• Provide a structured, multi-step plan to sales representatives for each prospect so they know exactly when to call, email, or send a social media message.<br>• Personalize outreach by inserting a prospect's name, company, and other details.<br>• Ensure consistent messaging and effective objection handling by providing teams with clearly defined steps that dynamically adapt to customer responses. | No-code interface to build customer engagement sequences | Sequence admin, sequence writer |
| Reduce duplicating sequence workflows by specifying multiple record-based triggers on various entities that can initiate a sequence. | Define trigger conditions | Sequence admin, sequence writer |
| Design telesales-oriented sequences using the schedule call activity, and enable outbound click-to-call capability by integrating with platforms such as Amazon Connect. | Add a schedule call activity to a telesales workflow sequence | Sequence admin, sequence writer |
| • Boost productivity by minimizing repetitive tasks so sales representatives can focus on high-value activities.<br>• Reduce the chance of missing a follow-up, ensure consistency in outreach, | Predefined activities that align with business goals and outreach strategy | Sequence executor |

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**Customer Engagement Sequences benefits (continued)**

| Benefit | Feature | Users |
|---|---|---|
| and minimize manual effort by following predefined steps.<br>• Accelerate onboarding by enabling new sales representatives to adopt proven outreach strategies from existing sequences. | | |
| Use the click-to-call capability to connect with prospective customers from the sequence task without needing to leave your workspace. | Fulfill a telesales sequence | Sequence executor |
| Accelerate lead nurturing by creating an email-based sequence that automates outreach and follow-up. | Customize the Lead nurturing email sequence | Sequence admin, sequence writer |

## What to explore next

The following topics provide more information about configuring and using Customer Engagement Sequences:

- Configuring Customer Engagement Sequences
- Using Customer Engagement Sequences
- Components installed with Customer Engagement Sequences
- Exploring Workflow Studio

## Buying Group

Buying Group represents the customer stakeholders within an account involved in a purchase decision for a product offering family, supporting multiple roles and persisting before, during, and after an opportunity.

## Buying Group overview

Buying Groups represent the set of stakeholders involved in a B2B purchase decision. Buying Group captures all contacts who influence the decision, track roles and engagement at both the individual and group level, and identify gaps such as missing roles or inactive participants. This structure helps teams assess stakeholder coverage and manage the buying process more effectively.

## Buying Group users

**Users**

| User | Description |
|---|---|
| Marketing and sales development representative (SDR) teams | Create and manage Buying Groups early, identify relevant personas, and qualify buying readiness before an opportunity exists. |
| Account Executives (AEs)/Sales agents | Attach Buying Groups to opportunities, validate roles and stakeholders, identify gaps, |

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**Users (continued)**

| User | Description |
|---|---|
| | and manage engagement during the sales process. |
| Sales managers and leaders | Review Buying Groups to assess opportunity health, stakeholder coverage, and risk across deals. |

## Buying Group benefits

**Benefits**

| Benefits | Details |
|---|---|
| Identification of decision stakeholders | Buying Groups make it explicit which contacts are involved in a purchase decision and what roles they play. |
| Structured evaluation of stakeholder roles | By tracking roles at the group level, Buying Groups help identify missing roles or stakeholders who are present but not engaged. |
| Early validation of buying readiness | Buying Groups help teams evaluate decision completeness before or during an opportunity, rather than evaluating contacts in isolation. |
| Continuity across opportunities | A Buying Group is an account#level construct that can be reused across multiple opportunities, preserving knowledge of the buying committee over time. |
| Improved coordination between marketing and sales | Buying Groups provide a shared structure that spans pre#sales and sales stages, enabling consistent tracking of stakeholder involvement and engagement. |
| Better opportunity risk assessment | By showing engagement and participation gaps at the stakeholder level, Buying Groups support more informed evaluation of deal health and potential risks. |

## What to explore next

The following topics provide more information about configuring and using Buying Group:

- Configuring Buying Group
- Using Buying Group

## Opportunity Management

The ServiceNow® Opportunity Management application enables your sales agents and account executives to analyze customer needs and generate product recommendations for potential customers.

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An opportunity in Sales Customer Relationship Management provides complete information about a product or service based on the needs of a customer (called a qualified lead). A lead for a product is the minimal information that a sales agent uses to advance the conversation with a potential customer and create an opportunity.

**Opportunity workflow in Sales Customer Relationship Management**




## Opportunity Management interface

The Opportunity Management application is integrated with the Product Catalog and product configurator to help sales agents access product offerings to build opportunities. The Opportunity Management interface contains the following tabs:

**Opportunity Management tabs**

| Tab | Description |
|---|---|
| Overview | Summary of key deal information including account, stage, amount, AI-generated opportunity insights and probability score, and guided selling actions such as stage exit criteria and playbook activities. |
| Details | Add basic information for the opportunity. |
| Catalog tab | Search for and add product offerings to your opportunity. |
| Needs | Lists the need templates that provide product recommendations for the opportunity. |
| Line Items | Add different line items to an opportunity. |
| Quotes | Create quotes directly from opportunities. |
| Contacts | Create opportunity associated contacts. |
| Team | Create opportunity team members. |
| Competitors | Record competitor information. |
| Emails | Create emails to send to the required stakeholders. |
| Allocations | Distribute sales credit across multiple contributors on a single opportunity. |
| Tasks | Create opportunity tasks. |
| Meetings | Related list of all meetings scheduled and associated with the opportunity. |

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**Opportunity Management tabs (continued)**

| Tab | Description |
|---|---|
| Touchpoints | Related list of customer interaction records (calls, emails, engagement activities) logged against the opportunity. |
| Related Channel Partners | Add authorized service organizations or partner entities (for example, referral or influencer partners) linked to a customer opportunity.<br><br>Related channel partners can be:<br>• Authorized organization: Full permissions to access, view, edit, or modify opportunity details<br>• Listed organization: Only for tracking purposes. No permissions to view, access, edit, or delete opportunity details |

## Integrating pricing in Opportunity Management

Opportunity Management integrates with the pricing engine to consume the default price list and displays the total price and unit price of product offerings in your opportunity.

Based on the prices of product offerings (POs) that are added to the opportunity, the total price values are auto-calculated. For more information, see Add and view the details of an opportunity and Add line items to an opportunity.

Pricing in Opportunity Management provides the following benefits:

- Revenue forecasting: The pricing engine helps agents evaluate an opportunity's total worth by computing the combined prices of each offering included, which in turn helps teams to strategize resource or budget allocation for deals.
- Deal prioritization: By analyzing the potential revenue of each opportunity, your sales team can focus on the deals based on their financial impact. For example, teams can focus on deals with higher potential revenue and higher margins.
- Negotiation enhancement: The pricing engine gives your sales team real-time pricing insights, which enhances the negotiation process by enabling your sales team to tailor offers that meet customer needs while maintaining profitability.

To learn more about pricing, see Pricing Management.

## AI capabilities that support Opportunity Management

**Opportunity summary**

Generate an AI summary for an opportunity record that enables you to get synthesized information from emails, touchpoints, deal stage, line items, and more without opening every related activity, contact, or deal record. For more information, see Summarize an opportunity using ServiceNow Otto for Sales Automation.

**Opportunity scores and insights**

Review AI-generated win probability scores and contextual insights for an opportunity to assess deal health and its probability to close. Use this to prioritize

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pipeline opportunities and identify risks. For more information, see View opportunity scores and insights.

Because opportunity scoring (Probability to Close) uses Predictive Intelligence and machine learning, you must train the ML model on the existing data. For more information, see Set up ML-based opportunity scoring and insights.

**CRM conversational query**

Ask questions and issue commands to work on an opportunity in plain language using an MCP client such as Claude Desktop. For more information, see CRM conversational query and Manage opportunity records using an AI interface.

## What to explore next

The following topics provide more information about configuring and using Opportunity Management

- Configuring Opportunity Management
- Using Opportunity Management
- Opportunity Management reference

The following topics provide links to resources for configuring and using AI capabilities with Opportunity Management

- AI capabilities in Sales CRM
- Configuring AI capabilities in Sales CRM

### Guided selling on opportunities

Guided selling on opportunities enforces process compliance and consolidates deal-related actions into a unified workspace so that sales agents can advance opportunities through each stage with confidence.

Guided selling helps sales agents follow a consistent, structured process as they move an opportunity through each stage of the sales cycle. Admins configure mandatory exit criteria for each stage, and agents complete the required actions before advancing to the next stage. This reduces the risk of deals stalling or advancing prematurely.

## Guided selling components

Guided selling on opportunities includes the following components:

**Stage exit criteria**

Mandatory conditions that a sales agent must meet before advancing an opportunity to the next stage. Admins define the criteria per stage. The system prevents stage advancement until all required actions are complete.

**Playbook activities**

Stage-contextual guidance that appears on the opportunity **Overview** tab. Playbook activities include progress indicators and an inline compact playbook view so that agents can track their progress without leaving the opportunity workspace.

**Action Center**

A panel on the opportunity that consolidates all deal-related tasks, meetings, touchpoints, quote tasks, and stage guidance in one place. The Action Center updates in real time as agents complete actions.

**Closed stage reason enforcement**

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Optional enforcement that requires sales agents to complete the win or loss reason fields before they move an opportunity to the Closed Won or Closed Lost stage. Admins enable this enforcement through system properties. For more information, see Configure guided selling activities in a playbook.

### Benefits

Guided selling provides the following benefits:

- Enforces process compliance by requiring agents to complete defined actions before advancing a stage.
- Reduces deal risk by surfacing contextual guidance at each stage of the sales cycle.
- Improves visibility for sales managers by providing a consistent, trackable process across the team.
- Reduces context switching by consolidating tasks, meetings, touchpoints, and stage guidance in the Action Center.

### What to explore next

To set up guided selling, see Configure guided selling activities in a playbook.

To use guided selling on an opportunity, see Use guided selling on an opportunity.

## Sales Forecasting

Project your future sales and revenue based on data from opportunities, historical performance, and pipeline analysis using Sales Forecasting. With this application, sales managers can allocate resources effectively, receive constructive feedback, and forecast sales with precision to make informed decisions.

Sales representatives are directly involved in communicating with their managers about the sales opportunities that they are handling, offering insights into what they expect to close during the forecast period. Sales Forecasting uses the data from the opinions and insights of your sales representatives on how they feel about the deals in their pipeline. The longer a prospect progresses along the sales pipeline, the better their chances of converting.#For example, a prospect who just signed up for your product's free trial is 20% more likely to convert into a paying customer. Whereas a prospect who attended the product demo is 80% likely to sign a contract.

Sales managers own the overall forecast for a group of sales representatives. Sales managers collect data from their team members and adjusting the forecasts based on these insights. They set sales targets and quotas for individual representatives and distribute targets.

### Key benefits

- Resource allocation:#Efficiently allocate budget and resources based on projected sales and revenue expectations.
- Budgeting and Financial Planning: Supports financial planning and budget creation by offering insights into anticipated revenue.
- Primary and secondary level hierarchy: Enable forecast owners to configure forecasting with product family as a secondary hierarchy with the primary hierarchy as territory or sales team.
- Base forecast source: Enable forecast owners to submit and adjust forecasts at base forecast source.

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- Multi-Period forecast rollups: Achieve better planning and strategy by configuring and managing forecasting for multiple time periods (weekly, monthly, quarterly) within a single forecast model for flexible data reporting.
- Sales Target Setting: Define sales targets and quotas for sales teams, territories, and individual sales representatives.
- Tracking Sales Targets: Track the sales and status of quota target achieved for your agents and team.

## What to explore next

The following topics provide more information about configuring and using Sales Forecasting:

- Configure Sales Forecasting
- Using Sales Forecasting

### Sales Forecasting terminology

Use the following list of terms to gain an understanding of Sales Forecasting concepts, components, and configuration.

## Forecast Model

The Forecast Model is a framework or method used to predict future sales based on historical data, current sales activities, and other relevant factors. It helps businesses estimate the expected sales figures over a specific period, such as a quarter or year. Only one forecast model, Opportunity Amount Forecast is available to the users. You can forecast the sales for the current opportunities in the system. The **Submission Required** option is enabled by default. From the **Submission Frequency** list, select weekly, monthly, or configure a customized time period to submit your final forecasts. For more info, see Creating business calendars. By default, Sales Team is selected in the Forecast Hierarchy Type list and the Sales Forecasting dashboard displays the forecasts based on sales teams. To view forecasts by regions or territories, select **Territory** from the **Forecast Hierarchy Type** list. To configure a territory see, Configuring the Territory. For more info, see Sales Territory Management.

## Forecast Category

The classification of opportunities is based on the level of certainty regarding their closure. The longer a sales prospect progresses along the sales pipeline, the better their chances of converting.#The forecast admin can configure these categories. By default, these six categories are available:

- Won:#Opportunities that have already been closed and won.
- Commit: Opportunities that sales representatives are confident will close in the forecast period.
- Strong upside:#Opportunities with greatest potential to close but have some minor uncertainty.
- Upside:#Opportunities with potential to close but with lower level of certainty.
- Pipeline: Opportunities in the early stages of the sales process with uncertainty if they will be closed deals.
- Omitted:#Opportunities that are excluded from forecast due to lack of data.

## Forecast rollup method

The forecast model defines how opportunities in different categories are aggregated into a forecast. There are two primary types of rollups: single and cumulative.

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When you select Single, this rollup method ensures that each forecast category is represented in its own column, with only the opportunities in that category being included.

**Single rollup method**

| Column Name on Forecast page | Opportunities that roll up to it from a forecast category |
|---|---|
| Pipeline | Pipeline |
| Upside | Upside |
| Strong Upside | Strong Upside |
| Commit | Commit |
| Won | Won |

When you select Cumulative, this rollup method aggregates forecast categories in a cumulative manner, where each subsequent category includes the opportunities from the previous categories. Each cumulative rollup method aggregates opportunities from higher order forecast categories.

**Cumulative rollup method**

| Column Name on Forecast page | Opportunities that roll up to it from a forecast category |
|---|---|
| Open pipeline | Pipeline + Upside + Strong Upside + Commit + Won |
| Cumulative Upside | Upside + Strong Upside + Commit + Won |
| Cumulative Strong Upside | Strong Upside + Commit + Won |
| Cumulative Commit | Commit + Won |
| Won | Won |

## Forecast schedule

The forecast schedule fetches all the opportunities in the system and generates the latest forecast data.

## Sales Quota Management

You can assign sales quota targets to sales representatives and managers based on their hierarchy, role, and forecast period.

## What to explore next

- Configure Sales Forecasting
- Using Sales Forecasting

## Sales Territory Management

Sales territory management enables you to structure and optimize the sales efforts of your organization based on territories. It focuses on dividing CRM entities, such as accounts, leads,

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opportunities, and consumers, into manageable segments (geographical, product, or industry-based) to promote efficient coverage and accountability.

## Sales Territory Management overview

Sales Territory Management executes and refines the territory plan so that the sales representatives cater to the correct leads and opportunities, optimizing sales efforts. It involves overseeing daily sales activities, adjusting team assignments to complete customer coverage, monitoring sales performance against goals, and updating territory assignments as markets change. Sales Territory Management plugin supports managing and distributing accounts, consumers, leads, and opportunities based on conditions to different sales territories.

## Sales Territory Management users

**Users**

| User | Description |
|---|---|
| Sales Territory Admin | Manage and view sales territory and CRM like Account, Consumer, Lead, and Opportunities. |
| Sales Territory Viewer | View sales territory. |
| Sales Territory Manager | Manage members and their roles in the territory hierarchy. |

## Sales Territory Management benefits

| Benefits | Details |
|---|---|
| Efficient territory allocation | Helps allocate sales regions efficiently to match business complexity and sales team distribution to avoid team overload. |
| Equitable distribution | Verifies fair distribution of sales among sales representatives. Automating territory assignments reduces manual tasks, enabling sales agents to focus more on selling. |
| Clear sales accountability | Assigning defined accounts or regions clarifies sales responsibilities and improves team accountability. |
| Segmentation | Based on the potential of each territory, you can effectively organize sales teams, avoid competing priorities for sales representatives, and set targets accurately. |
| Data security and compliance | Territory-based data sharing rules promote only authorized users access specific records, maintaining security and compliance. |
| Enhanced reporting and forecasting | Offers insights on sales team performance, enabling better forecasting and resource allocation decisions. |
| Adaptability and scalability | Adapts easily to organizational changes for long-term effectiveness. |

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| Benefits | Details |
| --- | --- |
| Systematically rule-based approach | Offers a structured, rule-based method ideal for managing large sales teams efficiently. |

## What to explore next

The following topics provide more information about configuring and using Sales Territory Management:

- Configuring Sales Territory Management
- Using Sales Territory Management
- Components installed with Sales Territory Management

## Activity Management

Activity Management helps customer-focused teams plan, execute, capture, and track customer interactions across multiple channels throughout the customer life cycle. These interactions include emails, meetings, calls, and key customer touchpoints such as discovery, product demos.

## Activity Management benefits

**Activity Management benefits**

| Benefit | Feature | Users |
| --- | --- | --- |
| Provide a single, consistent system to plan, capture, track, and act on all sales and service team activities such as discovery calls, demos, and customer business reviews across channels. | CRM Touchpoints | Sales and service teams |
| Eliminate context switching by accessing CRM data directly from Microsoft Outlook without opening a separate browser or application. | CRM Outlook Add-in | Sales representatives |
| Automate associating emails to Lead, Opportunity, Account, or Contact records using AI-based workflow. | AI sales activity association | Sales representatives |

## What to explore next

To learn more about configuring and using Activity Management, see:

- Configuring Activity Management
- Using Activity Management
- Activity Management reference

### CRM Touchpoints

CRM Touchpoints helps sales and service teams capture, track, and act on customer engagements throughout the customer's association with your organization.

## CRM Touchpoints overview

CRM Touchpoints provides sales and service teams a single, consistent system to plan, record, track, and act on customer interactions throughout the customer's association with your business. A touchpoint acts as a single container for all activities related to a specific customer

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engagement such as discovery preparation, stakeholder alignment, or post-meeting follow-ups so that nothing gets lost across disconnected tools or personal to-do lists. Link touchpoints to accounts, contacts, leads, and opportunities to preserve customer context and enable visibility into interaction history. It enables you to capture activities such as discovery calls, demos, and business reviews across channels, enabling leaders to monitor engagement health and verify whether teams are interacting effectively and productively.

## CRM Touchpoints users

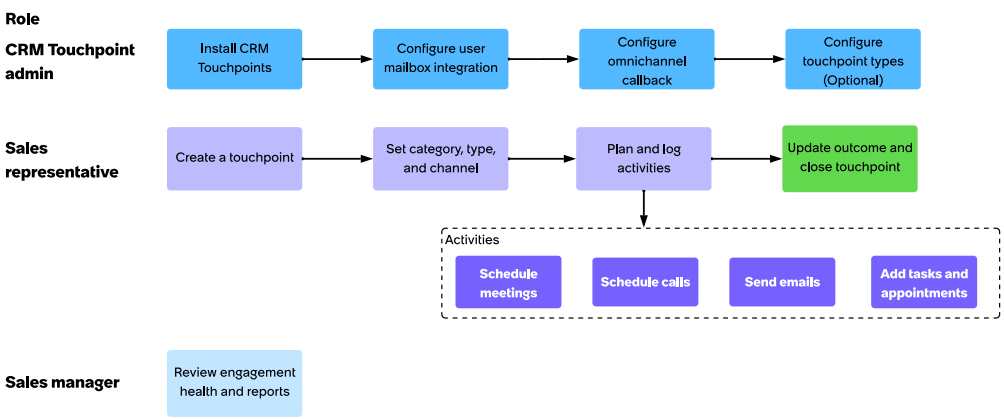
### Users

| User | Description |
|---|---|
| Touchpoint admin | Configures and manages the CRM Touchpoints application, and manages data retention policies. |
| Touchpoint users<br><br>For example, sales development representatives (SDR), account executives (AE), sales representatives, and customer success managers (CSM) | Create touchpoints and capture activities against those touchpoints for the CRM entities they have access to. |
| Touchpoint viewer<br><br>For example, managers, stakeholders | Gains visibility into various customer touchpoints without creating or modifying touchpoints. |

## CRM Touchpoints workflow

The following illustration shows a typical workflow for using CRM Touchpoints to track customer engagements.

### Capturing and tracking customer engagements with CRM Touchpoints




1. As an administrator, install and configure the CRM Touchpoints application on your ServiceNow instance.
2. Set up communication channels such as emails and calls that your organization uses for interacting with customers.

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3. If useful, set up custom touchpoint types in addition to the default types of discovery, demo, and customer business review (CBR) to match your organization's specific engagement processes.
4. As a sales or service representative, create a touchpoint record and associate it with a CRM entity such as a lead, opportunity, or account.
5. Set the touchpoint category to Pre-sales, Sales, Post-sales, or Partner, type as Discovery, Demo, CBR, or a custom type, and a primary communication channel.
6. As engagement activities occur, schedule meetings and appointments, send emails, log calls, and create tasks directly from the touchpoint record.
7. When the engagement is complete, update the touchpoint status and record the outcome. The application automatically captures completion timestamps and calculates duration.
8. As a sales or service leader, review touchpoint data to measure engagement health and team productivity.

## CRM Touchpoints benefits

### CRM Touchpoints benefits

| Benefit | Feature | Users |
|---|---|---|
| Capture and track all engagement activities in a single system, eliminating the need to switch between multiple tools and reducing data silos. | Create a CRM touchpoint | Sales representative |
| Classify engagements by category and type to match your organization's specific sales and service processes. | Create custom touchpoint types | CRM Touchpoints admin |
| Schedule meetings with customers and stakeholders directly from the touchpoint record to align teams and avoid scheduling conflicts. | Schedule a meeting from a touchpoint | Sales representative |
| Track customer follow-ups by scheduling calls directly from the touchpoint record. | Schedule a call from a touchpoint | Sales representative |
| Send emails without having to leave the workspace, ensuring all communications are logged and accessible to the entire account team. | Send an email from a touchpoint | Sales representative |

## What to explore next

To learn more about configuring and using CRM Touchpoints, see:

- Configuring Activity Management
- Using Activity Management
- Activity Management reference

### CRM Outlook Add-in

The CRM Outlook Add-in helps sales teams capture email interactions into ServiceNow CRM directly from Microsoft Outlook.

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## CRM Outlook Add-in overview

The CRM Outlook Add-in application packages the ServiceNow CRM for Outlook add-in, enabling sales teams to capture and log email interactions into ServiceNow CRM without having to leave Microsoft Outlook. Sales representatives can search for CRM records, associate emails with leads, contacts, opportunities, and accounts, and create new records. For high-volume email capture, administrators can configure redirect rules to route emails automatically to their ServiceNow instance without manual association. This ability eliminates context switching between applications, reduces manual data entry, and promotes consistent CRM data for better pipeline visibility and follow-up tracking.

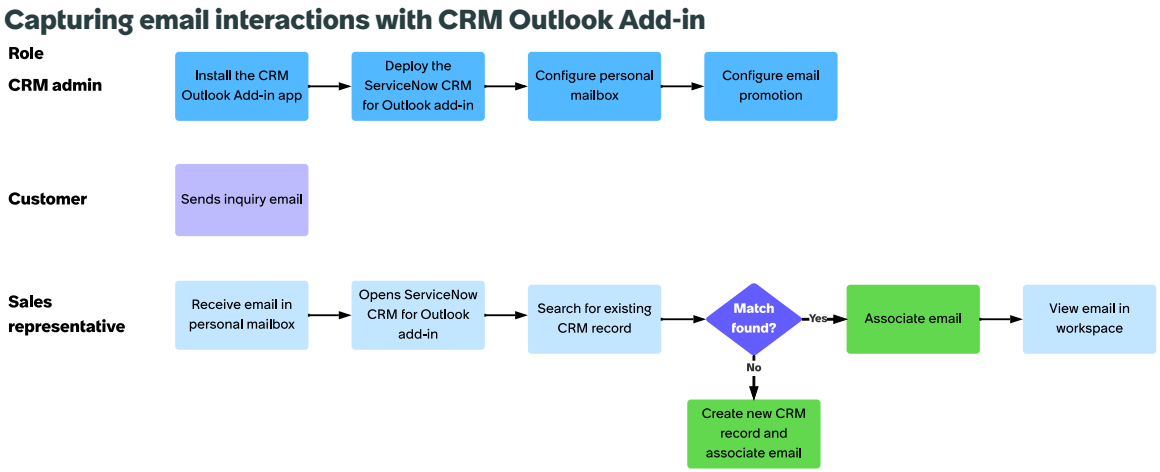
## CRM Outlook Add-in users

### Users

| User | Description |
|---|---|
| Sales representative | Searches for CRM records, associates emails to track engagement, and creates leads or contacts directly from Outlook. |
| Sales manager | Gains visibility into customer engagement and deal progression through consistently logged email interactions. |
| CRM administrator | Configures the CRM Outlook Add-in and AI sales activity association plugins, manages user roles, and sets up email promotion rules. |

## CRM Outlook Add-in workflow

The following workflow illustration shows how a sales representative captures an inbound inquiry using the CRM Outlook Add-in.




1. As an admin, install the CRM Outlook Add-in application.
2. Deploy the ServiceNow CRM for Outlook add-in using the manifest file.
3. Install the User Mailbox Integration plugin.
4. Configure email promotion so that emails associated with CRM records through the ServiceNow CRM for Outlook add-in are promoted from the Staged Email [sys_email_staging] table to the Email [sys_email] table, making them visible to agents in the workspace.
5. A prospect submits an inquiry through the company website or sends an email directly to a sales representative.

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6. The sales representative receives the email in their Outlook inbox and opens the ServiceNow CRM for Outlook add-in.
7. The representative searches for existing CRM records matching the sender's name, email, company, or other identifying information.
   - If a matching record exists, the representative associates the email to the lead, contact, opportunity, or account.
   - If no matching record exists, the representative creates a lead or contact record and associates the email to that record in one action.
8. Sales teams can view the associated email on the CRM Workspace.

## CRM Outlook Add-in benefits

| Benefits | Feature | Users |
|---|---|---|
| Locate CRM records such as leads, opportunities, accounts, or contacts, and link emails without leaving Outlook. | Associate an email with an existing CRM record | Sales representative, Sales manager |
| Capture new prospects immediately from inbound inquiries with auto-populated sender information and associate emails in a single action. | Create a CRM record from Microsoft Outlook | Sales representative |
| Promote emails from the Staged Email [sys_email_staging] table to the Email [sys_email] table, making them visible to agents in the workspace. | Configure email promotion rules for Activity Management | CRM administrator |
| View associated emails from the CRM entity records. | Track emails linked from Microsoft Outlook | Sales representative |
| Grant fine-grained access to CRM data by using the responsibility framework. | Responsibility-based access to Sales CRM entities | Admin |

## What to explore next

To learn more about configuring and using CRM Outlook Add-in, see:

- Configuring Activity Management
- Using Activity Management
- Activity Management reference

### AI sales activity association

AI sales activity association automatically connects incoming and outgoing emails to the correct CRM records using semantic search and agentic AI. Learn how the application works, its benefits, and common use cases for automating email association in your Sales CRM instance.

## AI sales activity association overview

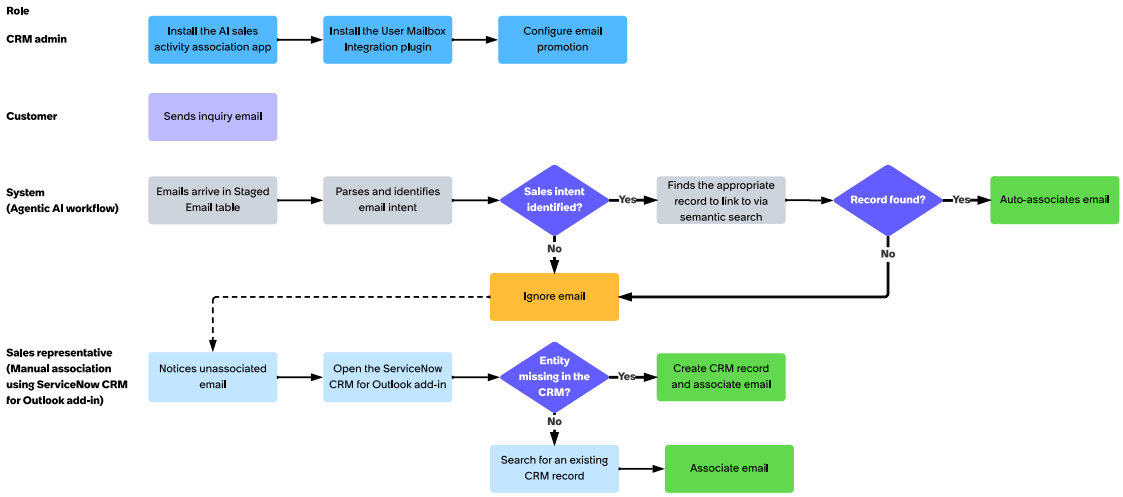
Using semantic search and AI-powered matching, the AI sales activity association application helps identify relationships between email content and existing accounts, leads, opportunities, and contacts. It automatically captures important communication history without requiring manual association. This automation helps ensure that all relevant customer communications are

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tracked and visible in your CRM records, even when those conversations begin outside of your organization and later connect to known entities in your system.

The following workflow illustration shows how the system processes and associates an inbound inquiry using the AI sales activity association app.

### Auto-associating emails using AI sales activity association




1. As an admin, install the AI sales activity association application.
2. Install the User Mailbox Integration plugin.
3. Configure email promotion so that emails that arrive in sales representatives' personal mailboxes are forwarded to the Staged Email [sys_email_staging] table.
4. A prospect submits an inquiry through the company website or sends an email directly to a sales representative.
5. The email enters the Staged Email [sys_email_staging] table where it waits for analysis.
6. An agentic AI workflow activates to determine if the intent of the email is related to sales.
7. If the sales intent is confirmed, the system uses semantic search to analyze the email content, looking for clues about which CRM entity (account, lead, opportunity, or contact) it might relate to, which includes:
   - Email sender and recipient information
   - Keywords and context from the message
   - Mentioned product details or business context
8. If the system identifies a matching entity with sufficient confidence, it auto-associates the email to that CRM entity and the sales representative is notified. Otherwise, the email is ignored.
9. If an email was ignored but the sales representative expected it to have been associated with a record, they can use the ServiceNow CRM for Outlook add-in to manually associate the email. For more information, see CRM Outlook Add-in.

## AI sales activity association benefits

### Accuracy

Emails are matched based on semantic understanding of content, not just keyword matching. The system recognizes context and intent, reducing false associations.

### Efficiency

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No more manual searching through emails or digging for related communications. The system handles association in the background, freeing your team to focus on selling and customer engagement.

**Completeness**

Captures communications that would otherwise be lost outside your CRM system. Ensures that every relevant customer interaction is visible and accessible in your records.

**Data quality**

Reduces duplicate records and orphaned communications. Keeps your CRM data cleaner and more reliable for reporting and analysis.

**Informed decision-making**

Sales teams have a complete communication history at their fingertips, enabling better judgment on customer needs, engagement level, and deal momentum.

### AI sales activity association use cases

**Multi-threaded customer engagement**

A customer sends an email about a new inquiry while simultaneously having an active opportunity in the system. The AI auto-association feature automatically connects both communications to the opportunity record, creating a complete view of all interactions for that deal.

**Prospect journey from outreach to qualification**

Your sales team has been nurturing a lead record in the CRM for a prospect who showed early interest in your product. When the prospect replies to a follow-up email or sends a new inquiry, that email lands in the staging table and triggers AI sales activity association. The AI agent evaluates the email and automatically links it to the correct lead record. As the prospect moves through qualification, every new inbound and outbound email is associated with the lead record as it arrives, building a comprehensive engagement timeline. Your sales team gets a complete, real-time view of prospect interactions without the overhead of manually logging each touchpoint.

### What to explore next

To learn more about configuring AI sales activity association, see:

- Configuring Activity Management
- Install AI sales activity association

## Configure, price, quote

Explore tools that support the configuration, pricing, and quoting of sales offerings.

### Get started

Select a link from the following table to explore CPQ tools that simplify configuration, quoting, and sales agreement management.

**CPQ applications**

| Application | Description |
|---|---|
| CPQ Configurator | Browse and customize configurable products. |

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**CPQ applications (continued)**

| Application | Description |
|---|---|
| Configurator | Configure complex products or services dynamically. |
| Pricing Management | Manage price lists, discounts, and rules to support dynamic and region-specific pricing. |
| ServiceNow Quote Experience | Manage quote creation, approval, and delivery. |
| Advanced Approval Management | Define workflows for approving sales entities, such as customer quotes, in your sales organization. |
| Customer Contracts and Entitlements | Standardize, organize, manage, and use contracts and entitlements. |
| Sales Agreement Management | Create and track contractual sales commitments. |

## What to do next

Configure the CPQ applications, so your agents can use them in their sales workflows. For more information, see Configuring the configure, price, quote applications.

**Related topics**

- Using configure, price, quote applications
- Configure, price, quote reference

## CPQ Configurator

The ServiceNow CPQ Configurator interface streamlines the process of configuring and pricing customizable products that are added to Sales Customer Relationship Management transactions.

## CPQ Configurator overview

The ServiceNow CPQ Configurator is an attribute-based interface embedded in Sales Customer Relationship Management workflows for opportunities, quotes, orders, and product configuration changes involving sold products and contracts. Product catalog admins use the Configurator to manage the product configuration experience, while agents and customers use the Configurator interface to configure customizable products.

**Product catalog admin experience**

Product catalog admins create configurable product offerings using Product Catalog Management. After saving a configurable product, they run a synchronization process that generates an associated blueprint for the product. The blueprint contains all the product attribute values (also called fields), product and pricing configuration rules, product relationships, and child products that were defined for the product offering. The blueprint controls the product configuration experience for the product offering and is managed using the ServiceNow CPQ Configurator. When configuration is complete, catalog admins publish the product offering to a product catalog, which also deploys the corresponding blueprint for use.

**Agent experience**

When agents select a configurable product from the product catalog for a Sales Customer Relationship Management transaction, for example when creating an

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opportunity or quote, the CPQ Configurator opens. The configurator displays the options and features that can be selected. As agents configure the product, a dynamic list of their selections with associated pricing is also displayed.

**Customer experience**

When customers use self-service features, such as placing orders, and select a configurable product from the catalog, the ServiceNow CPQ Configurator launches in the Business Portal. The configurator displays the options and features available for the offering. As customers configure the product, a list of their selections and associated pricing updates dynamically, providing a real-time, accurate view of their customizations.

## ServiceNow CPQ Configurator users

**Users**

| User | Description |
|---|---|
| Product catalog admin | Create configurable product offerings and generate the associated blueprints that contain the attributes (fields), product characteristics, product and pricing rules, product relationships, and child products, that guide valid product configuration by agents and customers. |
| Sales and order agents | Add configurable products to opportunities, quotes, orders, and other transactions such as sold products and contracts that involve configurable products in Sales Customer Relationship Management. |
| Customers | Add configurable products for self-service transactions in the Business Portal. |

## ServiceNow CPQ Configurator workflow

The following workflow describes the tasks involved in configuring and using the ServiceNow CPQ Configurator to configure customizable products.

### ServiceNow CPQ Configurator workflow for generating product blueprints and configuring customizable products

1. If upgrading from a release before Zurich, the system admin enables the system property that runs the CPQ Configurator in Sales Customer Relationship Management applications.
2. The product catalog admin creates and saves a configurable product offering in Product Catalog Management.

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3. The product catalog admin generates the product offering blueprint.
4. The product catalog admin publishes the configurable product offering so that it's available in the product catalog and also deployed as a blueprint.
5. The agent creates a transaction, such as a quote or order in the CRM Workspace. Or a customer uses the Business Portal for a self-service transaction, for example, placing an order.
6. The agent or customer selects a configurable product from the product catalog.
7. The agent or customer configures the product using the ServiceNow CPQ Configurator.
8. The agent or customer saves and closes the product offering configuration. The product offering is added as a line item for the transaction, such as a quote line or order line item.

## ServiceNow CPQ Configurator benefits

**ServiceNow CPQ Configurator benefits**

| Benefit | Feature | Users |
|---|---|---|
| Generate and maintain blueprints that contain configuration logic (rules, attributes, product relationships) for complex products. | Create configurable product offerings and associated blueprints | Product catalog admins |
| Quickly and accurately configure complex products based on requirements and product attributes, without requiring extensive knowledge of product structure and hierarchies. | Using the CPQ Configurator | Sales and order agents, customers |

## Product-based and attribute-based configuration

CPQ uses an attribute-based configuration model instead of a traditional product-based one.

**Product-based configuration**

- Requires sales reps to manually select products.
- Carries a high risk of error due to changing lists and rules.

**Attribute-based configuration**

- Prompts users with questions about desired features.
- Applies configuration rules to automatically generate valid outputs.
- Produces results that can be quoted in Salesforce CPQ or purchased directly online.

## What to explore next

To learn more about configuring and using the ServiceNow CPQ Configurator, see:

- Set up ServiceNow CPQ Configurator without guided setup
- Create configurable product offerings and associated blueprints
- Using the CPQ Configurator
- Online help (access help topics in the ServiceNow CPQ Configurator interface for product catalog admins)

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### Buyside user interface

The configurator buyside user interface is a modern, intuitive platform designed to simplify the configuration of complex products and services. Integrated with Salesforce CPQ and other enterprise systems, it enables users to create, manage, and visualize detailed product configurations, ensuring accuracy and efficiency throughout the sales and fulfillment process.

- The buyside user interface (UI) in CPQ is where sales reps or customers configure products in Salesforce CPQ.
- Provides guided, attribute-based product configuration with rules, enrichments, and integrations.
- Ensures accurate Bills of Materials (BOMs) are generated for quoting, manufacturing, or service operations.

## Key capabilities

- Multi-BOM displays: Organize and visualize different types of line items (sales, installation, service, support) in separate, easily navigable sections.
- Dynamic field grids: Collect and manage structured data (like sales figures or configuration attributes) in intuitive, tabular formats.
- Guided configuration: Use sections, subsections, and nested tiers to break down complex product lists, making selection and customization effortless.
- Rule-based automation: Automate calculations, field updates, and validation, ensuring accuracy and compliance with business logic.
- Enrichment scripts: Apply advanced logic—such as surcharges or custom fields—at the end of the configuration process, before passing data to downstream systems.
- No-code/low-code administration: Empower business admins to manage and update configurations without deep technical skills, using point-and-click tools

## Key personas

- Sales Representative: Configure and quote tailored solutions for customers, using guided workflows and automated rules to ensure compliance and accuracy.
- System Administrator: Manages platform setup, integrations, and ongoing maintenance, ensuring the configurator aligns with enterprise needs. Maintain and update configuration logic, manage integrations, and ensure the platform aligns with evolving business needs.
- Solution Architect: Design scalable configuration models and validate technical feasibility for complex deals.
- Business Process Owner: Oversee adoption, gather feedback, and drive continuous improvement.
- End User (Customer or Partner): Interact with the configurator via self-service portals, customizing products and services to their requirements.

## Key benefits

- Accelerated sales cycles: Guided, rule-based configuration reduces errors and rework, speeding up time-to-quote.
- Enhanced user experience: Intuitive UI, dynamic filtering, and real-time feedback make even complex configurations simple.

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- Operational efficiency: No-code administration empowers business users, reducing IT dependency and admin costs.
- Scalability and flexibility: Adapts to any industry, product complexity, or channel—supporting sales teams, partners, and self-service customers.
- Governance and compliance: Automated rules and AI-driven governance ensure configurations meet business and regulatory requirements.

## Workflow

1. Access the CPQ configurator: Users launch the configurator from Salesforce CPQ or a ServiceNow portal.
2. Configure products and services:
   - Use multi-BOM displays to separate sales, installation, and support items.
   - Filter and select products using sections, subsections, and nested tiers.
   - Enter and organize data in field grids for structured input.
3. Apply rules and automation:
   - Automated rules calculate prices, apply surcharges, and validate configurations.
   - Enrichment scripts add advanced logic, such as tax exemptions or shipping fees.
4. Collaborate and finalize:
   - Stakeholders review and approve configurations as needed.
   - Generate and share quotes, ensuring all business and compliance requirements are met.

## Example

Jack, a sales representative, receives a request from a SaaS customer for a tailored network solution.

- Jack opens the opportunity in Salesforce CPQ and launches the configurator buyside user interface.
- He uses multi-BOM displays to separate hardware, installation, and support items.
- Jack filters router models by business size using nested tiers, ensuring the customer only sees relevant options.
- The system automatically calculates surcharges and applies tax exemptions, thanks to built-in enrichment scripts as Jack adds installation services.
- The solution architect reviews and approves the configuration.
- Jack generates a quote, confident that all business rules, pricing, and compliance requirements have been met.
- The customer receives a clear, tailored proposal, ready for approval.

### Related topics

The CPQ Configurator

### Configurable products

Learn how configurable products connect blueprints to end-user configuration experiences in CPQ, supporting both headless and Salesforce-integrated use cases.

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Configurable products act as the bridge between a CPQ blueprint and the configuration experience that end users interact with. They define how a specific product launches and behaves during configuration—whether accessed through a headless application or integrated with Salesforce CPQ.

Each configurable product ties together the technical definition of a product (its blueprint) with the business object that represents it (the Salesforce Product2 record or headless configuration record). This association allows users to configure products dynamically, ensuring that all logic, pricing, and visualization rules from the blueprint are applied in real time.

## Key benefits

Configurable products simplify the connection between your product definitions and customer-facing configuration workflows. They provide:

**Key benefits**

| Benefit | Description |
|---|---|
| Unified Configuration Launch | Connects each product directly to a CPQ blueprint so the correct configuration UI opens automatically for the end user. |
| Cross-Platform Flexibility | Supports both headless and Salesforce CPQ environments with consistent configuration experiences. |
| Reduced Maintenance | Allows multiple Salesforce Product2 records to link to a single blueprint, simplifying updates across similar products. |
| Faster Go-to-Market | Eliminates the need for custom integration scripts to launch configuration sessions. |

## Configurable product architecture

At a conceptual level, configurable products establish the relationship between your CPQ blueprints and the user-facing configuration layer. This relationship varies slightly depending on whether your environment is headless or Salesforce-integrated:

- Headless: The configurable product is defined directly in CPQ, and end users access the configuration experience through a front-end application or API connection.
- Salesforce Integrated: The configurable product acts as the “front door” to the configuration experience in Salesforce CPQ. When users select a CPQ - enabled product, the corresponding configuration UI launches automatically.

In both cases, the configurable product ensures a seamless connection between the product’s logic and its visual configuration experience.

## Salesforce setup

In Salesforce-integrated environments, configurable products link CPQ blueprints to Salesforce Product2 records. This association ensures that selecting a Salesforce product automatically launches the correct CPQ configuration experience.

Only one blueprint can be associated with each configurable product, but multiple Product2 records may link to the same blueprint—simplifying management for similar product variations.

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The setup process depends on your Managed Package version used for CPQ: Once configured, selecting the product in Salesforce CPQ automatically opens the CPQ configuration experience for the user.

## General guidelines

- Maintain consistent blueprint naming conventions to simplify identification and mapping.
- Use CSV uploads for bulk creation of configurable products in headless environments.
- Verify that Product2 records in Salesforce are CPQ enabled before associating blueprints.
- Use sandbox environments to validate blueprint mappings before deployment to production.
- Regularly review configurable product associations when blueprints or product structures change.

**Related topics**

Setting up configurable products

### Blueprints

Learn how blueprints define the structure of configuration experiences in CPQ and act as containers for fields, rules, layouts, and configurable products.

Blueprints are the foundation of every configuration experience in CPQ. They define the structure, behavior, and visual layout of configurations by linking together all key elements —Fields, Rules, Layouts, and Configurable Products—into a single, manageable container. A blueprint represents the complete configuration logic for one product or experience and ensures consistent behavior across environments.

By using blueprints, administrators can design, deploy, and manage configuration workflows without duplicating content or logic. Each blueprint provides a modular, versioned space to build and refine configuration experiences safely before deploying them to production.

## Blueprint components

A blueprint brings together several key elements that define how a configuration behaves and appears to end users.

- Fields: Capture data and user input. Blueprints associate only the subset of global fields relevant to that configuration experience.
- Rules: Define the business logic that governs visibility, validation, product inclusion, and dynamic behaviors. Rules automatically connect to blueprints when their referenced fields are associated.
- Layouts: Determine how fields and pickers appear in the UI. Each Layout is unique to a single blueprint, though a blueprint can contain multiple Layouts.
- Configurable Products: Act as the entry point that launches the configuration defined by a blueprint. Multiple products can reference a single blueprint, but each product can only belong to one blueprint.
- Enrichments: Extend logic beyond the rules engine to handle advanced scripting, external connections, or pricing enrichments.

## Blueprint life cycle

Blueprints are version-controlled entities that progress through a simple life cycle: creation, association, deployment, and migration.

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- Create: Define a new blueprint record and assign a name.
- Associate: Link fields, rules, layouts, and configurable products to the blueprint.
- Deploy: Make the blueprint available for end-user configurations in your environment.
- Export/Import: Move blueprints between development, test, and production environments for versioning and reuse.

## Blueprint administration interface

Each blueprint record includes multiple tabs that provide visibility into its structure and related components:

- Associated Fields: View all fields and subfields linked to the blueprint, organized by type (Standard, Sets, product pickers, System).
- Related Rules: Review active and inactive rules automatically linked through field references.
- Layouts: View or modify layouts associated with the blueprint. The most recently saved layout is used by default during runtime.
- Configurable Products: View all products that launch the configuration experience defined by the blueprint.
- Deployments: Track the most recent deployments, including date, user, and status.
- Enrichments: Manage enrichment scripts that run outside the rules engine (for example, initialization or pricing scripts).
- Field Mapping: View and manage field mapping for context variables.

## Deployment and environments

Deployments make a blueprint visible to end users. All associated changes—fields, rules, layouts, and configurable products—become active upon deployment. Deployment notifications appear in the lower-left corner of the Admin interface, showing status updates such as “In Progress” or “Completed”.

Deployment behavior varies by environment type:

- Production: Deployed blueprints remain active indefinitely.
- Test: Automatically undeployed after 30 days of inactivity (reset upon redeployment).
- Demo: Automatically undeployed every weekend for maintenance.

## Migration and version control

Blueprints can be exported and imported across environments to support development life cycles and version control. The exported package includes all related elements such as fields, rules, and layouts, allowing you to migrate configurations without manually recreating components.

When importing, administrators can update Product IDs, rule mappings, and environment-specific references to ensure compatibility in the target org. CPQ maintains unique IDs for each Configurable Product to preserve data integrity across environments.

## General guidelines

- Create modular blueprints for each major product or configuration flow.
- Use descriptive names and variable names for clarity and maintainability.

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- Review inactive rules regularly to prevent outdated logic from re-entering deployments.
- Deploy changes in a controlled environment before promoting to production.
- Document the enrichment scripts and custom external connections that are used by each blueprint.

**Related topics**

Set up blueprints

### Fields

Learn how fields provide the foundational data model for CPQ configurations—what they are, how they relate to blueprints, rules, and layouts, and how to choose the right type and display for reliable, reusable experiences.

Fields are the smallest unit of the CPQ configuration model and represent a single piece of data (for example, a quantity, a choice, or a note). They power the user experience (what the user sees and edits), the logical model (what rules read and act on), and downstream outputs (what is written to the bill of materials or passed to external systems). Because fields are global in an environment, the same field can be reused across blueprints, rules, and layouts to ensure consistency and reduce duplication.

Fields become part of a specific configuration only when they are associated with a blueprint. When all fields referenced by a rule are associated to a blueprint, the rule is intrinsically related to the blueprint—no extra linking step is required.

## How fields fit into the configuration model

- Blueprints: Declare which global fields participate in a configuration. Association enables reuse without cloning.
- Rules: Read field values as inputs and perform actions on fields (determine values, show/hide, validate, filter options, add products).
- Layouts: Place fields visually and select a Component display type to control how the user interacts with each field.
- BOM/product list: field values can be mapped to product attribution or extended properties for downstream processing.

## Field scope and life cycle

Fields are created once and available globally. Their life cycle is lightweight and designed for reuse:

1. Create: Define the field type, name, and unique variable name (global identifier).
2. Associate: Add the field to one or more blueprints to make it available in those configurations.
3. Place Display: Choose the appropriate Component display type in a layout (for example, grid, visual picker, slider, read-only).
4. Orchestrate: Apply rules to read or set field values, control visibility, present messages, and drive product actions.

## Choosing the right field type

Selecting the correct type ensures valid data and simpler rules:

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- Text: Free-form string input (up to 2000 characters), with optional length constraints and default.
- Number: Numeric input with optional min/max; layout-level options can enforce step or precision and formatting (currency/percent/read-only currency).
- Boolean: True/False with customizable labels and default state.
- Picklist (single or multi-select): Constrained choices with definable options, defaults, and picklist extensions for rich, columnar option data and implicit filtering.
- Product Picker: A picker specialized for products that can add items to the BOM and map additional data to Product List fields—often removing the need for separate rules.
- Sets: Tabular collections where each row's subfields interact row-locally (ideal for calendar-like or line-item scenarios).

**Note:** Prefer constrained types (number, picklist, product picker) when possible. Clear constraints reduce validation logic and improve end-user guidance.

## Data model vs. display model

The field type defines the data model and specifies what values are valid. The Component display type defines how users interact with the field in a layout (for example, radio, menu, or grid). A single field can be rendered differently across layouts while preserving a consistent data model.

Examples:

- Number: shown as number input, number-with-submit, slider, read-only text/currency, or formatted number.
- Picklist: shown as traditional menu, vertical radio buttons or check boxes, visual tiles, or grid (with picklist extension columns).
- Product Picker: shown as a grid or visual tile experience with subfields and aggregates.

## Association and reuse

Because fields are global, reuse is the default. Associate a field with any blueprint that needs it; the field is then available to the blueprint's layouts and rules. If all referenced fields in a rule are associated with the blueprint, the rule is automatically considered related to the blueprint.

This model avoids cloning, reduces drift, and simplifies maintenance across products and experiences.

## Governance and naming

- Variable names: Use clear, stable, names (with words separated by underscores, as in shipping_method) to make rule scripts expressive and durable.
- Descriptions: Document intent and valid ranges (minimum and maximum, semantic meaning) to aid future reuse.
- Defaults: Set only when the business logic expects a starting state; otherwise, let rules determine values contextually.

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## Accessibility and internationalization

- Prefer display types that make choices obvious (radios/tiles) when option sets are small.
- Provide human-readable labels and help text; use read-only text with Markdown for structured guidance.
- Use layout-level formatting for numbers and currency to respect locale conventions.

## Performance and reliability tips

- Choose the simplest field type that satisfies the requirement. Fewer rules and validations mean faster run times.
- Use picklist extensions or product pickers to encapsulate rich option data and reduce rule count.
- Reserve “always-on” determination rules for true system defaults; prefer contextual conditions elsewhere.

## When to use bulk operations

For larger changes or environment migrations, use Matrix Loader to bulk-create and edit fields and field options. The spreadsheet artifact doubles as documentation and accelerates flow from dev to test to production.

**Related topics**

Configure fields

### Matrix Loader

Learn how the Matrix Loader accelerates configuration management by simplifying large-scale data creation, updates, and migrations across your CPQ environments.

The Matrix Loader is a bulk data management utility that enables administrators to efficiently add, edit, and migrate configuration elements such as fields, field options, rules, layouts, product pickers, and tables. Instead of creating elements one by one in the Admin interface, the Matrix Loader lets you define configurations in CSV files—making it ideal for scaling complex implementations, backing up configurations, and moving data between test and production environments.

The Matrix Loader ensures data integrity and consistency by automatically validating dependencies (for example, between fields and field options) and uploading elements in the correct order. Administrators can also use the Matrix Loader to export CSV templates and sample files, providing a quick reference for valid column structures, accepted values, and upload formats.

## Key concepts

- CSV structure: Each configuration type has a specific column schema. Administrators can rearrange columns as long as headers remain correct.
- Import order: The loader auto-sorts uploads logically (for example, fields → field options → rules).
- Validation and error handling: Errors during upload usually result from missing required columns, invalid references, or mismatched names. The Matrix Loader displays error messages to help correct them quickly.

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- Export and backup: All configuration entities can be exported from the Admin interface to create reusable CSV backups.
- No redeployment for tables: Updates to managed tables take effect immediately. However, rules referencing those tables require redeployment if modified.

## Key benefits

The Matrix Loader eliminates the repetitive and time-consuming steps involved in large-scale setup or updates. It provides several key advantages:

### Benefits of the Matrix Loader

| Benefit | Description |
|---|---|
| Efficiency | Upload hundreds of fields, rules, or tables in one batch instead of creating them manually. |
| Consistency | Maintain consistent configurations across environments with reusable CSV definitions. |
| Traceability | Use exported CSV files as a versioned record of environment data for audits or rollback. |
| Migration support | Seamlessly migrate configurations from sandbox to production environments. |
| Error handling | Validate and confirm successful uploads before committing changes. |
| No-code automation | Modify configurations and relationships without scripting. |

## Matrix Loader configuration types

The Matrix Loader supports multiple configuration types, each designed to streamline a specific aspect of the CPQ setup:

### Matrix loader configuration types

| Upload Type | Purpose | Example Use Case |
|---|---|---|
| Fields and field options | Create and manage fields, picklists, and product pickers. | Add 200 product options to a field at once. |
| Rules | Define business logic, calculations, and conditional visibility. | Upload all visibility and determination rules for a blueprint. |
| Layouts | Design user experiences by defining field placement and grouping. | Update layout structure across multiple blueprints. |
| Tables | Manage data sets used for lookups and dynamic logic. | Import pricing data or reference mappings. |
| Product pickers | Define product selection fields and their behaviors. | Bulk upload accessory or component data. |

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## How the Matrix Loader works

The Matrix Loader performs uploads in a controlled sequence to maintain relational accuracy between configuration elements. Here's how the process works:

1. Prepare data files: Define configuration elements in spreadsheet tools such as Google Sheets or Microsoft Excel, and export each sheet as a CSV file.
2. Access the Matrix Loader: in the left Admin navigation pane, click **Matrix Loader**.
3. Export sample templates (optional): Download sample CSVs for fields, field options, rules, or tables to use as reference templates.
4. Upload files: Drag and drop one or more CSV files. The Matrix Loader automatically detects file types based on filename keywords.
5. Validate mappings: Confirm that the Matrix Loader correctly identified each upload type (for example, fields vs. rules).
6. Import and verify: Click **Import**. The Matrix Loader runs each upload in the correct sequence. Review success or error notifications in the Notification Center.
7. Confirm configuration: Verify new and updated items on the relevant Admin pages (such as fields or rules).

**Note:** The Matrix Loader automatically performs dependency resolution—for example, ensuring that fields upload before field options or that rule dependencies are validated.

## Example use cases

- Bulk onboarding: Create hundreds of picklists, rules, and layout mappings for a new product line in minutes.
- Environment migration: Move configuration data from sandbox to production using standardized CSV exports.
- Mass update: Change field types, rule actions, or default values across multiple blueprints simultaneously.
- Backup and restore: Export CSVs regularly to maintain a recoverable version of your configuration.

### Related topics

Configure the Matrix Loader

Matrix Loader CSV fields and field options upload and export

Matrix Loader: CSV rules upload

Matrix Loader: CSV table upload

### Sets

Learn how sets organize repeatable field groups, simplify complex configurations, and enable data aggregation across repeated elements in CPQ.

A set is a reusable, repeatable collection of fields that lets administrators define multiple instances of similar configuration data—such as multiple products, components, or options—in a single blueprint.

Each row in a set represents one instance of a repeated group of fields, and each field in that row behaves independently. sets streamline configuration design, reduce duplication, and support advanced use cases that require tabular or list-based inputs.

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Administrators use sets to present configuration options in structured, table-like layouts that customers can easily edit in the end-user interface.

Sets are designed to:

- Simplify repeatable configurations. Instead of creating multiple fields and rules for each repetition, define once and reuse many times.
- Provide intuitive, tabular data entry. End users can add, remove, or edit multiple product instances in a structured grid.
- Support dynamic rules. Rules can reference values in the same row or aggregate data across all rows.
- Enable advanced reporting and summaries. Aggregates summarize field values across rows (for example, total quantity or total rack units).

## How sets work

A set groups several configuration fields together and repeats that group for each item in the list.

Each set row is fully independent:

- Fields in the same row can affect other fields in that row.
- Fields in one row cannot directly affect fields in another row.
- Fields outside a set can influence fields inside it, but not vice versa.

To affect fields outside a set, use:

- Aggregates: Sum, count, average, maximum, or minimum values across all rows.
- Product rules: Define logic that sets external field values based on set data.

A set can contain up to 2,000 rows.

## Display options

Sets can appear in the UI in several formats, depending on user experience requirements:

**Display options for sets**

| Display type | Description | Example use case |
|---|---|---|
| Table | Rows, columns, and cells with headers; ideal for detailed comparisons. | Configure multiple network devices. |
| List | Each row shown as a card; can support single-select or multi-select. | Select delivery slots or service packages. |
| Repeater | Displays one record at a time with navigation controls. | Edit configurations one-by-one in smaller layouts. |

Administrators control layout, alignment, and scrolling in the layout editor.

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## Field relationships

| Relationship | Behavior |
|---|---|
| Inside → Inside | Fields in the same row can trigger each other through rules. |
| Inside → Outside | Not allowed directly; use Aggregates or Product Rules. |
| Outside → Inside | Allowed. Rules or field actions outside a set can change set field values. |

## Key properties

Sets include several configuration categories that shape how users interact with the table or list:

- General settings: Orientation, maximum height, alignment, index labels.
- Display type: Choose between Table and List views.
- Inline settings: Show “Add Row” indicators, drop-down controls, or hover actions.
- Size settings: Manage how users increase or decrease set rows (numeric or slider field).
- Selection settings: Add single or multiple row selection with a Boolean selection field.
- Search settings: Allow users to search values in a set (for example, filter by available date).
- Message settings: Display validation messages or indicators in specific cells.

## Managing set data

Sets support importing and exporting data in CSV format.

- Download set data: Exports only visible columns based on filters applied in the UI.
- Upload set data: Adds or updates rows in the set using a structured CSV file.
  - Rules run automatically on upload.
  - New rows are appended; matching rows are updated.
  - System-enforced limits apply (25 visible columns recommended).

Enable uploads/downloads by adding JSON properties in the set’s raw value:

```
{
  "uploadDetails": {
    "uploadButton": { "label": "Upload CSV", "visible": true },
    "downloadButton": { "label": "Download CSV", "visible":
 true }
  }
}
```

## Scripting with sets

To reference sets in rules or scripts, use the following syntax:

| Use case | Example syntax |
|---|---|
| Access the set | `set.<setVarName>` |
| Access an aggregate field | `set.<setVarName>.<aggregateVarName>` |

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For example:

```
if (set.networkDevices.totalRackUnits > 50) {
   field.requiresAdditionalCooling = true;
}
```

**Related topics**

Configure sets

### Layouts

Layouts define how the configuration experience looks and feels for your users. They control where fields appear, how steps are grouped, and how the product list (shopping cart) is presented—turning a blueprint's logic and data into an intuitive, guided UI in CPQ.

A layout is the presentation layer of a configuration experience. Where a blueprint brings together fields, rules, layouts, and configurable products, the layout focuses on how those elements are displayed:

- Which fields appear on each page or tab
- How sections are grouped and labeled
- How sets, product pickers, and messages are arranged
- How the product list is rendered alongside the configuration

Layouts are defined per blueprint. A single blueprint can have one or more layouts, giving you flexibility to support different personas, channels, or demo experiences without duplicating configuration logic.

When a blueprint has multiple layouts, end users can rotate through them using the alternate layout control in the upper-right corner of the configurator UI.

## How layouts fit into the configuration model

Layouts are placed at the presentation layer of the CPQ configuration stack:

- Fields collect and display data.
- Rules control behavior (visibility, messaging, calculations, product inclusion, and more).
- Blueprints tie fields, rules, layouts, and configurable products into a single configuration experience.
- Layouts define the buyside interface—pages, tabs, sections, and product list—without changing the underlying logic.

Because layouts reference field variable names and product list parameters, you can safely iterate in the layout (for example, reorganizing tiers or changing display types) without modifying rules or data structures.

## Layout building blocks

Layouts are composed of reusable structural and visual elements that you define in a layout CSV file and refine in the Layout Wizard or the layout editor.

Tiers: pages, tabs, and sections: Tiers define the major structural areas of the configuration experience. Each tier has a tierDef that describes how it behaves:

- Pages (PagesWithLabels): Break the configuration into discrete steps with progress navigation.
- Tabs (VerticalTab): Group related content horizontally or vertically for quick switching.

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- Accordion (AccordionWithNavigation): Show one expanded section at a time for long or complex content.
- ExpandableSection: Allow users to expand or collapse content as needed.
- BasicContainer: Provide an unstyled container for simple grouping.

You can nest tiers to build multilevel layouts—for example, pages that contain tabs, or tabs that contain expandable sections.

## Layout definition and tools

Layouts are authored and maintained using a combination of CSV files and in-product tools:

- CSV layout upload
  - Primary definition format for layouts
  - Built in a spreadsheet tool and exported to a CSV file
  - Supports full control over tiers, column sets, fields, product list, and component properties
- Layout Wizard
  - Helps you quickly generate an initial layout from a blueprint's fields
  - Provides a visual preview of tiers and major groupings
  - Acts as a starting point; fine-tuning is done via CSV file or the layout editor
- Layout editor
  - Allows you to edit an existing layout directly in the Admin UI
  - Supports arranging tiers and column sets, editing labels, adjusting display types, and updating extended properties
  - Provides keyboard shortcuts and visual cues for missing or partially supported elements

Regardless of which tool you use, the layout is ultimately stored as a structured definition that can be exported, versioned, and replaced as your configuration experience evolves.

## Sets and repeatable content

Layouts also control how sets are presented:

- As tables (rows and columns with headers)
- As lists (card-style rows with optional selection and search behavior)
- In repeaters that focus the user on one set index at a time

Set-specific layout properties—such as expand direction, size controls, message indicators, inline add/remove controls, and upload/download behavior—are configured in the layout via extended properties and raw value JSON.

The product list section of a layout defines how the shopping cart is displayed:

- Which product list parameters appear as columns (for example, name, quantity, price, extended attributes)
- How columns are labeled and aligned
- Whether the product list is inline or in a window

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Product list columns are driven by the layout CSV file using the `productlist` and `productlistcolumn` types and by referencing `ProductList.<param>` values defined in the product rules and underlying tables.

**Related topics**

- Set up layouts
- Layout Wizard
- Layout: a deeper dive

### Product pickers

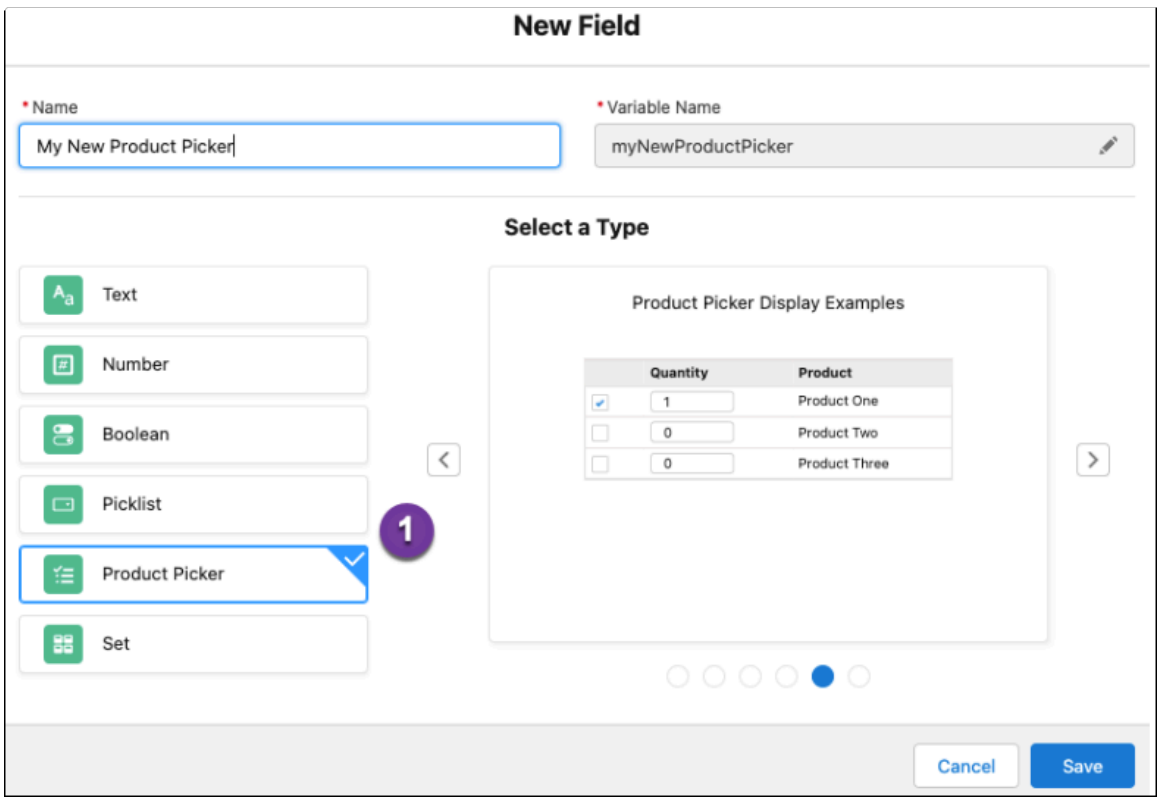
Learn how to create and configure product pickers to add products to a bill of materials (BOM) without writing rules. Define product options, subfields, aggregates, and display settings to enhance user interactions, automate data mapping, and present product information directly in layouts.

A product picker is similar to a picklist with extended data. Product pickers can add products to a bill of materials and map additional data to product list fields, including extended data, without writing standard rules. Bulk actions provide additional, table based rules that can be used with the product picker Field.

**Note:** You can update only manually created fields, actions, or options of product pickers that are synced to CPQ Administrator.

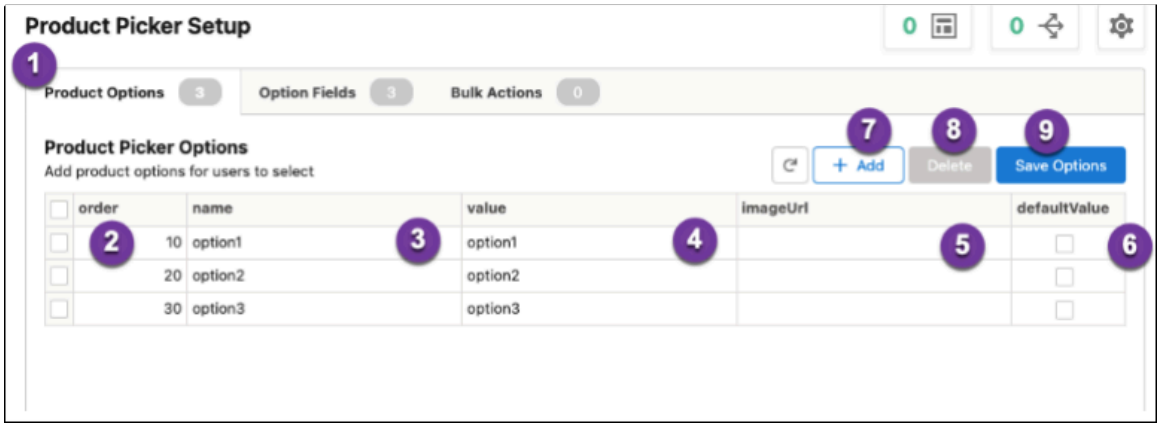
## Creating a product picker

Product Pickers can be created in the fields tab of the Admin. To make a new product picker functional, all you need to do is add some options, then place it on a Layout. Select product picker as the new field type.




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## Options




Just like picklists, product pickers have a list of options. Each option represents a product, which is added to the BOM when selected by the user.

(1) The Product Options tab is the starting point for adding options to the product picker. Options are displayed below in table format.

Product Picker Option Fields:

- (2) Order: display order of options in the product picker
- (3) Name: name to use for the product picker option (required)
- (4) Value: value to use for the product picker option (required, defaults to name)
- (5) imageUrl: URL of an image to use for this product picker option
- (6) defaultValue: Controls if this option is selected by default

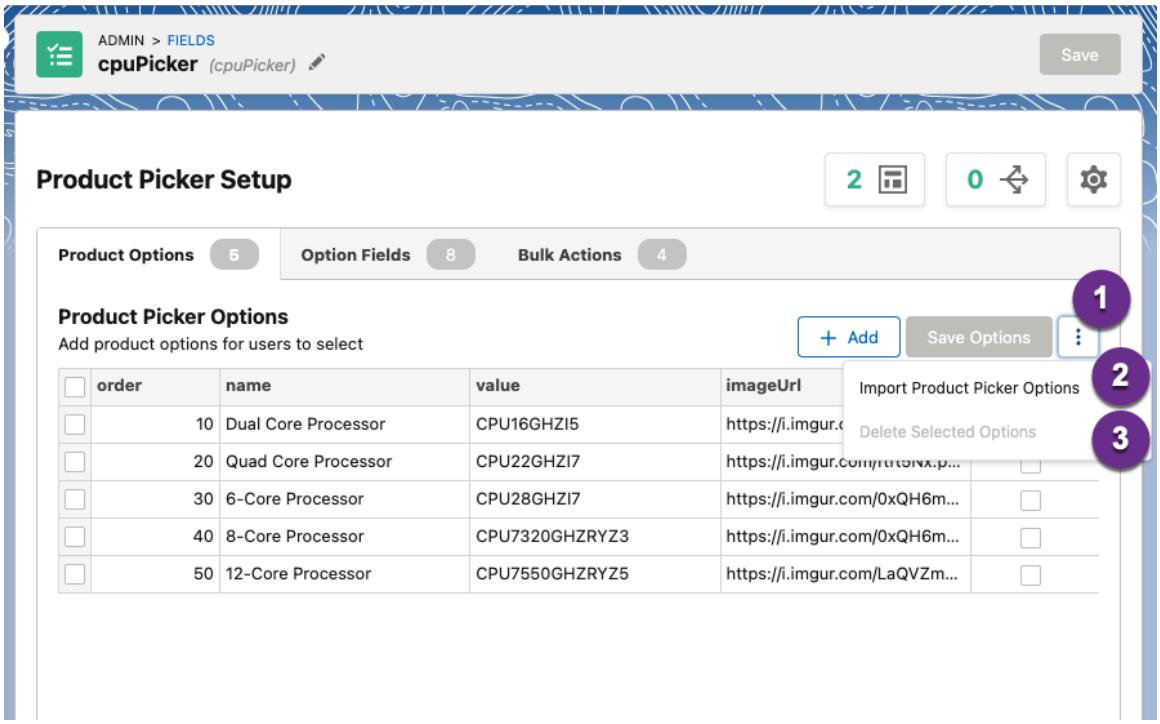
Actions:

- (7) Add Row: Add product picker
- (8) Delete: Delete the selected options of the product picker options table
- (9) Save options

## Option import

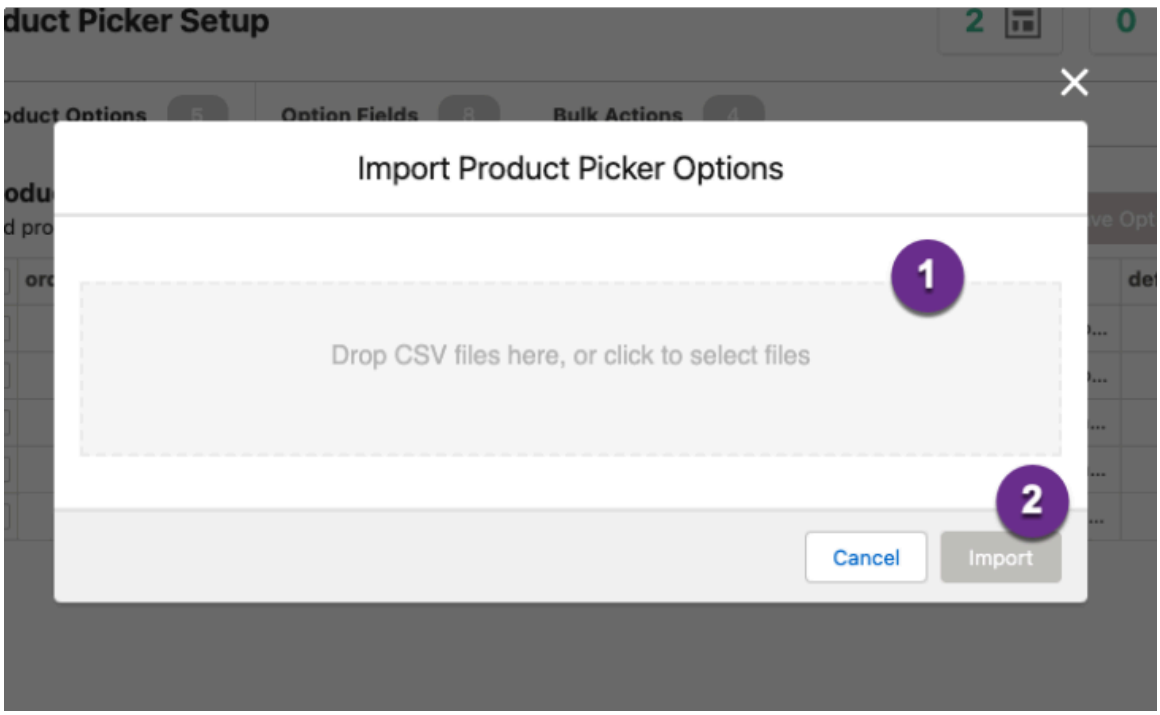
Product Picker options can be imported directly into the Picker by uploading a CSV file, much like picklist options.

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- (1) Menu: Click the 3 vertical dot icon to open the menu
- (2) Import product picker options: launch the import dialog for product picker options
- (3) Delete Selected options: If any product picker options are selected, delete them

Import dialog:



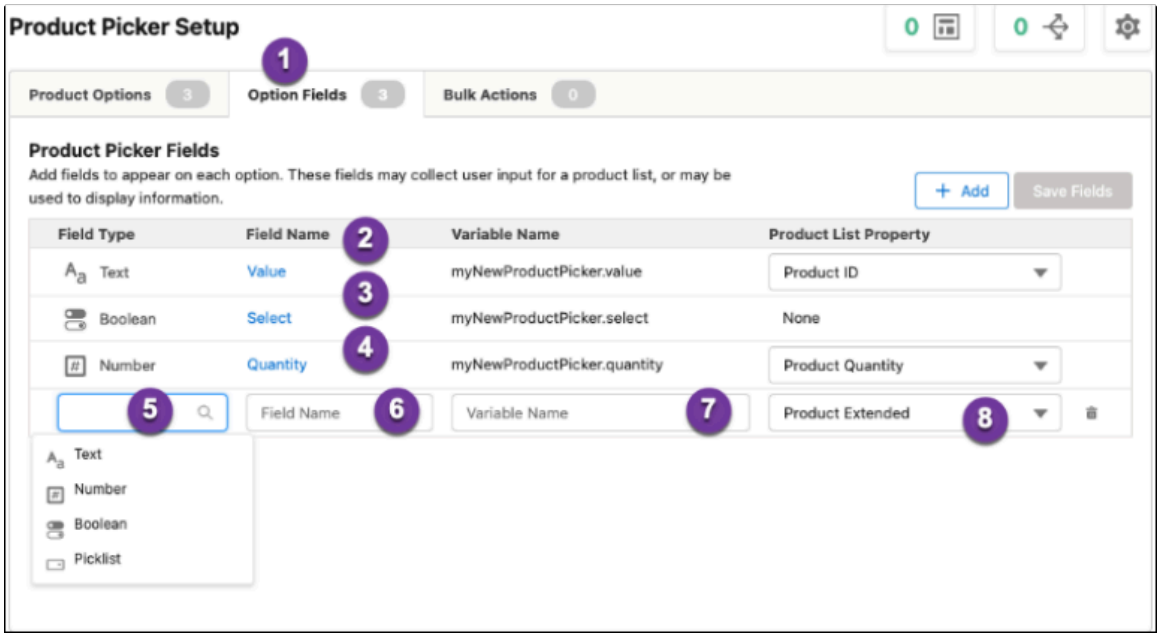

(1) CSV import: Click or drag and drop the CSV file containing the product picker options that you want to import.

(2) Import: Once a file is selected, click import to load the options into the product picker.

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## Product Picker fields

Fields can be created in the product picker and used to collect user input, interact with rules, display information and optionally set data in the product list. These fields are children of the current product picker and are found in the Option Fields tab. They are also referred to as subfields.




(1) Option Fields tab: Additional subfields can be created and added to the product picker to display and optionally pass additional data into the ProductList. Subfields are displayed in a table format below.

Three fields are automatically included in each product picker:

- (2) Value: the value of the option, by default maps to Product Id when selected
- (3) Select: Boolean field that controls if the product option is added to the product list (BOM)
- (4) Quantity: quantity of the product to add when option is selected, by default maps to Product Quantity

Additional subfields can be created and optionally configured to pass additional data into the ProductList or display in the UI.

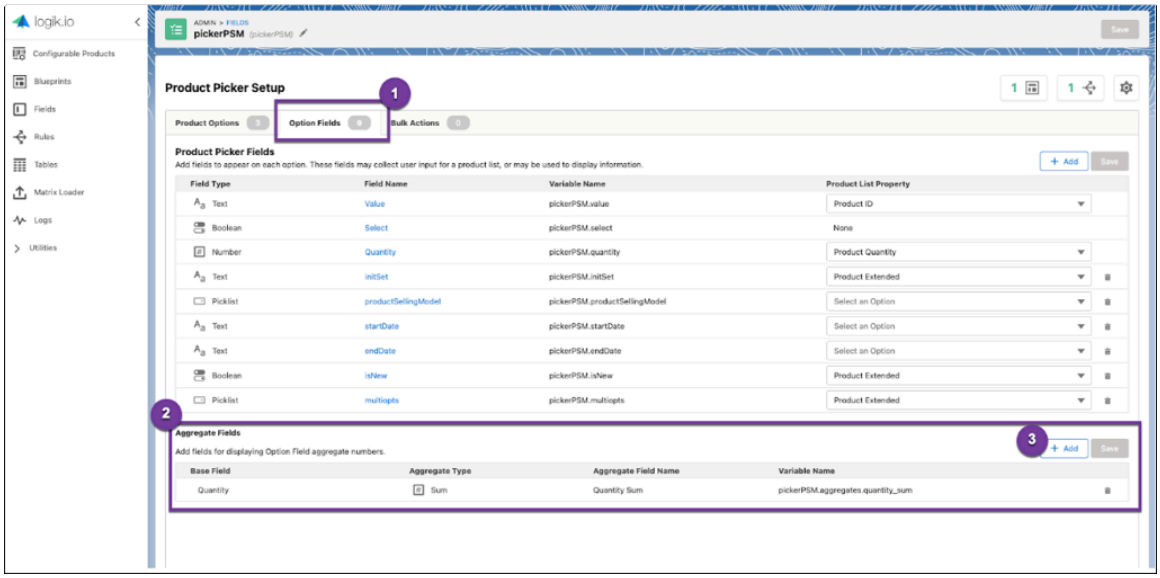
- (5) Field Type: Can be Text, Number, Boolean or Picklist
- (6) Field Name
- (7) Variable Name: Variable name of new subfield, including the product picker variable name as the prefix
- (8) ProductList property: Optionally, you can configure the newly created field to pass data into the ProductList. Select the field in the ProductList to map the subfield's value to, or choose None to not pass the data

## Aggregates

Aggregates can be created on product pickers, similar to how set aggregates work. For information about set aggregates, see Creating set aggregates.

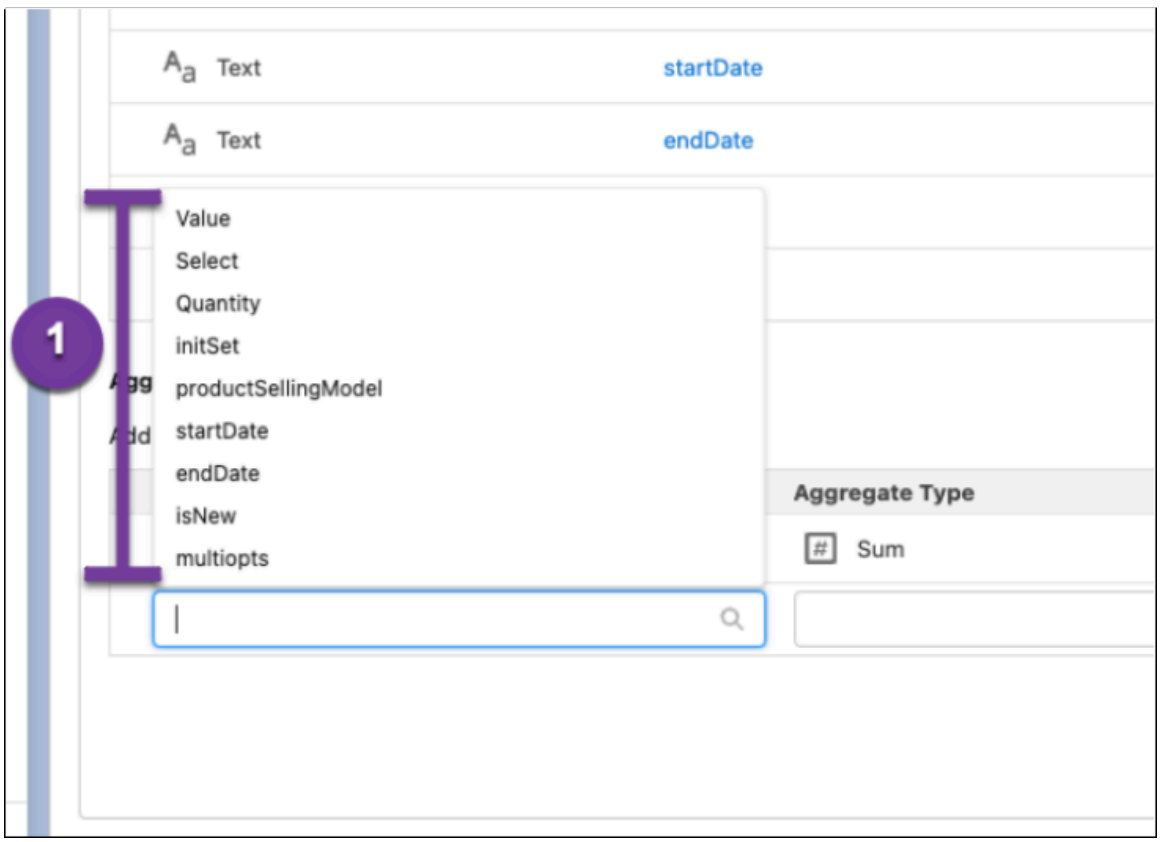
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## Setup




Navigate to a product picker field.

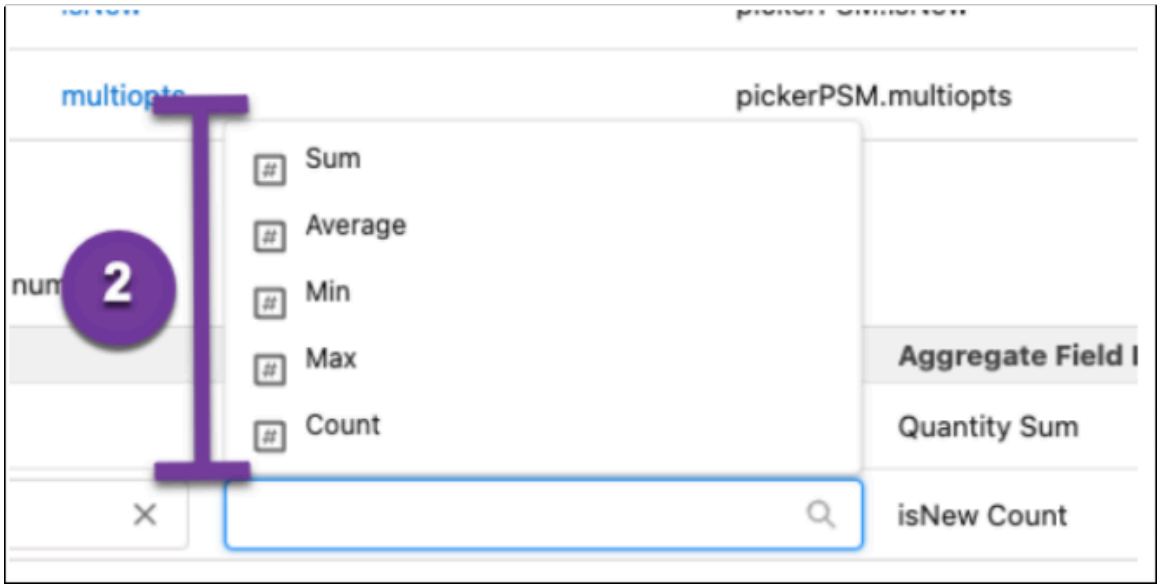
- (1) Open the Option Fields tab in the product picker
- (2) New section for aggregate fields
- (3) Add button to create a new aggregate field




When you create a new aggregate field, you can select any of the subfields in a product picker to aggregate on.

A list of available sub fields are displayed. Select the field to create a new aggregate.

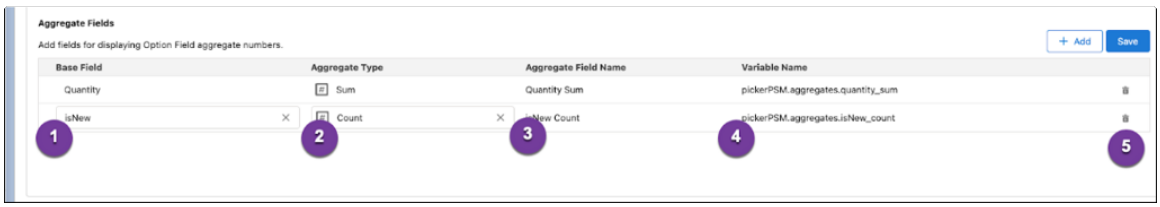
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1. Five types of aggregates can be created:

- Sum
- Average
- Min
- Max
- Count

Select the aggregate type to use for the subfield. Each aggregate type can only be used once per subfield.



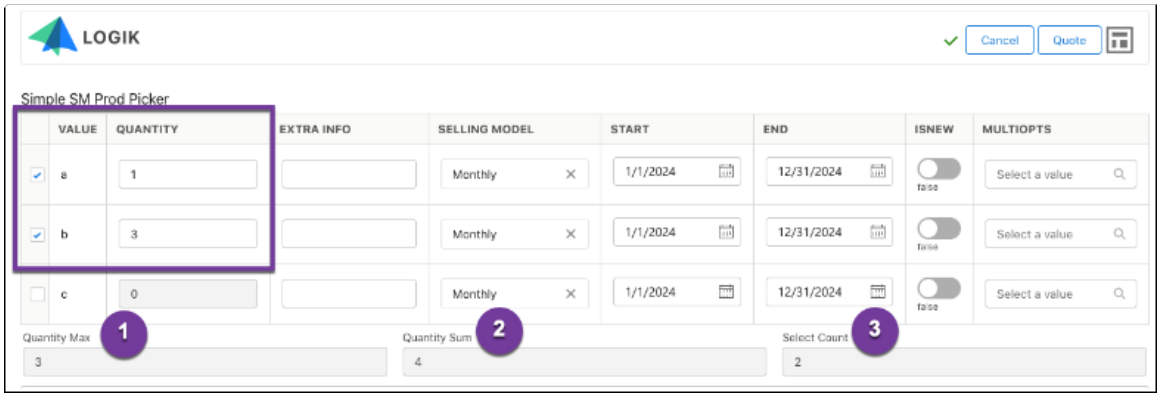

Final Aggregate Field:

- (1) Subfield to aggregate on
- (2) Aggregate Type
- (3) Field Name (automatically generated)
- (4) Variable Name (automatically generated)
- (5) Delete

## Example

Aggregate fields can be added to the layout and will automatically be calculated on change of a field.

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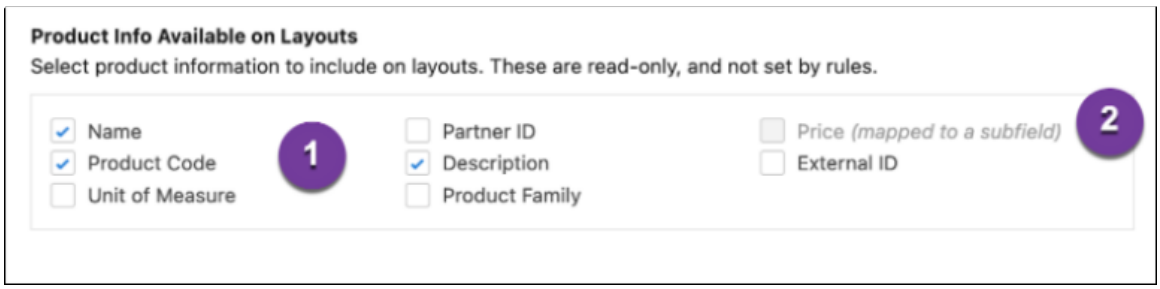



- (1) Quantity Max = 3, product b has qty 3
- (2) Quantity Sum = 4, one product with qty 1, one with qty 3
- (3) Select Count = 2, 2 products are selected

## Product Info fields

Product Pickers can optionally display some read-only information about a product. The values are pulled from the product template that is cached in CPQ. These fields can then be added to the layout.

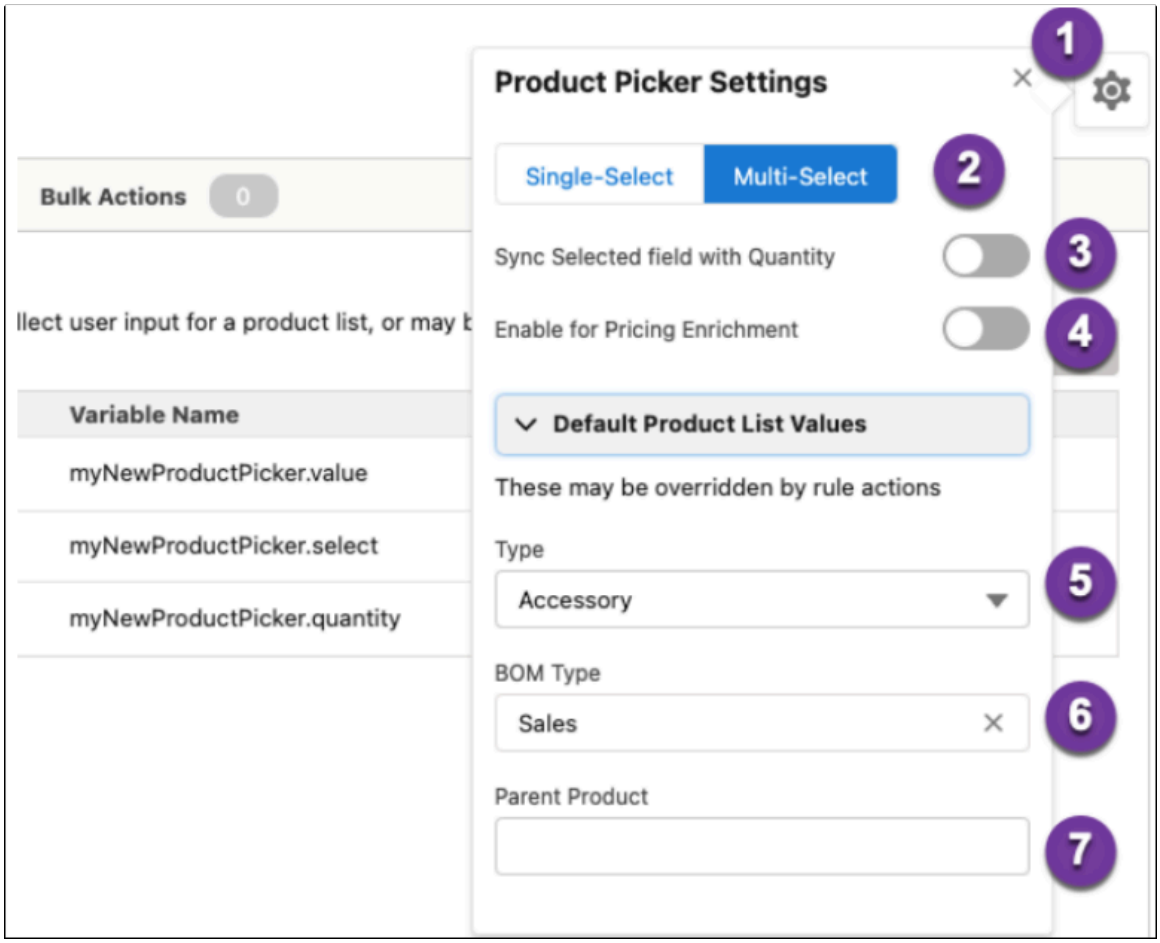
**Note:** These values are read-only and cannot be set by rules.




- (1) Available fields: Any available fields will be editable, to include a field and make it available in the layout, check the box next to the field name
- (2) Unavailable fields: Fields that are mapped to a subfield will be grayed out and unavailable to be included. To make a field available again, change the mapping of the subfield in the product picker Fields section

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## Product Picker settings




Product pickers have additional properties that can be set, both to control the product picker behavior itself and to set additional default values for the product list.

- (1) product picker Settings: Click the gear icon to open the product picker Settings menu
- (2) Type: Single-select or multiselect product picker, behaves same as picklist
- (3) Sync Selected field with Quantity: Boolean toggle field that controls whether the Quantity and Select fields in the Product picker are kept in sync. If enabled, these values are set based on whether the user has made changes. See the scenarios listed in the table below.
- (4) Enable for Pricing Enrichment: enable the product picker for Pricing Enrichments
- (5) Type: Type to use for product options, Accessory or Component
- (6) BOM Type: Which BOM to set by default for the product options
- (7) Parent Product: Name of the parent product to use by default for the product options

This table shows scenarios where the user changes Quantity and CPQ changes Select, or vice versa. In all other cases, the value is not changed.

### Changes to the Quantity and Select fields

| Change | Status of Quantity field | Status of Select field | Result |
|---|---|---|---|
| User changes Select to false | Set to non-zero by rule | | Quantity set to 0 |

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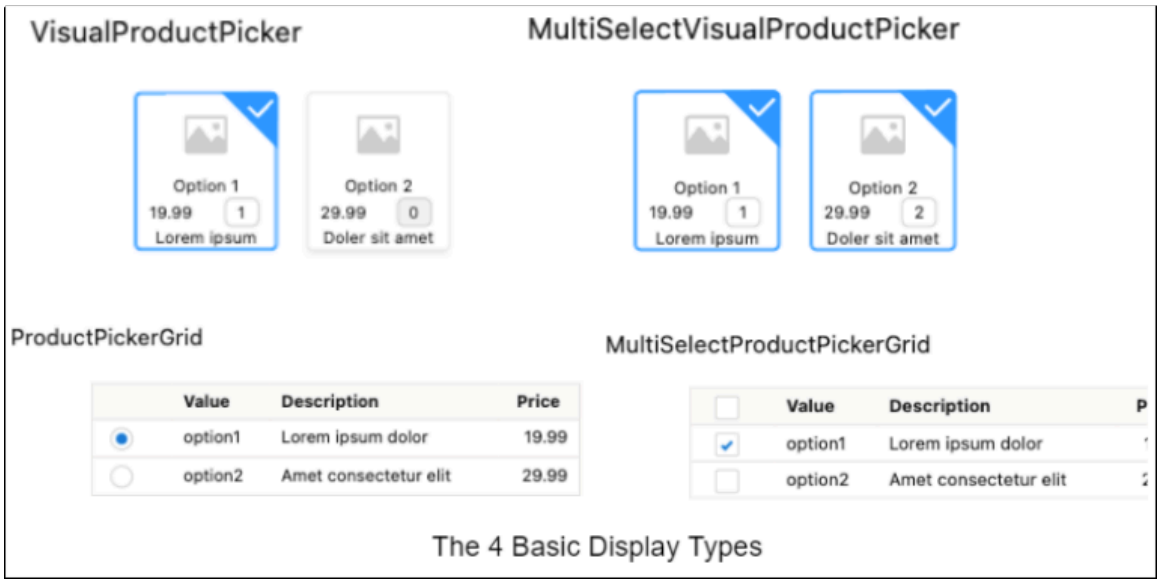
**Changes to the Quantity and Select fields (continued)**

| Change | Status of Quantity field | Status of Select field | Result |
|---|---|---|---|
| User changes Select to true | Set to 0 by user | | Quantity set to 1 (or its min value) |
| User changes Select to true | Set to 0 by rule | | Quantity set to 1 (or its min value) |
| User changes Quantity to non- zero | | Set to false by user | Select set to true |
| User changes Quantity to non- zero | | Set to false by rule | Select set to true |
| User changes Quantity to 0 | | Set to true by user | Select set to false |
| User changes Quantity to 0 | | Set to true by rule | Select set to false |

## Product Pickers in layouts

Product Pickers can be added and edited in Layouts both through the Layout Wizard and through the Layout CSV. Four basic display types are supported:

- VisualProductPicker: Tile based display, Single-select
- MultiSelectVisualProductPicker: Tile based display, multiselect
- ProductPickerGrid: Table based display, Single-select
- MultiSelectProductPickerGrid: Table based display, multiselect




The 4 Basic Display Types

## Product Picker imports and exports

If a product picker Field is associated with a blueprint, it will be included in the exports of that blueprint.

From the Fields page in the CPQ Admin, select a product picker to export and a ZIP file will be generated containing the following:

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- Product Picker fields
- Product Picker field options
- Product Picker definition and bulk actions
- Bulk Action data, each in a CSV file

A ZIP file containing a product picker can be imported through the Matrix Loader.

**Related topics**

Product picker bulk actions

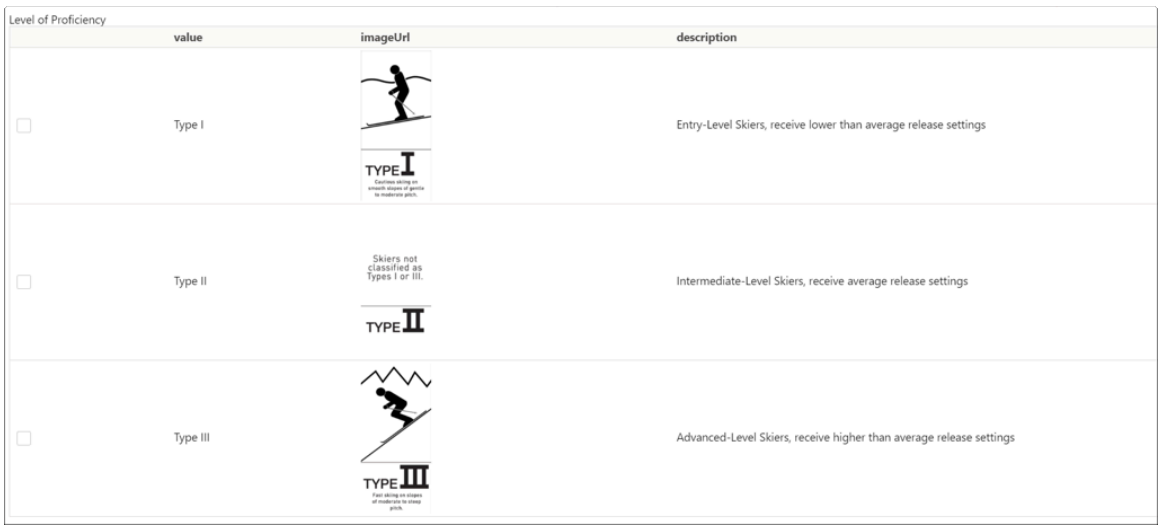
Referencing a product picker

### Picklist extensions

Picklist extensions enhance standard picklists by displaying additional option details, enabling automatic filtering, and supporting implicit product rules. Use them to simplify configuration logic and present richer, more informative option selections to users.

Picklist extensions provide three benefits:

- Display: Picklist extensions display the option data that resides in a picklist field, along with additional information that corresponds to each picklist. The graphic below is a single-select picklist in the form of a grid check box with three options, displayed as a picklist extension. Values of picklist options are in the leftmost column (value). All other columns are extended information.




- Optional implicit filtering (include/exclude rules): When tied to another field, options are filtered without having to write additional rules.
- Optional implicit product rules: The Admin can define a product and quantity for each selectable option.

**Related topics**

Configure picklist extensions

### Rules

Learn how to create and manage rules to deliver dynamic configuration experiences. Define conditions and actions to show or hide fields, display messages, calculate values, and generate

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bills of material (BOMs). Explore rule types, including visibility, message, inclusion, exclusion, determination, and product actions, to efficiently build intelligent, responsive configurations.

As the end user navigates through the configuration experience and populates information, rules provide its dynamic elements: hiding and showing content, calculating values, delivering recommendations and messages, and building the bill of materials (BOM).

Rules have two components: conditions and actions. CPQ supports six action types. The administration UI is a good place to add or edit a small number of rules. To update many rules at once, use the Matrix Loader. For more information, see Matrix Loader: CSV rules upload.

In the administration UI, rules are accessible in two ways:

- Global rules: In the navigation pane, click **Rules**. The rule list administration page displays all rules defined in the environment. If your task is to add new rules, this is the only place in the Admin UI where you can initiate a new rule.
- Rules associated with a single blueprint: Click **Blueprints**, and then click a blueprint. Click the Rules tab to view the rules. Click a rule to open it.

## Conditions

CPQ rule conditions consist of a logical expression. At runtime, the rules engine executes the rule if the expression evaluates true.

The administrator can define several kinds of conditions:

- Any Condition Is Met: ORs the defined logical expressions.
- All Conditions Are Met: ANDs the defined logical expressions.
- Always (Action Input Change): Runs the rule whenever the end user alters a relevant input.
- Custom Logic is Met: Allows the administrator to define custom logic, including ANDs and ORs, among expressions.
- Advanced Function: Enables the administrator to write a script to define the rule condition.

## Actions

The actions section of a rule defines the tasks the rule accomplishes when it runs (when its condition evaluates true). CPQ, unlike other engines, allows multiple actions and action types under one condition. This is a handy organizational feature that consolidates all tasks that need to be performed in the same scenario in one rule. The consolidation of multiple tasks with one condition also increases the efficiency with which the rules engine evaluates and accomplishes tasks. Increased efficiency translates to performance that the end user can see.

On the rule administration page, review the Actions section located below the summary and conditions area.

- List of actions: actions defined in this rule. Filter input allows you to find action(s) quickly, particularly when many actions are defined.
- Action editor pane: Allows Admin to review and edit the action selected in the list of actions.
- Add New Action button: define a new action for this rule. Six available action types are displayed in the action editor pane.

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## Hiding actions

Hiding actions hide an entire field from view to the end user. Use hiding actions to focus the end user's attention, presenting only those fields that are relevant to the solution being configured. A hidden field retains its value.

## Message actions

Message actions provide contextual information as the end user works through the configuration. The message is located relative to a designated field in the layout. Four message types are available.

**Message actions**

| Message type | Example | Notes |
|---|---|---|
| Info | X6000 doesn't require additional setup for the slot | No effect on configuration experience beyond message |
| Warning | Temperature specified is below freezing. Please evaluate heavy-duty options. | No effect on configuration experience beyond message |
| Error | Model 'P' power supply required. | Disables the Quote button so the user cannot move forward until the error state is alleviated. |
| Custom | Look is determined by user | The user can control whether this has no effect on configuration experience beyond message of if it disables the Quote button so the user cannot move forward until the error state is alleviated. |

You can customize the messages that are displayed. For more information, see Change how messages are displayed to the end user.

## Inclusion/exclusion actions

Control picklist field options using inclusion and exclusion actions. The two action types allow the administrator to define the set of field options in the most convenient manner possible. Both inclusion and exclusion rules may operate on the same picklist field. For a picklist, the displayed options are determined as follows:

1. Inclusion rules are applied to the set of options defined in the picklist field. If no inclusion rules are defined for the field, all of the picklist options continue past this step. The result of this step is the included set of picklist options.
2. The included set is then evaluated against any exclusion rules that apply. The result is the 'displayed set' of options.

Picklist options that are eliminated as a result of inclusion/exclusion actions can either be removed or disabled from the picklist menu of options visible to the end user.

During runtime, if a picklist option is selected (either by an end user or via determination action), but inclusion/exclusion rules later determine that it is an invalid option, users can specify what

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happens if currently selected options become excluded. The user may choose to leave the selections unchanged, deselect the selections, or to deselect the selections and then select the first valid option instead. The Quote button is disabled until the end user corrects this error state.

## Determination actions

A determination action programmatically sets the value of a field. The administrator can choose whether the determined value is soft-set or read-only (forceset).

If an end user changes the value of a field that had been soft-set by a determination rule, CPQ displays a message to the user reminding them of the recommended value. The message does not limit the user from quoting the configuration; it is informational only. If the user reverts the value of the field to the determination-recommended value, the message goes away. The Admin can choose not to display this message.

## Product actions

Product actions result in additions to the bill-of-material (BOM). When the BOM Type is set to Sales, a simple product action displays the product to the user as a line in the shopping cart. These sales BOM items are transferred to the Salesforce Quote Line Editor (SFDC QLE) when the configuration is quoted. If the BOM Type is set to Manufacturing, administrators usually do not show these lines to end users in the shopping cart. Manufacturing BOM items, however, are recorded and transferred to the SFDC Configuration Line Item object for communication with ERP and provisioning applications downstream.

### Inputs

| Input | Notes |
|---|---|
| Product | When BOM Type = Sales, the value in Product can be a 15-18 digit <SFDC Product2 Id> with format, 01t5f0000001tEIAAI. CPQ pulls product code, description, and price from the SFDC Product2 record, or <SFDC Product2 Product Code>, or External ID depending on environment Product Id field settings.<br><br>When BOM Type = Manufacturing, four options are available:<br>• <SFDC Product2 Id><br>• <SFDC Product2 Product Code><br>• External ID<br>• A valid string composed of letters, numbers, spaces, and the following special characters: { } [ ] ( ) \| \ ~ ` _ ^ @ ? <=> ; : / . - , + * ' & % $ # " ! |
| Quantity | <positive integer> |
| BOM Type | Sales: display in shopping cart. Quote pushes the item to the SFDC QLE and Configuration Line Items objects. |

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**Inputs (continued)**

| Input | Notes |
|---|---|
| | Manufacturing: usually not shown to the end user. Quote pushes the item to the SFDC Configuration Line Items object.<br><br>All: All BOM types display in shopping cart. Quote pushes the Sales and Manufacturing items to the Configuration Line Items object and Sales to the SFDC QLE object. |
| Mandatory | TRUE: end user is unable to delete the item from the shopping cart.<br><br>FALSE: end user is allowed to delete the item from the shopping cart. |

## Advanced product actions

If your use case requires multilevel bills of material (BOMs), setting a dynamic quantity, or product attribution beyond that available in simple product actions, an advanced product action is necessary. The advanced product action allows you to write a script that outputs records to the ProductList object.

The following matrix describes available ProductList attributions.

**ProductList attributions**

| ProductList.<param> | ReqOpt | Valid Values | Notes |
|---|---|---|---|
| bomType | R | Sales, Manufacturing, All | In Salesforce-integrated use cases, Manufacturing items are only written to LGK__ConfigurationLineItem__c; Sales items are written to the QLE and LGK__ConfigurationLineItem__c |
| description | O | <text> | |
| extended | O | <JSON object> consisting of key : value pairs (see note 1) | If populated, this information transfers to LGK_Extended_Information__c on the Configuration Line Item object in Salesforce, after the user clicks the Quote button |
| id | R | When SF-integrated use case AND bomType = Sales… | |

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**ProductList attributions (continued)**

| ProductList.<param> | ReqOpt | Valid Values | Notes |
|---|---|---|---|
| | | Product2.Id, Product2.ProductCode, or External Id | See note 2 |
| | | When Headless/eCommerce AND bomType = Sales... | |
| | | ProductId or ProductCode | See note 2 |
| | | When SF-integrated AND bomType = Manufacturing... | |
| | | <text>, Product2.Id, Product2.ProductCode, or External Id | Administrators may add items not stored in Product2. If referencing records stored in Product2, note 2 applies |
| | | When Headless/eCommerce AND bomType = Manufacturing... | |
| | | <text>, ProductId or ProductCode | Admins may add items not stored in the Product object. If referencing records stored in Product, note 2 applies |
| level | O | <integer> | Optional; for Admin reference; does not drive app logic |
| notes | O | <text> | |
| orderNumber | O | <integer> | Populate this parameter with numerical values that determine the sequence number of lines. Note: the ProductList object is filled by all product actions that trigger in the the blueprint. Limited to 28 digits. |
| parentProduct | O | <text> | If populated, must match uniqueIdentifier of parent line. In SF- integrated use cases, the top-most parentProduct is |

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**ProductList attributions (continued)**

| ProductList.<param> | ReqOpt | Valid Values | Notes |
|---|---|---|---|
| | | | the Configurable Product. Set this value to the Product2.Id or Product2.ProductCode of the Configurable Product. |
| price | O | <float> | Negative and zero allowed. If unassigned, CPQ retrieves the base price from the product master. |
| qty | O | <float> | Negative and zero allowed. If unassigned, defaults to 1. |
| selectionType | O | Required, Optional | If left unpopulated, defaults to Required |
| uniqueIdentifier | R | <unique text> | String that uniquely identifies this line from others in this configuration session (see Unique Identifier attribute section below) |
| uom | O | <text> | Unit of measure |

**Note:**

1. The ProductList.extended parameter can take a shallow JSON object. Example: `{ "key1": "val1", "key2": "val2" }` Also, the Admin can define the extended key : value pairs for a ProductList record using JavaScript. Examples:`ProductList.extended["key"] = "val";` `ProductList.extended.key = "val";`
2. To simplify the migration of product data between test and production environments, particularly in SF-integrated environments, administrators can request product actions to reference a ProductCode or External Id rather than ProductId. In the CPQ Admin, go to the Utilities menu in the navigation pane, and then click **Settings**. You can then set the Product Id field to Product Code, Partner Id, or External Id. If considering migrating from ProductId to ProductCode after go-live, you must coordinate the setting change with the values referenced in your Product actions and the implicit product actions in any picklist extension data you have defined.

## Unique Identifier attribute

CPQ passes the unique identifier of a product in CPQ to the Unique Line Id field on the quote line in Salesforce, allowing users to assign unique IDs to specific Salesforce quote lines.

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When using the parentProduct and uniqueIdentifier attributes for product hierarchy, if two child products have the same parent product and Product ID but need to be displayed separately in the BOM, each requires a unique “uniqueIdentifier”. This ensures that the UI treats them as unique products when listing them.

See the following sample script to observe how item hierarchy, differentiating parent items via uniqueIdentifier, bomTypes, and iterating through ProductList records can work: Adv Product Action: Sample Hierarchical BOM.

**Related topics**

Quote line unique IDs

### The CPQ Configurator

The CPQ Configurator is an advanced commerce logic solution that allows businesses to configure and sell products more effectively. Unlike traditional product-based systems, CPQ uses an attribute-based configuration model. This ensures that users are guided through selections, rules are enforced automatically, and only valid outcomes are generated.

The configurator connects customers to products faster and easier by enabling:

- Attribute-based user inputs that drive the commerce logic engine.
- Guided product and solution recommendations.
- Headless eCommerce experiences integrated with existing channels.
- No-code/low-code tools for simplified maintenance and administration.

## Key benefits

- Faster sales cycles: Guided Selling and Solution Selling that reduces errors. Customers and sales reps can configure products quickly and confidently.
- Next-Generation Performance: High-performance architecture supports large product models. Flexible UI built with Salesforce Lightning for seamless user experience.
- Accelerated Product Launches: Introduce products faster with fewer SKUs to manage. Quickly deploy and update rules across channels.
- Lower Administration Costs: A no-code/low-code Admin interface consolidates multiple systems. Reduces integration complexity and ongoing maintenance overhead.

## Key capabilities

- Attribute-Based Configuration: Prompts users with guided questions. Applies configuration rules to ensure valid results. Eliminates human error found in product-based systems.
- Guided Selling and Headless eCommerce: Self-service buyers receive automated recommendations. Sales reps follow consistent workflows.
- Dynamic Bills of Materials (BOMs): Sales BOMs integrate with Salesforce CPQ Quote Line Editor. Manufacturing/custom BOMs support ERP and Order Management flows.
- No-Code/Low-Code Administration: Intuitive UI for creating, updating, and deploying rules. Removes dependency on IT or development teams.
- High-Performance Architecture: Handles complex configurations at scale. Maintains speed without compromising accuracy.

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## Product-based and attribute-based configuration

Product-Based Configuration

- Requires sales reps to manually select products.
- High risk of error due to changing lists and rules.

Attribute-Based Configuration

- Prompts users with questions about desired features.
- Applies configuration rules to automatically generate valid outputs.
- Results can be quoted in Salesforce CPQ or purchased directly online.

## Examples of commerce logic in action

- Sales Enablement
  - Sales rep enters requirements (e.g., "number of users").
  - CPQ applies rules and generates a valid configuration instantly.
  - Results flow into Salesforce CPQ quotes.
- Headless eCommerce
  - Customer answers guided questions in a web storefront.
  - CPQ delivers a tailored recommendation.
  - Customer purchases without sales intervention.
- Manufacturing Integration
  - Complex product configuration produces both a Sales BOM and Manufacturing BOM.
  - Sales BOM passes to Salesforce CPQ.
  - Manufacturing BOM flows to ERP for production planning.

## Key components

The Commerce Logic Engine is built from modular components that define how products are configured and presented.

### Key components of the configurator

| Component | Description |
|---|---|
| Configured Products | Salesforce objects that require configuration in CPQ before being added to QLE. |
| Blueprints | Containers for all components needed to render the UI. |
| Fields | Attributes that capture user inputs. |
| Layouts | Define how the configuration UI is displayed. |
| Rules | Ensure products are configured correctly. |
| Sets | Dynamic arrays that adapt to user selections. |
| Product Pickers | Menus for selecting products without running the rules engine. |
| Picklist extensions | Extend the capabilities of picklists. |

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**Key components of the configurator (continued)**

| Component | Description |
|---|---|
| Product Lists | Display the configuration BOM to the user. |
| Tables and Table Queries | Store and retrieve supporting data during configuration. |
| Set Repeaters | Combine set functionality with flexible layouts. |
| Associated Picklist Sets | Dynamically sized sets based on menu choices. |
| Field grids | Tabular field groups for structured data entry. |
| Advanced Product Actions | Scripts to define which line items are sent to the Config BOM. |
| Twinning | Copies Salesforce Quote data into CPQ fields. |
| Enrichments | Scripts that run outside the rules engine during configuration. |
| External Connections | Connect to third-party data sources to retrieve configuration data. |

### Transaction Converse

With Transaction Converse, you can use natural language to manage line items in transactions and quotes. Add, update, and delete items quickly and intuitively with conversational commands, even in complex transactions with many line items.

The new Transaction Converse feature in ServiceNow Quote Experience simplifies and accelerates the way users manage line items in transactions and quotes. Using natural language to interact add, delete, and update line items makes dealing with complex transactions with numerous line items easier.

## Key features

- Conversational line item management

  Transaction Converse lets users perform actions such as adding, updating, or deleting line items by typing or speaking their requests. For example, when a user tells the system to "discount laptop by 25%" or "add rear camera to the quote," the feature identifies the relevant items and columns, previews the intended changes, and asks for confirmation before the changes are applied.

- Bulk and targeted actions

  The feature excels at handling bulk changes across many line items, making it particularly valuable for transactions or quotes with hundreds of line items. Instead of manually searching and editing each line, users can issue a single command, and Transaction Converse efficiently processes the request.

- Controls that keep users informed and involved

  Transaction Converse is designed with robust feedback mechanisms. Before any changes are finalized, users can preview which line items and columns are affected, ensuring transparency and control.

- Intelligent prompt handling and clarification

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If a user's request is vague or ambiguous (for example, "take care of the expired licenses"), the feature intelligently prompts for clarification or offers possible interpretations. For example, Transaction Converse might suggest which items would be updated or deleted based on context and fuzzy matching. Transaction Converse uses reinforcement learning with human feedback to adapt to the particular language and needs of each organization. Over time, the model becomes more attuned to the way users phrase requests and to the unique characteristics of their product catalogs, personalizing the feature for each customer and making it increasingly effective.

- Bulk update via file upload

  Users can upload files to quickly add products and update price and quantity.

  - If the uploaded file includes non-configurable products that are not currently in the transaction, the products are added to the transaction with their corresponding prices and quantities. (Configurable products cannot be added at this time.)
  - If the uploaded file includes products that are already in the transaction, their prices and quantities are updated to match the file. Both configurable and non-configurable products can be updated in this way.
  - Products that are in the transaction but not in the uploaded file are not updated and remain unchanged.

  Transaction Converse supports comma-separated value (.csv) files and Excel format (.xlsx) files for upload.

- Easy activation

  Transaction Converse can be enabled on request for customers using ServiceNow Quote Experience Interested customers can file a support ticket, and the team will assist with activation and collect feedback to guide future enhancements.

  **Note:** Create a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

## Takeaways

- Transaction Converse enables users to manage line items using natural language, which streamlines add, update, and delete actions.
- The feature is particularly beneficial for large, complex transactions, reducing effort and improving efficiency.
- Built-in preview and feedback mechanisms give users control over changes before they are applied.
- The system adapts and improves over time, learning from user interactions and organizational language.
- Customers can request activation and contribute to the ongoing development of Transaction Converse.

Using Transaction Converse, ServiceNow Quote Experience customers can transform how they manage transaction data, making the process faster, more intuitive, and increasingly tailored to their needs.

### Solution configurations

Solution configurations let you link multiple blueprints together so buyers complete related product configurations in a single, connected session.

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A solution configuration combines two or more blueprints into a coordinated configuration session. When a buyer reaches a product that requires additional configurable components, each component opens in its own child configuration — linked to the parent through configurable product actions. The result is a unified session with a consolidated bill of materials (BOM).

Solution configurations suit complex products that span multiple independent blueprints, such as a platform product that includes separately configurable hardware and software components. Each blueprint can be deployed and updated independently, and the same blueprint can participate in multiple solutions.

A configuration becomes a solution when at least one child configuration is added. The product that a buyer starts from is the solution root. From the root, any number of child configurations — and child-of-child configurations — can be created based on rules defined in the admin.

**Note:** Solution configuration is an environment-level feature that is off by default. Contact Support to enable it for your environment by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

## What is solution configuration

Configurable product actions are a specialized type of product action that can be added to rules. They are similar to standard product actions, but have a blueprint defined and can include field mapping to pass data between configurations. Advanced configurable product actions require that the product ID and the blueprint fields are defined outside of the script.

Solution configuration enables you to create interconnected blueprint hierarchies where:

- A solution root is the topmost configurable product that is launched by the end user.
- A parent (source) blueprint includes a rule with a configurable product action for another blueprint.
- A child (target) blueprint is used to create a child configuration when a configurable product action is triggered.
- A solution BOM is the aggregated bill of materials that rolls up across all configurations in the solution.

## Benefits of solution configuration

Solution configuration provides distinct advantages for both CPQ administrators and end users.

**For administrators**

- Independent deployment: Each blueprint can be deployed independently, allowing for finer granularity when making changes or updates to a blueprint.
- Separation of concerns: Segment logical components from a configuration and allow different teams to work on blueprints without conflicting.
- Blueprint reusability: Blueprints can be reused as part of a solution, multiple solutions, or as independently configurable products, reducing duplication and maintenance overhead.

**For end users**

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- End users can seamlessly work through multiple configurations without needing to relaunch CPQ each time.
- Users can clone valid child configurations in set-based solutions, with cloned nodes being fully independent of the original.
- Users can add blank nodes or remove nodes from the solution navigation sidebar as needed.

## Key concepts

- Solution root: the top-level configurable product a buyer launches. All other configurations in the session are descendants of the root.
- Solution hierarchy: the parent-child relationship between configurable products in a session. The hierarchy is independent of the BOM hierarchy and supports a maximum depth of four levels, including the root.
- Solution BOM: the consolidated bill of materials that rolls up all products added across every configuration in the session.
- Field mapping: a mechanism for passing field values from a parent blueprint to a child blueprint when a child configuration is created or when a mapped source field changes.

## When to use solution configurations

Solution configurations work well when you need to manage complex products as separate, independently deployable blueprints while keeping the buyer experience connected. For simpler scenarios, consider these alternatives:

- Sets: use when managing large numbers of rows that may have different configurations within the same blueprint.
- Product Pickers: use for lightly configurable products that do not require a separate blueprint.
- Multiple independent configurations: use when downstream systems require separate, unlinked configuration outputs.

### Related topics

Enable solution configuration

Solution configuration terminology

Solution configuration limits

Field mapping supported field types

### Field mapping in solution configuration

Field mapping defines how field values pass from a parent blueprint to a child blueprint when a solution configuration session is running.

When you configure a configurable product action, you can define field mappings that specify which parent fields send their values to which child fields. Field mapping runs when a child configuration is created and again whenever a mapped source field changes.

Field mapping is directional: values flow only from parent to child, one level at a time. To continue mapping across multiple levels, define the mappings on each blueprint in the chain.

## Supported field types

You can map fields of the same type only. The following field types are supported:

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- Number
- Text
- Boolean
- Picklist

## Restrictions

- Target fields are read-only in the child configuration during a session. The child buyer cannot change a value that was mapped from the parent.
- System fields can act as source fields, but cannot be set as target fields.
- Fields inside a Set can be mapped to a field on the child blueprint.
- Mapping of an entire Set or an entire Product Picker is not supported.
- Product Picker subfields cannot be mapped to a field on the child blueprint.

**Related topics**

Define field mappings for a solution configuration

Field mapping supported field types

Create a configurable product action

### Bill of Materials in solution configuration

The solution bill of materials consolidates products from all configurations in a session, including child and grandchild configurations.

The solution BOM is a roll-up of all products added across every configuration in a session. It includes products from the solution root and from every child configuration below it, to any depth.

The BOM hierarchy — the parent-child nesting of individual products within the BOM — is controlled by the Parent Product and Unique Identifier properties defined in each product action. This is separate from the solution hierarchy. A child configuration can add products at any level of the BOM, including at the top level of the parent.

When two child products share the same parent product and product ID but should appear as distinct entries in the BOM, each requires a unique Unique Identifier value.

**Related topics**

View the solution bill of materials

Solution navigation and layout

Solution configurations

### Solution navigation and layout

The solution navigation sidebar and layout settings control how buyers move between configurations in a solution session.

Each configuration in a solution displays its own layout, defined by the blueprint associated with that configuration. No additional layout configuration is required to enable the solution navigation sidebar — it appears automatically when child configurations are added during a session.

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The header, background style, buttons, and default Product List display come from the solution root layout. This includes currency display settings and any custom branding applied to the root layout.

## Header actions and scope

Header actions in the solution root layout apply across the entire solution:

- **Save** and **Cancel** apply to the whole solution, not to the currently viewed configuration.
- **Reset**, **Validate** (when a validation enrichment exists on the blueprint), and **Change Layout** apply only to the currently viewed configuration.

## Solution navigation sidebar

The solution navigation sidebar lists all configurable products in the current session, including the root. Buyers can select any item in the sidebar to navigate to that configuration. Buyers can also navigate to a configuration by selecting its configurable product entry in the solution BOM.

### Related topics

Launch a solution

Navigate within a solution

Bill of Materials in solution configuration

### Config Converse

With Config Converse, you can use natural language to create simple or complex configurations.

The new Config Converse feature can make creating new configurations easier and faster by using natural language to leverage artificial intelligence.

## Enable Config Converse

To enable Config Converse, follow these steps:

1. Submit a support request to enable AI features for CPQ.

   To submit a support request, use the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

   You'll receive a message confirming that the features have been enabled. When the features are enabled, continue to step 2.

2. In CPQ Admin, click **Utilities**.
3. On the Utilities page, open the settings.
4. Click to set **Enable Smart Predict**.
5. Click to set **Enable Config Converse**.

When Config Converse has been enabled, follow these steps to enable the feature on a layout that's part of a blueprint:

1. In CPQ Admin, click to open a blueprint.
2. Click to open a layout for editing, and then access the layout properties by clicking the gear icon.

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3. In the Layout Properties window, scroll down to the Config Converse section and click to set **Enable Config Converse**.
4. If you want to create a default landing page for Config Converse in this layout, click **Use Landing Layout**.

   When the landing page is enabled, users see a window where they can enter a configuration request using natural language. Depending on the landing page settings, they may also be presented with other options, such as the ability to choose from a menu of configuration scenarios. Users can choose to skip using Config Converse and go to the regular configuration page by clicking **Skip**.

## Use Config Converse

To use Config Converse, type a configuration request into the prompt box, and then click **Generate configuration**. Use natural language. For example, you might enter a request like the following:

```
I need to config a workload type of AI/ML using unstructured data types. Data will be accessed moderately frequently, with a data size of 20 TB, a growth rate of 20%, and 99.99% uptime. Data should be retained for two years. Setup will be handled in house.
```

Config Converse searches for relevant fields based on the information in the prompt and updates the fields to generate a configuration that meets the requirements you provide. Depending on the configuration, a bill of materials (BOM) is also created.

As the configuration is generated, a **Configuration AI** pane appears that shows the details of the new configuration. When the initial configuration is complete, the user is prompted to specify any changes to be made. These changes can also be specified using natural language. Users can also modify the configuration without using Config Converse.

### Scripts

Learn how scripting extends CPQ beyond simple rules—understand where scripts run, what they return, and how to use them to model advanced configuration logic safely and efficiently.

Scripting enhances CPQ when configuration logic requires more flexibility than simple rules. Administrators can use scripts to calculate complex values, evaluate conditions, or manipulate product data dynamically. Scripts are available in rule conditions, actions, and in blueprint enrichments for initialization, validation, or pricing.

Scripting complements, but does not replace, declarative options. Use standard rules, picklist extensions, and product pickers first. Reserve scripting for specialized scenarios.

## Where can you use scripts

- Rule conditions: Return `true` or `false` to determine whether actions run.
- Rule actions: Set field values, hide or display elements, or build product lists dynamically.
- Blueprint enrichments: Initialize data, call external systems, or enrich configurations during “On Configure” or “Reconfigure” events.

Each script type requires a specific return value to ensure predictable results.

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## Expected return values

**Expected return values**

| Script Type | Return Format | Example |
|---|---|---|
| Advanced condition | Boolean | `true` or `false` |
| Advanced hiding | String | `"field_to_hide"` |
| Field determination | Depends on field type | Number → 5; Text → `"Red"`; Multi-select → `["Option1", "Option2"]` |
| Inclusion and exclusion | Array | `["OptionA", "OptionB"]` |
| Product action | ProductList object | `ProductList.add({id:"123", qty:2})` |
| Enrichment | Updated configuration object | `return cfgRequest;` |

## Configuration objects

Scripts interact with the following configuration objects:

- `cfg`: A read-only snapshot of current field values used by rules.
- `cfgRequest`: A writable object available in Enrichments; use `.set("value", x)` to modify fields.
- `ProductList`: Used to add or modify items in the bill of materials (BOM).

You can reference properties using either dot or bracket notation (`cfgRequest.fieldName` or `cfgRequest["fieldName"]`).

## Working with external data

Use external data to enhance configurations dynamically:

- Managed tables: Query data with `lookup()` to map results into fields or products.
- External connections: Make approved calls (for example, SOQL queries to Salesforce) to populate sets or field values in Enrichments.

These techniques reduce hard-coded logic and centralize data management.

## Debugging and testing

The scripting interface includes built-in tools:

- Code suggestions: Autocomplete for functions, variables, and fields.
- Help panel: Lists all supported functions and parameters with examples.
- Debugger: Accepts JSON input and displays output and `console.log()` results. Save common test inputs as comments for reuse.

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## General guidelines

- Prefer declarative rules when possible.
- Keep scripts concise and focused on a single task.
- Always return the expected data type.
- Use clear variable names and comments.
- Avoid nested or long conditional logic—use tables or external connections instead.

**Related topics**

Create scripts

### IP allow-listing update

To better support our growing needs and increase capacity, we have expanded the pool of outbound addresses used for requests from CPQ.

**Important:** This change is relevant only if you use allow-listing to control which external systems can communicate with your integration servers. If you rely on allow-listing, it is important to update your configuration to include the new addresses listed below. This will help ensure that your integration calls from CPQ continue to function smoothly and without interruption.

**Inbound production (prod01.ServiceNow CPQ.io)**

- 35.224.151.71
- 34.83.141.224

**Outbound production (prod01.ServiceNow CPQ.io)**

- 34.72.98.104
- 104.198.22.182
- 35.238.218.128
- 35.233.220.207
- 35.222.102.215(new)

**Inbound non-production (test.ServiceNow CPQ.io)**

Inbound:34.135.130.9

**Oubound non-production (test.ServiceNow CPQ.io)**

- 34.68.236.64
- 34.30.162.13
- 35.226.98.108
- 34.121.127.94(new)
- 34.29.158.138(new)

## Aug 1, 2025 Test Sector Update

While performing testing for a large data migration, we had a large increase in outbound IPs. These are dynamically assigned currently, but on Friday, Aug 22, 2025, we changed to a much smaller static list in Test.

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The following are the new additions:

- 34.10.0.135
- 34.10.242.143
- 34.122.88.68
- 34.123.63.250
- 34.134.181.254
- 34.135.82.144
- 34.136.119.129
- 34.171.226.19
- 34.173.198.250
- 34.28.193.204
- 34.28.74.81
- 34.29.158.138
- 34.44.124.55
- 34.44.76.215
- 34.46.254.151
- 34.55.149.73
- 34.55.173.230
- 34.55.91.85
- 34.56.58.123
- 34.58.152.142
- 34.58.72.106
- 34.60.204.253
- 34.63.178.255
- 34.63.29.27
- 34.66.102.79
- 34.66.181.238
- 34.66.55.102
- 34.67.116.134
- 34.72.83.158
- 34.9.93.234
- 35.188.84.55
- 35.223.33.177
- 35.226.103.168
- 35.232.208.89
- 35.238.247.112
- 35.239.113.70

The following are the IPs recently introduced:

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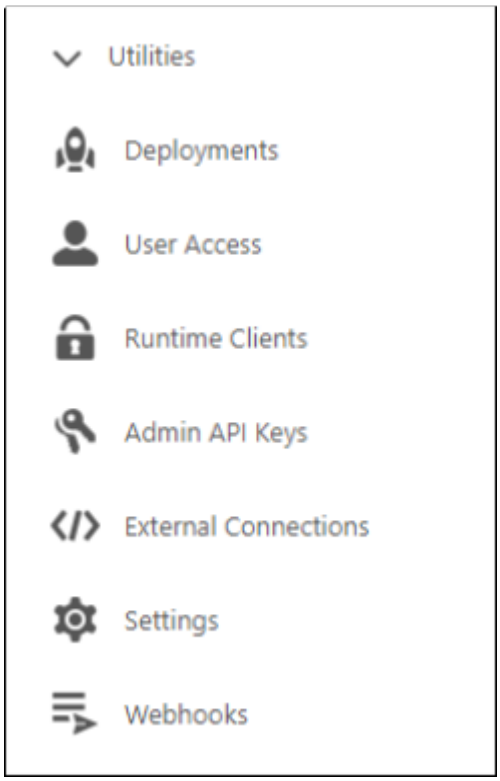
- 35.226.81.113
- 35.238.9.191
- 34.27.254.59
- 35.222.207.50
- 34.29.115.14

### Utilities

Access utilities including deployments, user access, and admin API keys to manage and customize CPQ.

CPQ has many features and settings outside the standard Admin pages of Fields, Blueprints, Rules, etc.

Any features that are not necessarily in common use when creating and editing a configuration can be found in the “Utilities” menu.




More information about the items in the menu can be found in the following topics:

- Viewing blueprint deployments
- Using CPQ user access management
- Set up a runtime client
- Intro to admin API keys
- Setting up configurable products
- CPQ: User Access Control
- Webhooks

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### Cosmo Admin Assist

Cosmo Admin Assist delivers conversational, AI-powered guidance to help admins quickly find answers and general guidelines. Using Retrieval-Augmented Generation (RAG) and ServiceNow knowledge articles, it provides context-aware, actionable support directly in the CPQ Admin interface.

Admin Assist significantly reduces the time it takes for product administrators (admins) to find answers about features and general guidelines. Admin Assist is especially useful for scenario-based questions, providing guidance you can immediately act upon and pointing to the most relevant articles for more information.

Admin Assist helps admins find answers and get guidance by using a Retrieval-Augmented Generation (RAG) approach. By leveraging ServiceNow's support and knowledge articles, Admin Assist lets admins ask both specific and scenario-based questions directly in the CPQ Admin interface. This feature streamlines the processes of learning about CPQ's capabilities and troubleshooting issues, reducing the time needed to find relevant information.

## Key features

- Conversational support: Admin Assist lets you ask questions in natural language, whether you're seeking information about a feature or exploring scenario-based use cases.
- Context-aware guidance: Admin Assist uses the context of your conversation to provide more detailed and relevant answers, tailoring suggestions to your specific needs.
- Knowledge article integration: Answers are drawn directly from ServiceNow's support and knowledge articles, ensuring that you receive accurate and up-to-date information.
- Decision support: To help you decide between complex alternatives, such as deciding between managed tables and external connections, Admin Assist outlines key considerations such as performance, data volatility, and source limitations.
- Direct support links: If Admin Assist can't fully resolve your query, you can reach out to ServiceNow's support team by following direct links in the interface.

## User feedback

Admin Assist continues to improve based on user feedback on its responses. Your input is essential for making the tool even more effective. Your insights help us enhance the feature and improve our models to serve you better.

**Related topics**

Cosmo SmartPredict

### Cosmo SmartPredict

Cosmo SmartPredict delivers AI-powered, in-context recommendations during configuration, helping users make informed decisions. It learns from live or uploaded data to generate accurate suggestions, improving configuration speed and consistency across blueprints. For clarity, suggestions are labeled Good, Better, or Best.

Cosmo SmartPredict provides users with fast, in-context, predictive recommendations as they complete their configurations. SmartPredict can be trained either on existing configurations that are stored in the CPQ environment or on data that is uploaded via a CSV file.

Cosmo SmartPredict leverages a strong underlying AI model, but depends on the quantity and the quality of the data that it is provided for training.

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## Setting up Cosmo SmartPredict

Access to Cosmo SmartPredict is restricted. To have SmartPredict provisioned in your CPQ environment, contact support.

**Note:** Create a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

Once provisioned, SmartPredict can be enabled on individual blueprints selectively. To enable SmartPredict on a blueprint, navigate to the blueprint, click the new Smart Predict tile in the blueprint, and click the toggle button on the SmartPredict screen.

To create a SmartPredict model, click **Create** to start defining the model parameters. At a minimum, a model must have a name and a variable name. Several additional model settings determine what data the model should use for training.

- Training with live data

  If you choose to use live data to train your model, existing and future configurations in CPQ that use this blueprint will serve as inputs to refine the model for the fields in the blueprint. You can further refine the training data by defining a start date and by specifying inclusion or exclusion of fields. You can create additional filters based on field values. Any filtering of the training data is optional. If all other parameters are left blank, the model will be trained on all existing configurations of the blueprint. Once finished setting parameters, click **Save & Train** to begin training the model.

  Optional filtering parameters include:

  - Start date: Choose a start date (inclusive) of configurations to train on. If blank, configurations will not be filtered by created date.
  - Fields: Individual fields on the blueprint can be selected to be either included or excluded.
  - Additional filters: To filter the training configuration data down to only those that match the filter criteria, you can select individual fields and enter equals criteria.

- Training with data from a CSV file

  Models can also be trained with data from external sources by formatting and uploading the data as a CSV file. In CSV data, the first row must be the variable names of the fields. You can download a sample CSV file with all the fields on the blueprint from the CSV upload page.

  When formatting the CSV file, you can choose to provide only a subset of the available fields on the blueprint.

  - Fields: The column header should be the variable name of the field that the values are provided for. Only fields that are of a type that can be predicted are used in training: Boolean, number, picklist, sets, and product pickers. Text fields are not predicted and are not used in training.
  - Multiselect picklists: Provide multiple values of a picklist using commas with no spaces.
  - Sets and product pickers: The formatting for set and product picker fields is `SetVariableName_index_fieldVariableName` or `ProductPickerVariableName_index_fieldVariableName`, using: 0, 1, or 2 for indexes, and the variable name for the fields, sets, or product pickers.

Once a model has been saved, it is queued for training based on the uploaded data or the filtered live data. Training is variable based on the amount of data that is supplied, but typically takes a few hours, or at most, a day. Once the model has completed training, it can be activated and deployed.

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Models are retrained if the filters, fields, or start date are changed when the model is using live data. If new CSV data is uploaded, the model is retrained. Models using live data continue to be trained on live data periodically. When the model is being automatically trained with new live data, there is no need to redeploy the blueprint to have it use the updated model.

## Using Cosmo SmartPredict

Once a model has been trained for a blueprint, it can be activated. Multiple SmartPredict models can be trained, but only one model can be active on a blueprint at any time. If a model is changed or activated for a blueprint, the blueprint must be redeployed to use the new model.

For an end user to trigger the recommendations from Cosmo SmartPredict, approximately 5% of the fields must be filled in with a value.

Predicted field types include numbers, picklists, Boolean values, sets (including number, picklist, and Boolean fields), product pickers, and subfields of all these types. Text fields are not predicted.

Three types of recommendations are provided to the user: Good, Better, and Best. These recommendations correspond to the model predictions based on the training data. As always, the quality of the data heavily influences the quality of the predictions.

Recommendations can change based on the fields that are filled out. Fields that are user-edited will not have a prediction.

If sets or product pickers are included in the predictions, all the fields in a set or product picker row have a predicted value.

## SmartPredict V1 and V2

Two models of SmartPredict are available: V1 and V2. While the V1 model remains available, V2 has superior capabilities.

The V2 model introduces several key enhancements and changes compared to its predecessor:

- Enhanced prediction confidence: V2 is engineered to provide higher-confidence predictions, typically offering a single, highly probable recommendation to guide your decisions.
- Broader field support: Prediction capabilities now extend to include sets and product picker fields, significantly widening its applicability across your configurations.
- Expanded prediction options: Unlike V1, V2 is not restricted to predicting three indexes or options for sets and product pickers, allowing for more comprehensive and flexible suggestions.
- Training data accessibility: Administrators can download the CSV training data used for any scenario from in the platform, offering greater transparency and control.

However, V2 model training times are significantly longer. For data sets of a few thousand rows, training typically ranges from 30 to 60 minutes. Furthermore, the model requires activation via the scenario list page. Activation consistently takes from 20 to 40 minutes, regardless of the training data size.

The V1 model remains operational, providing a smooth transition period as you consider whether to adopt V2.

Your input on the accuracy, performance, and overall experience with the V2 model is crucial for our continuous improvement. We are eager to hear about your experiences and celebrate the successes of customers leveraging AI in configuration. Please share your feedback with our support or product teams.

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### Notes and recommendations

Our AI model infrastructure requires substantial resources. To effectively manage capacity, models that have not been accessed for a prolonged period or exhibit very low usage may be automatically deactivated. Should your model be deactivated, you can easily reactivate it from the scenario list page. Allow approximately 20-40 minutes for the reactivation process to complete before predictions become available again.

In general, about 400 configurations are required to have a robust data set on which to train the model.

As with any AI model, the quality of the training data is the main factor in the quality of the predictions.

## Configurator

The Configurator is a user interface that is embedded in various Sales Customer Relationship Management applications, such as the Opportunity, Quote, and Order Management applications, enabling agents to configure complex products or services dynamically according to customer requirements.

**Note:** Check your entitlements to determine if you have access to this feature.

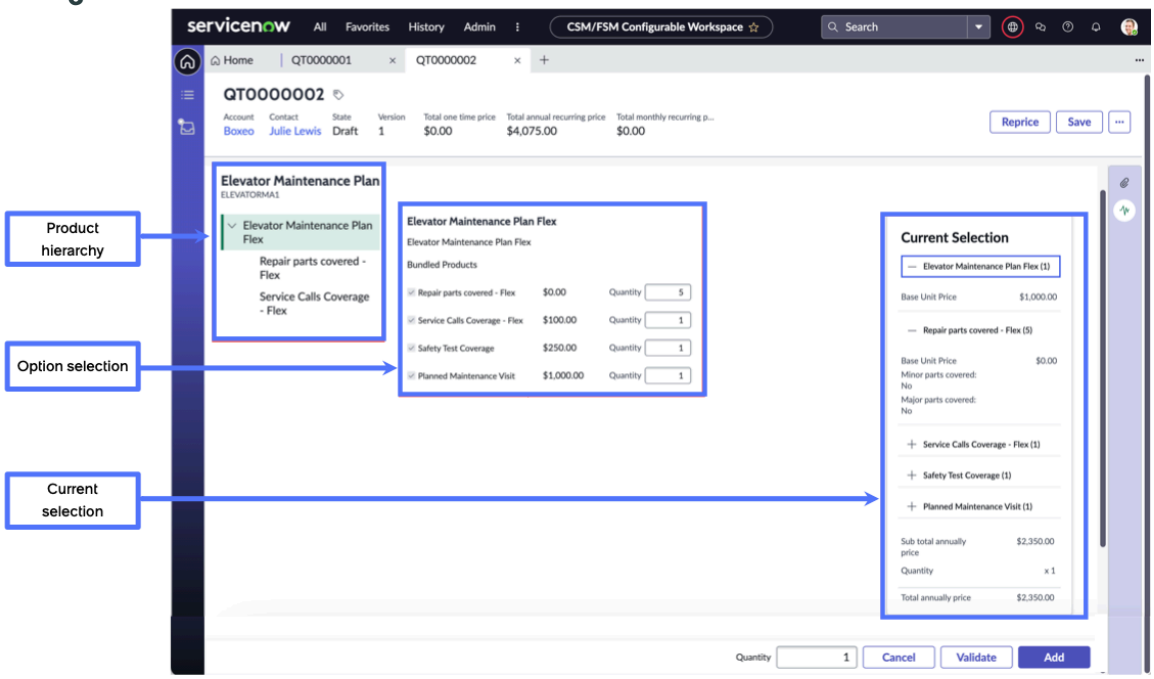
The interface consists of three main sections:

- **Product hierarchy**: Lists the parent and child product relationships for configurable products. Product hierarchies are configured using relationships and relationship groups. These hierarchies help agents navigate the product at different nodes or levels in a nested bundle. To learn more about how to configure this section of the product configurator, see Create product offering relationships.
- **Option selection**: Displays the product options or product characteristic options that can be selected. Characteristics and characteristic options are configured as you build your product offerings and appear in the product configurator. As your agents use the interface, visual indicators, alert messages, and contextual information about their entries are also displayed to help agents complete the order. For more information on configuring these options, see Create product characteristics and characteristic options.
- **Current selection**: Shows the pricing for the options that you select, which are calculated automatically and displayed. Pricing for selected options is shown and grouped as bundles as applicable. Also shown are the subtotals and total based on the recurring and one-time pricing methods. See Configuring product pricing for more information.

As an admin, you can use product configurator extension points and methods provided with the Open state management framework to customize the product configurator interface. To learn more about the framework, see Open state management.

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### Configurator interface




## ServiceNow Quote Experience

The ServiceNow Quote Experience is a single, modern quoting solution that supports both simple and complex quoting needs. It provides a configurable workspace for managing quotes, including products, pricing, approvals, and lifecycle progression.

### Key capabilities

- Create and manage quotes directly from your CRM opportunity workflow.
- Add products using the product configurator.
- Execute defined price strategies to generate accurate and competitive prices.
- Apply flexible pricing, including discounts, markups, and overrides.
- Route quotes through configurable approval workflows.
- Track the quote lifecycle from creation through completion.
- Generate customer-ready quote documents.

### Catalog and Configuration experience

The product catalog and product configurator lets users select and configure products directly within the Quote Experience. It supports complex product structures, dependencies, and pricing inputs while remaining embedded in the quoting workflow.

### Quote Pricing

ServiceNow Quote Experience integrates natively with CPQ Pricing Management, enabling your organization to set, manage, and optimize pricing strategies for Quotes. These pricing strategies enable your sales team to generate quotes with accurate and competitive pricing quickly.

### Composable architecture

The ServiceNow Quote Experience is modular and can be embedded into your existing CRM or customer experience platform. This flexibility enables you to:

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- Use the quote experience within ServiceNow Sales CRM or another CRM.
- Embed the quote experience in partner portals or custom sales applications.
- Integrate with external pricing, order management, and document systems.

## Implementation considerations

CPQ supports a range of deployment models and regulatory requirements:

- Deploy cloud-first implementations for modern, composable quoting experiences.
- Support tailored implementations for on-premises or federally regulated environments.
- Configure the solution to align with organizational controls, compliance requirements, and integration constraints.

## Supported use cases for the CPQ

Use the ServiceNow Quote Experience when you need a scalable, configurable quote solution that:

- Supports both simple and complex sales processes
- Integrates with your existing systems
- Provides consistent governance across the quote lifecycle

**Related topics**

Configuring ServiceNow Quote Experience

### Quote Management integration with Contract Management Pro

The Quote Management integration with Contract Management Pro is known as Contract Management for Sales CRM (com.sn_som_clm).

Quote Management integrates with Contract Management Pro to help sales agents create legal sales contracts from a quote. A legal sales contract confirms the sales deal and agreements between your company and customer.

The following roles are required to initiate, view, and manage contract execution:

- Contract fulfiller: This role is assigned with the **Sales agent** role and it enables sales agents to create contracts and execute the contract workflow.
- Contract configurator: This role is assigned with **Sales Ops specialist** role and it enables sales ops specialists to configure data required for contract initiation and its related tasks.

A contract generation process consists of the following steps:

- A sales ops specialist creates a contract type and document template, defines signatory rules, and completes configurations for the contract generation process. To learn more, see Configuring Contract Management Pro.
- A sales agent then initiates the contract creation process through the Initiate contract UI action by filling the required details, such as Type of paper, Contract type, Signature type, and Start and End dates.
  - **Inititate Contract** UI action is visible only when a quote is in Completed state.
  - After you submit the contract creation form, it creates a contract request record.
  - The new contract request triggers the workflow to generate the legal sales contract.

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To learn more, see Initiate a contract request.

- When the contract workflow is complete, the state of the contract request is changed to Closed complete.

## What to do next

To learn more, see Integrate with Contract Management Pro.

### Subscription Management in Quote Experience

Quote Experience integrates with existing subscription workflows to support the Subscription Management lifecycle.

## Integration overview

A system-provided blueprint defines the transaction fields, line type and line action fields, business rules, and guardrails that Quote Experience uses to populate and validate subscription quotes.

Sales agents use Quote Experience to create quotes and orders for subscription product offerings. When an agent completes the order, the system creates a contract that serves as the system of record for subscriptions. Subscription workflows manage the subscription lifecycle.

## Amendments and renewals

Sales agents can update a contract through amendments and renewals. For example, an amendment can increase or decrease the quantity of an existing subscription product offering. A renewal can change the renewal date.

Subscription workflows process amendments and renewals, assigning the line type and line action based on the change.

The workflows pass the data to Quote Experience, which uses the system-provided blueprint to populate the transaction fields.

Quote Experience uses the line type and line action fields to represent the change and support downstream processing. For example, an upsell requiring additional quantity splits the line. The workflow sets the line type to **Amend** and the line action to **Add** for the additional quantity. Quote Experience uses these values to represent the change on the quote.

Quote Experience also applies business rules and guardrails when it processes a quote. Business rules and guardrails support amendment and renewal processing and prevent changes that would invalidate the quote.

Together, the transaction fields, line types and line actions, business rules, and guardrails in the system-provided blueprint control how Quote Experience represents and processes subscription amendments and renewals.

**Related topics**

Quote Experience configuration for subscriptions

## Pricing Management

The Pricing Management application enables your organization to set, manage, and optimize pricing strategies for any Sales Customer Relationship Management solution. These pricing strategies enable your sales team to generate opportunities, quotes, and orders with accurate and competitive pricing quickly.

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The Pricing Management application is the foundation of any Sales Customer Relationship Management solution. Pricing Management provides various features to implement pricing in your organization.

**Note:** Check your entitlements to determine if you have access to these features.

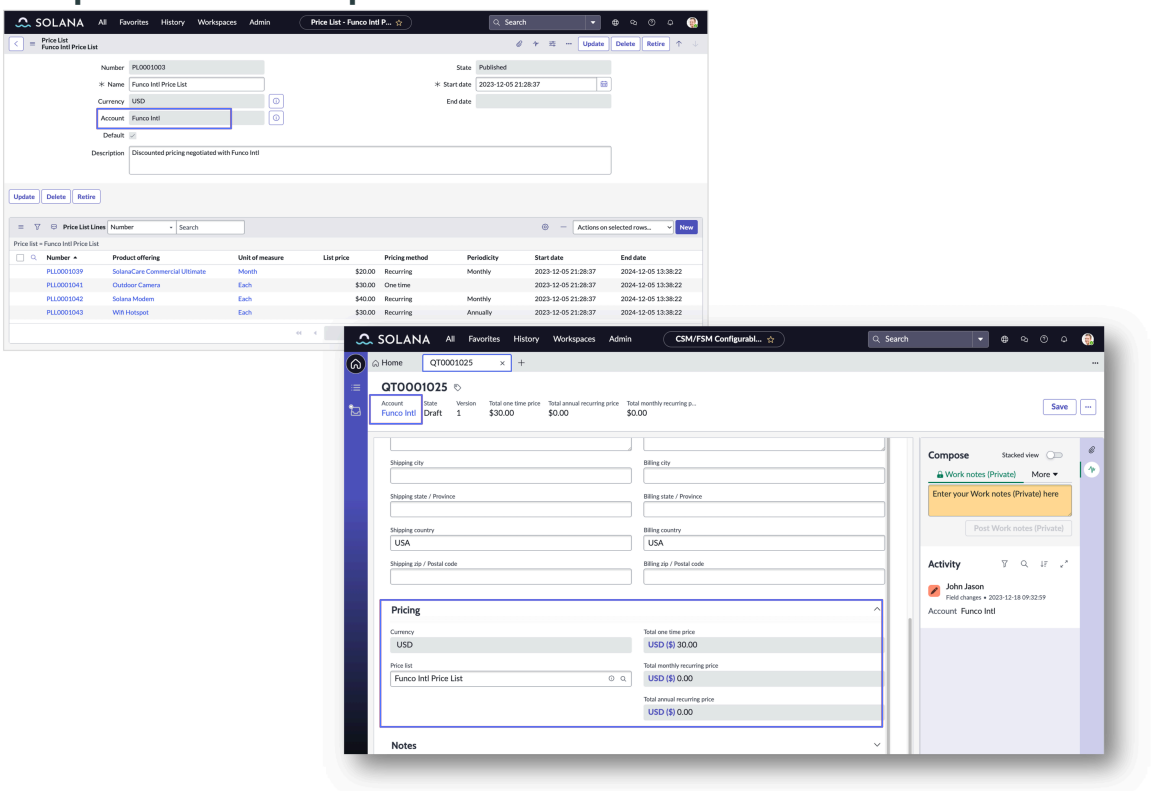
## Price lists

Price lists define the prices for products and services offered by your organization. Your agents use price lists to find product pricing quickly when creating quotes and capturing orders. Your pricing admins or managers create price lists and add price list lines that define the list price for each of your product offerings. They can also copy a published price list and its price list lines and use the copy to update the pricing or reuse the price list without having to create a new price list.

### Support for multiple price lists

Pricing Management supports multiple price lists, such as price lists based on currency or customer account. The initial, default price list that you create is based on the currency used, but you can change the default price list used by your agents. For example, you can create account-based price lists that are tailored to the needs and preferences of a specific customer or provide pre-negotiated prices for them. You can set an account-based price list as the default, which is then used by your agents when they create quotes or orders for that particular customer.

#### Example of account-based price list




### Pricing methods

The pricing method is either a one-time fee or a recurring pricing fee with monthly and annual frequencies. The pricing method is set in product offerings and is displayed in price list lines.

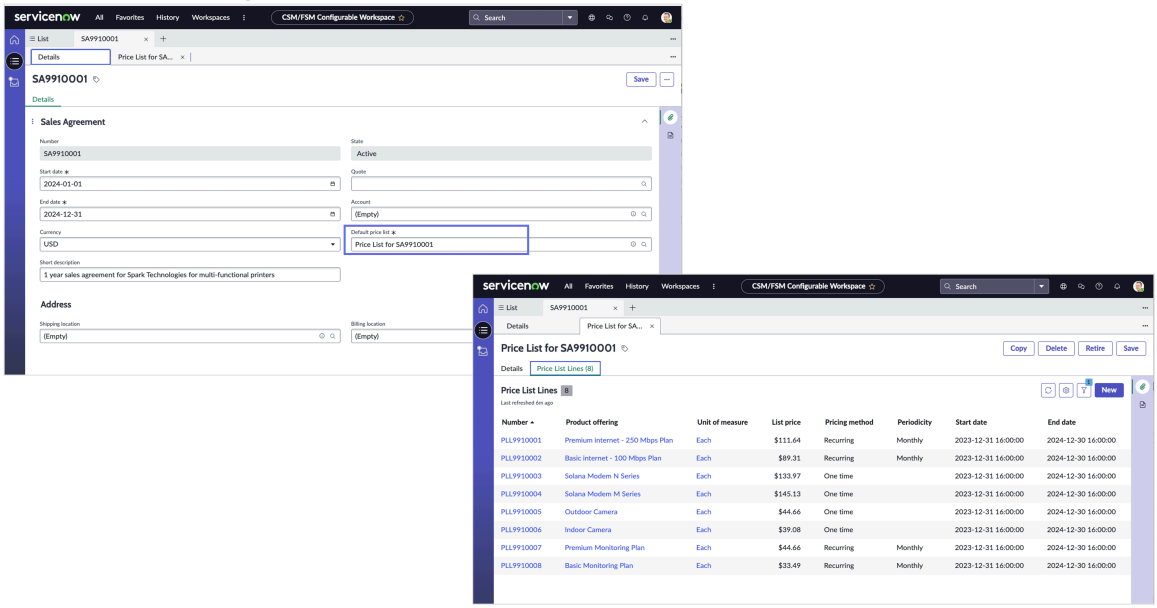
For details on setting up and managing price list features, see Configuring product pricing.

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## Sales Agreement price lists

If you're using the Sales Agreement feature, a published sales agreement price list is generated automatically when a sales agent creates a sales agreement from a completed quote. The sales agreement price list reflects the final unit price for each product that is captured as part of the sales agreement. The sales agreement price list is valid for the start and end dates specified for the agreement. To learn more about sales agreements, see Sales Agreement Management.

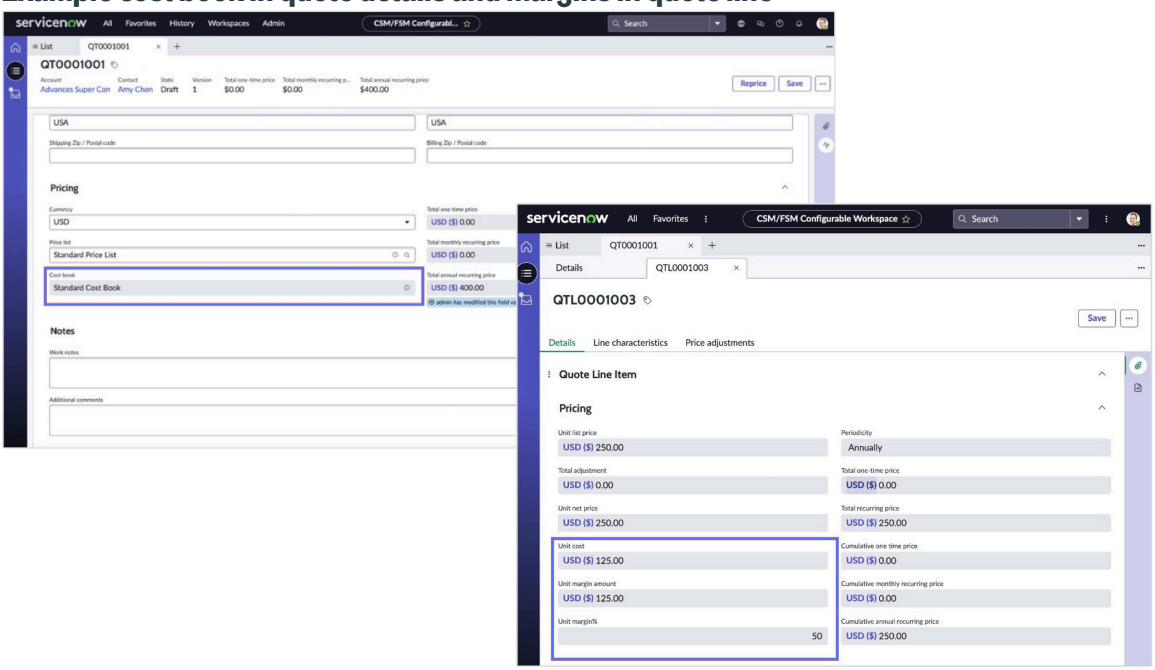
### Example of sales agreement price list




## Cost books

Cost books define the unit cost for product offerings. This information is used in the Quote Management application to provide sales agents with the unit cost, unit margin amount, and unit margin percentage for products in quotes. With this information, your sales agents can perform a simple profitability analysis by subtracting the cost of the product offer from the quoted selling price.

### Example cost book in quote details and margins in quote line




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Your pricing admins or managers create a cost book and add a cost book line to set the unit cost for each product offering. They can also copy a published cost book and its cost book lines to revise costs in the cost book (update the copy) or reuse a cost book without having to create a new one. For details on setting up cost books and cost book lines, see Create and publish a cost book and Create a cost book line. For information on activating the cost book and cost margin features in Quote Management, see Configuring Quote Management.

## Cost-based attribute adjustments

As a pricing admin, you can capture the base cost for a product based on its characteristics, such as model or size, since those attributes can affect the final cost. You can define a cost-based attribute adjustment for a product by specifying a fixed amount or percentage markup or markdown to be applied to all cost books or to selected cost book lines. The base costs are used by the pricing engine to calculate profit margins for products in sales quotes. For more information, see Create and publish a cost-based attribute adjustment.

## Price adjustments

In Pricing Management, you can adjust the list price of your products by specifying a markdown or markup fixed amount or percentage, or a price override, based on the following features:

- **Product attributes**: Define a price adjustment based on product characteristics, such as model or color. For more information, see Create a product attribute-based pricing adjustment.
- **Non-product attributes**: Create a price adjustment based on characteristics that aren't related to a product, such as shipping information or sales channel. For example, you can create a pricing adjustment for customers in a particular region. For details, see Create a non-product attribute pricing adjustment.
- **Bundled products**: Create price adjustments for product offerings in a bundled product. For example, you might want to specify a markdown amount for certain product offerings in the bundle, because the bundle provides discounted pricing. For more information, see Create pricing adjustments for bundled products.

## Pricing matrices

Pricing matrices are frameworks for setting conditions in decision rules, which enable you to implement complex pricing adjustments and manage default price list or cost book selection. For instance, if you have multiple price lists, you can use a pricing matrix to specify the conditions that determine the default price list to be applied when agents create a quote or order. Pricing Management offers the following matrices:

- **Price List Defaulting**: Select the default price list to be used, such as the standard price list or an account-specific price list. For more information on configuring this price list matrix, see Control the default price list on transaction header or header line.
- **Cost Book Defaulting**: Select the default cost book to be used, for example the standard cost book or an account-specific cost book. To learn more about configuring this matrix, see Control the default cost book on transaction header or header line.
- **Standard Price Adjustment**: Apply an adjustment based on context variables that represent non-product attributes, such as shipping location or account. Pricing Management provides certain system-defined, non-product context variables that you can use in this matrix, but you can also create your own custom variables, for example, market segment. Your pricing administrator can work with your administrator to develop custom context variables that can be used in pricing matrixes. For details on configuring these adjustments, see Create a non-product attribute pricing adjustment. For more information on configuring custom context

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variables, see Create a custom context variable and Map a custom context variable to a transaction entity.

- **Configuration Component Price Adjustment**: Adjust the price of a product when it's sold as part of a product bundle. For details, see Create pricing adjustments for bundled products.

## Matrix validations

As an admin, you can use system-defined validations or set your own validations to validate rows entered into the decision tables for pricing and product eligibility rule matrices. For more information on these validations, see Configuring matrix validation rules.

## Pricing plans

Pricing Management provides a default pricing plan that defines the sequence of steps in which pricing calculations and adjustments are applied to determine final product prices. Adjustments include the pricing changes set in the pricing adjustment matrices. You can use the default plan, or you can copy the default plan and customize it by adding or changing the pricing steps to tailor it for your organization. To learn more, see Configurable pricing plans.

## Pricing extensions

Pricing extensions are integration points that your administrator can use to customize the pricing engine, giving you the flexibility to use pricing information from external sources or control the pricing engine processing logic. Pricing Management provides these extensions:

- Select Price List (DefaultPriceListExtensionPoint): Change the selection logic for using the default price list on a quote or order header.
- Select Cost Book (DefaultCostBookExtensionPoint): Change the selection logic for using the default cost book on a quote header.
- Get Product List Price (ListPriceExtensionPoint): Get pricing directly from another data source or extend the current price list derivation.
- Apply Attribute Adjustments (AttributeAdjustmentExtensionPoint): Get attribute adjustments from another data source, such as product manufacturers, or extend the current adjustment derivation logic.
- Get Cost (CostExtensionPoint): Get the unit cost for a product offering directly from another data source or extend the current cost book derivation logic.
- Apply Pricing Adjustments (PricingAdjustmentsExtensionPoint): Get pricing adjustments for a product offering from another data source, or extend the pricing engine logic by not relying on the Standard Adjustment and Component Configuration Rule Matrices to get the adjustment values.

To learn more, see Use extension points in Pricing Management.

# Advanced Approval Management

The Advanced Approval Management application enables you to define workflows for approving Sales Customer Relationship Management entities, such as customer quotes, in your sales organization.

## Advanced Approval Management overview

Sales agents use workflows created by approval admins in Advanced Approval Management to preview and submit approval requests for entities such as quotes. Authorized approvers review approval requests to verify that the items meet legal guidelines and company pricing policies. They can either approve or reject requests. These workflows provide oversight of the approval

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process, which helps prevent financial errors and delays in approvals, particularly for high-value or high-risk deals. During the approval process, sales agents and approvers receive notifications informing them of the approval status and approval tasks.

## Advanced Approval Management users

**Users in Advanced Approval Management**

| User | Description |
|---|---|
| Approval rule admin, approval rule writer<br><br>(For example, sales or business operation managers) | Creates approval configurations for Sales Customer Relationship Management entities, approval chains, approval trigger conditions, approval rules, approval users, and approval groups. |
| Approval rule viewer<br><br>(For example, business stakeholders, operations managers) | Views approval entities, approval chains, approval trigger conditions, approval rules, approval users, and approval groups. |
| Approval requester<br><br>(For example, sales representatives) | Creates, previews, and submits approval requests for entities, such as quotes. Tracks status, recalls approval requests if needed, and views approval history. |
| Approvers<br><br>(For example, members of Sales, Finance, and Legal teams) | Reviews, approves or rejects, and delegates approval requests. Can act on requests using different notification channels, such as email, CRM Workspace, and approval centers. |
| Approval request viewer | Views approval requests and approval steps. |

For a complete list of user roles, see Components installed with Advanced Approval Management.

## Advanced Approval Management workflow

This section describes the tasks involved in configuring and using Advanced Approval Management.

1. As an approval rule admin or writer, create an approval configuration for a Sales Customer Relationship Management entity, such as quotes.
2. Build approval workflows by creating:
   - Conditions that trigger the rules in the workflow
   - Approval rules that control the steps in the workflow
   - Approval chains for organizing workflow steps and the type of approval work
   - Approval users and groups (approvers and approver groups)
3. As a requester (sales rep), create and preview an approval request, then submit the request. The approval engine routes the approval request to authorized approvers.
4. As a requester, monitor and track the approval process using the advanced approval interface.

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5. As an approver, review and either accept or reject an approval request based on conditions and rules.
6. As a requester, update rejected requests and resubmit the requests.
7. As a requester, when the request is approved, proceed with the transaction.

## Advanced Approval Management benefits

**Advanced Approval Management benefits**

| Benefit | Feature | Users |
|---|---|---|
| Build and automate workflows that can handle sequential or parallel approvals or a combination of both | Create approval rules and Create approval chains | Approval admins |
| Enforce financial and legal guidelines particularly for high-value deals to reduce financial and legal risk | Create conditions that trigger approval workflows | Approval admins and approvers |
| Preview the rules, steps, and approvers before submitting a request | Working with approval requests as a requester | Requesters |
| Monitor approval workflow and status | Tracking approval status and history | Requesters, approvers, and business stakeholders |
| Approve or reject approval requests | Working with approval requests as an approver | Approvers |
| Submit quotes for approval | Submit a quote for advanced approval | Requesters |
| Approve quotes submitted for advanced approval | Approve an approval request for a quote | Approvers |

## What to explore next

To learn more about configuring and using Advanced Approval Management, see:

- Configuring Advanced Approval Management
- Using Advanced Approval Management
- Advanced Approval Management reference

## Advanced Approval Management AI

The ServiceNow® Advanced Approval Management AI application brings quote approval capabilities to Model Context Protocol (MCP)-compatible clients. Advanced approval users can manage quote approvals using natural language requests in an MCP client, without opening a ServiceNow instance.

## Advanced Approval Management AI overview

Advanced Approval Management AI provides MCP tools that enable approval users to engage in approval activities using the chat feature of an MCP client such as Claude. The MCP tools retrieve quote and approval information from the Sales CRM server, which connects the MCP client to a ServiceNow instance.

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Approval requesters and approvers enter prompts and queries in the chat interface of the MCP client, without navigating through application menus and forms in the ServiceNow instance. For example requesters or approvers can ask for the approval history for a quote or get quote details. The MCP client runs the appropriate Advanced Approval Management AI MCP tool functionality, then returns the result.

Your requesters (sales reps) and approvers can do the following advanced approval tasks by entering natural language prompts in the MCP client interface.

**What approval users can do with Advanced Approval Management AI**

| Approval activity | User role | Example query or prompt |
|---|---|---|
| Get quote details, such as header and line items | Requester or approver | • `Get me info on QT0001035`<br>• `I need header details on QT0001035` |
| Preview the approvals required for a quote, such as the approval rules and approvers | Requester | • `Who are the approvers for QT0001035?`<br>• `What is the business rule for QT0001035?` |
| Submit quote for approval | Requester | `Submit QT0001035 for approval` |
| Retrieve the complete approval cycle history for a quote (including every approval request, step, approval actions, any recalls or rejections) | Requester or approver | • `What is the history for QT0001035?`<br>• `What is happening with QT0001035?`<br>• `Who approved QT0001035?` |
| Retrieve all pending approval requests | Approver | `What requests do I need to approve?` |
| Executes approve or reject actions on pending approval steps | Approver | `Approve this step` |

## Advanced Approval Management AI users

**Users**

| User | Description |
|---|---|
| Requester (sales rep) | Submits sales quotes for approval and tracks the status of approval requests as they move through the approval |

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**Users (continued)**

| User | Description |
|---|---|
| | workflow. Accesses quote details and approval history to track approval request status. |
| Approver | Reviews and approves or rejects requests for quote approval. Accesses quote details and approval history to track approval request status. |
| Admin | Installs the required plugins and assigns the MCP server roles to requesters and approvers. |

## Advanced Approval Management AI workflow

Requesters and approvers manage the quote approval process by entering a series of queries or prompts in the chat interface of an MCP client. For example, approval activities can include getting quote information or performing a task, such as submitting a quote for approval. The client returns requested information and performs requested actions, then provides a summary of information requested or confirmation that the task was completed.

The following describes a typical end-to-end workflow.

1. The sys admin installs the required plugins and assigns the MCP-related roles to advanced approval users.
2. Requesters and approvers connect their MCP-compatible client to the Sales CRM Server.
3. The requester asks for quote details to review the current state of a quote.
4. The requester requests an approval preview of the quote to see the approval routing, approval rules, and approvers, before submitting a quote.
5. The requester submits the quote for approval.
6. The approver asks for a list of their pending approvals list to identify and prioritize quote approval requests that require action.
7. The approver retrieves the quote header and line details and optionally reviews the approval history for the quote.
8. The approver approves or rejects the request. If the quote is rejected, the approver must supply a comment that explains the reason for rejection.

## Advanced Approval Management AI benefits

With Advanced Approval Management AI, your approval users can perform approval tasks with improved efficiency by using the conversational interface of an MCP client, instead of navigating between multiple options and forms to complete tasks or switch between tools during the sales cycle.

## What to explore next

To learn more about configuring and using Advanced Approval Management AI, see:

- Configuring Advanced Approval Management AI
- Using Advanced Approval Management AI
- Components installed with Advanced Approval Management AI

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## Customer Contracts and Entitlements

The Customer Contracts and Entitlements application for Customer Service Management (CSM) provides solution to standardize, organize, manage, and use customer contracts and entitlements.

## Customer Contracts and Entitlements overview

You can use the Customer Contracts and Entitlements application to manage contracts from the initial offer to contract finalization, directly within the CRM Workspace. You can also manage customer contracts and entitlements life cycle changes, scope modifications, and cancellations. The application enables tracking of entitlements and improves contract compliance.

A customer contract acts as an agreement between the customer and the organization. A contract includes the consumer or account details, the products covered, and the contract term. Contract lines store information related to the product or services purchased as a part of the contract.

Contracts and entitlement workflows help in efficiently managing the complete life cycle of customer contracts and entitlements. The workflows in this application enable you to generate, modify, and renew contracts and entitlements.

## Customer Contracts and Entitlements benefits

### Customer Contracts and Entitlements benefits

| Benefit | Feature | Users |
|---|---|---|
| View and manage contracts and entitlements in the Agent Workspace. | Using Customer Contracts and Entitlements | Customer service manager, order agent |
| Establish relationships with existing customer data, such as sold products and install base items, by adding the contract and entitlement data to the common data model. | Add a sold product or install base item to a customer contract | Customer service manager |
| Support customer needs by implementing capabilities ranging from account-based support entitlements to contracts that include service plans with complex entitlement coverage. | Modifying an entitlement | Customer service manager, order agent, sales agent |
| Customers can create contracts to manage subscription, support, and maintenance contracts. Customers can create these contracts from product inventory records and also manage these contracts by modifying, renewing, or canceling them. | Creating and managing subscription contracts | Customer service manager |
| Integrates product catalog management, order management, and contract management to deliver a seamless capability to support selling of service contracts and entitlements. | Integration with Customer Service Management modules | Customer service manager |
| Manage changes in contracts and entitlements. If the customer wants to modify contracts such as changes in coverage or other specific terms, these changes can be | Modifying Contracts and Entitlements | Customer service manager, order agent, sales agent |

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**Customer Contracts and Entitlements benefits (continued)**

| Benefit | Feature | Users |
|---|---|---|
| managed using order management. You can also suspend, resume, and cancel them based on your requirement. | | |
| Enables the complete end-to-end sales and order management process to generate new customer contracts and entitlements. | Generating new customer contracts and entitlements | Customer service manager, order agent, sales agent |
| View the Price Ramp details on the contract line, that are applied to quote line items to define incremental price changes for recurring product offerings. This enables customers to scale their purchases during the contract or subscription term by adjusting the pricing. | Using Contracts and Entitlements Workflows | Customer service manager, order agent, sales agent |
| Enables non-standard renewals of contracts outside of the renewal cycle. This covers three scenarios: an early renewal, a late renewal, and a short-term renewal. | Renew a customer contract line | Customer service manager, order agent, sales agent |
| Enables consolidation of contracts where customers can merge multiple contracts for the same account into a single contract. | Renew a customer contract line | Customer service manager, order agent, sales agent |
| You can add or reduce the quantity to an existing contract during its term. | Upsell or Downsell a customer contract line | Customer service manager, order agent |

## What to explore next

To learn more about configuring and using Customer Contracts and Entitlements, see:

- Configure Customer Contracts and Entitlements
- Using Customer Contracts and Entitlements

## Sales Agreement Management

Sales Agreement Management is an application that captures the scope and conditions from a quote for future sales transactions, over a specified period between a buyer and a seller.

Sales Agreement Management can be a separate application or part of the Sales Customer Relationship Management application.

A quote is a formal offer for products and services, proposed at specific prices and related payment terms, which is sent to a prospective customer. Only after a quote is completed or closed, a sales agreement can be generated.

- Details about the buyer and seller involved in the transaction
- Validity period of the agreement
- Details of the products and services to be supplied
- Specific products and services: Quantities and pricing

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### Sales agreement workflow: Quote-to-sales agreement

Sales agreement and Sales agreement lines are based on quote and quote lines using the same product offerings.

### Sales agreement line items

In a sales agreement, a line item refers to any product or service being sold by the seller. These offerings can range from simple items to more complex ones that are configurable or bundled together. Each offering may also have specific features or characteristics. A line item might be a particular version of a product, a combination of different product configurations, or a category of products. A single agreement can include multiple line items.

### Sales agreement price list

In a sales agreement, the prices for products and services that are negotiated and finalized are called price lists. These lists specify the agreed-upon prices for various items included in the agreement. When a sales order is placed based on a sales agreement, these price lists are used to determine the pricing of the order. This ensures that the terms negotiated in the sales agreement are consistently applied to all sales transactions under that agreement.

## Order management

The Order Management application streamlines the order life cycle from capture to fulfillment. It automates decomposition, enrichment, and orchestration workflows, empowering users to accelerate delivery, reduce fallouts, and manage complex orders efficiently through a unified workspace and customer portal.

### Order Management overview

Automate and streamline the complex process of capturing and fulfilling customer orders with Order Management, a central hub that connects sales, operations, and technical teams.

- Order decomposition: Automatically break down a single, complex customer order into smaller, manageable tasks using predefine product catalogs and decomposition rules.
- Pricing capabilities: Ensure accurate billing with dynamic price lists, pricing matrices, and adjustment features.
- Order enrichment: Add necessary data to orders post-capture before they're decomposed.
- Single source of truth: Establish a unified source for all order data, eliminating silos and ensuring real-time consistency for all stakeholders.
- Jeopardy and fallout management: Proactively flag at risk orders and automate the handling of fulfillment errors to manage issues effectively.

With Telecommunications Service Management (TSM) or Technology Provider Service Management (TPSM) subscriptions, you can use workflows that help you manage your industry-specific products and services.

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## Order Management users

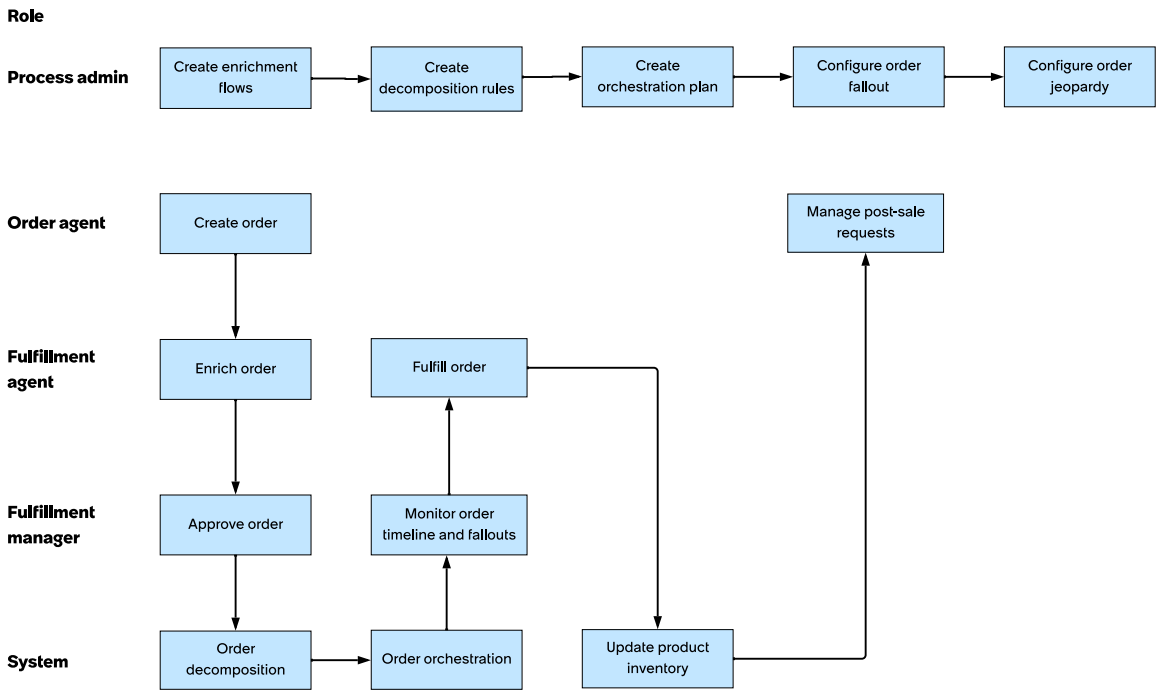
### Users

| User | Description |
|---|---|
| Customer | Accesses the Business Portal to browse catalogs, place and track orders, raise issues or request changes to orders, or work offline with agents to place orders or request services. |
| Order agent | Engages with customers and helps them place orders. |
| Order fulfillment agent | Monitors the fulfillment process and updates fulfillment tasks such as receiving, reviewing, and processing orders. |
| Order manager | Manages customer and service orders. |
| Order approver | Approves customer orders and ensures order accuracy. |
| Order fulfillment manager | Manages order fulfillment tasks, reviews and approves orders. |
| Order fallout agent | Investigates and diagnoses order fallout issues, eliminates order processing errors, and unblocks blocked orders. |
| Order fallout manager | Oversees order fallout agent and monitors fallout tasks to ensure that order fallouts are being addressed. |
| Process admin | Manages automated Order Management workflows such as order enrichment, order decomposition, jeopardy management, and so on. |

## Order Management workflow

The following illustration describes the tasks involved in configuring and using Order Management to manage the end-to-end order life cycle.

### Creating and fulfilling order with Order Management




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1. Process admins create order enrichment flows, decomposition rules, order orchestration plans, and order fallout logic using Workflow Studio and decision tables. Optionally, they also install and configure Jeopardy Management.
2. Order agent initiates the order life cycle by capturing an order in Order Management.
3. The fulfillment agent captures additional technical information essential to fulfillment.
4. The fulfillment manager reviews the order for accuracy and approves the order.
5. The system creates domain orders (product, service, and resource orders) based on the specification relationships set in the product catalog and decomposition rules. If some of the information isn't available when order decomposition starts, Order Management can stagger the decomposition to create certain orders using the information available at the time. Order tasks and work orders are created and assigned to the fulfillment based on the orchestration logic.
6. Using the order timeline view and orchestration UI, the fulfillment manager monitors the order status, fallouts, and jeopardy scenarios.
7. The fulfillment agents fulfill the order. This could involving installing products at customer sites or provisioning services.
8. After all order tasks are complete and order is closed, the product inventory records are created, which can be used to cater to future customer requests like disconnecting, suspending, or resuming products or services. The system also creates contracts and entitlements against the sold products and services respectively.

## Order Management benefits

### Order Management benefits

| Benefit | Feature | Users |
|---|---|---|
| Create and implement enrichment flows that the system applies during order orchestration. | Configure order enrichment flows using Decision Tables | Process admin |
| Configure jeopardy management rules to monitor fulfillment tasks ans alert managers when tasks are at risk. | Configuring Jeopardy Management | Fulfillment managers |
| Detect errors or exceptions during order processing and take corrective actions to improve SLA compliance and expedite order processing. | Managing order fallout | Fallout agent |
| Create and track orders via the workspace, or import orders from third-party systems. | Methods of creating orders in Sales Customer Relationship Management | Order agents |
| Speed up fulfillment with orchestration workflows driven by an advanced product catalog using the order orchestration UI. | Using the order orchestration UI | Fulfillment agents, fulfillment managers |
| Track orders, prioritize tasks, and allocate resources using Gantt charts to see order status and risks. | View an order timeline | Fulfillment agents, fulfillment managers |

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**Order Management benefits (continued)**

| Benefit | Feature | Users |
|---|---|---|
| Drive flexibility and efficiency of complex order orchestration by processing domain orders when the required information becomes available. | Staggered decomposition | Fulfillment agents |
| Enable post-sale support and drive customer satisfaction by effectively managing customers requests for disconnecting, suspending, or resuming products or services. | Managing post-fulfillment order changes | Order agents |

## Order Management variants

The industry-agnostic Order Management (sn_ind_tmt_orm) application supports a wide range of order processes for retail, e-commerce, and standard business operations. It focuses on product catalog management, order capture, and fulfillment, and is suitable for businesses with straightforward order processes. Key features include the ability to:

- Define products, underlying services, and the relationships between them.
- Create offerings for these products and services and market them to customers.
- Capture and enrich new orders received through channels which include the Product Order and Service Order Open API.
- Decompose orders into the appropriate product, service, and resource orders, and order tasks required to fulfill those orders.
- Define catalog rules that dictate how order characteristics are propagated and transformed during order fulfillment.
- Manage and orchestrate product, service, and resource orders to the external fulfillment and billing systems.
- Identify order fallout and automatically route fallout tasks to the appropriate team to investigate and diagnose.

The demo data available with Order Management demonstrates order intake and fulfillment for enterprise mobility products.

The Order Management for Telecommunications, Media, and Technology application (sn_om_tmt) is a tailored version of the industry-agnostic Order Management (sn_ind_tmt_orm) application, suitable for telecommunications and technology service providers. It contains reusable demo data related to telecom-specific offerings, specifications, decision tables, flows, ordering, and inventory. It provides TM Forum-compliant APIs for order capture and fulfillment. It enables you to handle complex service orders including:

- Single-domain service orders
- Multi-domain service orders
- All ordering scenarios including number portability
- Integration with network inventory, resource provisioning, service activation, field service, billing, ERP, assurance, and partner provisioning.

The following are some key differentiators for Order Management for Telecommunications, Media, and Technology:

**Complex product bundles**

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Handles highly intricate product and service bundles common in telecom (for example, voice, data, TV packages) and technology (XaaS, cloud services).

**Subscription and usage-based billing**

Native support for the complex life cycle of recurring, subscription, and consumption-based services.

**Service provisioning and activation**

Specialized workflows and integrations for activating network services, provisioning cloud resources, or deploying software licenses.

**Network-as-a-Service (NaaS)**

Support for following the NaaS architecture pattern with dual-layered decomposition and orchestration using the CFSS (Customer-facing Service Specification) abstraction.

**Network inventory integration**

Integrates deeply with network inventory to manage the technical aspects of service fulfillment.

**High-volume MACD**

Optimized for frequent commercial changes (Modify, Add, Change, Disconnect), common in subscription-based services.

**TM Forum (TMF) Open API alignment**

Aligns with industry standards like TM Forum Open APIs for easier integration in complex telecom ecosystems. For more information, see TMF APIs for TMT.

**Specific orchestration models**

Includes concepts like staggered decomposition and horizontal relationships unique to these industries.

Order Management for Telecommunications, Media, and Technology is part of the Sales CRM for Telecommunications. For more information, see Exploring Sales CRM for Telecommunications.

## What to explore next

To learn more about configuring and using Order Management, see:

- Configuring Order Management
- Using Order Management
- Extending Order Management with ServiceNow applications and integrations
- Order Management reference

# Jeopardy Management

Jeopardy Management is a risk assessment tool that monitors fulfillment tasks, assesses the risk level, and alerts fulfillment managers when the assigned task time is in jeopardy.

## Overview of Jeopardy Management

Jeopardy Management consists of multiple components in the Order Management application that work together to monitor and report on task completion time in a fulfillment plan.

If a task is taking longer than expected, the system assesses the percentage of delay and assigns a risk level.

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In Order Management, some customer orders are expected to be fulfilled in a committed time frame. The time commitment may be part of a contract that the customer and customer service provider (CSP) have signed to ensure delivery and assurance of products and services. To fulfill an order in the target date and time, a CSP depends on order management systems to monitor the fulfillment progress. Jeopardy Management proactively identities any delays and shares alerts, which can be addressed by fulfillment managers.

Jeopardy Management provides proactive risk management for the order fulfillment process through the following steps:

1. Monitor order fulfillment progress.
2. Predict jeopardy and risk for domain orders and order tasks.
3. Make jeopardy information available to users.
4. Fulfillment managers resolve tasks in jeopardy.

## How Jeopardy Management works

Jeopardy Management works by tracking tasks in an order fulfillment process. Order task relationships are created and task durations are set. Planned tasks are set in the Draft state and have a start time and an end time. As an order task is being fulfilled, any delays in the task's assigned amount of time triggers a jeopardy alert.

Jeopardy Management uses the following components to monitor and manage risk in order fulfillment:

**Define subflows and decision tables**

- Define subflows that create order tasks upfront and define task relationships.
- Configure jeopardy policy decision tables.

**Monitor order fulfillment progress**

- Define and launch SLA for order tasks.
- Monitor fulfillment progress and closure of domain orders and order tasks.

**Predict jeopardy and risk**

- Leverage planned task date fields and date roll-up logic to produce timelines for order task fulfillment progression.
- Monitor the progress of each order task and produce jeopardy information.
- Roll up jeopardy date changes for all order entities.

**Share jeopardy information**

Use the order forms, list, and orchestration UI forms to show jeopardy details for orders, domain orders, and order tasks to prioritize tasks to take action.

**Resolve tasks in jeopardy**

Based on jeopardy condition, customers can implement notifications or other logic as required based on the jeopardy level flag on each entity jeopardy.

## Jeopardy Management alert levels

In Jeopardy Management, the fulfillment manager can set different levels of alerts for each task. As the system monitors task duration, any delay triggers adjustments to the jeopardy level of predecessor and successor tasks in the fulfillment plan.

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The following table compares how Jeopardy Management assesses risk levels across tasks in a fulfillment workflow for three scenarios: expected, on-time, and delayed.

| Scenario | Product order | Task A | Task B | Task C | Task D |
|---|---|---|---|---|---|
| Expected | Duration: 48 hours | 12 hours | 12 hours | 12 hours | 12 hours |
| Scenario 1: On-time | Duration: 34 hours | 10 hours | 10 hours | 8 hours | 6 hours |
| Scenario 2: Delayed | Duration: uncertain | 10 hours | 18 hours (in jeopardy, task delayed) | Uncertain fulfillment time | Uncertain fulfillment time |

The following table shows how Jeopardy Management assesses risk levels for tasks in a fulfillment workflow and the impact on the successor tasks.

| Scenario | Task status | Risk level | Impact on successor tasks |
|---|---|---|---|
| Task completed within the expected time | On time | None | No adjustment to successor task risk levels |
| Task slightly delayed but within the acceptable threshold | At risk | Low | Successor tasks flagged as low risk |
| Task significantly delayed, exceeding the acceptable threshold | Delayed | High | Successor tasks escalated to high risk; jeopardy alert triggered |

Jeopardy Management assesses all tasks in a workflow and adjusts the risk level for tasks that occur later in the workflow. In the delayed scenario, a delay in Task B causes the fulfillment time for all successor tasks to become uncertain, and the product order duration can no longer be determined.

### What to explore next

For information on configuring and using Jeopardy Management, see:

- Configuring Jeopardy Management
- Monitoring order jeopardy

## Order operations

Explore tools that help manage exceptions, returns, and process visibility across the order life cycle.

### Get started

Select a link from the following table to explore tools that support exception handling, returns, process visibility, and sales operations across the lead-to-cash life cycle.

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**Order operations applications**

| Application | Description |
|---|---|
| Order Operations Case Management | Capture and manage order exceptions. |
| Case Lines and Workflows | Track and manage multiple related issues in a single case. |
| Case Management for Invoice Operations | Capture and manage invoice exceptions. |
| Lead-to-Cash Process Management | Create dashboards using consolidated sales data across ERP and ServiceNow systems to gain visibility into the full sales process. |
| Return Merchandise Authorization | Manage return, replacement, or refund cases for installed products. |

## What to explore next

Configure the order operations applications, so your agents and customers can use them in their sales workflows. For more information, see Configuring the order operations applications.

## Lead-to-Cash Process Management

The ServiceNow® Lead-to-Cash Process Management application empowers sales teams by providing a consolidated view of all critical sales data and activities.

## Lead-to-Cash Process Management overview

Lead-to-Cash Process Management is a centralized, real-time command center that aggregates information from various sources like Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) platforms into a dynamic dashboard.

## Lead-to-Cash Process Management users

**Users**

| User | Description |
|---|---|
| Sales admin<br>Contract admin | Define and create the sales process and relationships between the sales entities to be monitored using Lead-to-Cash Process Management. |
| Sales process manager | Create sales process records for an account and monitor, manage, and follow-up on tasks. |

## Lead-to-Cash Process Management workflow

The following illustration describes the tasks involved in configuring and using Lead-to-Cash Process Management to monitor the end-to-end sales process from a single interface.

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### Lead-to-Cash Process Management workflow

1. Sales admins create a business object group in the Next Experience UI, is a logical entity that defines your business process and the entities involved. For example, order-to-cash.
2. Create business entities (business object type) you want to monitor in your sales process and define relationships between them.
3. Add the business entities as members of the business object group.
4. The sales process manager creates sales process records in the CRM Workspace.
5. Sales process managers create sales process records for monitoring a customer account. A dashboard is created that contains the hierarchical node map view of the opportunities, quotes, orders, and other related entities.
6. Manage tasks, status, documents, and emails related to the business entities, and follow up with respective teams to expedite the process.
7. Track other tasks at the sales process record level by creating business process records.

## Lead-to-Cash Process Management benefits

**Lead-to-Cash Process Management benefits**

| Benefit | Feature | Users |
|---|---|---|
| Create a hierarchical relationship between sales entities using built-in or custom business objects that mirror your organization's structure and strategic goals. | Create business objects and set up relationships between the entities | Sales admin |
| Customize the number of levels and tile content on the node map, enhancing clarity and control so that the sales process managers can focus on relevant data and navigate through complex sales processes effectively. | Customize the sales process dashboard | Sales admin |
| Select parent entities (such as Opportunity, Quote, or Order) and child entities (such as Quote lines or Order lines) to create a customized view of the sales life cycle that reflects the structure and needs of each account. This capability helps you track only relevant records, reducing noise and improving focus. | Create account-specific sales process records | Sales process manager |

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**Lead-to-Cash Process Management benefits (continued)**

| Benefit | Feature | Users |
|---|---|---|
| Gain end-to-end visibility of the defined sales process through a consolidated view that provides a real-time snapshot of opportunities, quotes, orders, and related entities. The ability to see an entity's details eliminates the need to toggle between systems. | Consolidated view and nodal hierarchy for monitoring a sales process | Sales process manager |
| Adjust which entities are actively tracked by linking and delinking records or changing how records are linked to focus on relevant sales activities. | Link and delink records | Sales process manager |
| Streamline communication, task management, and documentation, which accelerates decision-making and improves cross-functional alignment and collaboration without having to leave the workspace. | View consolidated emails and tasks, create checklists and attachments, and use integrated chat | Sales process manager |

## What to explore next

The following topics provide more information about configuring and using Lead-to-Cash Process Management:

- Configuring Lead-to-Cash Process Management
- Using Lead-to-Cash Process Management
- Lead-to-Cash Process Management reference

## Return Merchandise Authorization

Return Merchandise Authorization (RMA) enables the return, replacement, and repair for install base items. It offers simplified processes, decreased turnaround time, and a unified workflow.

The RMA Case Management application includes the RMA case type. This case type provides the ability to reference multiple install base items as case line items on an RMA case record.

Using case line items, multiple issues can be tracked for the same RMA case. Also, the issues can be resolved in each case line item independently before resolving and closing the RMA case.

## What to explore next

- Activate the Return Merchandise Authorization plugin
- Return Merchandise Authorization Case Management

### Return Merchandise Authorization case end-to-end workflow

The Return Merchandise Authorization (RMA) end-to-end process is structured into a four-stage playbook that provides structured guidance and oversight throughout each phase. The RMA case workflow initiates when a customer logs an issue for their products.

The following are the different phase involved in RMA case end-to-end workflow.

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### Initiate case

- Agent action: Navigate to the RMA Case list and select **New** to open the RMA Case form.
- System action:
  - The playbook record generator renders the RMA Case form.
  - And once the RMA Case form is rendered, Agent fills the customer details and **Request Source** fields, and select **Save**.
  - The system creates the RMA Case in the **Draft** state.
- Agent action: Add defective install base items as RMA Case Lines.
- System action: Create RMA Case Lines for each selected item.
- Agent action: Update each line with request reason code and customer-expected resolution, then submit.

### Review case

Agent action:

- Assign the case to an agent, moving it to Work In Progress (WIP).
- Perform warranty and entitlement checks for each case line.
- Update proposed resolution sales return cases.

### Resolve case

Agent action:

- Create tasks for support teams if needed.
- Place case lines in the Awaiting Info state if more information is required.
- Communicate with the customer as needed.
- Update resolution codes and state for all case lines once resolved.

### Close case

Agent action:

- Put the RMA case in Resolved state and formally close the case after all lines are resolved.
- Send a final communication to the customer confirming the closure.

### What to explore next

- Activate the Return Merchandise Authorization plugin
- Return Merchandise Authorization Case Management

#### Return Merchandise Authorization case user journey

The Return Merchandise Authorization (RMA) user journey describes the steps a customer and support agent take when handling a sales return cases.

The RMA user journey starts when a customer reports an issue. The agent then manages the request through a clear four-stage process:

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1. Initiate the case
2. Review the details and entitlements
3. Resolve the issue
4. Close the case

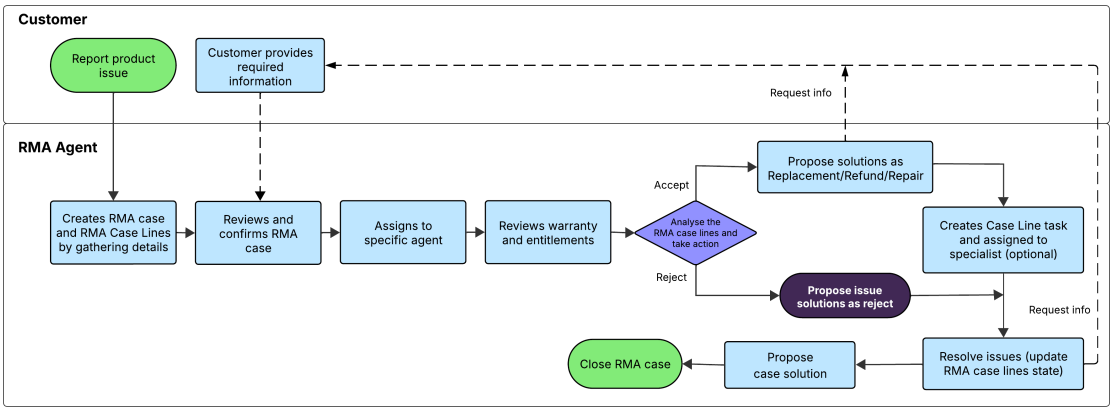
This approach confirms that every request is handled smoothly, with clear communication and a focus on effective resolution.

**Steps involved in the RMA case user journey**

| Steps | User | Action | System response |
|---|---|---|---|
| 1 | Customer | Identifies product issue and contacts customer support. | Support request is logged. Customer is guided to provide product and issue details. |
| 2 | Agent | Receives request and navigates to the RMA Case list. | Agent selects New to initiate RMA Case creation. |
| 3 | Agent | Fills in customer or account details and request source in the RMA Case form. | System renders the form and creates the RMA Case in Draft state. |
| 4 | Agent | Adds defective products as RMA Case Lines by selecting from customer's install base items. | System creates RMA Case Lines for each selected item. |
| 5 | Agent | Updates each case line with request reason code (such as defective, damaged) and customer expected resolution. | System saves details. Agent submits the case for processing. |
| 6 | Agent | Assigns the case to self (or another agent) to begin processing. | RMA Case and lines move to Work In Progress state. |
| 7 | Agent | Reviews warranty and entitlements for each case line. | System displays entitlement status and enables agent to add entitlements as needed. |
| 8 | Agent | Decision: Accept or Reject RMA Case? | If accepted, proceed to next step. If rejected, agent notifies customer and closes the case. |
| 9 | Agent | (If accepted) Proposed solution and updates repair type. | System records proposed resolution. |
| 10 | Customer | Reviews proposed solution and provided feedback (accepts or requests clarification). | System logs customer response. |
| 11 | Agent | If additional work is required, create task for specialist. | System assigns task and tracks progress for each case line. |
| 12 | Agent | Updates case line and overall case status as tasks are completed and customer feedback is received. | System transitions case through Resolved and Closed states as appropriate. |
| 13 | Agent | Communicates final resolution to customer and formally closes the case. | System archives the case and all related records. |

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### RMA case user journey




## What to explore next

- Activate the Return Merchandise Authorization plugin
- Return Merchandise Authorization Case Management

# Post-sales engagement

ServiceNow® post-sales engagement applications support adoption and post-sales workflows.

## Get started

Select a link from the following table to learn about key features and benefits of an application and how it can be used for post-sales workflows.

### Post-sales engagement applications

| Application | Description |
|---|---|
| Customer Life Cycle Management Workflows | Manage the life cycle of your sold products. |

## What to explore next

Configure the post-sales engagement applications to enable post-sales workflows. For more information, see Post-sales engagement.

# Partner Relationship Management

Learn how the Partner Relationship Management application enables enterprises to hire and engage channel partners to sell their products and services to grow and improve their business.

## Overview of Partner Relationship Management

Channel partners streamline and help manage the sales process of a product or a service for an enterprise. The PRM solution offers tools to manage the end-to-end partner life cycle.

PRM enables an efficient and continuous partner engagement and collaboration system with the enterprise to provide essential support. The PRM system enables partner onboarding, life cycle management, and improves the overall collaboration between channel partners and enterprises.

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To learn how to configure Partner Relationship Management, see Configure Partner Relationship Management.

The collaboration improves case management solutions and enables partners to log in to the Partner Portal to raise concerns or queries and communicate directly with the enterprise. This provides better resolutions leading to improved enterprise and partner collaboration.

In the partner ecosystem, channel partners such as resellers and system integrators are critical to expanding an enterprise's reach and drive customer success. Channel partners often must raise operations, sales, and service related issues directly with the enterprise. However, without a structured servicing and collaboration system, partners experience delays, inefficiencies, and friction that impact both partner satisfaction and business outcomes. The PRM solution can build a bridge between the channel partners and enterprises.

Use the Deal Registration Management plugin to ensure partners are recognized and rewarded for the opportunities they source and develop. Enterprises can also properly manage an upcoming deal from partners and help prevent multiple partners or internal teams from overlapping on the same customer or opportunity. To learn more about the Deal Registration Management application, see Deal Registration.

## Use case

ABC systems, a global technology reseller and implementation channel partner for XYZ solutions (enterprise), operates across North America with hundreds of active customer engagements. ABC's consulting and delivery teams frequently encounter challenges requiring direct support from XYZ, such as clarification on licensing models or product configurations. With the Partner Relationship Management solution, ABC no longer needs to rely on ad hoc emails, informal escalation channels, or multiple sessions leading to delays.

With the Partner Relationship Management solution, the channel partner ABC can do the following.

- Submit and manage support cases through the Partner portal designed for easy access and case tracking.
- Benefit from a role-based experience where channel partner managers and associates can independently raise cases and monitor the status without dependency on enterprise contacts.
- Gain visibility into program participation and support activities through personalized dashboards.
- Use the unified partner data model to confirm that entitlements and participation in XYZ's partner programs are accurately tracked and easily accessible.

With the Partner Relationship Management solution, the enterprise XYZ can do the following.

- View and fulfill cases raised by the channel partner ABC in a centralized workspace.
- Route assignments to the appropriate support agents.
- Track channel partner engagement levels within ABC via real-time dashboards.

By streamlining support and collaboration through PRM, ABC reduces its resolution time, improves internal efficiency, and strengthens its partnership with XYZ.

## Key benefits of PRM

The Partner Relationship Management solution offers the following benefits.

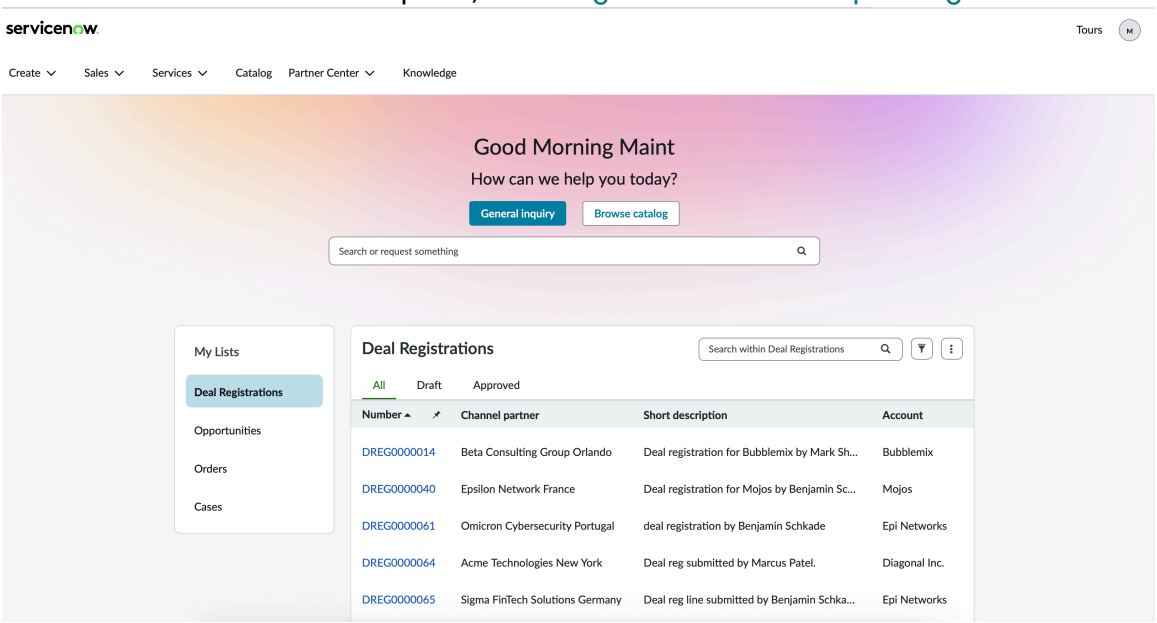
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- Enhances partner experience- Support partner onboarding and life cycle management to provide an improved interaction system between channel partners and enterprises. This increases partner satisfaction and reduces onboarding time.
- Increase sales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

## Partner portal

The Partner portal enables channel partners to create cases, register external members as staff, and view knowledge articles.

To learn more about the Partner portal, see Using Partner Relationship Management.




### Related topics

- Configure Partner Relationship Management
- Using Partner Relationship Management
- Partner Relationship Management
- Configure Segment Management
- Deal Registration
- Install Sales Common for Partner Relationship Management
- Install Order Management for Channel Partners

## Segment Management

Group entities effectively based on value, performance, or relevance using the Segment Management application (com.snc.segment_mgmt) to make sure that all customers or entities are treated equally.

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Define segments and set specific criteria levels to limit the ability to differentiate support levels, incentives, or even visibility. Segmentation enables organizations to engage entities effectively and offer incentives based on the criteria mapped for each segment.

Create and manage various segments to enable structured customer groupings. You can assign different segment structures to different programs and define criteria to drive consistent customer progression.

### What to explore next

Configure Segment Management

## Lead-to-cash foundation

Lead-to-cash foundation applications enable you to manage the end-to-end commercial life cycle from product setup to core transaction flows.

### Get started

Select a link from the following table to explore key capabilities that streamline your product setup, pricing strategy, and core lead-to-cash operations.

**Lead-to-cash applications**

| Application | Description |
|---|---|
| Product Catalog Management | Organize and maintain a unified catalog of products and services. |
| Pricing Management | Manage price lists, discounts, and rules to support dynamic and region-specific pricing. |
| CRM Core | Enable seamless integration of lead generation, quoting, order management, and fulfillment. |

### What to explore next

Configure the lead-to-cash foundation applications to enable core capabilities for using Sales Customer Relationship Management. For more information, see Configuring the lead-to-cash foundation applications.

### Product Catalog Management

Product Catalog Management enables your organization to manage your product offerings by grouping them into catalogs and categories, which streamlines the ordering process and helps manage leads, opportunities, quotes, and orders in Sales Customer Relationship Management.

Product Catalog Management provides various features to implement product catalogs and categories in your organization.

- Product catalog user interface: Launch from anywhere in lead, opportunity, quote, and order capture workflows, enabling agents to browse and find products quickly with a full catalog search function.
- Catalog category hierarchy: Use hierarchical structures of catalogs and categories to organize products and services logically.

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- Version control: Track changes made to product information over time, helping with transparency and auditability.
- Product offer eligibility: Filter your product catalogs, product offering categories, and product offerings so that agents sell customers only the products for which they're eligible.

**Note:** Check your entitlements to determine if you have access to these features. Also, starting with the Yokohama release, customers can use the Business Portal with Order Management to create orders using the product catalog and product configurator. For more information on this self-service portal, see Using the Business Portal.

To learn more about setting up product offering catalogs, see Configuring product offerings and catalogs.

## Product catalog UI

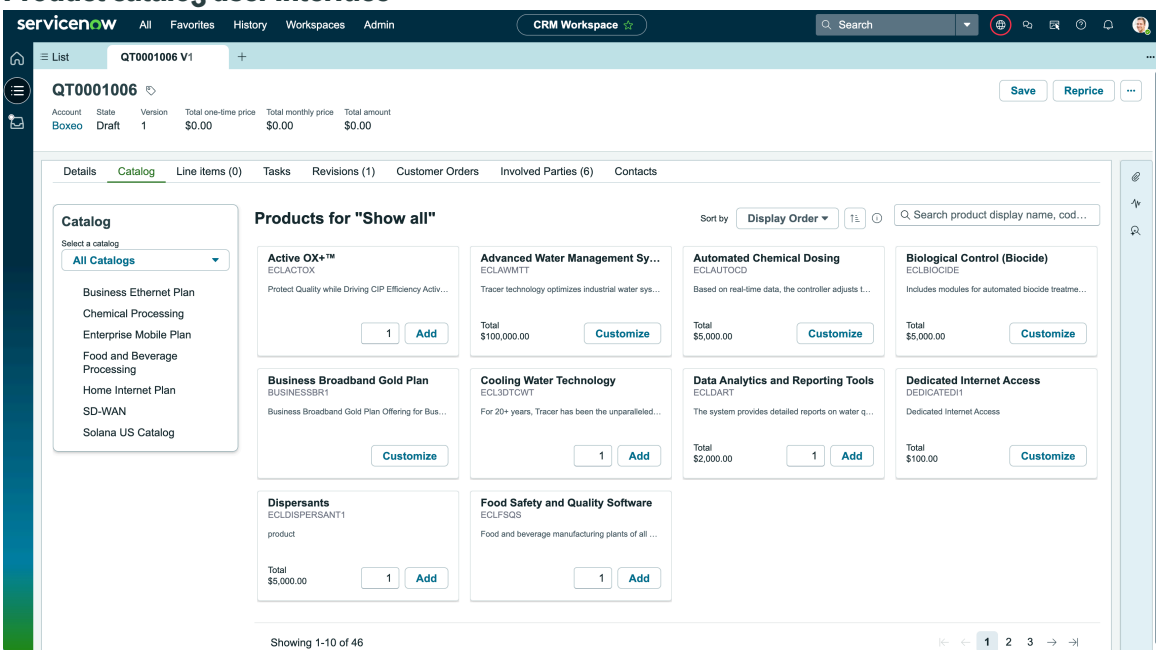
In the product offering catalog, agents and customers can do the following:

- Browse and search product offerings by using keywords, descriptions, and industry codes.

  Product catalog admins or managers can also configure AI Search in the product catalog interface, enabling agents and customers to find relevant product offerings or service specifications by using semantic queries.

- Review product offers that are organized by catalog category hierarchy, which streamlines catalog navigation.

### Product catalog user interface




## Product offering catalogs and categories

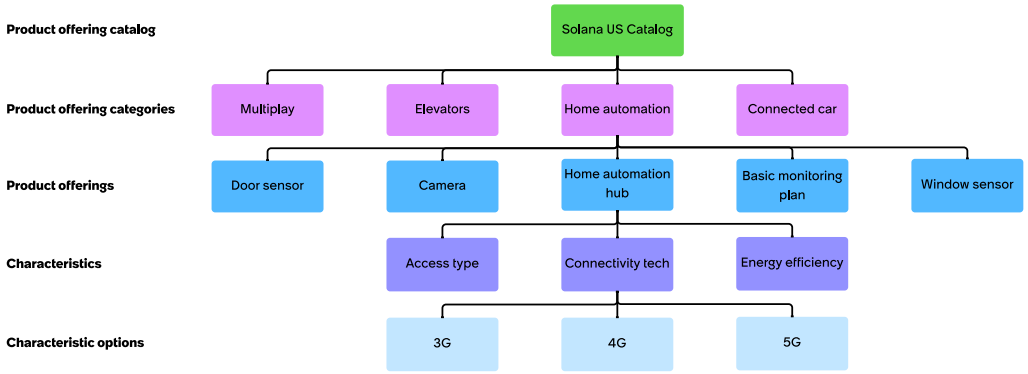
Product offering catalogs and categories offer a way to organize product offerings so that agents can easily find products to create orders.

- Product offering catalog: Hierarchical product offering structures of categories and product offerings.
- Product offering categories: Categories are a logical grouping of product offerings.

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- Product offerings: Physical goods or non-tangible services that are configurable.
- Characteristic and Characteristic options: Product options that are created based on customer preferences.

**Example catalog hierarchy with categories and product offerings**




## Product offering families

A product family is a collection of product offerings that share similar or common features. You can use a product family to create a hierarchical classification of product offerings, like a category tree. A product family can have parent-child relationships, where each node in the family tree can have a parent, forming a multi-level hierarchy. With this structure, you can apply attributes, business rules, and product updates to a product family, rather than change products individually.

After you create product families, you can assign a product family to a product offering. To learn more, see Create a product offering family.

## Product offer bundling

You can create product offer bundles with an offer hierarchy using product offer relationships and relationship groups. These bundle offers can have references to a product specification or specification hierarchy at any level in the bundle. For more information, see Product offer bundling with product specifications.

## Product offer eligibility

As a product catalog admin or manager, you can use business rules to filter the product catalog, product offering categories, and product offerings dynamically, displaying only the appropriate catalog, categories, and offerings for which a customer is eligible. These rules enable your sales agents to sell the correct products to customers based on context, such as specific customer accounts, customer location, sales contracts, and more. You define these rules using product eligibility matrices. To learn more about using the product eligibility matrices, see Configuring product offer eligibility.

## Product recommendations

In Sales Customer Relationship Management, different types of product recommendations are available to your sales agents. Your agents can get product recommendations as they're generating or updating leads and opportunities, or updating quotes.

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- Product recommendations using needs analysis - When your sales agents are generating leads and opportunities, they can use product selection guides to help determine relevant products for their customers. For information on setting up needs analysis, including the product selection guides, see Configuring needs analysis. For details on how your agents can get product recommendations for leads and opportunities, see Get product recommendations for leads using needs analysis and Get product recommendations for opportunities using needs analysis.
- Product offering recommendations for quotes - When your sales agents are updating quotes, they can get product recommendations for upselling or cross-selling additional products for existing quote line items. For information on setting up these recommendations, see Configuring product offering recommendations. For details on how product offering recommendations work in quotes, see Using product offering recommendations in quotes.

## What to explore next

Configuring product offerings and catalogs

## CRM Core

Create the Sales Customer Relationship Management workflows for a product and service through entity configurations and mappings. By creating this workflow, your organization can analyze lucrative business opportunities, customer leads, and the billing, support, and maintenance requirements after a sale is complete.

## Workflows overview

A product goes through multiple phases and workflows from the time that a product is identified to the time that it's purchased by the customer. The workflow includes the creation of a quote for a product or services, the creation of orders, the sold products, the install base items, and the contracts and entitlements.

If you're an administrator, you create the workflows for your organization and configure the metadata for your various CRM Core entities by activating the foundational CRM Core (com.snc.l2c_core) application. With the CRM Core (com.snc.l2c_core) plugin, you can compose and build the workflows that your organization maintains for the life cycle of a sold product. For example, on the CRM Core Entities Mapping form on the ServiceNow AI Platform®, you select the sold product entity as a source entity and the order as a target entity. You then map these entities and configurations to create a source to the target flow that is a sold product to order flow. This mapping provides your users with a unified workflow experience across the different entities.

**Note:** An entity is defined as a collection of tables that have information about an order. The information can come from multiple tables.

## Entity configurations

You can configure the definition of a CRM Core entity by defining a name and configuration ID on the CRM Core Entity form. The definition creates a back and forth flow of the information between the various entities.

To learn how to create entity configurations, see Create an entity configuration. To learn how to create entity mappings, see Create an entity mapping.

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### Reconfiguration

You can reconfigure an order or a quote that is in the **Draft** state to make customizations in the Configurator UI. After the configuration is complete, all the order line items associated with the order are also updated. To learn more about reconfiguration, see LeadtoCashCore - Scoped.

### What to explore next

- Configuring the lead-to-cash foundation applications

## Customer self-service for Sales Customer Relationship Management

Support your business-to-business (B2B) customers by enabling self-service capabilities through the Business Portal to create and manage orders, invoices, and requests for quotes.

### Business Portal overview

The Business Portal is a self-service, customer-facing web interface in Sales Customer Relationship Management that enables B2B customers to discover products, configure offerings, and place orders directly through a secure, web-based experience. The portal complements internal sales workflows, enabling your customers to engage with the sales process independently while remaining fully integrated with core CRM data and processes. The Business Portal, which is based on Customer Service Management, streamlines order placement, reduces dependency on manual sales interactions, and accelerates revenue generation. It also provides integrated access to knowledge articles, community forums, service catalogs, and chatbots.

### Business Portal benefits

The Business Portal provides benefits for administrators and B2B customers. Administrators can easily manage and administer the portal and install plugins to enable new features. The following table lists the benefits for B2B customers.

**Business Portal benefits for B2B customers**

| Benefit | Feature |
|---|---|
| Enable customers to place orders independently, reducing sales cycle time and accelerating revenue realization. | Create orders from the Business Portal |
| Accelerate pricing and proposal turnaround by enabling customers to request quotes directly within the portal. | Submit a request for quote from the Business Portal |
| Enable customers to view quotes generated from requests for quotes (RFQs) or quotes created offline by a sales agent. | View quotes from the Business Portal |
| Reduce customer dependency on customer service agents for routine order inquiries or raising order issues such as quantity or address disputes. | Request updates for one or more orders<br>Request updates for items in a single order |
| Provide customers access to their invoice and invoice line details so they can track billing information and identify discrepancies. | View invoices on the Business Portal |

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**Business Portal benefits for B2B customers (continued)**

| Benefit | Feature |
| --- | --- |
| Simplify invoice inquiries and dispute management through a direct, trackable self#service support channel. | Dispute a specific line item on an invoice against your account using the Business Portal<br><br>Dispute multiple invoices against your account using the Business Portal |

## Generative and agentic AI applications for enabling customer self-service

The ServiceNow Otto for Order Management includes the following applications that enable business-to-business (B2B) customers to submit order and invoice cases autonomously in simple conversational format from the Business Portal.

### Manage Order Operations

The Manage Order Operations application (com.sn_ord_ops_aias) includes the following AI agents:

- Manage order operations AI agent: Enables B2B customers to submit order cases autonomously from the Business Portal using natural language.
- Order exception AI voice agent: Enables B2B customers to submit order cases using voice calls.

### Manage Invoice Operations

The Manage Invoice Operations application (com.sn_inv_ops_aias) includes the following AI agents and agentic workflow:

- Invoice dispute intake assistant AI agent: Enables B2B customers to submit invoice dispute cases autonomously from the Business Portal using natural language.
- Invoice dispute AI voice agent: Enables customers to submit invoice dispute cases using voice calls.
- Invoice dispute assist agentic workflow: Enables finance agents to validate and resolve invoice disputes using a guided experience from the Now Assist panel in the CRM Workspace. Internally, it uses the invoice dispute support assistant AI agent to validate invoice information, trigger API calls to check quantity discrepancies and provide resolutions.

## Business Portal and sales agents

Sales agents don't directly use the Business Portal, but work on orders, order cases, invoice cases, and RFQs submitted through the Business Portal from the CRM Workspace. Depending on the process for orders, order cases, invoice cases, and RFQs, the agents work on their assignments and work with the customers to provide resolution. For example, reviewing RFQs, converting RFQs to quotes, applying price adjustments, and returning the quote to the customer for approval.

## What to explore next

The following topics provide more information about configuring and using the Business Portal:

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- Configuring the Business Portal
- Using Business Portal for self-service workflows in Sales CRM
- Getting started with the Business Portal: Configure Business and Consumer Portal
- Business Portal reference for Sales Customer Relationship Management
- Using the Business Portal
- Business Portal user roles

## Mobile experience for Sales CRM

Manage your Sales CRM workflows from anywhere using the Sales CRM Mobile application. Sales professionals can manage their accounts, consumers, opportunities, and more on the Sales CRM Mobile application.

The Sales CRM Mobile application is available through the Now Agent mobile application.

**Features of Sales CRM Mobile application**

| | |
|---|---|
| My Day | • Today's meetings and tasks due<br>• Quick access to Tasks and Calendar<br>• Opportunities in focus (at-risk and critical deals) |
| Sales Hub | • Manage core sales records such as opportunities, leads, account, and contacts<br>• Sales pipeline health and status |
| Notifications | Push and in-app alerts for tasks and deal assignments. Notifications are enabled for the following record types:<br>• Lead<br>• Opportunity<br>• Lead task<br>• Opportunity task |
| Offline mode | • Download the cache while you have an internet connection, then turn on offline mode to access cached records when you lose connectivity.<br>• The cache reflects the data as of when you last downloaded it. |

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**Features of Sales CRM Mobile application (continued)**

| | |
|---|---|
| Get AI-powered assistance | • Ask ServiceNow Otto conversational questions about your Opportunities, Accounts, Contacts, and other details.<br>• Review AI-generated win probability scores and contextual insights for an opportunity to assess deal health without opening individual activity, contact, or deal records. Use this to prioritize pipeline opportunities and identify risks. |

### Empower sales professionals with an optimized mobile application

Sales representatives manage meetings, notes, and deal updates on the go from their mobile device. Sales agents can manages deals remotely, use the Sales CRM Mobile application for tracking and updating opportunities and leads on the field. Sales CRM Mobile supports the *sales_agent*, *sales_restricted_agent*, *sales_manager*, and *lead_agent* personas.

**Related topics**

Configure Sales CRM Mobile Application

Sales CRM Mobile Application

## Configuring Sales Customer Relationship Management applications

Set up the Sales Customer Relationship Management (Sales CRM) applications so that your agents can work on various stages of the product sales life cycle, such as sales opportunities, quotes, order capture and fulfillment, contracts and entitlements, and also the basic product catalog and pricing features used by each application.

As a user with the admin role, complete the following main configuration tasks to set up your applications. Select a tile to learn about how to install and configure a set of Sales CRM applications to implement and support pre-sales, sales, and post-sales workflows in your organization.

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| | | |
|---|---|---|
| **Lead-to-cash foundation**<br><br>Set up core apps that enable your lead-to-cash processes. | **Configure, price, quote**<br><br>Set up tools to configure products and manage pricing, quotes, and sales agreements. | **Sales automation**<br><br>Set up tools to capture leads, engage customers, manage opportunities, forecast sales, and define sales territories. |
| **Order management**<br><br>Set up tools to manage order creation and fulfillment, manage jeopardy, and resolve fallout issues. | **Order operations**<br><br>Set up workflows to manage end-to-end lead-to-cash processes and handle product returns. | **Post-sales engagement**<br><br>Set up tools to manage customer contracts, entitlements, and life cycle workflows on sold products. |
| **Partner Relationship Management**<br><br>Set up tools to onboard partners, manage relationships, and enable collaboration. | **Business Portal**<br><br>Set up a self-service portal for B2B customers to place orders, submit RFQs, view quotes, and raise order cases. | |

## Configuring the lead-to-cash foundation applications

Learn how to configure lead-to-cash foundation applications to establish a unified platform for Sales Customer Relationship Management entities such as managing leads, opportunities, quotes, and orders efficiently.

Installing and configuring the following applications involve installing the applications from the ServiceNow Store store, assigning appropriate roles to users and groups, and then configuring foundational features such as product catalogs, pricing, and customer data models.

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1. Configuring product offerings and catalogs

   Create product offerings and the associated product catalogs that can be used by Sales Customer Relationship Management agents for pre-sales activities, order capture, and post-sales engagement.

2. Install and configure CRM Core

   Install the CRM Core application which enables you to compose and build workflows that your organization maintains for the life cycle of a sold product.

3. (Optional) CRM API Core

   Configure the CRM API Core plugin to enable tracking and management of Sales Customer Relationship Management workflows through structured request handling, flow processing, and external system integration.

**Related topics**

Using lead-to-cash foundation applications

Lead-to-cash foundation reference

## Configuring product offerings and catalogs

Create product offerings and the associated product catalogs that can be used by Sales Customer Relationship Management agents for pre-sales activities, order capture, and post-sales engagement.

As a product catalog administrator or catalog manager, you complete various configuration tasks to create the product catalogs and offerings for products and services sold by your organization. You also work with your pricing administrator, who sets the pricing for your product offerings. For more information on pricing, see Configuring product pricing.

The following workflow example shows a typical series of steps for setting up catalogs and product offerings, including the pricing configuration tasks performed by your pricing administrator. Some steps may be optional in your organization, and other steps, such as setting up product relationships between catalog entities, may occur in a slightly different sequence.

### Product catalog and pricing configuration workflow

**Note:** Review your entitlements to see the product offering options available to you.

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## Overview of product offering and catalog configuration

Starting with the May 2024 release of Sales Customer Relationship Management applications, you can use the CRM Workspace to configure product offering catalogs, product offerings, and product offering relationships.

The following table identifies the configuration tasks for setting up the various features available in Product Catalog Management.

### Product offering and catalog management configuration tasks

| Configuration task | Description |
|---|---|
| Create a product offering catalog | Create a catalog, which is the top-level entity in the catalog hierarchy. Catalogs can have categories, and categories can have subcategories or product offers. Set a custom display order for a catalog so it appears in the sequence you choose instead of alphabetically. |
| Create a product offering category | Define a product offering category used to organize similar product offerings in a catalog. Catalog categories make it easier for agents to browse and navigate product offerings when creating opportunities, quotes, and orders. Set a custom display order for a category within a catalog so it appears in the sequence you choose instead of alphabetically. |
| Create a product offering family | Create a product offering family for products with similar or common features that have multiple variations. You can apply common rules or attributes for product offerings at the product offering family level instead of applying them individually to each product offering. |
| Create product characteristics and characteristic options | Define the specific attributes, properties, and options that distinguish a product offering, influencing its configuration and pricing. |
| Create product offerings | Configure and add product offerings to catalogs and categories. Once published, product offerings are available to Sales Customer Relationship Management agents as they create opportunities, quotes, and orders. |
| Add product visuals | Add images and thumbnails to your product offerings to help agents as they build opportunities, quotes, and orders. |
| Create product offering relationships | Create product relationships to bundle products and services together to streamline the order process. Product offering relationships drive the order capture experience by letting you group multiple product offerings into bundles. Bundles also let you offer special bundle pricing. |
| Control cascading quantity values in child product offerings | Control how the quantities for child line items in a product offering for a quote or order are calculated by using the *sn_prd_pm.enable_cascade_quantity* system property. |
| Add related contracts to product offerings | Add related contracts to your product offerings in the Sales Customer Relationship Management application. |
| Add a unit of measure to a product offering | Add a unit of measure (UOM) to a product offering in Sales Customer Relationship Management. |

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**Product offering and catalog management configuration tasks (continued)**

| Configuration task | Description |
|---|---|
| Create a product offering version | Create a product version to add updates to a published product offering. |
| Create product offering relationship groups | Combine bundles of product offerings into related groups in Sales Customer Relationship Management. |
| Configure needs analysis | Create needs templates, which are questionnaires from product selection guides that your agents use to determine what product offers can be added to opportunities. |
| Configure product offering recommendations for quotes | Create offer recommendations that sales agents can use to complement or supplement items in their quotes. |
| Export and import product catalog entities | Export and import product catalog entities between ServiceNow instances. For example, you can promote catalog entities from a non-production instance to a production instance. |
| View product offering hierarchy and associated specification hierarchy | View the complete hierarchy of a product offering and any associated specifications (product, service, and resource). Use these views to verify that all entities have been defined and associated correctly. |
| Configure product offer eligibility | Filter the product catalog, product categories, and product offerings dynamically, to display only eligible product offerings for a customer in the product catalog. |

**Related topics**

- Using product catalogs
- Product Catalog Management

### Create a product offering catalog

Create a product catalog that lists the product offerings available to your customers. Catalogs are top-level entities in the catalog hierarchy. Catalogs have categories and categories can have sub-categories or product offers.

## Before you begin

Role required: sn_prd_pm.product_catalog_manager

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offering Catalogs**.
3. Select **New**.
   In the form, fill in the fields.

**Product Offering Catalog form**

| Field | Description |
|---|---|
| Number | System-generated number that identifies the product catalog. |

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| Field | Description |
|---|---|
| Name | Name of the catalog. |
| Thumbnail image | Thumbnail image of your catalog. Select **Attach Image** to upload your image. |
| Image | Image of your catalog. Select **Attach image** to upl0ad your image. |
| Default | Option that indicates this catalog is the default catalog displayed to your agents. Agents can switch from one default catalog to another. |
| Description | A brief description of your product catalog, for example, . |
| State | State of the catalog. The supported life cycle states are Draft, Published, Retired, and Archived. |
| Start date | Date and time that the catalog is available for Sales Customer Relationship Management applications. Select the Calendar icon to choose the start date and time, then select **OK**. |
| End date | Date and time that the catalog is no longer available for use in Sales Customer Relationship Management. Select the Calendar icon to choose the end date and time, then select **OK**. |
| Code | System-generated product code for the catalog.<br><br>The system automatically generates a code based on the catalog **Name** entered, but you can change the value to any desired alphanumeric string. |
| Order | Number that sets where this catalog appears relative to other catalogs. Catalogs display in ascending order by this number, then alphabetically. Leave this field empty to sort the catalog alphabetically with other unordered catalogs. |

4. Select **Save**.
   The product offering catalog is in the Draft state.
5. Select **Publish**.
   The catalog state changes to Published. The Categories tab opens for creating a product offering category.

### What to do next

Create product offering categories.

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### Related topics

Using product catalogs

Product Catalog Management

### Create a product offering category

Define a product offering category used to organize similar product offerings in a catalog. Product categories make it easier for agents to browse and navigate product offerings when creating opportunities, quotes, and orders.

## Before you begin

Role required: sn_prd_pm.product_catalog_admin and sn_prd_pm.product_catalog_manager

## About this task

**Note:** Creating a product offering category and associating it to the product offering is required for validating product offerings before publishing them using the In Test and Staged intermediate life cycle states. For more information on the life cycle states, see Validating product offerings before publishing.

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offering Categories**.
3. Select **New**.
4. In the form, fill in the fields.

### Product Offering Category form

| Field | Description |
|---|---|
| Number | A unique system-defined number that identifies the product category. |
| Name | Name of the category. |
| Leaf | Option indicating there are no subcategories for this category. Selecting **Leaf** means the category can have product offers but not subcategories. If **Leaf** isn't selected, the category can only have subcategories but not product offers. |
| Thumbnail image | Thumbnail image for the product offering category. Select **Attach Image** to upload your image. |
| Image | Image of the product offering category. Select **Attach Image** to upload your image. |
| Description | A brief description of the category. |
| State | State of the category:<br>○ Draft: Initial state of the category, before it's published.<br>○ Published: The product category has been published to the catalog. After a category is published, you can update it. You can |

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| Field | Description |
| --- | --- |
| | delete, retire, or archive it if there are no associated product offerings.<br>○ Retired: Category has been retired and is no longer active. The category can't be updated.<br>○ Archived: Category has been archived and is no longer available for use.<br>○ Copied to Catalog: The product category has been copied. |
| Start date | Date and time that the category is available in the catalog. Select the Calendar icon to choose the start date and time, then select **OK**. |
| End date | Date and time that the category is no longer used in the catalog. Select the Calendar icon to choose the end date and time, then select **OK** |
| Code | Product code for the category.<br>The system automatically generates a code based on the category **Name** entered, but you can change the value to any desired alphanumeric string. |

5. Select **Save**.
6. Associate the category to a catalog.
   a. In the Catalogs tab, select **New**.
   b. In the Catalog Category form, select the published Catalog to which this category belongs.
   c. **Optional:** Control where the category appears relative to the catalog's other categories by entering a value in the **Order** field.
   If left empty, the categories are sorted alphabetically with other unordered categories in this catalog.
   d. Select **Save**.
7. In the Details tab for the category, select **Publish**.
   The category state changes to Published and is added to the selected catalog.
8. If needed, define the parent category and subcategories for the category using the Parent categories and Child categories tabs.

### What to do next

Create product offerings.

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### Related topics

Using product catalogs

Product Catalog Management

### Create a product offering family

Create a product offering family for products with similar or common features that have multiple variations. You can apply common rules or attributes for product offerings at the product offering family level instead of applying them individually to each product offering.

## Before you begin

Role required: sn_prd_pm. product_catalog_admin or sn_prd_pm.product_catalog_manager

## About this task

A product offering family is a hierarchical classification of product offerings, like a category tree. Product families can have parent-child relationships (multi-level tree). You can define parent-child relationships, where each node in the family tree can have a parent, forming a multi-level hierarchy. With a product family you can aggregate sales data by family, such as total revenue across sub-family products, as a rollup dimension for sales forecasting.

For example, a product offering family hierarchy could be Hardware > Computers > Laptops. After you create product offering families, you assign a product offering to a product offering family when you create a product offering.

**Note:** A product offering family can't be its own ancestor or descendant. If you select a parent family that would create a circular hierarchy, the save is blocked with an error.

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Offerings** > **Product Offering Families**.
4. Select **New**.
   Fill-in the form.

### Create New Product Offering Family

| Field | Description |
|---|---|
| Number | System-assigned number for the product offering family. |
| Name | Product offering family name |
| Description | Short description of the product offering family. |
| Parent family | If the product offering family that you're creating is a child of an existing product offering family, select the parent product offering family. |

5. Select **Save**.
   The product offering family is available for use and can be selected when you create a product offering.

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### What to do next
Create product offerings

**Related topics**

- Using product catalogs
- Product Catalog Management

## Activate the display of product catalog visuals

Turn on the display of product images shown in the product tiles of product catalogs by using the *sn_prd_pm.show_product_visuals_on_catalog_ui* system property.

### Before you begin
Role required: admin

### About this task
The *sn_prd_pm.show_product_visuals_on_catalog_ui* system property controls the images displayed in commercial product catalogs. This property doesn't apply to service catalogs or product inventory catalogs.

### Procedure
1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *sn_prd_pm.show_product_visuals_on_catalog_ui* system property.
3. In the **Value** field, enter `true` to activate the display of product offering images in the product catalog.
4. Select **Update**.
   The product offering visuals are loaded in the catalog. If a product offering doesn't have a visual, the text **Image not available** is presented in the product offering tile instead.

**Related topics**

- Using product catalogs
- Product Catalog Management

## Control cascading quantity values in child product offerings

Control how the quantities for child line items in a product offering for an opportunity, quote, or order are calculated by using the *sn_prd_pm.enable_cascade_quantity* system property.

### Before you begin
Role required: admin

### About this task
The *sn_prd_pm.enable_cascade_quantity* system property, if enabled, automatically cascades the quantity value for a top-level offer to child lines, when the quantity for the top-level offer is greater than 1. For example, when an agent creates an opportunity, quote, or order for a configurable offer and updates the quantity so that it's greater than 1, the quantity on the child line items is multiplied by the quantity for the top-level offer. Pricing for the child lines is based on the cascaded quantity. If you use the quantity on the child offers as the total quantity ordered, using cascading quantities considers the quantity on the parent offer as well.

However, if you consider the quantity on the child offer as the quantity of the child offer per one quantity of the parent offer, you might not want cascading quantity values.

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**Note:** If you're upgrading from a release before the November 2024 release, this property is enabled by default. If you don't want the quantity values to be cascaded to child lines, suppress this feature by setting the property to false.

### Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *`sn_prd_pm.enable_cascade_quantity`* system property.
3. Set the property value for the cascading quantity feature in the **Value** field.
   - Enter `true` to activate this property.
   - Enter `false` to suppress this property if it's currently enabled.
4. Select **Update**.
   If you enabled this property, quantity values are cascaded to the child lines for product offers. If you suppressed this property, quantity values are not cascaded to the child lines for product offers.

### Related topics

Using product catalogs

Product Catalog Management

## Create product offerings

Create and publish a product offering in Sales Customer Relationship Management. Product offerings represent entities that are orderable from the provider of the catalog and includes pricing information. Once published, product offerings are available to agents as they create leads, opportunities, quotes, and orders and to customers placing orders.

### Before you begin

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_manager

### Procedure

1. Navigate to **Workspaces** > *`CRM Workspace`*.
2. Select the List icon ☰.
3. Navigate to **Offerings** > **Product Offering** and select **New**.

   **Note:** You can also create a product offering from the product specification.

4. In the Details tab, fill in the fields.

**Create New Product Offering form**

| Field | Description |
|---|---|
| Number | System-assigned number for the product offering. |
| Name | Alternative name for the product offering to differentiate it from similar product names. |
| Display name | Name of the product offering to be added. |
| Code | System-generated alphanumeric number based on the product name. Although system generated, you can edit |

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| Field | Description |
| --- | --- |
| | the code to represent a SKU or any other industry-specific product codes. |
| Product family | The product offering family to which this product belongs. Select the product offering family, which is a collection of products that share similar or common features. A product offering can belong to a single family only. |
| Sellable | Option, if selected, indicates that the product offering can be sold as a standalone item. If not selected, the product offering can be sold as part of bundle but not as a standalone item. |
| Configuration Status | Indicates the status of the product offering:<br>○ None: The product offering is not configured. This is the default value.<br>○ Creating: Creation of the product offering in CPQ Administration is in progress.<br>○ Created: The product offering is created in CPQ Administration and is available as a blueprint.<br>○ Error: An error occurred while creating blueprint for the product offering in CPQ Administration. |
| Configurable | Option that indicates the product is customizable and can be configured by agents and customers using the CPQ Configurator, if implemented in your organization. For more information, see Using the CPQ Configurator. |
| Allow multiple configurations | Option that enables agents or customers to create and manage multiple configurations of a child product offering so each configuration can be handled as a separate line item in a configurable product.<br>**Note:** If the product has an associated product specification, this option is enabled automatically and can't be deselected.<br>For more information on how multiple configurations work in configurable products, see Multiple configurations. |
| Transient | Option indicating that the product is for one-time use.<br>**Note:** When the order for a transient product is completed, the sold product or product inventory record for the product is set to an Inactive state, to differentiate the product from persistent products.<br>○ Move, Add, Change, Disconnect (MACD) actions can't be performed on the sold product or product inventory records of transient product offerings.<br>○ The **Create contract** option is not applicable to transient product offerings.<br>For more information on transient products, see Defining transient products. |

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| Field | Description |
| --- | --- |
| Description | Short description of the product offering. The description helps the agent identify the product when creating a lead, opportunity, quote, or order. |
| State | State of the product offering. States include In Draft, Published, Retired, and Archived. You can update product offerings In Draft state. |
| Start date | Date and time that the product offering is available for Sales Customer Relationship Management applications. Select the Calendar icon to choose the start date and time, then select **OK**. |
| End date | Date and time that the product offering is deleted from Sales Customer Relationship Management applications. Select the Calendar icon to choose the end date and time, then select **OK**. |
| Offering type | Type of product offer. Select one of the following:<br>○ Product: A product entity that an agent or customer can add to a Sales CRM transaction. For example, agents can add products to a lead, opportunity, quote, or order from the CRM Workspace. Customers can add products to an order from the Business Portal.<br>○ Entitlement: An entity such as a warranty or subscription that can be added to a lead, opportunity, quote, or order by an agent. |
| Offering sub-type | Type of entitlement. Select one of the following:<br>○ Warranty<br>○ Extended warranty<br>○ License<br>○ Subscription |
| Distribution channel | Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels.<br>If you're using the Service Exchange Order Management for Providers application, enter Service Exchange. |
| Owner | Person responsible for the product offering. |
| Product specification | Functional view of a product offering that drives order fulfillment. Select the product specification associated with the product offering.<br>**Note:** Only published specifications appear. |
| Product model | Name of the product model. |
| Copy child specification characteristics | Option that when selected copies all child specification characteristics in a specification hierarchy. For example, if the product offer has an associated product specification, this |

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| Field | Description |
|---|---|
| | option indicates that the characteristics are inherited from the child specifications in addition to the parent specification.<br><br>This field displays when a product specification for a composite product is entered and the product offering is saved. |
| Pricing method | Pricing method for the product:<br>○ One-time: A single fee for the product.<br>○ Recurring: A fee that occurs at scheduled intervals. You can set the **Periodicity** for a recurring fee.<br><br>**Note:** If you're creating a configurable product offering that can have ramps, select Recurring as the **Pricing method** so that the **Enable ramps** option can be selected. |
| Periodicity | Recurring pricing: Monthly or annually. |
| Monthly recurring charges | Charges that are applied monthly. |
| Non recurring charges | Charges that are applied once. Supported for backward compatibility. Use price lists to define prices. |
| Enable ramps | Option that enables the ramp feature, where sales agents can create ramps for transaction lines, such as quotes, to schedule price and quantity increases over certain time periods. To learn more, see Price and quantity ramps. |
| Create contract | Option indicating to agents that entitlement contracts can be added to the product order. If selected, service contracts are created after order fulfillment. Used when entitlements are managed as contracts.<br><br>**Note:** For transient product offerings, this option isn't available. |
| Contract term | Length of the contract:<br>○ 12 months<br>○ 24 months<br>○ 36 months<br>○ 48 months<br>○ 60 months |
| Version | Version number that is assigned to this product offering version. |
| Initial version | Name of the initial version of the product offering. |
| Previous version | Several versions of a product offering can exist. This field lets you view previous versions. |

5. Select **Save** and then select **Publish**.

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### What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version
- Create product offering relationship groups

### Related topics

Using product catalogs

Product Catalog Management

### Defining product characteristics and characteristic options

As a product catalog admin, you create the characteristics and characteristic options for product offerings and specifications. Product characteristics are attributes that define and describe a product.

For example, if a product offering is a bike, the characteristics might include bike size and color. The characteristic options are the choices, such as the various bike sizes and colors available. Characteristics and characteristic options for products are displayed in the product configurator when agents configure products for opportunities, quotes, and orders and when customers order products using the Business Portal.

## Characteristic data input types

When you define product characteristics and characteristic options, you provide basic attribute information, including the characteristic name and the data input type for the characteristic options. The data input type indicates how the characteristic options are entered in the product configurator, such as single line text or choice selection.

The following data input types are available for characteristic options:

- Address - Mail address
- Attachment - External document to be attached
- CheckBox - Select or clear an option
- Choice - Options that can be chosen, presented as radio buttons or available from a drop-down list
- Decimal - Numbers that require a decimal point to indicate fractional amounts
- Dates - Date picker for selecting day, month, and year
- Date/time - Date picker for selecting day, month, year and time of day
- Duration - Period of time
- Email - Email address
- Single Line Text - Free-form text
- Integers - Whole numbers
- Yes/No - Yes/no response

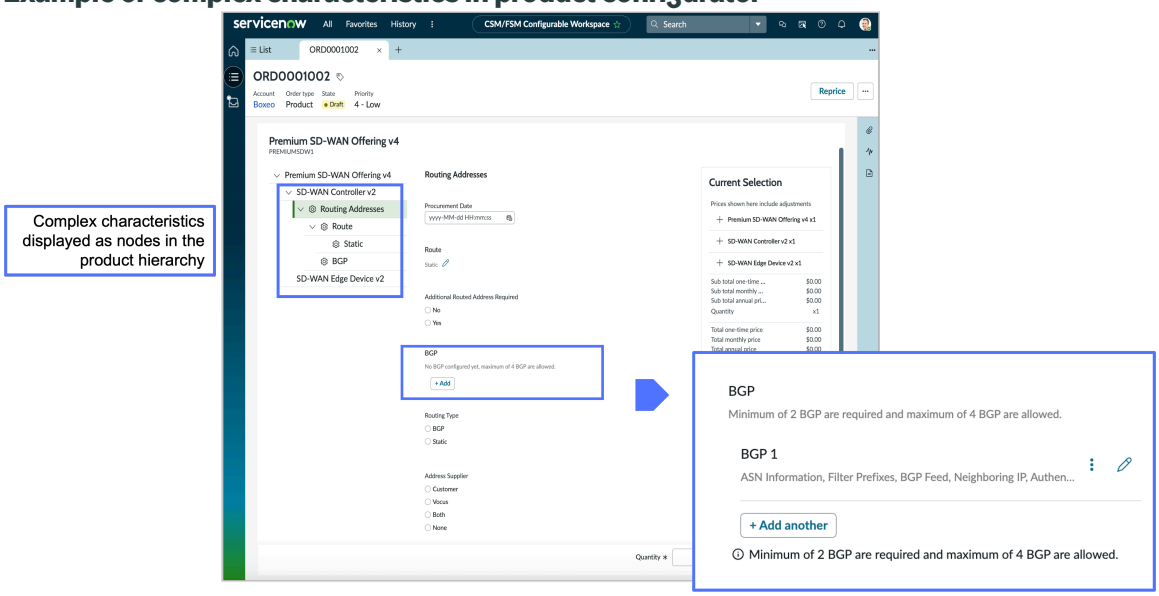
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- Object - Structure that represents a hierarchy of attributes, also called complex characteristics. An object has parent attribute with one or more child attributes.
- Arrays - Multiple instances of the same attribute type, such as arrays of Date, DateTime, Integer, Single Line Text, Object, and Decimal

You can use the Object type to build a hierarchy of complex characteristics, which has a top-level parent attribute with one or more child attributes. The child characteristics can be any of the data input types, including objects with data arrays.

The following example shows a characteristic hierarchy for Routing Addresses, which is a parent-level attribute with an object data type. This attribute has the following child attributes: Procurement Date, Route, Additional Address Required, BGP, Routing Type, and Address Supplier. Notice that the BGP child characteristic is an array of objects with a minimum size of 2 and maximum size of 4.

**Example of complex characteristics in product configurator**




## Setting up complex characteristics

Defining a hierarchical attribute structure involves setting up the parent attribute, for example routing addresses, as an object type. You then define the characteristic relationships between the parent attribute and child attributes to establish the hierarchical structure and the order in which the child characteristics display in the product configurator.

For details on defining characteristics, see Create product characteristics and characteristic options.

### Related topics

Using product catalogs

Product Catalog Management

### Create product characteristics and characteristic options

Add product characteristics and characteristic options that you can later add to your product offerings in Sales Customer Relationship Management.

**Before you begin**
Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_catalog_manager

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### About this task

Use this procedure to build product characteristics (also called attributes) and characteristic options, which you add to product offerings and specifications. For example, if the product offering is a bike, characteristics might include bike size and color. The characteristic options are the option choices, such as the various bike sizes and colors available. These options appear in the configurator when your agents add configurable products to opportunities, quotes, and orders or when customers submit orders using the Business Portal.

When you define a characteristic, you select the data input type, which indicates how the characteristic option is entered in the product configurator, such as Single Line Text, Choice (radio buttons or drop-down list), and Yes/No selections. Complex data input types are also available to define complex characteristics that have hierarchical attribute structures. You use the object data type to define complex characteristics, which have a top-level parent attribute and associated child characteristics. These structures can also include data arrays, another complex data type that you can use to specify multiple instances of the same data input type, such as multiple lines of text or integers.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Characteristics** > **Characteristics**.
3. Select **New**.
4. In the form, fill in the fields.

**Create New Characteristic**

| Field | Description |
|---|---|
| Name | Name of the product characteristic. |
| Code | System-generated alphanumeric value based on the product characteristic name. Although system generated, you can edit the code to represent a SKU or any other industry specific product codes.<br><br>**Note:** If you enter a product characteristic name that has non-English characters, special symbols, or both, the **Code** value may be a hash of alphanumeric characters that uniquely identifies the characteristic, if your admin has set the *sn_prd_pm.use_hash_to_generate_characteristic_cod* system property to false. If this property is set to true, the system can't generate an alphanumeric **Code** value that includes non-English characters, special symbols, or both. |
| Description | Brief description of the characteristic, for example DSL speed. |
| Input type | List of input options that identify the functionality for the characteristic, such as check box or a line of text. Depending on the input type, additional options become available: |

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| Field | Description |
| --- | --- |
| | ○ **Address**: Input for the entry of an address.<br>○ **Attachment**: Input for the attachment of an external document.<br>○ **CheckBox**: Option that can be selected or cleared. You can specify a **Default value** to be displayed for the option.<br>○ **Choice**: Options that can be chosen for the characteristic. In the Characteristic options tab, you indicate how the option is to be selected in the product configurator, either as a Radio button or from a Drop-down list. You can also specify a **Default value** to be displayed for the option.<br>○ **Date**: Date picker for selecting the day, month, and year, for example an activation date.<br>○ **Date/Time**: Date picker for selecting the day, month, year, and time of day for example, an activation date at a specific hour, minutes, and seconds.<br>○ **Duration**: Input for the entry of a duration of time.<br>○ **Email**: Input for the entry of an email address.<br>○ **Label**: Input for the selection that enables the production of a label.<br>○ **Single Line Text**: Input for the free-form entry of a single line of text. You can specify a **Default value** to be displayed for the option.<br>○ **Yes/No**: Input that requires the selection of a Yes/No response. You can specify a **Default value** to be displayed for the option.<br>○ **Integer**: Input that requires a numeric value, such as number of support hours. You can specify a **Default value** to be displayed for the option.<br>○ **Decimal**: Input for numbers that require a decimal point, such as currency or car mileage that require fractions.<br>○ **Object**: Input for defining the top-level characteristic in a hierarchy of characteristics that consists of a parent characteristic and its child characteristics. A top-level characteristic has one or more child characteristics. The child characteristics can be any of the data input types or an object or array type. The Characteristic Relationship tab opens for specifying the associated characteristic options.<br>○ **Array.Date**: Input that includes one or more instances of dates as child characteristics. You specify a Min and Max value for the array size. The default Min and Max value is 1.<br>○ **Array.Datetime**: Input that includes one or more instances of child characteristic of datetime. You also specify a Min and Max value for the array size. You |

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| Field | Description |
| --- | --- |
| | specify a Min and Max value for the array size. The default Min and Max value is 1.<br>○ **Array.Decimal**: Input that includes one or more instances of a child characteristic of decimals. You specify a Min and Max value for the array size. The default Min and Max value is 1.<br>○ **Array.Integer**: Input that includes one or more instances of a child characteristic of the integer data type. You specify a Min and Max value for the array size. The default Min and Max value is 1.<br>○ **Array.Object**: Input that includes one or more instances of a child characteristic of the object data type. You specify a Min and Max value for the array size. The default Min and Max value is 1.<br>○ **Array.SingleLineText**: Input that includes one or more instances of a child characteristic of the SingleLineTest data type. You specify a Min and Max value for the array. The default Min and Max value is 1. |

5. Select **Save**.
   Depending on the **Input type** you selected, you may need to complete additional steps if the new characteristic has more options.
6. If the new characteristic has more options, complete the following steps:

   a. In the Characteristic Options tab, select **New**.

   b. Enter the Option for the characteristic and select **Save**.
   The option is added to the characteristic. Repeat this step to add as many options as needed.

   For example, if you create a SIM card type characteristic, you then create the associated Nano, eSim, Micro, Mini, and Standard options.

   Later, when you are configuring product offerings, you can add the characteristics and options.

   c. Select **Save**.

7. If the new characteristic is an object that has child characteristics as part of hierarchical attribute structure, complete the following steps to create a characteristic relationship between the parent characteristic and child characteristics in the characteristic hierarchy:

   a. In the Characteristic Relationships tab, select **New**.

   b. In the form, fill in the fields.

**Create New Characteristic Relationship**

| Field | Description |
| --- | --- |
| Display name | The name of the characteristic relationship, for example Routing addresses |

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| Field | Description |
|---|---|
| Parent characteristic | The parent-level characteristic in the characteristic hierarchy. |
| Mandatory | Option that indicates the characteristic is required and must be entered or selected in the product configurator. |
| Order | The position of this child characteristic in the attribute hierarchy. |
| Child characteristic | Characteristic that is a child of the parent characteristic displayed. Select the characteristic from the drop-down list. |

**Note:** A parent-level characteristic (object input type) must have at least one child characteristic relationship defined for the hierarchical structure.

**c.** Select **Save**.

### What to do next

Continue working on other areas related to the product offering or specification. For example:

- Add product visuals
- Add product catalog categories
- Create product offering relationships
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version
- Create product offering relationship groups
- If you're creating technical products such as telecommunications products, you can create the product, service, and resource specification categories and associate them to model categories.

### Related topics

Using product catalogs

Product Catalog Management

## Add characteristic and characteristic options to a product offering

Add characteristic and characteristic options to an existing product offering using the **Product Offering Characteristic** tab in Sales Customer Relationship Management.

### Before you begin

Role required: sn_prd_pm.product_catalog_admin

### About this task

There are a number of ways to create characteristic and characteristic options. The following procedure lets you add characteristics to product offerings that already exist but have not been published.

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### Procedure

1. In the CRM Workspace, select the **List** icon .
2. Navigate to **Offerings** > **Product Offerings** and select the product offering that you're working with.
3. In the **Product Offering Characteristics** tab, select **New**.
4. On the form, fill in the fields.

#### Product Offering Characteristic form

| Field | Description |
|---|---|
| Characteristic | Product offering characteristic. Select an existing characteristic. Select **New** to create a characteristic. |
| Characteristic option | Characteristic option for the product offering. Select an existing characteristic option or select **New** to create options. |
| Characteristic type | Option that lets you select a characteristic type. |
| Value | Default value for the characteristic, applicable only when the characteristic's input type is single-line text, integer, email, address, label, decimal, date, date/time, or duration. This field is available only when the characteristic has one of these input types. For choice, complex, or boolean characteristics, use the characteristic option instead. |
| Product offering | Name of the product offering. |
| Order | Numerical order for the options. Options designated with the number 1 appear first in the order. |
| Mandatory | Option indicating that the characteristic option is required to complete the order. |
| Default | Option indicating this characteristic option is the default choice. |
| Customer input required | Option indicating that consumer input is required for the product option. |

5. Select **Save**.
   The product offering characteristic is added to the product offering. Select the characteristic in the **Product Offering Characteristics** tab to make further changes.

### Related topics

Using product catalogs

Product Catalog Management

## Create configurable product offerings and associated blueprints

Create a configurable product offering and generate an associated blueprint using the CPQ Configurator. A blueprint contains the product structure and includes product attributes, product relationships, product and pricing rules, and any child products for the offering. Blueprints drive the agent and customer experience for configuring customizable products with the CPQ Configurator.

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### Before you begin
Role required: sn_prd_pm_product_catalog_admin

### About this task
A configurable product offering, also called a complex product offering, has multiple characteristics and one or more product relationships. The process of creating a configurable product offering involves defining the product in Product Catalog Management, then generating the blueprint. The blueprint is used in the CPQ Configurator to manage the product configuration experience for agents and customers.

### Procedure
1. Create the configurable product offering.

   a. In the CRM Workspace, select the **List** view.

   b. Create an offering or copy an existing offering to make a new offering.
   - To create an offering, navigate to **Offerings** > **Product Offerings** and select **New**.
   - To copy an offering, navigate to **Offerings** > **Product Offerings**, select the offering to be copied, and select **Copy**.

   c. In the Details tab, fill in the fields to create a configurable product or modify the copy to create a product.

   **Note:** For details on creating a product offering, see Create product offerings. To identify the offering as a configurable product, select the **Configurable** option in the form, even if there are no characteristics or relationships defined. Selecting the **Configurable** option indicates that the product offering is to be configured using the CPQ Configurator.

   d. Select **Save**.
   The **Create Configuration** button is displayed. The Record Information pane shows the synchronization state as *Sync Not Initiated*.

2. Start the synchronization process by selecting **Create Configuration**.
   The synchronization process begins, as indicated by the synchronization state *Sync initiated*. The synchronization process creates the blueprint for the offering. If you previously defined attributes, product relationships and groups, and other product or pricing rules for the offering, that information is included in the blueprint.

   When the synchronization completes, the status changes to *Sync success*. The Configuration Setup tab (related list) displays the blueprint. The **Update configuration** and **Publish** buttons are also displayed.

   **Note:** If the synchronization fails, use the Configuration Errors tab (related list) to view the errors in the synchronization process.

   The product blueprint has the following features:

| Blueprint feature | Description |
|---|---|
| Associated Fields | Attributes and attribute types. |
| Related Rules | Product and pricing rules. |

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| Blueprint feature | Description |
|---|---|
| Layouts | Arrangement of the elements displayed in the configurator interface. A default layout is applied during synchronization, but you can change the layout. |
| Configurable Products | Child products of the offering. |
| Enrichments | Scripts used by the rules engine to retrieve external data such as pricing or product data. |

For more information on blueprints and how you can use them, see the online help accessible from the interface.

**Note:** If you defined rules and attributes in Product Catalog Management, those rules and attributes must be updated in Product Catalog Management and not in the blueprint. However, you can add new rules and fields using the blueprint.

3. If you want to make further changes to the product offering, and the offering is still in Draft state, select **Update configuration** and change the offering details.
4. When you're ready to publish the offering, select *Publish*.
Another synchronization occurs, and the product offering is published to the product catalog.

**Note:** When extended life cycle states are enabled and the CPQ Integration plugin is installed, the synchronization also runs when an offering moves from Draft to In Test. This means the blueprint is updated at the In Test transition, not only at publication. For more information, see Validating product offerings before publishing.

**Related topics**

Using product catalogs

Product Catalog Management

### Add product visuals

Add visuals to your product offering in Sales Customer Relationship Management to show what the product looks like in the product catalog.

**Before you begin**
Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

**Procedure**

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering that you're working with.
3. Select the **Product Visuals** tab.
4. Select **New**.
5. On the form, fill in the fields.

**Product Visuals**

| Field | Description |
|---|---|
| Name | Name for the visual. |

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| Field | Description |
|---|---|
| Product offering | Name of the product. |
| Active | Option indicating that a thumbnail image is used to depict the product. |
| Thumbnail image | Thumbnail visual of your product offering. Select **Attach Image** to upload the thumbnail image. |
| Primary | Option indicating that the thumbnail visual is the primary visual. |
| Image | Visual of your product offering. Select **Attach Image** to upload the image. |

6. Select **Save**.

**Note:** You must turn on the display of product visuals in product catalogs. For more information, see Activate the display of product catalog visuals.

### What to do next

- Create product characteristics and characteristic options
- Add product catalog categories
- Create product offering relationships
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version
- Create product offering relationship groups

### Related topics

Using product catalogs

Product Catalog Management

## Add product catalog categories

Use the Product Offering Categories tab to organize your products in groups in Sales Customer Relationship Management.

### Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

### About this task

Product catalog categories help organize products into groups, which makes it easier for order agents to find products while creating orders or building quotes. Catalog categories are associated with a catalog. For more information about catalogs, see Create a product offering catalog.

Product offering catalog categories must be published before products can be added.

This procedure explains the Product Offering Category tab. To set up categories before adding products, see Create a product offering category.

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**Note:** Creating a product offering category and associating it to the product offering is required for validating product offerings before publishing them using the In Test and Staged intermediate life cycle states. For more information on the life cycle states, see Validating product offerings before publishing.

### Procedure

1. In the CRM Workspace, select the **List** icon .
2. Navigate to **Offerings** > **Product Offerings** and select the product offering you are working with.
3. Select the **Product Offering Categories** tab.
4. Select **New**.
5. On the form, fill in the fields.

| Field | Description |
|---|---|
| Category | Select an existing published category. |
| Product offering | Name of the product offering you are working with. |

6. Select **Save**.
7. Review the category information and select one of the following options.
   - Ready for Test
   - Publish

   The category is available to add product offerings or create child categories.

### What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version
- Create product offering relationship groups

### Related topics

Validating product offerings before publishing

## Create product offering relationships

Create product relationships to bundle products and services together to make ordering more convenient. Product offering relationships drive the order capture experience by letting you group multiple product offerings into bundles. Bundles can also be added to other bundles in relationship groups.

### Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

### About this task

Create product offering relationships that bundle products together. A bundled product offering can be ordered as a group and can't be changed.

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### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering you're working with.
3. Select the **Product Offering Relationships** tab.
4. Select **New**.
5. On the form, fill in the fields.

**Product Offering Relationship form**

| Field | Description |
|---|---|
| Display name | Name of the product relationship displayed in the interface. |
| Source product offering | System-generated reference to the source product offering. |
| Target product offering | The offering that is bundled with the source product offering. |
| Relationship type | Option that identifies how the products are related:<br>○ None - Indicates that the bundled products have no relationship.<br>○ Implicit - Indicates the products grouped in a bundle have an implicit relationship. |
| Order | Numerical order for the options. Options designated with the number 1 appear first in the order. |
| Product offering relationship group | Reference to offer relationship groups used to logically group similar product offers. |
| Unit of measure | Unit of measure for the bundled products. Select a unit of measure, for example Box or Case. |
| Default | Option indicating that the product offering relationship is the default. |
| Mandatory | Option indicating that the product offering relationship is mandatory. |
| Default quantity | Option indicating the default quantity of product relationships. |
| Max quantity | Option indicating the maximum quantity of products in the bundle. |
| Min quantity | Option indicating the minimum quantity of products in the bundle. These flags mean different things depending on whether each relationship is or is not part of a relationship group. |
| Effective from | Future date on which the product offering is available for quoting or ordering. |

6. Select **Save**.
   The relationship is created. Select the relationship on the **Product Offering Relationships** tab to make further changes.

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### What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Add related contracts to product offerings
- Add a unit of measure to a product offering
- Create a product offering version
- Create product offering relationship groups

### Related topics

Using product catalogs

Product Catalog Management

## Add related contracts to product offerings

Add related contracts to your product offerings in the Sales Customer Relationship Management application.

### Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering that you're working with.
3. Select the **Related Contracts** tab.
4. Select **New**.
5. On the form, fill in the fields.

#### Contract Product Offering

| Field | Description |
|---|---|
| Contracts | Contract to add to the product offering. Select the contract from the list of contracts. |
| Product offering | System-generated entry reflecting the product offering you're working with. |

6. Select **Save**.
   The contract appears in the product offering under the **Related Contracts** tab. You can select the contract record to make further changes to the contract details.

### What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Create product offering relationships

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- Create a product offering version
- Create product offering relationship groups

**Related topics**

Using product catalogs

Product Catalog Management

### Add a unit of measure to a product offering

Add a unit of measure (UOM) to a product offering in Sales Customer Relationship Management.

## Before you begin

Role required: sn_prd_pm.product_catalog_admin and sn_prd_pm.product_catalog_manager

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering that you're working with from the list.
3. Select the **Units of Measures** tab.
4. Select **New**.
5. On the form, fill in the fields.

**Unit of Measure form**

| Field | Description |
|---|---|
| Product offering | Name of the selected product offering. |
| Unit of measure | Option for selecting an existing unit of measure or select **New** to add a new unit of measure. |
| Default | Option indicating the selected UOM is the default. |
| Active | Option indicating the selected UOM is active. |

6. Select **Save**.

## What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Create product offering relationships
- Add related contracts to product offerings
- Create a product offering version
- Create product offering relationship groups

**Related topics**

Using product catalogs

Product Catalog Management

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### Create a product offering version

Create a version of a product offering when updates are needed to a published offering in Sales Customer Relationship Management.

#### Before you begin
Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

#### About this task
After a product offering is published, changes can't be made. To add changes to a published product offering, create a new version.

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering that you're working with from the list.
3. In the **Versions** tab, select **Create New Version**.
   The next version of the product offering is displayed.
4. In the **Details** tab, make and save any changes, and then publish the offering.

   Version history is maintained. Each version has its own life-cycle status.

#### What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Create product offering relationships
- Add related contracts to product offerings
- Create product offering relationship groups

#### Related topics

Using product catalogs

Product Catalog Management

### Create product offering relationship groups

Use relationship groups to organize child offer options or relationships into logical groups and set up cardinality rules at the group level in Sales Customer Relationship Management. Groups of product offerings then appear on the product configurator.

#### Before you begin
Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

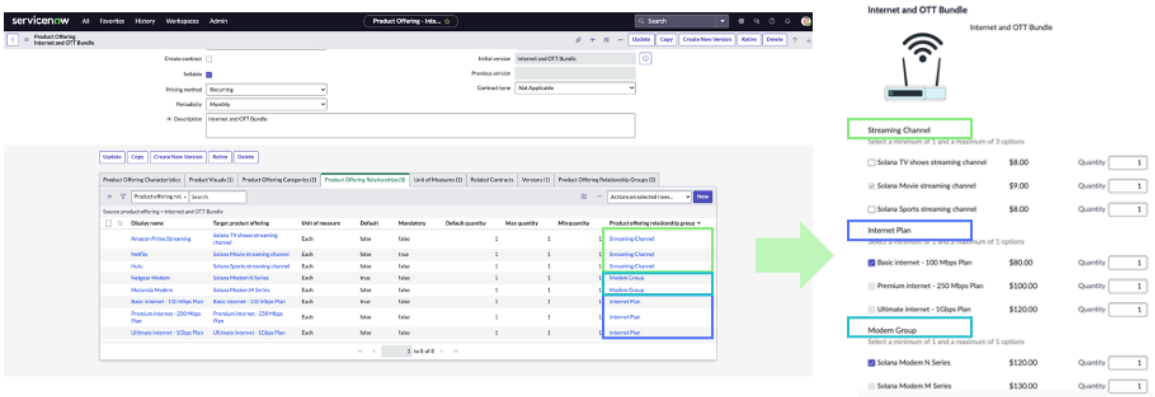
#### About this task
Create product offering relationship groups to organize product bundles into groups in the product configurator.

For example, an internet and OTT Bundle Product Offering is configured to have three product offering relationship groups: modem group, internet group, and the plan streaming channel group.

Bundled product offerings can be other bundles or individual product offerings.

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Assign child product offerings in a bundle to the product offering relationship group, which presents the options in logical groups on the product configurator to the agent. The following example shows how product offering groups appear in the product configurator.



## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select the product offering you're working with.
3. Select the **Product Offering Relationship Groups** tab.
4. Select **New**.
5. On the form, fill in the fields.

### Product Offering Relationship Group form

| Field | Description |
|---|---|
| Name | Name of the relationship group. |
| Description | A description of the relationship group. |
| Product offering | Reference to the current product offering in context. |
| Order | Order in which the relationship group is displayed in the product configurator. |
| Max options | Maximum number of options that can be selected within the relationship group during configuration. |
| Min options | Minimum number of options that must be selected within the relationship group. |

6. Select **Save**.
   The relationship group is created as part of the product offering.

## What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Create product offering relationships
- Add related contracts to product offerings

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- Add a unit of measure to a product offering
- Create a product offering version

**Related topics**

Using product catalogs

Product Catalog Management

### Defining transient products

When you create product offerings and technical specifications, you can identify single-use products and services as transient, to differentiate them from persistent products. Examples of one-time use products include installation or consulting services.

When new orders with transient products are submitted for fulfillment in ServiceNow® Order Management, the sold product or product inventory records are created with an Installation pending state. After new orders with transient products are fulfilled, the sold product or product inventory state changes to Inactive. Your fulfillment managers can then quickly see which products aren't part of the active inventory. Agents can't perform Move, Add, Change, Delete (MACD) actions on inactive sold product or product inventory records.

## Guidelines for defining transient products

When you're defining product offerings, use the **Transient** option in the Create New Product Offering form to identify a transient product. If the product has associated technical specifications, you also set the **Transient** option in the appropriate Product, Service, and Resource Specification forms.

When defining transient products, note the following restrictions:

- Create New Product Offering form: The **Transient** option and the **Create contract** option can't be enabled at the same time for the product.
- Parent and child product offerings: Transient parent product offerings and parent specifications must have transient child product offerings and child specifications. However, non-transient parent product offerings and parent specifications can have transient child product offerings and child product specifications.
- Linking product offerings to product specifications: A transient product offering must be linked to a transient product specification and vice versa.
- Specification relationships: When defining specification relationships for a transient product, you can associate only a transient service specification or resource specification. Transient product orders are decomposed as indicated in the associated specification.
- Turning on the **Transient** option for a published product offering doesn't require creating a new version. Turning it off still requires one.

For details on setting the **Transient** option for product offerings and specifications, see Create product offerings

**Related topics**

Using product catalogs

Product Catalog Management

### Multiple configurations

As a product catalog manager, when you define a configurable product offering, you can enable agents to add multiple configurations of a child product offering. When agents add multiple configurations, they can change the quantity for each configuration of the offering, define each

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configuration as a separate line item, and select the appropriate options and characteristics for each configuration.

## How multiple configurations work

When you use the Create New Product Offering form to define configurable product offerings and child product offerings, select the **Allow multiple configurations** option to enable the creation of multiple child offering configurations. For information on defining product offerings, see Create product offerings.

**Note:** If the configurable product has an associated product specification, the **Allow multiple configurations** option is enabled automatically and can't be unselected.

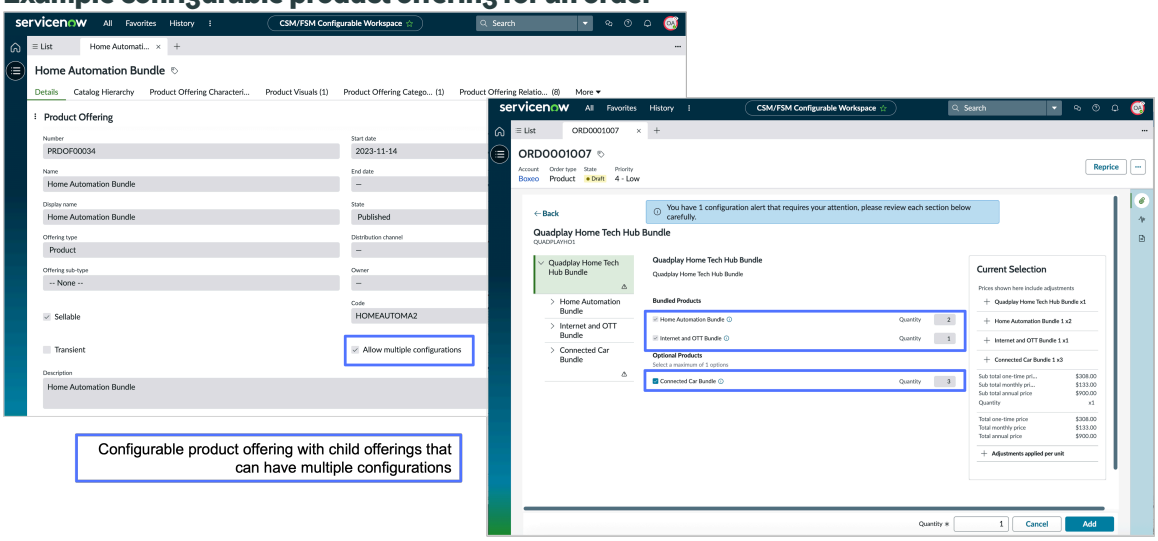
When agents add configurable products to new opportunities, quotes, and orders, they can create multiple configurations for a child offering. They navigate to a summary page for a selected child offering. From this page, they can do the following:

- Change the quantity of a child offering.
- Clone a child offering.
- Split a child offering that has a quantity greater than 1, to create child offering instances with different quantities.

Each offering instance becomes a new line item that can be configured separately.

In the following example, the Home Automation Bundle is a child offering that has a default quantity of 2 in the Quadplay Home Tech Bundle. An information icon displays next to each child offering that can have multiple configurations. The information icon, when selected, displays a message indicating that multiple configurations can be created for the child offering.

### Example configurable product offering for an order




## How multiple configurations are created

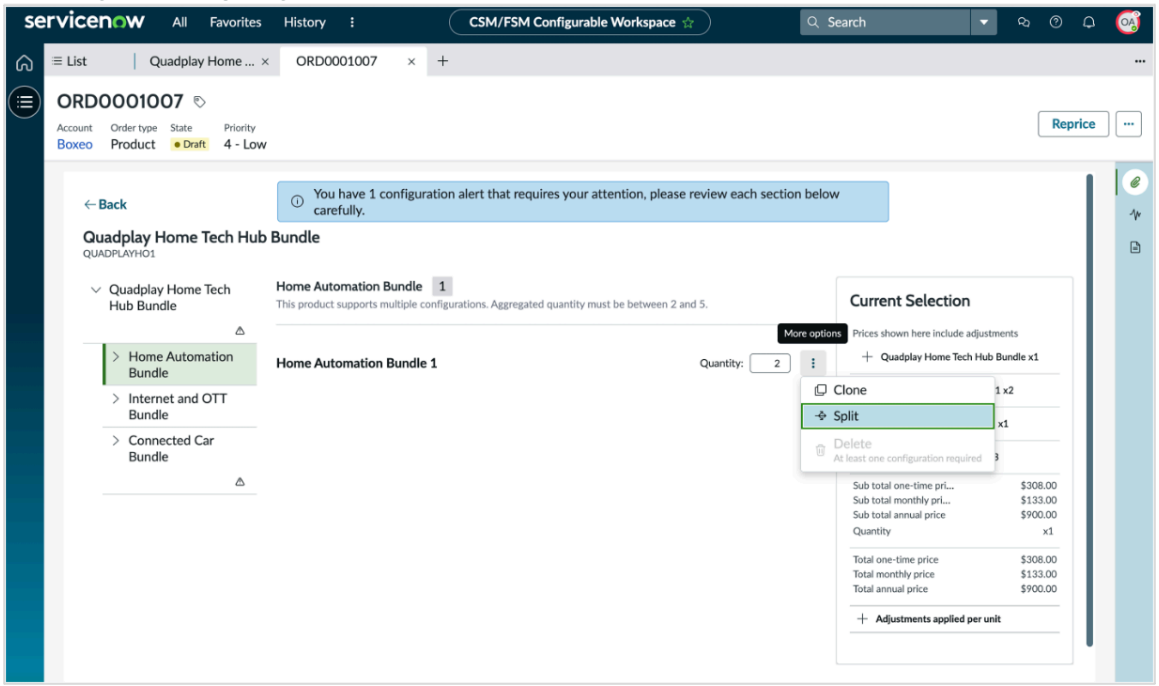
When agents review a bundle offering in the product configurator, they identify the child offerings that can have multiple configurations. They navigate to the summary page for the appropriate child offering to create multiple configurations.

In the offering summary page, a message indicates that the offering supports multiple configurations and the aggregated quantity of configurations that can be created. Agents can change the quantity of the child offering on this page.

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The More options icon displays next to the **Quantity**. Selecting the icon lists the options available for creating and managing multiple configurations.

**Offering summary page with More options menu**




The following options are available to manage child offering configurations:

- **Clone**: Create child offering configurations by copying the selected child product offering configuration. The agent is prompted to enter the number of clones to be made.

  For example, if the current child offering quantity is 2, and the agent specifies 2 copies, two identical copies of the child product offering are created. Each clone becomes a separate line item and has a quantity of 1.

- **Split**: Create child offering configurations by splitting the current child offering quantity and distributing the quantity evenly across all the copies. The agent is prompted to enter the number of splits.

  For example, if the child offering quantity is 5, and an agent specifies 3 splits, two child offering instances are created. After the split, there are three child offering instances, where the instances have a quantity of 2, 2, and 1, respectively.

- **Delete**: Removes the child offering instance. If deleting a child offering instance causes the number of child offers to fall below the minimum quantity defined for the product, the **Delete** option isn't available.

When the child offering configurations are created, each offering name reflects the child product offering name followed by an incremental number. For example, Home Automation Hub configurations are named Home Automation Hub 2, Home Automation Hub 3, and so on. Agents can then select the appropriate offering instance to configure it. If the agent changes the **Quantity** value, the Current Selection pane reflects the new quantity and associated pricing.

## Validation during multiple configuration creation

As your agents create multiple configurations, the system uses the default, minimum, and maximum cardinality rules defined for the product offering to validate the configurations. If

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there are violations, the system displays the appropriate information and error messages in the product configurator UI.

The system also uses the cardinality rules to determine when certain configuration options (**Split** and **Delete**) should be enabled or turned off, based on the context. For example, if the minimum child offering quantity is 1 and a child offering has a quantity of 1, the system disables the **Delete** option in the More options menu.

## Limitations for multiple configurations

Multiple configurations aren't supported for quotes of type sales agreements. Also, changes for quotes and orders with sold products or product inventory have the following limitations:

- Sold products: When creating a modify order, the **Delete** option for multiple configurations is supported, but the **Clone** and **Split** options aren't supported.
- Product inventory: Multiple configurations are supported. The **Split** option isn't supported.

## Setting up multiple configurations

For details on enabling and creating multiple configurations for child offerings, see the following sections:

- Create product offerings
- Create multiple configurations

### Related topics

Using product catalogs

Product Catalog Management

### Setting up specifications and product offerings

By creating and publishing versioned specifications and product offerings in a technical product catalog, your customers can order up-to-date versions of the products or services that they require. Your product catalog manager can create versions of the published specifications and product offerings with the required enhancements to support your customer's business, marketing, manufacturing, or operational changes.

## Overview of product offerings with specifications

As a product catalog manager, you set up product offerings in a technical product catalog. A product offering contains the product description, pricing, eligibility, and product options. You use a product catalog to group your product offerings so that your customers can order the products or services that they want. Only published product offerings can be added to customer contracts.

The relationship between product offerings and the product, service, and resource specification determine how a product is fulfilled. Each product offering has the following components:

**Product specification**

A product specification defines the various aspects of a product including the following:

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- All the specification characteristic options that are available for a product, and how they should be fulfilled.
- Various categories of information, such as the brand, cost, terms and conditions, and product-related materials, which include product visuals. Product specifications are customer-facing and are added to product offerings.
- Its relationship to other product, service, and resource specifications, and how a customer order of a product offering is delivered.

**Service specification**

A service specification defines a service, and the technical information of that service, including the following:

- All the specification characteristic options that are available for a service, and how they should be fulfilled.
- Various categories of information, including the cost, terms and conditions, and service-related materials. These resources include the service-related visuals and implementation guides. Service specifications can be customer-facing or resource-facing.
- Its relationship to other product, service, and resource specifications.

**Resource specification**

A resource specification defines the technical information for a resource, including the following:

- All the specification characteristic options that are available for a resource, and how they should be fulfilled.
- Various categories of information, such as the manufacture, model, and brand-related information about a resource, including the resource visuals and activation guides. Resource specifications are not customer-facing.
- Its relationship to other product, service, and resource specifications. You can enable the product and service delivery by using the required resource.

## Create specification characteristics

Define characteristics for a product, service, or resource specification.

### Before you begin

Create product characteristics and characteristic options that can be selected for a specification.

Role required: sn_prd_pm_product_catalog_admin

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Specifications** and select the specification for which characteristics are to be defined.
3. In the Specification Characteristics tab, select **New**.
4. In the form, fill in the fields.

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### Create New Specification Characteristic form

| Field | Description |
|---|---|
| Characteristic | Characteristic for the specification. Select the characteristic. |
| Characteristic option | Characteristic option for the product offering. Select a characteristic option. |
| Order | Numerical order for the options. Options designated with the number 1 appear first in the order. |
| Specification | Name of the specification that you selected. |
| Mandatory | Option indicating that the characteristic option is required to complete the order. |
| Default | Option indicating this characteristic option is the default choice. |

5. Select **Save**.

**Related topics**

- Using product catalogs
- Product Catalog Management

## Create specification relationships, quantity mapping, and decomposition rules for Order Management

Create the specification relationships and optional decomposition rules that define the associations between the product, service, and resource specifications for a product that you offer. These relationships impact how an order is fulfilled for a customer.

### Before you begin

Role required: sn_prd_pm.product_catalog_manager

### About this task

Specification relationships define the relationships and associations between the product, service, and resource specifications. They designate how an order that contains the source specification is decomposed, fulfilled, and delivered to the customer. For example, if you have a product that you deliver through a service specification, you can designate that it is composed of three unique service specifications (product, service, or resource).

**Note:** The target product, service, or resource specification you select in the **Target Specification** field can be in any state, including a Draft state. The selected specification does not have to be published before selecting it in this field.

You can also select the characteristic options of the quantity characteristic for the specification relationship to provide the quantity of the target specifications. The order decomposition process refers to the mapped quantity to decompose the order for the source specification and creates the required number of domain orders for the target specification.

If the quantity characteristic has a number as a characteristic option, the decomposition process refers to the characteristic option and creates the number of domain orders for the target specification.

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Optionally, you can create decomposition rules for the selected source and target specification relationships. The specification relationships can have product, service, or resource specifications as the source specifications.

**Note:** To learn more, see the following:

- Order quantity support in Order Management
- Order decomposition

### Procedure

1. Open CRM Workspace.
2. Navigate to **List** > **Specifications** and select a specification type.
   - Product Specifications
   - Service Specifications
   - Resource Specifications

   A list of specification records is displayed.
3. Select a record you want to modify.
4. Navigate to the **Specification Relationships** tab.
5. Select **New**.
6. On the form, fill in the fields.

**Specification Relationship form**

| Field | Description |
|---|---|
| Display name | Name for the specification relationship. |
| Source specification | Product, service, or resource specification that you create the relationship from. For example, the source specification could be a product specification for an SD-WAN. |
| Target type | Type of specification:<br>○ Product Specification<br>○ Service Specification<br>○ Resource Specification |
| Target specification | Specification that you create the relationship to. For example, the target specification could be a service specification for an SD-WAN.<br>**Note:** The target product, service, or resource specification you select can be in any state, including a Draft state. The selected specification does not have to be published before selecting it in this field. |
| Mandatory | Option that designates if the relationship between the selected source and target specifications is mandatory and should |

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| Field | Description |
| --- | --- |
| | always exist when a customer orders the product.<br>○ If selected, the target specification is always included with the source specification. During the ordering process,you must select the characteristics and characteristic values for the target specification.<br>For example, if you are defining an SD-WAN Service Package, you designate that the SD-WAN Edge Device and SD-WAN Controller target specifications are mandatory.<br>○ If cleared, it is an optional target specification and is only included with the product if the customer selected it during the ordering process.<br>For example, if you designate that the SD-WAN Security specification is optional, it's included in an ordered SD-WAN Service Package only if the customer selected it during the ordering process. |
| Relationship type | Type of relationship that designates how an order that contains the source specification decomposes for fulfillment after you receive and approve it.<br>**Composed of**<br>Source specification that is composed of the selected target specification.<br>An order that contains the source specification and characteristics decompose into a single service order.<br>**Realized as**<br>Source specification that is realized as the selected target specification.<br>**Bundles**<br>Source specification bundles as the selected target specification.<br>An order that contains the source specification and characteristics decompose into unique order line items for each of the target specifications bundled from that parent product specification. |

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| Field | Description |
| --- | --- |
| | **Requires**<br>Source specification that requires the selected target specification.<br>To enable the delivery of the promised services in the specification, an order that contains the source specification and characteristics also requires the target resource specification. |
| Order | Enter a numeric value that represents the order in which this relationship is applied, if there is more than one relationship. |
| Minimum quantity | Required minimum number of specifications for an order. |
| Default quantity | Default quantity if there is no selected amount. |
| Maximum quantity | Maximum quantity of specifications. |
| Quantity characteristic | Source specification characteristic that is used for quantity mapping. The quantity characteristic is supported only for a specification relationship in a product specification. |
| Rule | Configuration rule that defines the condition-based logic for decomposing the source specification into the target specification. This field is available only when the condition-builder decomposition feature is enabled, and is populated automatically when you create a decomposition rule. |

7. Select **Save**.

### What to do next

Optionally, create decomposition rules for selected specification relationships that have a product, service, or resource specification as the source specification. For more information, see: .

### Related topics

- Using product catalogs
- Product Catalog Management

### Updating specification versions

Enterprises frequently create and update new versions of product and service specifications. When these changes occur, it's important to update the existing product specification in ServiceNow®. Failure to update the product specifications can lead to difficulties with MACD (Modify, Add, Change, Delete) operation when orders enter fulfillment.

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Updating specification versions helps with:

- Introducing new characteristics along with their options.
- Adding new options to existing characteristics and removing existing characteristics or their options.
- Renaming existing characteristics and options.
- Incorporating new relationships and updating or removing existing relationships.
- Adding compatibility rules.

## Specification version updates

The following list shows the types of specification version updates that can occur:

- Characteristics
  - New
  - Changed - enumerations
  - Removed
- Child Relationships (bundled/composed)
  - New
  - Removed
  - Change cardinality
- Horizontal Relationships/Compatibility Rules
- Attribute Mapping Rules

## Batch specification version update

A set of specification versions can be updated using the batch specification utility in Sales Customer Relationship Management. The specification can also be scheduled.

### What to do next

Configure update specification versions

### Configure update specification versions

Configure specification version updates so that product specification versions can be updated to reflect changes and updates.

### Before you begin

Role required: system_catalog_admin

### About this task

To configure the product specification version change, modify the check-for-an-incoming-specification ID and the product inventory specification ID.

### Procedure

1. Navigate to **All** and enter `sys_properties.list` in the search area to open the **System Properties** list.
2. In the **System Properties** list, search for `sn_ind_tmt_orm.allowSpecVersionUpdateInChangeOrder` then select to open the system property.

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If the system property record is in an uneditable state, select the message to make the record editable.

3. In the **Value** field, set the value to `true`.
4. Select **Update**.
   The specification version update is activated.

**Related topics**

Using product catalogs

Product Catalog Management

### Batch update for product specification versions

Use the inventory batch update job to update product specifications when changes occur from one version to another.

## Before you begin

Role required: product_catalog_admin and product_catalog_manager

## About this task

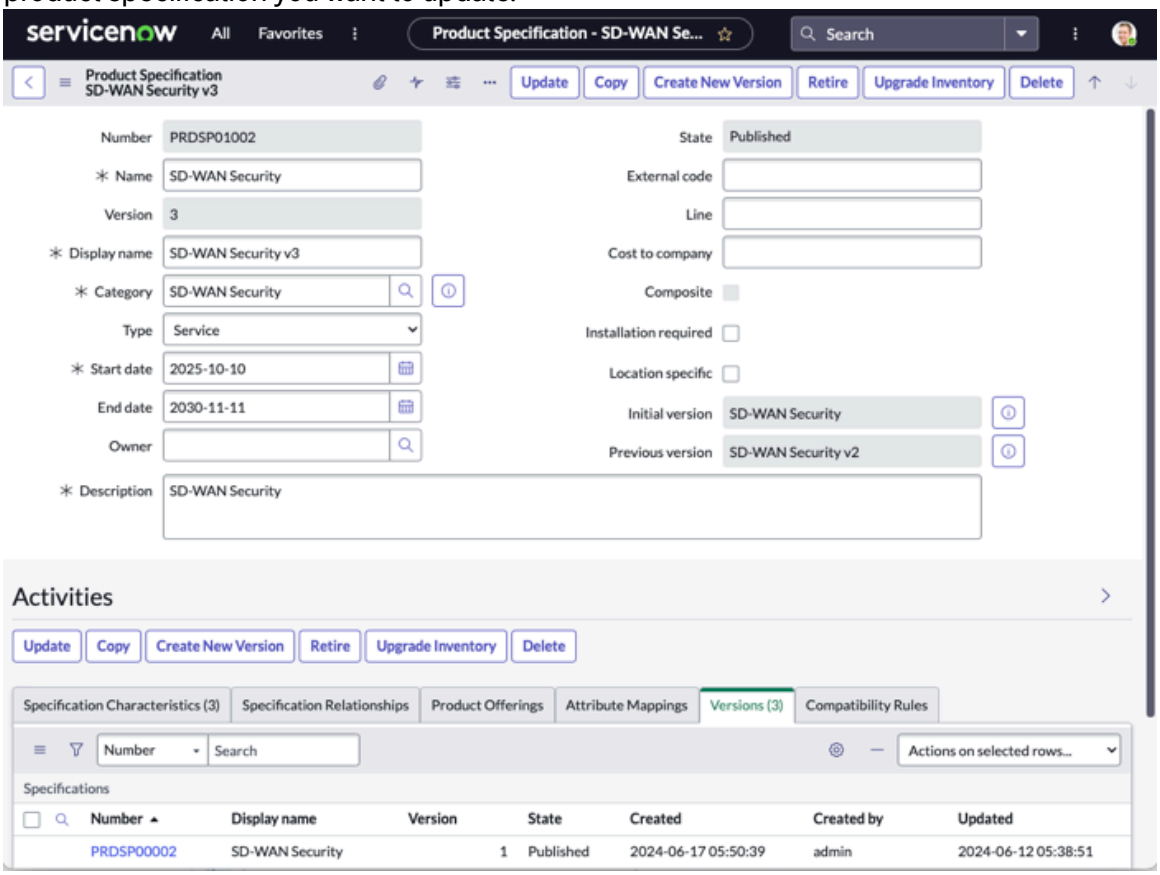
Batch inventory specification update lets catalog admins and product managers create an on-demand job that triggers a batch specification version update. The update doesn't create change orders but directly updates product inventory in orders. Batch updates also create a log that including errors.

There are two steps to perform this process. The first is to update the specification version from the source version to the target version. The second step is to run an inventory upgrade job.

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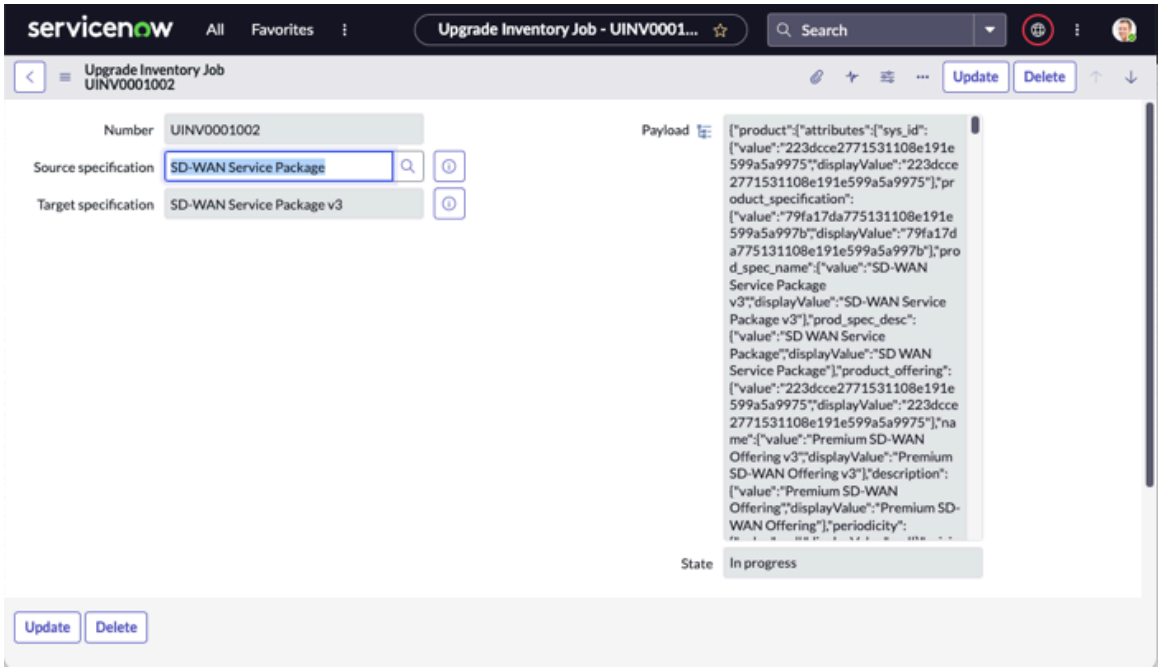
## Procedure

1. Navigate to **All** > **Product Catalog Management** > **Product Specifications** and select the product specification you want to update.




2. Select the **Create New Version** button to create a version of the specification.
3. Select **Publish** to publish the specification version, then select **Update** to update the specifications to add the new version.
   Now there are two published versions of the specification. The initial version is considered the source version and the v2 version is considered the target version.
4. To start the version update on existing product inventories, select **Upgrade Inventory** and select **Yes** at the prompt.
   The job is created for the source specification as v1 and the target is automatically populated as the latest published version of the source specification. The inventory upgrade job starts and runs a series of validation steps to confirm the job runs successfully. When the validation is complete, the job enters an **In progress** state. If an error occurs, the job status turns to **Error**.
5. Navigate to **All** > **Inventory upgrade job** and select the job you're working with to view the status of the job and address any errors.

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6. Navigate to **All** > **Inbound queue** > **Inbound requests** and select the record id you're working with to view the status.
   The number of inbound queue requests indicates the number of product inventories that matched the source specification. Once all the inbound queue records are processed, the request creates a change order for each of the inbound queue records processed successfully.

### Related topics

Using product catalogs

Product Catalog Management

## View upgrade inventory job status

View the status of a specification upgrade job using the upgrade inventory Job status list form.

### Before you begin

Role required: sn_ind_tmt_orm.order_agent

### Procedure

1. Navigate to **All** > **Product Catalog Management** > **Upgrade Inventory Jobs** and select **All**.
2. Select the inventory job that you're working with.

| Entry | Description |
|---|---|
| Number | A system-generated number identifying the inventory job. |
| Target specification | The target specification that is going to be updated. |
| Payload | Payload is the specification data that is being added to the target specification. |

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| Entry | Description |
| --- | --- |
| State | Shows the state of the job. |

3. Select **Update** to save any changes.

**Related topics**

Using product catalogs

Product Catalog Management

### Validating product offerings before publishing

Extended life cycle states add validation stages before publication, so you can assemble and review catalog hierarchies without publishing unfinished records.

Enable the optional In Test and Staged states to validate product offerings and product, service, or resource specifications before publication. These states provide clear checkpoints between authoring and release.

By default, records move directly from Draft to Published. With extended states enabled, records move through Draft, In Test, Staged, and Published.

## Building product hierarchies with unpublished components

Without a validation stage, an offering under review can't be added as a child of another offering until it is published. This limitation can force admins to publish individual components before a bundle is complete.

Extended states let a product offering include child offerings that are in Draft, In Test, Staged, or Published. You can assemble and refine a bundle from work-in-progress components without publishing each component first.

The following table provides more information about these states.

### Product offering life cycle states

| States | Purpose | Editing behavior |
| --- | --- | --- |
| Draft | Author and update the record. | The record and its child lists are editable. |
| In Test | Validate the record before release. | The record and its child lists are read-only. Return the record to Draft to make changes. |
| Staged | Prepare the validated record for publication. | The record and its child lists are read-only. A rejected approval anywhere in the hierarchy blocks the move to Staged. |
| Published | Make the record available according to its configured dates and visibility. | Published visibility applies unless prepublication visibility is enabled. |
| Retired | Remove the record from active use. | Staged records can be Retired directly without publishing |

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**Product offering life cycle states (continued)**

| States | Purpose | Editing behavior |
|---|---|---|
| | | it. A retired record can't be reverted to any active state. |

Product offerings in the In Test and Staged states can also be referenced in the price lists, cost books, price adjustments, and context variables.

## Referencing records in compatible life cycle states

Product offerings and specifications can be organized into hierarchies in which a parent record references one or more child records. For example, a bundle offering can reference child product offerings, and a product offering can reference an underlying product specification.

The life cycle state of the parent determines which child records it can reference. These rules help prevent a parent record from advancing toward publication while its dependencies are still incomplete or haven't reached an appropriate state.

For example, before an offering can move from In Test to Staged, each referenced child must already be Staged or Published. If a child is still Draft or In Test, the parent can't move to Staged. Move the child to a compatible state, and then retry the transition.

The state of a record determines the states of the records that it can reference.

**Compatible life cycle states**

| Parent record state | Allowed states for referenced records |
|---|---|
| Draft | Draft, In Test, Staged, or Published |
| In Test | In Test, Staged, or Published |
| Staged | Staged or Published |
| Published | Published |

## Enabling extended life cycle states

Product offerings and specifications use two related system properties as listed in the following table. Both properties are off by default, so the existing Draft-to-Published behavior remains unchanged until a product catalog admin enables the properties.

**System properties for enabling life cycle states**

| System property | What it controls | Default |
|---|---|---|
| sn_prd_pm.enable_extended_product_lifecycles | Adds the In Test and Staged states between Draft and Published. | false |
| sn_prd_pm.enable_product_lifecycle_preview | Makes In Test and Staged records visible to catalog consumers. Takes effect only when extended life cycle states are enabled. | false |

For more information, see Enable extended life cycle states for product offerings.

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Keep extended product life cycle statuses turned off if your organization wants to continue using the existing Draft-to-Published process. Enabling the feature is optional and doesn't change existing catalog behavior until a product catalog admin turns it on.

## Controlling prepublication availability

Enable prepublication visibility in an instance where the catalog teams need to test pre-release catalog records. When extended life cycle statuses and prepublication visibility are enabled, In Test and Staged records can appear in catalog listings and reference fields. They can also be used to validate quote, order, pricing, configuration, and portal flows before the records are published.

**Note:** If the *sn_prd_pm.enable_product_lifecycle_prepublish_visibility* property is turned off, only published offerings appear to catalog consumers. This property has no effect unless extended life cycle states are also enabled. The *sn_prd_pm.enable_product_lifecycle_prepublish_visibility* is turned off in production environments by default.

## Example: Build a bundle from work-in-progress offerings

A product catalog admin is building a bundle from several child offerings that aren't ready for publication. In a test or preproduction instance, the admin moves the child offerings to In Test and adds them to the bundle without publishing them. The implementation team can then validate the bundle structure and use the pre-release offerings in supported quote and order transaction flows.

If testing identifies an issue, the admin moves the affected offering back to Draft, makes the required changes, and returns the offering to In Test for further validation. After the bundle and its child offerings pass validation, the admin moves each eligible record to Staged and then to Published.

This process enables the team to validate the complete bundle before release, without publishing unfinished offerings or creating unnecessary revisions.

## Moving records through the extended life cycle

1. In the Draft state, create and update a record and its child lists.
2. Move the record to In Test when it is ready for validation. The record and its child lists become read-only.
3. Return the record to Draft if you need to make changes.
4. Resolve rejected approvals anywhere in the hierarchy before moving the record to Staged.
5. Move the validated record from Staged to Published when it is ready for release.
6. Retire a record when it's no longer in active use.

For more information, see product/tmt-order-mgt/task/move-offering-spec-states.dita.

**Related topics**

Product Catalog Management properties

### Enable extended life cycle states for product offerings

Turn on the In Test and Staged life cycle states for product offerings and product, service, and resource specifications, and optionally preview pre-publish records before they're published.

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### Before you begin
Role required: sn_prd_pm.product_catalog_admin

### About this task
Turning on the sn_prd_pm.enable_product_lifecycle_prepublish_visibility property has no effect unless the sn_prd_pm.enable_extended_product_lifecycle property is also on.

### Procedure
1. Navigate to **All** and enter `sys_properties.LIST` in the navigation filter.
2. Enable the extended states between Draft and Published.
   a. In the Name field, search and select the **sn_prd_pm.enable_extended_product_lifecycle** property.
   b. Activate the system property by changing the value of the **Value** field to `true`.
   This adds the In Test and Staged states between Draft and Published for product offerings and specifications.
   c. Select **Update**.
3. Enable preview of the In Test and Staged entities in test or pre-production environments.
   a. In the Name field, search and select the **sn_prd_pm.enable_product_lifecycle_prepublish_visibility** property.
   b. Activate the system property by changing the value of the **Value** field to `true`.
   The sn_prd_pm.enable_product_lifecycle_prepublish_visibility property is turned off in production environment.
   c. Select **Update**.

### Result
Product offerings and specifications can now move through Draft, In Test, Staged, and Published states. The **Return to Draft** button becomes available on the Product Offering, Resource, Service, and Product Specification pages, used for changing an In Test record to Draft for editing.

### What to do next
product/tmt-order-mgt/task/move-offering-spec-states.dita

#### Related topics
product/tmt-order-mgt/concept/channel-specific-availability.dita

## Validate product offerings and specifications

Move a product offering or specification through the In Test and Staged statuses to validate it before you publish it.

### Before you begin
Extended life cycle states must be turned on. For more information, see Enable extended life cycle states for product offerings.

Role required: sn_prd_pm.product_catalog_admin

### About this task
Only the actions available for a record's current status appear on the record.

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### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to the module you want to test.
   - **Specifications** > **Product Specification**
   - **Specifications** > **Service Specification**
   - **Specifications** > **Resource Specification**
   - **Offerings** > **Product Offerings**
4. Select the product offering or specification record you want to test.
5. Select the action for the status change that you want to make.

| Action | Result |
|---|---|
| **Ready for Test** | Moves a Draft record to In Test. The record be comes read-only. |
| **Return to Draft** | Moves an In Test record back to Draft so you can edit it again. This option is unavailable for records in the Staged state. |
| **Ready for Staging** | Moves an In Test record to Staged. Blocked if anything in the record's hierarchy has a reject ed approval. |
| **Publish** | Moves the staged record to Published state. |
| **Retire** | Retires a staged or published record. A staged record can be retired directly without publishing it first. This action is irreversible. |

### Related topics

product/tmt-order-mgt/concept/channel-specific-availability.dita

### Releasing product offerings by distribution channel

Channel-specific availability lets you release a published product offering to different distribution channels on different dates. Use channel overrides to coordinate phased rollouts instead of launching everywhere at once.

Set a channel-specific release date to make a published product offering available in selected channels at different times. This flexibility helps you coordinate training, regional launches, partner readiness, and other rollout dependencies without delaying availability in channels that are ready.

By default, the start date on a product offering applies to every distribution channel. Agent assist is the default channel. Add a channel override when a channel requires a different release date.

## How effective dates affect catalog visibility

Every product offering has a Start date and an optional End date. When you open the catalog from a quote or an order, the catalog uses these dates to decide whether an offering appears. The offering appears only when the entity's transaction date falls within its effective period.

An offering's effective period follows these rules:

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- An offering whose start date hasn't arrived doesn't appear.
- An offering whose end date has passed doesn't appear.
- Both dates are inclusive, so an offering is available on its start date and on its end date.
- An offering with no end date remains available indefinitely.

Effective dates filter the catalog listing, the result totals shown alongside it, and AI Search results.

For a quote or order dated in the future, the catalog evaluates effective dates against that transaction date instead of today's date. This lets you build a quote for a future date and see the offerings that will be effective on that date.

Effective date filtering doesn't apply when you open the catalog from an opportunity. Offerings outside their effective period still appear in that context.

An optional child product offering also carries its own effective date on the relationship to its parent offering. You can add an optional child offering to a published parent without creating a new version of the parent. The child offering appears in the CPQ Configurator product picker only after its effective date is reached.

## How channel-specific availability works

Use channel overrides to control when a product offering becomes available in each distribution channel.

- Add channel overrides while the product offering is in Draft. After publication, you can adjust only the end date on an existing override, and only to a future date.
- Control visibility until the release date. The offering remains hidden from the specified channel in catalog search and AI Search until the override date.
- Adjust a published offering safely. After publication, you can change the date on an existing override only to a future date.
- Keep availability current automatically. A nightly scheduled job applies channel availability as release dates arrive. You don't need to refresh the catalog manually.

For more information, see product/tmt-order-mgt/task/set-channel-release-date.dita.

## Distribution channels

Each distribution channel includes a Value field. This field stores the canonical token that the system uses to match the channel at runtime, such as when a quote or order provides a channel through a context variable or header of the entity.

When you create a distribution channel, the system populates the Value field automatically. It reuses a matching order channel value when one exists. Otherwise, it derives the value from the channel name. Runtime matching uses the Value field, not the Name field. As a result, you can rename a distribution channel without interrupting channel-based filtering.

Predefined distribution channels include Web, Mobile, Service Exchange, and Agent assist.

## Example: Stagger a launch across channels

A product catalog admin plans to release a new mobile plan on the website two weeks before it becomes available in Agent assist. This approach gives support agents time to complete training before they can use the plan.

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The admin adds a channel override for Web and sets its release date two weeks earlier than the offering's default start date. As a result, the plan becomes available on the website on the override date. It becomes available in Agent assist and all other channels on the default start date.

You can use the same approach for a regional or partner rollout. For example, set an earlier override date for Service Exchange and continue to use the default dates for other channels.

**Related topics**

product/tmt-order-mgt/task/set-channel-release-date.dita

Components installed with Product Catalog Management

Using product catalogs

### Set a channel-specific release date for a product offering

Add a channel override to a product offering so it becomes available on a specific sales channel on the date you choose.

## Before you begin

Role required: sn_prd_pm.product_catalog_admin

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Offerings** > **Product Offerings**.
4. Select a product offering that you want to make available on a specific channel.
   The product offering must be in the Draft state.
5. From the **More** drop-down menu, select the **Product Offering Channel Overrides** option.
6. Select **New**.
7. On the Channel override form, fill in the fields.

| Field | Description |
|---|---|
| Product offering | Product offering to which the channel-specific availability applies. The value is populated from the product offering where you create the override. |
| Channel | Distribution channel where you want the product offering to become available on different dates. |
| Start date | Date when the product offering becomes available in the selected channel. Until this date, the offering is hidden from the channel in catalog search and AI Search. |
| End date | Date when the product offering stops being available in the selected channel. If no end date is specified, the channel override continues to apply. |

**Note:** While the offering is in Draft, you can set both a start date and an end date. After the offering is published, you can only change the end date, and only to a future date.

8. Select **Save**.

## Result

The product offering stays hidden from the selected channel in catalog search and AI Search until the release date arrives.

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**Related topics**

Validating product offerings before publishing

### Product offer bundling with product specifications

Product Catalog Management supports the bundling of product offers that have associated product specifications or specification hierarchies at any level of the bundle.

## Supported product offer bundles

As a product catalog admin or manager, you can create a bundle offer for the following product offer combinations:

- A top-level offer with several offers in multiple levels, but no product specification reference at any level.
- A top-level offer with several offers in multiple levels that can have a product specification reference at any level.
- A top-level offer with two or three levels of nesting, where the leaf-level product offer references a specification hierarchy.

When offer bundles that have a specification reference at different levels are added to a quote or an order, the appropriate transaction lines are generated with specification references and product offer references. If fulfillment is done in ServiceNow Order Management, the applicable domain orders are generated and records for sold products and product inventory are created or updated.

## Characteristics inherited from product specifications

When you create a product offering and reference a product specification hierarchy, you can select an option called **Copy child specification characteristics**. When you select this option, the product offer inherits all the characteristics from the specification or specification hierarchy. For example, if a product offer has an associated product specification, the characteristics are inherited from the child specifications in addition to the parent specification. The attributes from parent specification are always inherited by the product offer.

You can also do the following when you create a bundle product offering:

- Add other characteristics to the offering, such as attributes for order enrichment, aside from characteristics inherited from the specification.
- Delete product offering characteristics that were inherited from the specification.

To learn more about product offerings, see Create product offerings.

**Related topics**

Using product catalogs

Product Catalog Management

### Product catalog hierarchy visualization

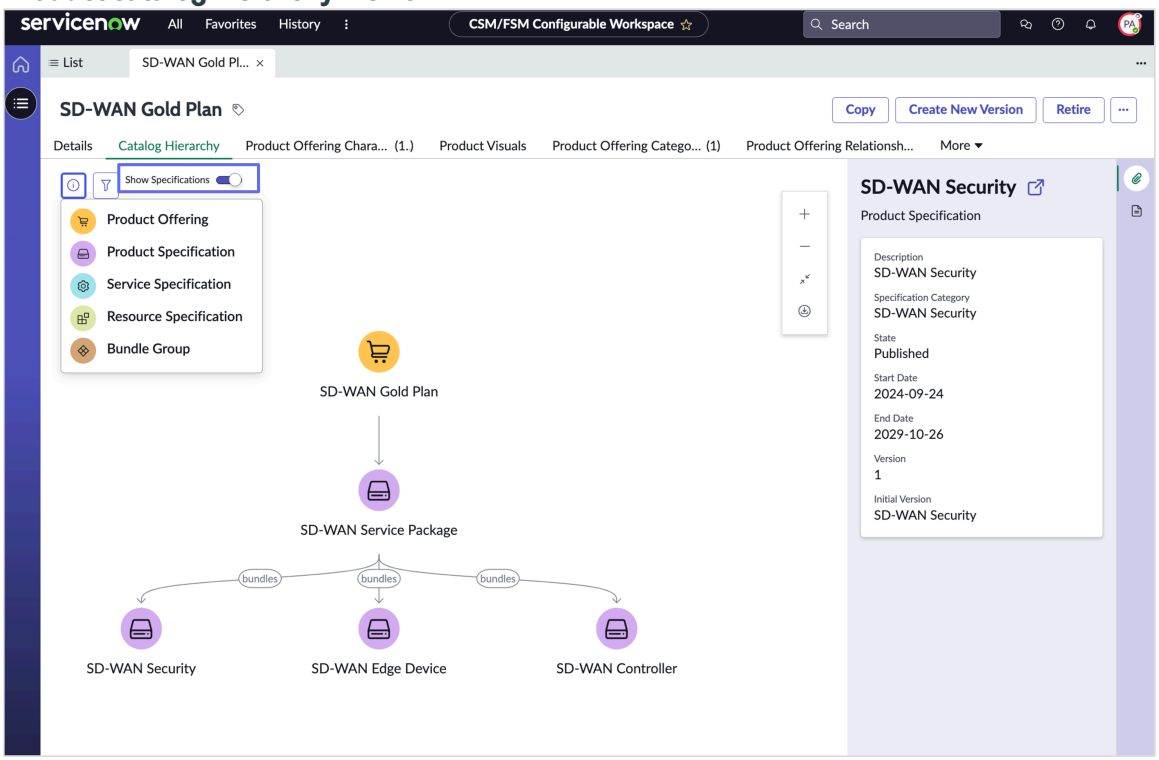
As a product catalog admin or manager, you can view the complete hierarchy of a product offering and any associated specifications (product, service, and resource). Use these views to verify that all entities have been defined and associated correctly.

For product offerings that have associated specifications, you can toggle the hierarchical view of the product offering to show its specification hierarchy. The hierarchical specification view shows the services that enable the product to be realized and the resources that are required to deliver those services. This view helps you visualize different aspects of a product offering, to validate

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the product and determine that the supporting services and resources are designed as needed. The hierarchy also highlights any relationships between specifications.

### Product catalog hierarchy views




To view the product catalog hierarchy in the CRM Workspace, in the List view navigate to **Offerings** > **Product Offerings**. Select a product offering, then select the Catalog Hierarchy tab. Use the **Show specification** toggle to switch between the product offering and specification hierarchical views.

The toggle legend identifies the product offering and specification icons displayed in the visualization. Similar to the selection of specification nodes, when you select any product offer node, the side panel displays the high-level details of the product offer. You can use the filter to select a node and display the hierarchy under the node rather than the whole tree.

#### Related topics

- Using product catalogs
- Product Catalog Management

### Minor changes to published product offerings and specifications

As a product catalog admin, you can make minor changes to published product offerings and specifications without creating a new version, including updating eligible fields and adding optional characteristics or future-effective optional child offerings.

Minor changes can include updates to supported fields or eligible additions to a published entity. For a published product offering, you can add an optional characteristic or an optional child offering without creating a new version of the parent offering. When you add an optional child offering, specify a future effective date on the relationship to control when the child becomes available for transactions.

**Note:** Changes to fields other than those identified as minor, and changes that don't meet the conditions for an optional characteristic or optional child relationship, require you to generate a new version of the product offering or specification.

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## How minor changes are processed

The following sections describe the minor changes that you can make to published product offerings and specifications. Updates to supported fields and optional characteristics are applied when you save the record. An optional child-offering relationship is saved without creating a new version of the parent offering, but the child offering becomes available for transactions based on the relationship's effective date.

At runtime, the system compares the transaction date with the effective date of the child-offering relationship. The child offering isn't available for transactions dated before the effective date. It is available for transactions dated on or after the effective date. This evaluation applies to new-purchase and modify, add, change, or disconnect transactions.

If you're using the CPQ Configurator, minor changes are handled as follows:

- Minor changes to simple products are synchronized automatically.
- Minor changes to configurable products require synchronization. In the CRM Workspace, the **Save** and **Update Configuration** buttons are displayed when you make minor changes to a product offering. Selecting **Update Configuration** synchronizes the configurable product offering with its corresponding blueprint.
- If any blueprints have a reference to a simple or configurable product with minor changes, you must synchronize those blueprints.

### Related topics

Using product catalogs

Product Catalog Management

### Make minor updates to published product offerings

Make minor changes to certain fields in a published product offering and its related entities.

### Before you begin

Role required: admin

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Offerings** > **Product Offerings**.
4. Select the product offering to be changed and choose the appropriate tab (related list).

   You can change any of the product offering fields listed in the following table.

| Product offering entity | Fields that can be updated |
|---|---|
| Product offering | ○ Name<br>○ Display name<br>○ Description<br>○ Sellable<br>○ Allow multiple configurations: Change the setting from unselected to selected (true). |

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| Product offering entity | Fields that can be updated |
|---|---|
| Product Offering Characteristics | ○ Customer input required<br>○ Order<br>○ Mandatory |
| New Characteristic Option | Add Characteristic option |
| Product Offering Relationship | ○ Display name<br>○ Order |
| Product Offering Relationship Groups | ○ Name<br>○ Description<br>○ Order |
| Product Offering Relationship Characteristics | Order |
| Relationship#Characteristic Option | Add Characteristic option |

5. **Optional:** Add a child product offering.

   **Note:** If a specification is associated with more than one product offerings, then it can't be added to the product offering as a child product offering relationship. You must create a new version of the parent product offering.

   a. Navigate to the **Product Offering Relationships** tab.

   b. Select **New**.

   c. On the form, fill in the fields.
   For a description of the form fields, see Create product offering relationships.

   d. Select **Save**.

   The optional child offering is added without incrementing the parent product offering version. The child becomes available for eligible transactions on or after the relationship's effective date.

6. **Optional:** Add a characteristic to the product offering.

   a. Navigate to the **Product Offering Characteristics** tab.

   b. Select **New**.

   c. On the form, fill in the fields.
   For a description of the form fields, see Add characteristic and characteristic options to a product offering.

   The **Mandatory** option is disabled.

   d. Select **Save**.

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### Make minor changes to published specifications

Make minor changes to certain fields in a published specification and its related entities.

## Before you begin

Role required: admin

## About this task

1. In the CRM Workspace, select the List view.
2. Navigate to#**Specifications**.
3. Select the specification to be changed (Product, Service, or Resource) and choose the appropriate tab (related list) for the entity to be changed.
4. Repeat step 3 for each specification entity that has minor changes.
5. When you finish the changes, select **Save**.

   The changes to the published specification are updated immediately.

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to#**Specifications** and select one of the following options.
   - Product Specifications
   - Service Specifications
   - Resource Specifications
4. Select a specification record you want to change.
   You can change any of the minor fields listed in the following table.

| Entity | Fields that can be updated |
|---|---|
| ○ Product Specification<br>○ Service Specification<br>○ Resource Specification | ○ Name<br>○ Display name<br>○ Description<br>○ Line<br>○ External code |
| Specification Characteristics | Order |
| New Specification Characteristic | Add characteristic options |
| Specification Relationships | Order |

5. **Optional:** Add a specification characteristic.

   **a.** Navigate to the **Specification Characteristics** tab.

   **b.** Select **New**.

   **c.** On the form, fill in the fields.

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For a description of form fields, see Create specification characteristics.

The **Mandatory** and **Default** options are disabled.

**d.** Select **Save**.

6. **Optional:** Add a specification relationship.

**a.** Navigate to the **Specification Relationships** tab.

**b.** Select **New**.

**c.** On the form, fill in the fields.
For a description of form fields, see product/tmt-order-mgt/task/order-mgt-specification-rels.dita.

The **Mandatory** and **Default** options are disabled.

**d.** Select **Save**.

### Configuring product offer eligibility

You can filter the product catalog, offering categories, and product offerings dynamically, to display only the appropriate catalog, categories, and offerings for which a customer is eligible. Your agents see this filtered product information when they're creating opportunities, quotes, and orders.

## Product offer eligibility overview

As a product catalog admin or manager, you create the business rules that filter the product catalogs, offering categories, and product offerings to display only the eligible products for customers when agents are creating quotes or orders. Filtering the products helps agents sell the correct products to customers. The filters are based on decision rules that you set in the following product eligibility matrices:

- **Product Offering Catalog Eligibility**: Define the eligibility rules to be applied to product offering catalogs. For example, you can use this matrix to filter sales catalogs based on customer location, such as country, state, or city.
- **Product Offering Category Eligibility**: Define the eligibility rules to be applied to product offering categories.
- **Product Offering Eligibility**: Define the eligibility rules to be applied to product offerings.

These matrices are frameworks for setting the conditions and the context variables that control the catalogs, product categories, and product offerings displayed. You can use system-defined context variables provided with Product Catalog Management and Pricing Management, or you can work with your admin to develop your own custom context variables, such as marketing segment or sales channel, to be used in the eligibility matrices.

## Configuration tasks

Complete the following tasks to set up product eligibility matrices.

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**Product eligibility configuration tasks**

| Task | Description | Role |
|---|---|---|
| Create a custom context variable (if needed) | Review system-defined and existing custom context variables. If needed, add a new context variable, then map the customer variable to a transaction entity. | Admin |
| Create a rule entity filter | Define the eligibility filters for a product entity. | Product catalog admin or manager |
| Define product eligibility rules in a product eligibility matrix | Define the eligibility rules in the decision table of a product eligibility matrix. | Product catalog admin or manager |

### Related topics

- Using product catalogs
- Product Catalog Management

## Create a rule entity filter

Create a rule filter for the product entity to be used in a product eligibility matrix. The rule filter defines how the rule is applied, for example to a product catalog, category, or offering.

### Before you begin

Determine the entity to which the filter applies, for example a particular product catalog, category, or a product offering.

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Rule Entity Filter**.
3. Select **New**.
   On the form, fill in the fields.

**Rule Entity Filter**

| Field | Description |
|---|---|
| Filter Name | Name of the filter, for example `Ineligible offers for CA`. |
| Entity | Product entity for the rule:<br>○ Product catalog<br>○ Product offering category<br>○ Product offering |
| Filter type | Type of filter to be applied: |

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| Field | Description |
|---|---|
| | ○ Static: Use a particular list to filter the product entity.<br>○ Dynamic: Set the conditions to filter the entity. |
| Code | System-generated alphanumeric number based on the filter name. |
| Product <catalogs, categories, or offerings> | The product catalog, category, or offering to be filtered, based on the **Entity** selected. This field appears only when Static is selected as the **Filter type**. |
| Condition | Condition to be used to filter the entity. Use the **Set conditions** builder to specify the conditions. This field appears only when Dynamic is selected as the **Filter type**. |

4. Select **Save**.
   The rule filter can now be used in a product eligibility matrix.

**Related topics**

Using product catalogs

Product Catalog Management

### Define product eligibility rules in a product eligibility matrix

Define product eligibility rules by using the Product Offering Catalog Eligibility, Product Offering Category Eligibility, or Product Offering Eligibility Matrix.

## Before you begin

Create the rule entity filters and define any new custom context variables needed to define the eligibility rules.

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

## About this task

When you define eligibility rules, consider the two modes for determining eligibility:

- Ineligible: Determine all the catalogs, categories, and product offers that are considered ineligible by default, then set your eligibility rules as needed.
- Eligible: Determine all the catalogs, categories, and product offers that are considered eligible by default, then set your ineligibility rules as needed.

Use the **Default result** field in the decision table for the product eligibility matrix to control the default mode.

The November 2024 release provides Version 2 of the product eligibility matrices, which now support eligibility rules based on transaction line attributes. You can also use service location context variables to set product eligibility rules for service locations: Service City, Service State, Service Country, and Service Zip.

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### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Rule Matrices**.
3. Select the product eligibility matrix for the rule to be defined.
   - To set the eligibility rules for a product catalog, select the Product Catalog Eligibility Matrix.
   - To set the eligibility rules for a product category, select the Product Category Eligibility Matrix.
   - To set the eligibility rules for a product offering, select the Product Offering Eligibility Matrix.
4. Select **Edit Rule**.
   The Decision Table for the selected eligibility matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions that control the eligibility.
5. In the decision table, set the rule to control the eligibility.
   a. In the **Default result** field of the Condition section, review the eligibility mode being used and update it if needed.
   b. Select **Add new decision row**.
   c. In the row, select the column for the input (context variable) to be applied, such as the Billing State or Account.
   d. In the **Active** column, set the value to true.
   e. In the Results section, under the **Eligibility Rules** column, select the eligibility state to be applied, for example Ineligible or Eligible.
   f. Under the **Rule Entity Filter** column, select the filter to be applied.
6. Select **Save**.
   Review the **Validation Status** and **Validation Messages** columns to see if you're missing mandatory inputs, outputs or other information. If so, enter the appropriate information and select **Save**.
   The filtered product entity (product catalog, category, or offering) is displayed or hidden to sales and order agents, depending on the filter.

### Related topics

Using product catalogs

Product Catalog Management

## Use extension points in product eligibility

Use extension points to call custom scripts from external sources that control product eligibility logic used in the Sales Customer Relationship Management (Sales CRM) applications.

To access the available extension points, navigate to **All** > **Scripted Extension Points** and in the Extension Points list, select the desired extension point to view it.

### Product eligibility extension points

| Extension point | Description |
| --- | --- |
| `sn_prd_pm.EligibilityRulesExtensionPoint` | Extension point for defining eligibility methods for product catalogs, categories, and offerings. |

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**Related topics**

- Using product catalogs
- Product Catalog Management

### Exporting and importing product catalog entities

As a product catalog admin, you can both export and import product catalog entities between ServiceNow instances. For example, you can promote catalog entities from a non-production instance to a production instance. Each process involves a separate set of steps.

## Managing product catalog entities

The first step before exporting product catalog entities is adding the **Code** field values to product catalog entities. The **Code** field value is used by the system to determine whether an entity is to be inserted or updated in the target instance.

You then choose the product catalog entities to be exported and run the export process.

After you export your product catalog entities, certain base entities must be imported first to your target instance, such as characteristics, characteristic options, template, and Unit of Measure (UOM), since they're referenced by product offerings, product specifications, and service specifications. For this reason, import certain product catalog entities to your target instance in the following order:

1. Import the exported base entities.
2. Import the product offering catalog if you're exporting product offerings.
3. Import product offerings and product specifications.

## Export and import process

Follow these steps to export and import product catalog entities.

**Export and import product catalog steps**

| Step | Description |
|---|---|
| Add Code field values to catalog entities | Add the **Code** field values for the main product catalog entities on your source and target instances. |
| Export product catalog entities | Export product catalog entities from one instance to another. The entities are exported as JSON and are downloaded to your local download directory. |
| View export job status | Check the state of the export job. |
| Import product catalog entities | Import product entities exported as JSON files to another instance. |
| View import job status | Check the state of the import job. |

**Related topics**

- Using product catalogs
- Product Catalog Management

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### Add Code field values to catalog entities

Add the **Code** field values for the main product catalog entities. The system uses this field as a way to identify catalog entities uniquely and to determine whether the **Code** field values for an export catalog entity are to be inserted or updated in the target instance.

## Before you begin

Role required: admin

## About this task

The **Code** values for product catalog entities are system-assigned alphanumeric values based on the catalog entity name, such as the name of a product offering. If the **Code** field values for the main catalog entities are empty, run certain on-demand scheduled jobs and fix scripts to add the **Code** field values for the main product catalog entities.

Both the scheduled jobs and fix scripts add the **Code** field values for the catalog entities.

## Procedure

1. On the source instance, navigate to **All** > **System Definition** > **Scheduled Jobs** and do the following:

   a. In the filter, enter `Application is Product Catalog Management Core`, then select **Run**.
   A list of jobs for Product Catalog Management Core is displayed.

   b. Run each of the following jobs in the order listed below (select the job, then select **Execute Now**).
   - **Migrate prod chars values to char options**
   - **Schedule job to modify code field on characteristic records that contain special characters**
   - **Schedule job to populate code field on master entities**
   - **Schedule job to populate name field on product offering characteristics**
   - **Schedule Job with upgrade script to populate code**

2. Navigate to **All** > **System Definition** > **Fix Scripts**.

   a. In the filter, enter `*code` to view the list of applicable fix scripts.

   b. Run each of the following fix scripts (select the script, then select **Run Fix Script**).
   - **Populate Code Field** - For Product Catalog Management Core application
   - **Populate Code Field** - For Compatibility Management application
   - **Populate Code Field** - For Attribute Propagation
   - **Populate Code Field Decomposition Rule** - For Order Management application

   These scripts can be run in any order.

3. Repeat Steps 1 through 2 on the target instance.

## Result

Your product catalog admin can export product catalog entities from the source instance and import them to the target instance.

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**Related topics**

Using product catalogs

Product Catalog Management

### Export product catalog entities

Export product catalog entities as a JSON file and save the file to your local download directory so that it can be imported to another ServiceNow instance.

## Before you begin

Role required: product_catalog_admin

## About this task

You can export catalog entities in any sequence, but you must import them to a target instance in a certain order. You import base entities (characteristics and characteristic options, template, and unit of measure) first, followed by the product catalog, product offerings, and product specifications.

## Procedure

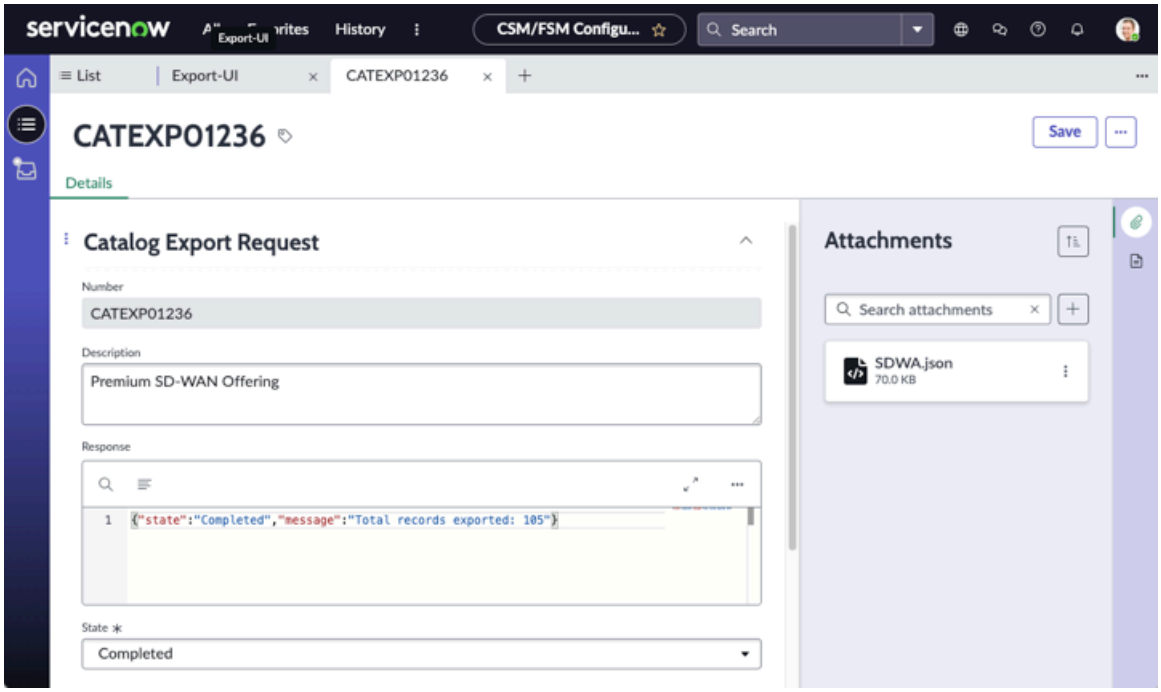
1. In the CRM Workspace, select the **List** view.
2. Navigate to **Export** > **Export Entities**.
   The Export Entities list shows the previous export jobs.
3. Start an export job by selecting **Export Hierarchy**.
   The **Catalog Export** form opens in the **Export-UI** tab.
4. In **Entity Type**, select the product catalog entity to be exported from your source instance.
   The product catalog entities include:
   - Product offering catalog
   - Unit of Measure
   - Template
   - Product specification
   - Service specification
   - Resource specification
   - Product offering - The product offering characteristics, including complex characteristic hierarchies, related specifications, and distribution channel values are also exported with an offering.

   **Note:** During export, note the following:
   - Versioned entities can be exported in any order. However, if you have many versioned entities that must be exported, the lowest version of the entity must be exported before exporting higher versions of the entity.
   - Referenced specifications are also exported. For example, when an attribute mapping is exported, the target service specification in that mapping is also exported.
   - Exceptions and errors are captured when required plugins aren't installed, to help identify issues with drop-down menus that aren't populated with catalog entities.
5. Select the items that you want to export and select **Export**.
6. Give the export job a file name and description, then select **Submit**.
   The export process begins and a message displays the catalog export ID.

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7. Find and view the exported JSON file by refreshing the **Export Entities** list and selecting the export job.

   The exported file appears in the **Attachments** pane.




8. Select the attachment to download the exported file.
   The file is downloaded as a JSON file and saved to your local download directory.

### What to do next

- Import product catalog entities
- View export job status

### Related topics

Using product catalogs

Product Catalog Management

## View export job status

Check the status of an export job for product catalog or pricing entities to see if it's in progress or completed.

### Before you begin

Role required: product_catalog_admin for catalog entities, sn_csm_pricing_pricelist_administrator for pricing entities

### Procedure

1. In the *CRM Workspace*, select the **List** view.
2. Navigate to **Export** > **Export Catalog**.
   The **Export Catalog** list shows the status of export jobs.
3. In the **State** column for the export job, view the status.

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### What to do next

If the export job is complete, import the product catalog entities or import the pricing entities to your target instance.

### Related topics

Using product catalogs

Product Catalog Management

## Import product catalog entities

Import product catalog entities by using the ServiceNow Platform import function.

### Before you begin

The application scope must be set to Product Catalog Management core. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: product_catalog_admin

### About this task

You import certain product catalog entities to your target instance in the following order:

- Import the exported base entities.
- Import the product offering catalog if you're exporting product offerings.
- Import product offerings and product specifications.

### Procedure

1. Go to the target instance where you want to import the data.
2. Navigate to **All** > **Product Catalog Management** > **Catalog Import** > **Import**.
   The Catalog Import Data Source window opens.
3. Attach the JSON file by selecting the **Attachments** icon.
4. Select **Choose file** and select the file you want to import.
   Versioned entities can be imported in any order. However, if you have many versioned entities that must be imported, the lowest version of the entity must be imported before higher versions of the entity.

   **Note:** When you're importing files to a target instance, import the files in a certain order, based on the type of entity:

   a. Import the exported base entities first, for example characteristics, characteristic options, template, and Unit of Measure (UOM).

   b. Import the product offering catalog if you're exporting product offerings.

   c. Import service specifications, product specifications, and then product offerings.

5. When the file is uploaded, close the Attachments window.
6. Under Related Links, select **Load All Records**.
   The data from the imported file loads, and a Progress window opens showing the imported job.
7. Select **Run Robust Transform**, then select the **Transform** button.
8. In the Progress window under the Next Steps section, select the imported file name to view the results.
   The imported data is loaded into the correct tables.
9. Navigate to the Entity list view of the entity that you imported to check the imported data.

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### What to do next

- View export job status
- View import job status

### Related topics

Using product catalogs

Product Catalog Management

## View import job status

Check the status of an import job for product catalog or pricing entities.

### Before you begin

Role required: product_catalog_admin for catalog entities and sn_csm_pricing_pricelist_administrator for pricing entities

### Procedure

1. Navigate to the product catalog or pricing module.
   - To check product catalog entities, navigate to **All** > **Product Catalog Management** > **Catalog Import**.
   - To check pricing entities, navigate to **All** > **Pricing** > **Import**.
2. Select the links under **Related Links** to view import job status:
   - Import sets - View the import sets for this data set.
   - Loaded Data - View the newly imported data for catalog entities in the Catalog Import Data Source table [sn_prd_pm_catalog_import_data_source] or for pricing entities in the Pricing Import Data Source [ sn_csm_pricing_import_data_source] or sn_csm_ctxrul_mgt_import_data_source staging tables.
   - Run Robust Transform - Transforms a loaded import set using a robust transform.
   - Import Log - Opens the import log.

### Related topics

Using product catalogs

Product Catalog Management

## Caching in Product Catalog Management

The Product Catalog Management application uses caching to improve user interface performance when agents access product catalogs and product offerings through the product configurator.

The product offering catalog and configurable product offerings have hierarchical structures that require frequent database retrieval when they're used. To improve performance, these hierarchical structures are cached when you publish these features.

As a product catalog admin or manager, when you make the following changes to a published product offering or product offering catalog, you must update the associated cache so that you can immediately see the changes just made:

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- **Unit of Measure** (UOM) in product offerings – Although product offerings cannot be changed after you publish them, you can change the default **Unit of Measure**. After updating the UOM, you must update the product offering cache.
- **Product offering catalog changes** – If you change the hierarchies for catalog to category or category to sub-category hierarchies, you must update the product offering catalog cache.

For details on regenerating these caches, see Update a cache in Product Catalog Management.

**Related topics**

Using product catalogs

Product Catalog Management

### Update a cache in Product Catalog Management

Regenerate the cache associated with product offerings or product offering catalogs after changing the Unit of Measure in a product offering or category-related hierarchies in a product offering catalog.

## Before you begin

Role required: sn_prd_pm.product-catalog_admin, sn_prd_pm.product-catalog_manager, or admin

## Procedure

1. Navigate to the record that you updated.

| Feature change | Navigate to |
|---|---|
| **Unit of Measure (UOM) for a product offering** | **a.** Navigate to **All** > **Product Catalog Management** > **Product Offering**.<br>**b.** Select the product offering record that you just updated. |
| **Product offering catalog changes**<br>○ **Catalog to category**<br>○ **Category to sub-category** | **a.** Navigate to **All** > **Product Catalog Management** > **Product Offering Catalogs**.<br>**b.** Select the product offering catalog record that you just updated. |

2. Right-click the **Additional actions** menu in the record header and select **Regenerate Product Offering Cache**.
   The system immediately updates the associated cache for the product offering or product offering catalog. You can then view the changes that you made to the **Unit of Measure** in a product offering or the product offering catalog.

**Related topics**

Using product catalogs

Product Catalog Management

### Configuring needs analysis

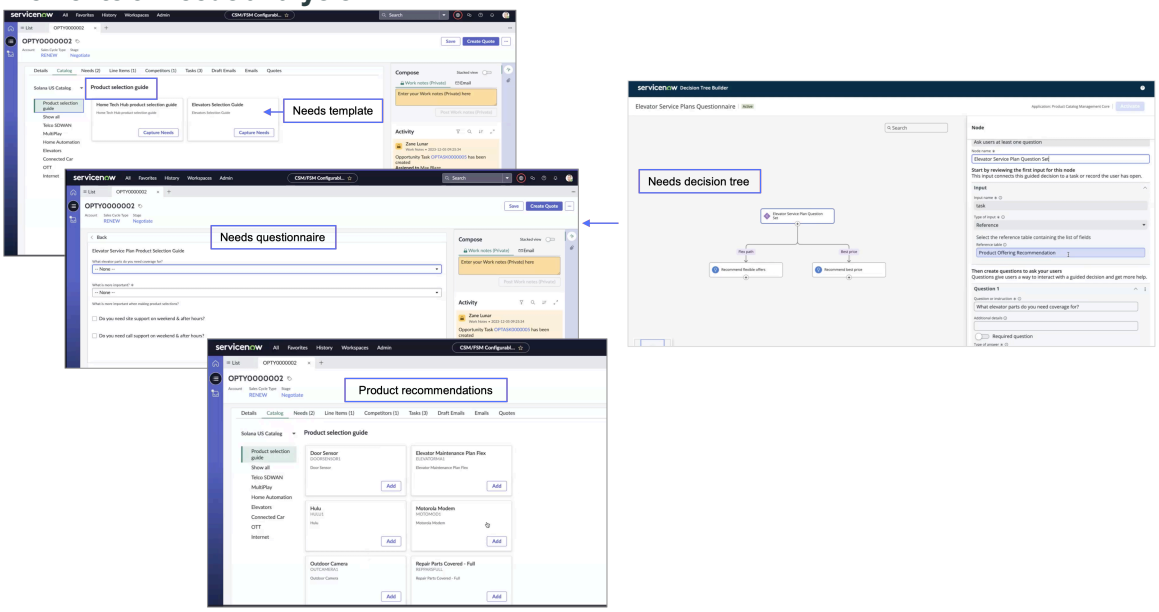
As a product catalog administrator, you can create needs templates, which are questionnaires that agents use to find product offers to add to a lead or opportunity. Questionnaires function as product selection guides. When agents complete a questionnaire based on customer input, they get product recommendations that they can add to a lead or opportunity.

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## Overview of needs analysis

When agents create a lead in the Lead Management application or an opportunity in the Opportunity Management application, a product selection guide is displayed in the product catalog. The product selection guide lists the needs templates that agents can choose to get product offer recommendations.

### Elements of needs analysis




**Needs template**

Product selection guides associated with the product catalog display one or more needs templates. Each needs template is a questionnaire that has a set of guided questions that agents answer to get product recommendations for a customer. Each template is associated with a needs decision tree.

**Needs decision tree**

A multi-step, guided decision process that presents a series of questions to the agent. You use Decision Tree Builder to create and build the decision tree.The decision tree defines the question nodes, expected answers, connection points, decision logic, and guidance for decision paths in the questionnaire.

**Product recommendations**

The product offerings suggested for an opportunity or lead, based on the results of the needs questionnaire.

## Working with decision trees

You configure decision trees by adding nodes, defining paths, and attaching guidances in Decision Tree Builder. This tool is a canvas for diagramming the basic elements in a decision tree, such as the question nodes and decision paths. Needs analysis provides a default guidance, the Product Offering Recommendation guidance, which references information from the Needs Based Offering Recommendation [sn_prd_pm_product_offering_recommendation] table as you create the question nodes and guidances in the decision tree.

Before creating decision trees for needs templates, review how decision trees work:

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- Decision trees in Guided decision - Learn the basic elements of a decision tree, such as node types, linking inputs in nodes, and decision tree paths.
- Example configuration of a decision tree - Review an example decision tree, including preparations for creating a decision tree, to understand the end-to-end configuration of a decision tree.
- Answer types for questions - Learn about the various types of answers to questions, such as Choice, Date, or Integers.

## Setting up needs analysis

Follow these steps to configure needs analysis:

1. Create a needs-based product offering recommendation.
2. Create a decision tree for a needs template.
3. Build a needs decision tree.
4. Create a needs template and set the catalog relationship.

### Related topics

Using product catalogs

Product Catalog Management

### Create a needs-based product offering recommendation

Set the product offering to be used as a product recommendation for a needs template.

#### Before you begin

Product offerings must be defined and published before they can be set as a product recommendation.

Role required: sn_prd_pm.product_catalog_manager, sn_prd_pm.product_catalog_admin, admin

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Needs** > **Needs Based Offering Recommendation** and select **New**.
   On the form, fill in the fields:

**Create New Needs Based Offering Recommendation form**

| Field | Description |
|---|---|
| Name | Name of the recommended offering displayed to the agent. For example: Recommend Flex or Recommend Quad Play service bundle. |
| Description | Brief description of the recommendation. For example: Recommending flex offers based on customer needs. |
| Product Offering | Product offering to be recommended. |

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3. Select **Save**.
   The selected product offering is available as a product offering recommendation and can be selected as a guidance node in a needs decision tree.

### What to do next

Create a decision tree for a needs template.

### Related topics

Using product catalogs

Product Catalog Management

## Create a decision tree for a needs template

Create a decision tree that defines the questions that agents answer to determine customer needs and get product recommendations.

### Before you begin

Before creating decision trees, review the following information:

- Decision trees in Guided decision - Become familiar with the basic elements of a decision tree and how they work, such as node types, linking inputs in nodes, and decision tree paths.
- Example configuration of a decision tree - Walk through an example decision tree, including preparations for creating a decision tree, to understand the end-to-end configuration of a decision tree.
- Answer types for questions - Learn about the various types of answers, such as Choice, Date, or Integers.

Role required: sn_prd_pm.product_catalog_manager, sn_prd_pm.product_catalog_admin

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Needs** > **Decision Tree** and select **New**.
3. Select **New**.
   On the form, fill in the fields.

**Create New Decision Tree form**

| Field | Description |
|---|---|
| Name | Name of the decision tree. |
| Action Label | Label of the decision tree displayed on the needs template card in the product selection guide. |
| Description | Brief description of the decision tree. The description is displayed on the needs template card in the product selection guide. |
| Title | Name of the decision tree on the needs template card in the product selection guide. |
| Show a dismiss button | Option that shows or hides the **Dismiss** button that cancels the flow of a decision tree |

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| Field | Description |
| --- | --- |
| | during opportunity or lead creation. This field is enabled by default. |

4. Select **Save**
   A decision tree is created with the name specified in the **Name** field.

### What to do next
Build a needs decision tree using Decision Tree Builder.

#### Related topics
- Using product catalogs
- Product Catalog Management

## Build a needs decision tree

Define the decision tree question nodes, decision paths, and guidance for each decision path using Decision Tree Builder.

### Before you begin
Role required: sn_prd_pm.product_catalog_manager, sn_prd_pm.product_catalog_admin

### About this task
As you build your decision tree, for example after adding a decision node or a path, you save and close the decision tree record. To continue working on the tree, navigate to the Decision Trees list, select the decision tree record, and open it in Decision Tree Builder, as described in steps 1 through 3 of this procedure.

### Procedure
1. Navigate to **All** > **Product Catalog Management** > **Needs** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, define the start node:
   a. Select **New node**
   b. In the **Node name** field, enter a name for the start node.
   c. In the **Reference table** field, select the Product Offering Recommendation table.
   d. Enter the question for the agent to answer.
      You can make the question mandatory by selecting the **Required question** field and enter more details in the **Additional details** field.
   e. Select the type of answer for your question.
      For a description of the answer types, see Answer types for questions.
   f. **Optional:** Add more questions.
   g. Select **Save and close.**

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5. Continue building your decision tree in Decision Tree Builder.

| Option | Steps |
| --- | --- |
| **Determine the next node displayed in a deci** | Configure a path to set the conditions for when the next question is displayed in a deci sion tree. |
| **Add a follow-up set of questions or instruc** | Configure a question node to add follow-up questions or instructions. An answer to these questions either leads to a guidance or a fur ther set of questions. |
| **Add a guidance node for the product recom mendation questionnaire** | Configure a guidance node, which identifies the product recommendation displayed after agents answer the questions. The guidance node is the leaf node of a tree.<br>**a.** Select the Add path icon on a node.<br>**b.** Select **Add node**.<br>**c.** In the pop-up, select **Propose a guidance as the outcome** and select **Continue**.<br>**d.** Enter a name for the node.<br>**e.** In the **Guidance** field, select Product Offer ing Recommendation.<br>**f.** In the **Set field inputs to pass data into this guidance** section, select the product recom mendation to be displayed.<br>**g.** Select **Save and close**. |
| | When your decision tree is complete, select **Activate** in Decision Tree Builder, which vali dates your tree. If there are no errors, select **Activate now** in the confirmation message di alog box.<br>The decision tree status changes to active. |

### What to do next

Create a needs template and set the catalog relationship.

### Related topics

- Using product catalogs
- Product Catalog Management

## Create a needs template and set the catalog relationship

Define a needs template for a decision tree and associate the template with the product catalog to which it belongs.

### Before you begin

Role required: sn_prd_pm.product_catalog_manager, sn_prd_pm.product_catalog_admin

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### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Needs** > **Needs Template** and select **New**.
   On the form, fill in the fields.

**Create New Needs Template**

| Field | Description |
|---|---|
| Number | Unique system-assigned number that identifies the needs template. |
| Name | Name of the needs template, for example Home Tech Product Selection Guide. |
| Decision tree | Name of the decision tree that has the questionnaire to determine customer product needs. |
| Description | Brief description of the needs template. |
| Start date | Date and time that the needs template becomes effective and is listed in the product selection catalog. |
| End date | Date and time that the needs template is no longer effective and not listed in the product selection catalog. |
| State | Stage of the needs template:<br>○ Draft: Initial state of the needs template. The template hasn't been published yet.<br>○ Published: Template has been published. After a template is published, you can update or delete it. |

3. Select **Save**.
   The Needs Template Relationship tab opens. The needs template is also listed in the Needs Template list.
4. In the Needs Template Relationship tab, set the catalog relationship.
   a. Select **New**, which opens the Create New Needs Template Relationship form.
   b. In the **Catalog** field, select the published Product Offering Catalog to which this needs template belongs.
   c. Select **Save**.
   The selected catalog name is listed under the **Catalog** field in the Needs Template Relationships section.
5. Select **Publish** to make the specified catalog available in the product selection guide.

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**Related topics**

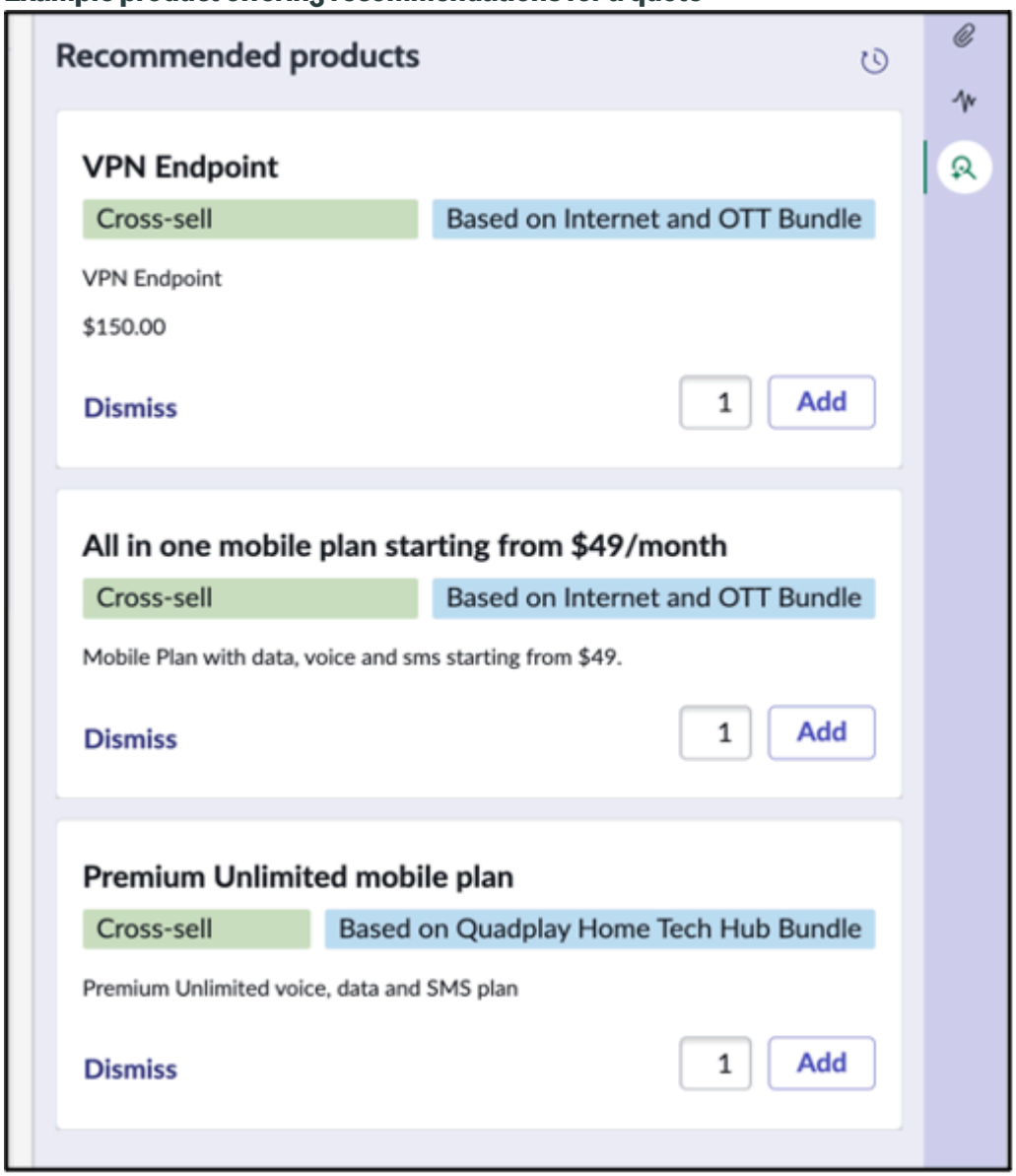
- Using product catalogs
- Product Catalog Management

### Configuring product offering recommendations

As a product catalog admin or manager, you can create product offering recommendations that agents can use to upsell or cross-sell additional products in quotes.

Product offering recommendations provide your sales agents with relevant products to supplement or complement existing items in quotes. The recommendations are displayed as cards in the contextual side panel of the CRM Workspace when your agents update a draft quote. Product offering recommendations enable your agents to find and add relevant items quickly to their quotes.

**Example product offering recommendations for a quote**




As a catalog admin or manager, you configure product recommendations by identifying the source product offerings, the type of recommendation, and the associated recommended product. There are two types of product recommendations:

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- Upsell: An upgraded or enhanced version of a product in the quote.
- Cross-sell: A related product that complements a product in the quote.

For details on configuring product recommendations, see Create a product offering recommendation.

**Related topics**

Using product catalogs

Product Catalog Management

### Create a product offering recommendation

Create product offering recommendations that can be used by your sales agents to upsell or cross-sell additional products in quotes.

## Before you begin

Review the product offerings that your sales agents can add to quotes, then determine the complementary and supplementary products that can be recommended to upsell or cross-sell additional products for those products. The source product offerings and also the recommended product offerings must be published in the product catalog.

Role required: Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm.product_catalog_admin, admin

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Recommendations** > **Product Offering Recommendations** and select **New**. Fill in the form.

**Create New Product Offering Recommendation**

| Field | Description |
|---|---|
| Source product offering | Product for which a recommended product offering is to be defined. The source product can be a simple or complex product. Select from the list of published product offerings. |
| Recommended product offering | Product recommended for the source product offering. Select from the list of published product offerings. |
| Type | Option that indicates the type of recommendation:<br>○ Upsell: Recommendation for upgrading or enhancing the source product, for example a better or bigger version of a product.<br>○ Cross sell: Recommendation for buying a product that is related to but different from the source product. |
| Active | Option that indicates the recommendation is active and displayed to agents when they're adding or updating quotes and quote line items. |

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| Field | Description |
|---|---|
| | To deactivate the product offering recommendation, deselect this option. |
| Order | Number that determines the sequence in which the recommendation is displayed in the contextual side panel of theCRM Workspace. |
| Description | Brief description of the offering recommendation. |

3. Select **Save**.
   The product recommendation card for the product is displayed to your agents when they're updating a quote that has the source product offering for this recommendation. For more information on how sales agents use product offering recommendations, see Get additional product offering recommendations for quotes.

**Related topics**

Using product catalogs

Product Catalog Management

### Enable localized product catalogs and product offerings

Make product catalogs and offerings available in multiple languages so sales agents can view catalog content in their preferred locale.

### Before you begin

Role required: sn_prd_pm.product_catalog_admin, admin

### Procedure

1. Log in to your ServiceNow instance.
2. Install and activate the languages you want to support.
   For more information, see Activate a language.

   The language you want to activate must have the value of the Active field as true in the Languages [sys_language] table.
3. Add languages in the sn_prd_pm.supported_language_translations system property that you want to enable.
   The base locale is specified in the glide.sys.language property and the default value is en (English).

   a. In the **All** navigation filter, enter `sys_properties.LIST`.

   b. In the **Name** field, search and select the **sn_prd_pm.supported_language_translations** property.

   c. Enter comma-separated language codes in the **Value** field.

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**Example**
`en,fr,de`

**d.** Select **Update**.

**4.** Populate the translated text for the product offering or product catalog content in the Translated Text [sys_translated_text] table.

For a list of Product Catalog Management entities that support translation, see Multilingual product catalog entities.

For more information about the Translated Text [sys_translated_text] table, see Translating text fields and Translated text table.

**5.** Translate the existing product offering or catalog entries.

**a.** Navigate to **Workspaces** > *CRM Workspace*.

**b.** Select the List icon.

**c.** Navigate to the respective module and select a record you want to translate.

- **Offerings** > **Product Offerings**.
- **Offerings** > **Product Offering Catalog**.

**d.** Regenerate the cache by selecting an option from the More Actions icon depending on the record type.

| Record type | Option |
|---|---|
| Product Offering | **Regenerate Product Offering Cache** |
| Product Offering Catalog | **Regenerate Catalog Hierarchy Cache** |

**Note:** You must regenerate the cache if you're adding translations for a published product offering or catalog.

## Result

A Configuration JSON record is created in the Product Offering Translation [sn_prd_pm_product_offering_translation] and Product Offering Catalog Translation [sn_prd_pm_product_offering_catalog_translation] tables in the specified language respectively. Each row corresponds to a product offering or product catalog per locale.

The products in the product configurator UIs are displayed in the language set in the user preferences, from the list of available languages.

### Related topics

ServiceNow AI Platform translation and localization

### Configuring AI Search for the product catalog

Configure and manage the implementation of AI Search in the product catalog for Sales Customer Relationship Management.

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## How AI Search works in the catalog interface

AI Search in the product catalog for Sales Customer Relationship Management transactions enables agents and customers to use semantic queries combined with keyword queries to find relevant product offerings and service specifications.

AI Search looks across all product offerings and service specifications, including product characteristics, bundled product offerings, and child offerings, to return results in the product catalog interface.

For example, entering the term `sedan` finds any products that contain this characteristic, parent products containing child products with this characteristic, and related products that have semantic similarity to this search term or results. Semantic similarity considers the context behind user queries, such as the user intent, to determine relevant results even if the exact terms or phrases aren't provided.

To enhance the accuracy of semantic results, AI Search uses the AI Search Retrieval Augmented Generation (RAG) application, which matches user queries with indexed records based on both keyword and semantic similarity.

The main elements of AI Search for product catalog include the following:

**Indexed source**

Defines the table records to be indexed for product catalog search:

- The Product Offering Indexed source uses the Product Offering [sn_prd_pm_product_offering] table as the source. The **Configuration JSON** field provides the characteristic options and attributes for products, which AI Search uses to find catalog items by characteristics and options. The **Display name** field is also indexed, which AI Search uses to find catalog items by the product offering name.
- The Service Specification indexed source uses the Service Specification [sn_prd_pm_service_specification] table as the source.
- Semantic Index Configuration settings define the embedding model, chunking configuration, and the semantic index fields used to control semantic indexing in AI Search. To learn more about semantic indexing, see Semantic index configuration for indexed sources.

For more information on indexed sources, see Indexed sources in AI Search.

**Search source**

A search source defines the searchable set of indexed records to be used as the search source and the conditions for items that can be searched. For example, the Product Offering Search source has two conditions that a product offering must meet so that it's returned as a search result:

- [State] [is] [published]
- [Sellable] [is] [true]

The Service Specification Search source has one condition, [State] [is] [published], that a specification must meet so that it's returned as a search result.

For more information on search sources, see Search sources in AI Search.

**Search profiles**

Search profiles (Product Offering Search Profile and Service Specification Search Profile) manage the search experience offered to users and the data to be searched. You can fine tune the synonyms, stop words, typo handling rules used

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in auto-correction, and result improvement rules that control the product catalog search experience. To learn more about the features that can be changed in a search file, see Search profiles in AI Search.

**Search application configurations**

Search application configurations define the search engine used, the search profile used, and also auto-complete suggestions. For details about these configurations, see Search application configurations.

Product catalog admins inherit the ais_admin role, which allows them to create, read, update, and delete content indexing and search settings for AI Search.

## Implementing AI Search for product catalog

Users with the admin role perform the following steps to implement AI Search for the product catalog.

1. Install AI Search for Next Experience only if you upgraded from Tokyo or a previous release.

   Skip this step if you're a new customer using the Brazil release or if your instance was zBooted in the Brazil release. AI Search for Next Experience is automatically installed.

2. Configuring AI capabilities in Sales CRM.

   Depending on your entitlements, the ServiceNow Otto for Sales Automation plugin might be automatically installed. If it is not automatically installed but you have the appropriate entitlements, install the ServiceNow Otto for Sales Automation plugin (sn_som_gen_ai). This plugin installs the AI Search RAG plugin (sn_ais_rag) and the AI Search Semantic Controller plugin (com.glide.ais.semantic_search) for the AI Search Retrieval Augmented Generation (RAG) application used by AI Search for product catalog.

   **Note:** If you don't install ServiceNow Otto for Sales Automation plugin (sn_som_gen_ai), the product catalog interface provides simple keyword search, also known as Zing search.

3. Run scheduled job to populate product offering categories only if you upgraded to the Brazil.

   This step adds the product offering categories field to the Product Offering table. Skip this step if you're a new customer using the Brazil release or if your instance was zBooted in the Brazil release.

4. Run scheduled job to publish stop words dictionary, search profiles, and index tables.

   This scheduled job sets up the indexes and publishes the stop word dictionary and search profiles used in AI Search for product catalogs.

5. Enable AI Search in product catalog.

   Set the *enable_ai_search_in_catalog* property to true, which enables AI Search for the product catalog interface and verifies that the necessary files are configured to run AI Search.

6. Reindex the product offering search index only if you're using AI Search in the product catalog and upgraded to the Brazil release.

   Skip this step if you're a new customer using the Brazil release or if your instance was zBooted in the Brazil release. The Product Offering Indexed Source is reindexed automatically.

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After AI Search has been implemented, product catalog admins can manage and customize various AI Search features if needed. Product catalog admins inherit the ais_admin role, which allows them to create, read, update, and delete content indexing and search settings for AI Search[var.ai-search].

**Related topics**

- Using product catalogs
- Product Catalog Management

### Run scheduled job to populate product offering categories

After upgrading to the Zurich release and the ServiceNow Otto for Sales Automation plugin is installed, run a scheduled job that generates the product offering categories for pre-existing product offerings in the product catalog with AI Search.

## Before you begin

Role required: admin

## About this task

Run the scheduled job called *`Scheduled job to populate product_offering_categories glide list for product offerings`* only if you've upgraded from a release before the Brazil release. This job adds the product offering categories field to the Product Offering table. If you're a new customer using the Brazil release or Zbooted, do not run this job.

## Procedure

1. Navigate to **All** > **System Definition** > **Scheduled jobs**.
2. In the **Search** field, enter *`Scheduled job to populate product_offering_categories glide list for product offerings`*.
3. Select **Execute Now** to run the scheduled job.

## What to do next

Run the scheduled job to index the tables, publish the stop word dictionary, and publish search profiles.

**Related topics**

- Using product catalogs
- Product Catalog Management

### Run scheduled job to publish stop words dictionary, search profiles, and index tables

After upgrading to the Brazil release and the ServiceNow Otto for Sales Automation plugin has been installed, run a scheduled job that publishes the stop word dictionary, search profiles, and index tables for using AI Search in the product catalog.

## Before you begin

ServiceNow Otto for Sales Automation plugin must be installed.

Role required: admin

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### Procedure

1. Navigate to **All** > **System Definition** > **Scheduled jobs**.
2. In the **Search** field, enter `Scheduled job to publish stop words dictionary, search profiles and index tables`.
3. Select **Execute Now** to run the scheduled job.

### Result

The stop words dictionary, search profiles, and index tables for running AI Search in the product catalog are published.

#### Related topics

- Using product catalogs
- Product Catalog Management

## Enable AI Search in product catalog

Use the *enable_ai_search_in_catalog* property to enable AI Search in the product catalog interface for Sales Customer Relationship Management.

### Before you begin

Role required: Role required: admin

### About this task

The *enable_ai_search_in_catalog* system property checks that the Product Offering [sn_prd_pm_product_offering] and the Product Specification [sn_prd_pm_product_specification] tables are indexed for use in AI Search. This property also verifies that the AI Search plugin is installed. If you're upgrading from an earlier release, use this property to enable AI Search.

### Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *enable_ai_search_in_catalog* system property.
3. Set the property value for enabling AI Search in the **Value** field.
   - Enter `true` to enable AI Search.
   - Enter `false` to suppress AI Search if it's currently enabled. If this property is set to `false`, the simple keyword search feature is used in the product catalog interface.
4. Select **Update**.
   If you enable this property, AI Search features are available in the product catalog interface.

#### Related topics

- Using product catalogs
- Product Catalog Management

## Reindex the product offering search index

Reindex the Product Offering Indexed Source so that AI Search considers the product offering display name, in addition to product characteristics, when ranking search results in the product catalog.

### Before you begin

Role required: admin

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### About this task

Product offerings with a display name that closely matches a search term can rank lower than other offerings that only reference them, such as a bundle that includes the offering. Reindexing the Product Offering Indexed Source adds the display name to semantic indexing so that the offering that most closely matches the search term ranks highest.

### Procedure

1. Navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Sources**.
2. In the **Name** field, search for `Product Offering Indexed Source` and select it.
3. Select **Index Selected Table/s**.
4. In the **Generate Text Index - Single Table** dialog box, select **sn_prd_pm_product_offering** from the drop-down menu and select **Index**.

### Result

When indexing is complete, the **Keyword Ingestion State** and **Semantic Ingestion State** columns show indexed in the Indexing History related list.

#### Related topics

Use AI Search in product catalogs

## Install and configure CRM Core

Install the CRM Core application, which enables you to compose and build workflows that your organization maintains for the life cycle of a sold product.

This mapping provides your users with a unified workflow experience across different entities.

Admins and users with various roles complete the following configurations tasks to use lead to cash.

**Configuration tasks for CRM Core**

| Task | Description |
|---|---|
| Entity configuration and mapping | Map entities that define a structure and transfers data from the source entity to the target entity. |
| Create an entity configuration | Use entities to compose a workflow between two entities so that you can update their existing configurations and perform the required **Suspend**, **Resume**, or **Disconnect** actions on a sold product. |
| Create an entity mapping | Create an entity mapping to perform the declarative actions like **Suspend**, **Resume**, or **Disconnect** actions on a sold product. |

#### Related topics

Using lead-to-cash foundation applications

CRM Core

### Install CRM Core

If you have the admin role, you can install the CRM Core application. The application includes the demo data and installations that are related ServiceNow® Store applications and plugins.

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### Before you begin

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

Depending on your entitlements, you may have to install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

### About this task

The following items are installed with CRM Core application:

- Plugins
- Store applications
- Roles
- Tables

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the CRM Core 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, request it from the ServiceNow Store.

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

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install the CRM Core application.
4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|---|---|
| **If demo data is available and you want to in stall it** | **a.** Select the **Load Demo Data** option.<br>**b.** Select **Install**.<br>**Important:** If you don't load the demo data during installation, it's unavailable to load later. |
| **If the Load Demo Data option isn't available but you want demo data** | Load the demo data after installing the CRM Core application.<br>**a.** Install CRM Core.<br>**b.** Navigate to the **All** and in the Filter, type `v_plugin.list`.<br>**c.** In the related Links, select **Install Demo Da ta Only**. |

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**Related topics**

- Using lead-to-cash foundation applications
- CRM Core

### Entity configuration and mapping

Use the Entity Configuration tables and forms to configure and map an entity that defines a structure and transfers data from source to target.

## Mapping and configuration

Create the configurations and mappings for the entities by using the Entity Configuration tables.

## Entity Configuration tables

The entity configuration tables provide you with the information for the fields on the entity configuration form.

### Entity Configuration tables

| Table | Name | Description |
|---|---|---|
| Lead to Cash Entity | sn_l2c_core_entity | Defines and manages the lead-to-cash entities. |
| Lead to Cash Entity Definition | sn_l2c_core_entity_definition | Defines and manages the definitions that are associated with the lead-to-cash entities. |
| Lead to Cash Entity Attribute | sn_l2c_core_entity_attribute | Defines and manages the attributes that are associated with the lead-to-cash entities.<br><br>The lead-to-cash attributes are based on the definitions that are set for the entities. |

Each field on the entity configuration form gathers the information from one entity configuration table. The following table has the information about the fields, their descriptions, and the entity tables that the data is populated from.

**Note:** The Lead to Cash Entity Definition and Lead to Cash Entity Attributes are related lists on the Entity Configuration form.

### Entity Configuration form

| Table | Field | Description |
|---|---|---|
| Lead to Cash Entity | Name | Name of the lead-to-cash entity. |
| Lead to Cash Entity | Config ID | Unique configuration ID for the entity. |
| Lead to Cash Entity | Active | Status of the entity, whether active or inactive for the configuration. |

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**Entity Configuration form (continued)**

| Table | Field | Description |
|---|---|---|
| Lead to Cash Entity Definition | Entity | Reference to the lead-to-cash entity definition. |
| Lead to Cash Entity Definition | Type | Type of the entity definition. |
| Lead to Cash Entity Definition | Table | Table that is associated with a lead to cash entity. |
| Lead to Cash Entity Definition | Label | Label for the entity definition. |
| Lead to Cash Entity Definition | Parent definition | Parent of the current entity definition. |
| Lead to Cash Entity Definition | Relationship field | Query field that is associated with the parent entity definition record. |
| Lead to Cash Entity Definition | Parent field | Query field that is associated with the current entity definition record. |
| Lead to cash Entity Definition | Inherit parent definition | Parent definition that is also used by the current entity definition.<br>**Note:** To make the current entity definition record follow the same definition that is associated to the parent record, select **Inherit parent definition**. |
| Lead to Cash Entity Definition | Order | Numerical order to process and visualize the hierarchy of configurations. |
| Lead to Cash Entity Definition | Filter conditions | Filter conditions specification. |
| Lead to Cash Entity Definition | Enable post processing | Advanced script for post processing of current record. |
| Lead to Cash Entity Definition | Post processing script | Script for post processing of current record. |
| Lead to Cash Entity Attribute | Field | Name of the field. |
| Lead to Cash Entity Attribute | Entity | Reference to the lead-to-cash entity attribute. |
| Lead to Cash Entity Attribute | Table | Table that is associated with the lead-to-cash attribute. |
| Lead to Cash Entity Attribute | Key | Unique key for the entity attribute. |
| Lead to Cash Entity Attribute | Advanced | Option for advanced configurations. |

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### Entity Configuration form (continued)

| Table | Field | Description |
|---|---|---|
| | | **Note:** To modify the script according to your requirements, select **Advanced**. |
| Lead to Cash Entity Attribute | Script | Script for the advanced attributes. |

## Entity mappings

With entity mappings, you can map the source and target tables to transfer the data between the entities that depend on the available entity configurations. The entity mapping tables provide the information for the fields on the entity mapping forms.

### Entity Mapping table

| Table | Name | Description |
|---|---|---|
| Lead to Cash Entity Mapping | sn_l2c_core_entity_mapping | Defines and maps the lead-to-cash entity mappings. |
| Lead to Cash Entity Table Mapping | sn_l2c_core_entity_table_mapping | Defines and manages the mappings for the different tables that are associated with the lead-to-cash entities. |
| Lead to Cash Entity Attribute Mapping | sn_l2c_core_entity_attribute_mapping | Defines and manages the attributes and their mappings with the corresponding lead-to-cash entity. |

The entity mapping form enables you to map the entities with their corresponding tables and attributes.

**Note:** The Lead to Cash Entity Table Mapping and Lead to Cash Entity Attribute Mapping are related lists on the Entity Mapping form.

### Entity Mapping form

| Table | Field | Description |
|---|---|---|
| Lead to Cash Entity Mapping | Mapping name | Name of the mapping. |
| Lead to Cash Entity Mapping | Mapping config ID | Unique ID for the mapping. |
| Lead to Cash Entity Mapping | Source entity | Source entity in the mapping process. |
| Lead to Cash Entity Mapping | Target entity | Target entity in the mapping process. |
| Lead to Cash Entity Mapping | Active | State of the target entity, whether active for mapping or not. |

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### Entity Mapping form (continued)

| Table | Field | Description |
|---|---|---|
| Lead to Cash Entity Table Mapping | Source entity table | Table that is associated with the source entity. |
| Lead to Cash Entity Table Mapping | Target entity table | Table that is associated with the target entity. |
| Lead to Cash Entity Table Mapping | Use condition | Conditions required for mapping.<br>**Note:** To set specific mapping conditions, select **Use condition**. |
| Lead to Cash Entity Table Mapping | Condition | Conditions for mapping tables from the source entity to the target entity. |
| Lead to Cash Entity Table Mapping | Active | State of the source entity, whether active for mapping or not. |
| Lead to Cash Entity Table Mapping | Order | Numerical priority for mapping. |
| Lead to Cash Entity Attribute Mapping | Entity table mapping | Reference to the Lead-to-Cash entity table mapping. |
| Lead to Cash Entity Attribute Mapping | Source attribute | Attribute that is associated with the source entity. |
| Lead to Cash Entity Attribute Mapping | Target attribute | Attribute that is associated with the target entity. |
| Lead to Cash Entity Attribute Mapping | Advanced | Option for advanced mapping.<br>**Note:** To modify the script according to your requirements, select **Advanced**. |
| Lead to Cash Entity Attribute Mapping | Script | Script to customize the mappings. |

### Roles and access

| Role | Access |
|---|---|
| sn_l2c_core.admin | Create, read, update, delete, report_view, report_on |
| sn_l2c_core_viewer | Read access to all CRM Core tables |
| sn_l2c_core.entity_mapping_viewer | View access to CRM Core entity mapping |

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**Note:** Add a user with the sn_l2c_core.admin role, who is responsible for configuring metadata for all Lead-to-Cash tables, as a Delegated Developer for the application where the configuration is being created. Assign the permission "Manage Update Set" (added under Manage Developers for the respective application). This ensures that all changes are captured in the correct scope and update sets. For details, see Delegated development and deployment.

**Related topics**

Using lead-to-cash foundation applications

CRM Core

### Create an entity configuration

Create an entity configuration to compose a workflow between two entities. You can update existing configurations and perform actions like suspend, resume, or disconnect a sold product.

**Before you begin**
Role required: admin

**Procedure**

1. Navigate to **All** > **Lead to Cash** > **Entity Configurations**.
2. On the Lead to Cash Entities form, create an entity by selecting **New**.
3. On the form, in the **Name** field, enter the entity name and in the **Config ID** field, enter the entity ID.

   For a description of the field values, see Entity configuration and mapping.
4. Select **Submit**.
   You've created an entity configuration. You must now create lead-to-cash entity definitions and attributes.
5. On the Lead to Cash Entity form, in the Lead To Cash Entity Definitions related list, create an entity definition by selecting **New**.
6. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
7. Select **Submit**.
8. On the Lead to Cash Entity form, in the Lead To Cash Entity Attributes related list, create an entity attribute by selecting **New**.
9. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
10. Select **Submit**.

**Result**
You've created an entity configuration and defined its definition and attributes. You must now create a custom entity mapping. To learn how to create a mapping, see Create an entity mapping.

**Related topics**

Using lead-to-cash foundation applications

CRM Core

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### Create an entity mapping

Create an entity mapping to compose a workflow between two entities so that you can update their existing configurations and perform a set of declarative actions like suspend, resume, or disconnect a sold product.

#### Before you begin

Role required: admin

#### Procedure

1. Navigate to **All** > **Lead To Cash** > **Entity Mappings**.
2. On the Lead to Cash Entity Mappings form, create a mapping by selecting **New**.
3. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
4. Select **Submit**.
   You've created an entity mapping. You must now create an entity table mapping and an entity attribute mapping.
5. On the lead to cash entity mapping form, in the Lead To Cash Entity Table Mappings related list, create an entity table mapping by selecting **New**.
6. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
7. Select **Submit**.
8. On the lead to cash entity mapping form, in the Lead To Cash Entity Table Mappings related list, create an attribute mapping by selecting **New**.
9. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
10. Select **Submit**.

#### Related topics

Using lead-to-cash foundation applications

CRM Core

## CRM API Core

Enables seamless tracking and management of Sales Customer Relationship Management workflows through structured inbound and outbound request handling, configurable flow processing, and integration with external systems.

## Overview of CRM API Core

The CRM API Core (com.sn_tmt_core) plugin has three key components.

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### CRM API Core components

| Table | Description |
| --- | --- |
| Inbound Request (sn_tmt_core_inbound_queue) | Tracks the status of both synchronous and asynchronous flows. It enables agents to monitor the progress of requests and also enables sequential processing of dependent records to maintain data accuracy and consistency.<br><br>It captures detailed status information for each request. For example, when an order is created from a quote, it logs a confirmation message with the order header number.<br><br>It also supports archival and cleanup policies enabling organizations to cleanup records by applying different durations for successful and failed requests to optimize data management. |
| Inbound Request Configuration (sn_tmt_core_inbound_queue_config) | Defines how each flow is processed and tracked.<br><br>It's a metadata table that is referenced by the Request Configuration field in the Inbound Request Table.<br><br>It enables administrators to:<br>• Configure synchronous vs asynchronous processing.<br>• Adapt the Request Tracker across CRM flows.<br>• Set notification types (default, custom, or none). |
| Outbound Request (sn_tmt_core_outbound_request) | Facilitates outbound interactions with external Service Order Management (SOM).<br><br>It supports end-to-end order fulfillment via bi-directional REST API integration and requires specific roles. |

### Roles and access

| Role | Access |
| --- | --- |
| sn_tmt_core.admin | Create, read, update, delete, report_view, and report_on |
| sn_tmt_core.viewer | report_view, report_on, and read |

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**Related topics**

- Using lead-to-cash foundation applications
- Lead-to-cash foundation reference

### Inbound Request

Track the status of Sales CRM workflows and enable agents to track the status of any synchronous and asynchronous flows. It also supports processing dependent records sequentially to make sure that the data stays accurate and consistent.

## Inbound request table

Add a record to the modified Inbound Request table [sn_tmt_core_inbound_queue].

The following fields have been added to enhance the Inbound Request table:

- Requested flow
- Account
- Contact
- Consumer
- Response payload
- Source record ids
- Status
- Run in the background
- Initiated by
- Domain
- Execute after
- Request configuration
- Job id

### Inbound Request table fields and descriptions

| Fields | Description | Field type |
|---|---|---|
| Requested flow | The reference to the Lead to Cash Entity mapping, for example Sold Product to Order mapping. | Reference: sn_l2c_core_entity_mapping |
| Run in background | Determines whether the flow is synchronous or asynchronous. | True/False<br><br>Default value: True |
| Resource | The name of the flow that creates the record in the Inbound Request table. | String |
| Source record ids | System-generated id of the source records. | List |
| Source table | Primary Lead to Cash Entity table on which the request is triggered. | Table name |

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**Inbound Request table fields and descriptions (continued)**

| Fields | Description | Field type |
|---|---|---|
| Record id | System-generated id of the target record. | String |
| Reference table | Name of the target entity table for the request. | Table name |
| Payload | Request received as input to trigger the flow. | String |
| Response payload | Response of the request that contains the result of the flow and captures the record-level action and transaction status. | JSON |
| State | Current state of the transaction. | String (choice)<br><br>New, In progress, Completed, Error, Pending |
| Status | The status of completion of the flow, for example success, partial success, failure | String (choice)<br><br>Success, partial success, failure |
| Error message | Error message that is returned for an exception. | String |
| Account | The account associated with the source or target record. | Reference: customer_account |
| Contact | The contact associated with the source or target record. | Reference: customer_contact |
| Consumer | The consumer associated with the source or target record. | Reference: csm_consumer |
| Initiated by | The user id from the current user session. | Reference: sys_user |
| Domain | The current domain scope of the record, for example global | Domain id |
| Request Configuration | The reference to the Inbound Request Configuration table.<br><br>strict_read_only field | Reference: sn_tmt_core_inbound_queue_config |
| Execute After | Inbound request that must be processed before the current request.<br><br>strict_read_only field | Reference: Inbound Request |
| Job id | Reference to Upgrade Inventory Job table.<br><br>strict_read_only field | Reference: sn_ind_tmt_orm_upgrade_inventory_job |

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**Note:** The **requested_flow** and **response_payload** fields aren't visible to agents.

Use the **Requested flow <is not empty>** to filter out records using the CRM Core APIs. The Inbound Request table [sn_tmt_core_inbound_queue] provides the status and other details related to the request. For example, while creating an order through a quote record, a confirmation message with the order header number.

**Note:** The flow designer **SOM Request Processor** is deprecated. Requests are directed to the flow designer IBQ Request Processor.

## Security roles

**Security roles and access for the Inbound Request table**

| Role | Permission |
|---|---|
| Inbound Queue admin [sn_tmt_core.inbound_queue_admin] | Create, read, delete, and update |
| Inbound Queues Create User [sn_tmt_core.inbound_queue_create_user] | Create<br>**Note:** For Sales CRM requests, the user doesn't have access to the **response_payload**, **payload**, or **requested_flow** fields. |
| Inbound Queues Write User [sn_tmt_core.inbound_queue_writer] | Write access for non Sales CRM requests<br>Read only access for Sales CRM requests<br>**Note:** For Sales CRM requests, the user doesn't have access to the **response_payload**, **payload**, or **requested_flow** fields. |
| Inbound Queue Read User [sn_tmt_core.inbound_queue_read] | Read access to all Sales CRM requests<br>**Note:** For Sales CRM requests, the user doesn't have access to the **response_payload**, **payload**, or **requested_flow** fields. |

## Archival policies

Archive the records in the Inbound Request table and determine when to clean up records on the table after a certain number of days. You can implement a different retention period for successful and failed requests.

| Archival rule | Time period |
|---|---|
| Successful requests | 10 days |
| Failed requests | 30 days |

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**Related topics**

Inbound Request Configuration

### Inbound Request Configuration

Enables you to define the configurations to determine how each flow is processed and tracked within an Inbound Request.

## Overview of the Inbound Request Configuration table

The CRM API Core (com.sn_tmt_core) plugin is required to use the Inbound Request Configuration table (sn_tmt_core_inbound_queue_config).

The Inbound Request Configuration table is a metadata table that must be configured to decide how a particular flow is executed, whether synchronous or asynchronous.

The table can be used to perform the following tasks.

- Enable admins to configure synchronous vs asynchronous processing of requests.
- Adapt the Sales Customer Relationship Management Request Tracker across all CRM flows.
- Enable configuration of notification types, whether default, custom, or no notifications.

The **Request Configuration** field on the existing Inbound Request Table [sn_tmt_core_inbound_queue] is a reference to the new Inbound Request Configuration table (sn_tmt_core_inbound_queue_config).

Any workflow that requires the tracking of a completion status, can use the Inbound Request Configuration table and configure whether a flow is synchronous or asynchronous.

## Fields on the Inbound Request Configuration Table

An admin creates a record in the table and specifies the configuration using the **run_mode**, **trigger_notification**, and **configuration_api** fields.

### Field and descriptions

*List of fields on the inbound request configuration table, their descriptions, and the type of fields.*

| Field | Description | Type |
|---|---|---|
| Config ID | Unique configuration ID for the metadata configuration. | String |
| Label | Unique label name for the metadata configuration. | Translated text |
| Active | Specifies whether the Inbound request configuration record is active or not. | True/False<br><br>Default value is **False** |
| Run Mode | Specifies whether a request runs synchronously or asynchronously. | String (choices): **Sync**, **Async**, **Advanced**. |

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**Field and descriptions**

*List of fields on the inbound request configuration table, their descriptions, and the type of fields.*

**(continued)**

| Field | Description | Type |
|---|---|---|
| | | • Synchronous: Synchronous processing.<br>• Asynchronous: Asynchronous processing<br>• Advanced: Use custom script to determine if the flow has to be synchronous or asynchronous |
| Trigger Notification | Specifies how you want to receive notifications.<br><br>A notification is triggered in one of the following situations.<br>• **Trigger notification** field is set to **Default**.<br>• State of a request is **Complete** and the status is either **Success** or **Partial success**.<br><br>The notifications for the record in the Inbound table are only received by whoever has initiated the flow. | String (choices): None, Default, Custom<br><br>• None: No notifications<br>• Default: Notifications only for asynchronous requests.<br>• Custom: Custom notification for asynchronous requests based on requirements.<br><br>Configure custom notifications by using the existing event (sn_tmt_core.ibq.custom.notification) or by handling your own custom event.<br><br>Default value for the field is **Default**. |
| Configuration API | Script required to process the inbound request.<br><br>To learn more about the configuration API, see IBQConfigBase API - Scoped. | Reference: sys_script_include |
| Domain | The current domain scope of the record, for example global. | Domain ID |

## Security roles

The security roles for the Inbound Request Configuration table (sn_tmt_core_inbound_queue_config) provide different levels of access to the [sn_tmt_core.inbound_queue_admin] role.

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### Roles and access

| Role | Access |
|---|---|
| sn_tmt_core.inbound_queue_admin | Create, read, update, delete, report_view, report_on |

**Note:** Add a user with the roles sn_tmt_core.admin or sn_tmt_core.inbound_queue_admin, who is responsible for configuring the Inbound Request Configuration table, as a delegated developer for the application where the configuration is being created. Assign the permission “Manage Update Set” (added under Manage Developers for the respective application). This ensures that all changes are captured in the correct scope and update sets. For details, see Delegated development and deployment.

### Related topics

IBQConfigBase API - Scoped

### Outbound Request

Initiate outbound requests to manage service orders by interacting with external Service Order Management (SOM) to facilitate end-to-end order fulfillment. This process requires specific roles and is enabled via bi-directional REST API integration with Order Management for CRM API Core.

## Overview of the Outbound Request table

The CRM API Core (com.sn_tmt_core) plugin is required to use the Outbound Request table (sn_tmt_core_outbound_request).

As a provider, you can initiate an outbound request to manage service orders by interacting with external systems such as Service Order Management (SOM). This process supports the end-to-end order fulfillment life cycle, enabling seamless coordination between internal and external platforms.

## Fields on the Outbound Request Table

### Field and descriptions

*List of fields on the Outbound request table, their descriptions, and the type of fields.*

| Field | Description | Type |
|---|---|---|
| Request ID | Outbound request ID that is generated by the Order Management for Telecommunications, Media, and Technology application. | String |
| State | State of the outbound request. | String (choices):<br>• Not applicable: Created, but not in use yet<br>• Fulfilled: The service order fulfillment is completed |

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**Field and descriptions**

*List of fields on the Outbound request table, their descriptions, and the type of fields.*

**(continued)**

| Field | Description | Type |
|---|---|---|
| | | • Pending error: The service order has encountered an error and is waiting for a resolution<br>• Failed: The record is discarded and not in use |
| Table name | Name of the table that is referenced in the source record. | Table |
| Number | Unique number generated for each record.<br><br>strict_read_only field | String: auto generated |
| Source record | Reference field values from different tables. | Document ID |

## Security roles

**Roles and access**

| Role | Access |
|---|---|
| sn_tmt_core.outbound_request_write | Create, read, update, delete, report_view, and report_on |
| sn_tmt_core.outbound_request_read | report_view, report_on, and read |

**Related topics**

Using lead-to-cash foundation applications

Lead-to-cash foundation reference

# Configuring the sales automation applications

Learn how to install and configure the sales automation applications to support pre-sales workflows.

Installing and configuring the following applications involve installing the application from the ServiceNow Store store, assigning appropriate roles to users and groups, and then configuring app-specific features such as lead assignment rules, opportunity stages, forecasting settings, and so on.

1. Configuring Lead Management

   Install the Lead Management application, which enables sales agents and sales development representatives to create leads and provide pre-sales product recommendations based on

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customer needs. You then assign the user roles and configure related features, such as needs analysis and kanban view used in Lead Management.

2. Configuring Customer Engagement Sequences

   Install and configure Customer Engagement Sequences so that the sales representatives can receive predefined sequence steps for interacting with prospects and customers.

3. Configuring Buying Group

   Learn how to configure Buying Group to organize multiple contacts within Sales CRM by account and product offering family, and link them to opportunities.

4. Configuring Opportunity Management

   Install the Opportunity Management application to enable your sales agents and account executives to create and manage opportunities that identify and track potential sales based on identified customer needs.

5. Configure Sales Forecasting

   Activate and configure the Sales Forecasting plugin help your sales teams project future sales volumes and revenue based data from opportunities and pipeline analysis.

6. Configuring Sales Territory Management

   Install the Sales Territory Management application from the ServiceNow Store store. Configure the features and components that help distribute accounts, consumers, leads, and opportunities to manage sales territories.

7. Configuring Activity Management

   Install and configure the necessary plugins for enabling Activity Management features.

8. Responsibility-based access to Sales CRM entities

   Learn how the responsibility framework grants users fine-grained, role-based access to leads, opportunities, accounts, contacts, and CRM Touchpoints based on the records they're responsible for.

9. Create a responsibility access configuration in Sales CRM

   Configure access for an existing responsibility definition so users with the required roles get access to the leads, opportunities, and related records they're responsible for.

**Related topics**

Using sales automation applications

Sales automation

## Configuring Lead Management

Install the Lead Management application, which enables sales agents and sales development representatives to create leads and provide pre-sales product recommendations based on customer needs. You then assign the user roles and configure related features, such as needs analysis and kanban view used in Lead Management.

Admins and users with various roles, such as application admins and sales operation specialists, complete the following configuration tasks to set up Lead Management.

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### Configuration tasks for Lead Management

| Task | Description | Role |
|---|---|---|
| Install Lead Management | Install Lead Management from the ServiceNow® Store Store. | Admin |
| Configuring product offerings and catalogs | Create the product offerings and catalogs, unless they've been previously defined. | Product catalog admin |
| Configuring needs analysis | Create the needs templates for questionnaires that sales agents complete to get product recommendations for leads. | Product catalog admin |

**Related topics**

Using Lead Management

Lead Management

### Install Lead Management

If you have the admin role, you can install the Lead Management application. The application includes the demo data and installations that are related to ServiceNow® Store applications and plugins.

## 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.

Depending on your entitlements, you may have to install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

## About this task

The following items are installed with Lead Management:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

## Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Lead Management application (sn_quote_mgmt) using the filter criteria and search bar.

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

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

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

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Lead Management.

4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|---|---|
| **If demo data is available and you want to in stall it** | **a.** Select the **Load Demo Data** option.<br>**b.** Select **Install**.<br>**Important:** If you don't load the demo data during installation, it's unavailable to load later. |
| **If the Load Demo Data option isn't available but you want demo data** | Load the demo data after installing Opportuni ty Management.<br>**a.** Install Lead Management.<br>**b.** Navigate to the **All** and in the Filter, type `v_plugin.list`.<br>**c.** In the **System Plugin** list, search for Lead Management data model (sn_l2c_lead_ mgmt_data_model) plugin.<br>**d.** In the System **Plugin Lead Management da ta model** window, under Related Links, se lect **Install Demo Data Only**. |

**Related topics**

Using Lead Management

Lead Management

### Nurturing leads using agentic workflow

Use the Help nurture new leads agentic workflow to process the entire lead record process.

## Help nurture new leads agentic workflow overview

The Help nurture new leads agentic workflow works with a team of AI agents to assist you with managing the life cycle of leads, either independently or under supervision. You can use the agentic workflow to do the following:

- Proactively engage with initial leads
- Book an appointment or demo to get the lead closer to qualification
- Identify opt-outs and disinterest for lead disqualification

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To modify the Help nurture new leads agentic workflow duplicate it, and adjust the settings according to your requirements. You can activate the agentic workflow template by making triggers active and setting the display settings to include the ServiceNow Otto panel.

**Important:** When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

## Prerequisites to use an agentic workflow

The prerequisites to use an agentic workflow are as follows:

- Make sure that the ServiceNow Otto panel is turned on.
- Set up the work schedule for sales agents:
  - Navigate to **All** > **Agent schedule** > **Work schedule**.
  - Create a work schedule for sales agents.
- Duplicate the agentic workflow and activate the triggers.

**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.

There might be AI agents installed on your instance that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

## Help nurture new leads use cases

To access the use case:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **Use cases**.
2. Select **Help nurture new leads**.

## Help nurture new leads AI agents

The following table lists the Help nurture new leads AI agents.

**Important:** In the Define availability screen for the AI agent, make sure that the **Status** field is enabled to activate the AI agent.

**AI agents and their roles in the Help nurture new leads use case**

| AI agent | AI agent role |
|---|---|
| Lead outreach AI agent | Initiates the outreach and follow-up flow. This flow supports sales agents by sending the initial outreach and follow-up emails. |
| Lead disinterest AI agent | Handles disqualification of the lead and opt-out requests. |

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**AI agents and their roles in the Help nurture new leads use case (continued)**

| AI agent | AI agent role |
|---|---|
| Inbound email AI agent | Initiates the inbound response handler flow. This flow supports sales agents by retrieving and analyzing the latest email records. Based on its analysis, it recommends necessary actions required to move forward with the lead. |
| Appointment management AI agent | Assists in managing appointments for lead records. The agent is capable of creating, updating, or canceling appointments based on the availability of the lead owner. |

## Roles required to create an agentic workflow

The roles required to activate and access the workflow are as follows.

**Roles and responsibilities**

| Roles | Responsibilities |
|---|---|
| Sales AI admin | • Configure the agentic workflow.<br>• Change AI settings.<br>• Create and manage new workflows and AI agents. |
| Sales AI user | Interact with AI using the ServiceNow Otto panel. |

## Activating the agentic workflow

Activating duplicated workflow

1. Navigate to the Help nurture new leads agentic workflow and duplicate it. The workflow also duplicates any triggers associated with that agentic workflow.
2. Navigate to the duplicated workflow and activate the trigger (the lead record is created or updated).

> **Note:** You can activate the triggers associated with the workflow.

Activating external triggers

1. Navigate to **All** > **System Policy** > **Email** > **Inbound actions**. There are 2 inbound actions that must be activated:
   - Activate the **Trigger agentic workflow for lead** inbound action.
   - Activate the **Trigger agentic workflow for lead task** inbound action.
2. Navigate to the SalesAIAgentsConstants script and change the value of HELP_NURTURE_NEW_LEAD_FLOW_ID property to the sys_id of the duplicated agentic workflow.

Nurturing a lead

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To nurture a lead, perform the following steps:

1. Navigate to **All** > **AI Agent Studio**.
2. Review the information in the Describe and connect screen, make the necessary updates to ensure that the use case adapts to your requirements, and then select **Save and Continue**.
3. In the Define trigger screen, activate the triggers that adapt to your requirements, or create your own triggers, and then select **Save and Continue**.
4. In the Select display screen, perform the following steps:
   a. Select where you want the use case output to be displayed.
   b. Use the arrow next to it to add roles that can access the use case.

      **Note:** The sales_agent is the default role for the use case.

   c. Select **Save and test**.

The agent executes the testing in AI Agent Studio for the use case.

In the ServiceNow Otto panel, the agent receives a notification as soon as the interaction is generated, which enables them to follow the on-screen instructions and complete the task. For more information, see Request the generative AI capabilities in Customer Service Management by using the ServiceNow Otto panel.

## Configuring Customer Engagement Sequences

Plan and configure your implementation of Customer Engagement Sequences.

## Configuration overview

Create multi-trigger, multi-step sequences using the Customer Engagement Sequences application so that sales representatives can engage with prospective leads or customers on outreach-related activities in an organized format. Build telesales workflows and email-based sequences using schedule call activity, email activity, and decision nodes. Integrate with platforms such as Amazon Connect to enable outbound calling from the sequence task. Install the User Mailbox Integration plugin to enable sending emails from agent's mailbox.

1. Install Customer Engagement Sequences

   You can install the Customer Engagement Sequences application (com.sn_crm_sequence) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they aren't already installed.

2. Grant delegated developer permissions for managing sequences

   Assign delegated developer roles to designated Customer Engagement Sequences users so they can create and manage sequences without needing a system admin role.

3. View feature availability and compatibility information

   Which features are supported in Customer Engagement Sequences is determined by combinations of the ServiceNow AI Platform, Playbooks in Workflow Studio, and the Customer Engagement Sequences app version. Review the feature availability and compatibility information to make informed decisions during upgrades or deployments and take advantage of optimal functionality.

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4. Install the User Mailbox Integration plugin

   Install the User Mailbox Integration plugin (com.glide.email.user_mailbox.integration) on your ServiceNow instance for using email-based sequences such as the Lead nurturing email sequence.

## What to do next

Create a customer engagement sequence

Drive personalized outreach by creating customer engagement sequences that automate timely, relevant interactions, ideal for nurturing leads, onboarding clients, or reengaging inactive customers.

### Related topics

Using Customer Engagement Sequences

Components installed with Customer Engagement Sequences

### Install Customer Engagement Sequences

You can install the Customer Engagement Sequences application (com.sn_crm_sequence) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

## Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Customer Engagement Sequences application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

## About this task

The following items are installed with Customer Engagement Sequences:

- Roles
- Tables

For more information, see Components installed with Customer Engagement Sequences.

## Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Engagement Sequences application (com.sn_crm_sequence) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

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4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

**Related topics**

Using Customer Engagement Sequences

Customer Engagement Sequences

### Grant delegated developer permissions for managing sequences

Assign delegated developer roles to designated Customer Engagement Sequences users so they can create and manage sequences without needing a system admin role.

### Before you begin

Role required: admin

### Procedure

Assign the Manage Update Set delegate developer permission to the following users:

- sn_crm_sequence.admin
- sn_crm_sequence.writer
- pd_author or playbook.admin (for version 1.0.0.)

For more information, see Delegated development and deployment and Developer and deployment permissions.

**Related topics**

Using Customer Engagement Sequences

Customer Engagement Sequences

### Compatibility information for Customer Engagement Sequences

The features that are supported in Customer Engagement Sequences are determined by combinations of ServiceNow AI Platform, Playbooks in Workflow Studio, and the Customer Engagement Sequences app version.

The following versions of the Customer Engagement Sequences application are compatible with the ServiceNow® Xanadu, Yokohama, Zurich, and Australia releases:

- Customer Engagement Sequences 1.0.0
- Customer Engagement Sequences 2.0.1
- Customer Engagement Sequences 2.1.0

The following table provides a comparison of features available with two Customer Engagement Sequences version 1.0.0 and 2.0.1.

| Feature | Customer Engagement Sequences 1.0.0 | Customer Engagement Sequences starting with version 2.0.1 |
|---|---|---|
| Roles<br><br>For more information, see Components installed with | • Sequence viewer<br>• Sequence task read granular | • Sequence admin (granular admin role)<br>• Sequence executor (renamed from Sequence viewer) |

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| Feature | Customer Engagement Sequences 1.0.0 | Customer Engagement Sequences starting with version 2.0.1 |
|---|---|---|
| Customer Engagement Sequences. | | • Sequence writer<br>• Sequence reader<br>Provides the ability to view the sequences in Playbooks starting with the Zurich release.<br>• Sequence task read granular |
| Schedule call activity | Unavailable | Available starting with the Xanadu release. |
| Multi-trigger capability | Available starting with the Zurich release and Playbooks version 28.1. | Available starting with the Zurich release and Playbooks version 28.1. |
| Decision branches for stages<br>Demo data | Available starting with the Zurich release and Playbooks versions 28.3. | Available starting with the Zurich release and Playbooks version 28.3. |
| Runtime permissions | Available starting with the Zurich release and Playbooks version 28.1. | Available starting with the Zurich release and Playbooks version 28.1. |

**Note:** The click-to-call capability and activity picker options for the Schedule call activity in Workflow Studio vary by release.

- In Xanadu and Yokohama, only the **Schedule call** activity is available in the activity picker and does not include the click-to-call capability.
- Starting with Zurich and Customer Engagement Sequences 2.1.0, both **Schedule call** and **Schedule call - Deprecated** appear in the activity picker. Use the **Schedule call** activity to enable the click-to-call capability.

**Related topics**

Using Customer Engagement Sequences

Customer Engagement Sequences

## Configuring Buying Group

Learn how to configure Buying Group to organize multiple contacts within Sales CRM by account and product offering family, and link them to opportunities.

## Activate Buying Group

As an admin, activate the plugin (sn_buying_group) to enable users to access Buying Group. For more information, see Activate a plugin.

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### Buying Group plugin

| Plugin | Description | Dependency |
|---|---|---|
| sn_buying_groups | • Represent collections of contacts involved in a purchasing decision.<br>• Organize stakeholders by role or context and support associating multiple contacts with accounts, product families, and sales opportunities. | • Product Catalog Management Core - (com.sn_prd_pm)<br>• Sales common - (com.sn_l2c_sales_common)<br>• Customer service - (com.sn_customer_service) |

## What to do next

View buying group engagement metrics

View a buying group engagement metrics to track how individual members and the group as a whole interact across marketing and sales activities, providing a consolidated view of participation, engagement levels, and buying readiness throughout the buying group lifecycle.

**Related topics**

Using Buying Group

Configuring Opportunity Management

Configuring Lead Management

### Create new buying groups

Create buying groups for an account and product family to capture the set of decision-makers, influencers, and evaluators involved in a purchase decision.

## Before you begin

Role required: bg_admin; bg_writer

## Procedure

1. Navigate to **All** > **Buying Group** > **All Buying Groups**.
2. Select#**New**.
3. On the form, fill in the fields:

### Create New Buying Groups form

| Fields | Description |
|---|---|
| Buying Groups | |
| Number | A system#assigned, human#readable identifier for the Buying Group record. |
| Name | The name of the Buying Group. It identifies the buying decision being tracked, typically for a specific account and product family. |

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| Fields | Description |
|---|---|
| Account | The customer account to which the Buying Group belongs. The Buying Group is always associated with a single account. |
| Product Family | The product family associated with the Buying Group. Each Buying Group is created for a specific product family within an account. |
| Owner | The sales or marketing user responsible for managing the Buying Group, including maintaining its members, roles, and lifecycle status. |
| Stage | Represents the current lifecycle state of the Buying Group. Stages reflect the progress of the buying decision itself (for example, Identified, Qualified, In#sales motion, Successful, or Disqualified) and are independent of opportunity stages. |
| Description | Optional text that provides additional context about the Buying Group, such as the purpose of the buying decision or relevant background information. |
| Active | Indicates whether the Buying Group is currently active. Inactive Buying Groups represent completed or discontinued. |
| System Information | |
| Created | The date and time when the Buying Group record is created. |
| Created by | The user who created the Buying Group record. |
| Notes | |
| WorkNote | An internal notes field used to record observations, updates, and important context related to a Buying Group. It captures ongoing activities, signals, or decisions associated with the purchase and supports internal collaboration and tracking. |

4. Select **Save**.
   The new buying group is created.

**Related topics**

Using Buying Group

Buying Group

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### Add buying group member

Add buying group member to a buying group to represent decision participants, assign roles within the decision process, track active participation, enable opportunity synchronization, and support accurate assessment of decision structure.

## Before you begin

Role required: bg_admin; bg_writer

## Procedure

1. Navigate to **All** > **Buying Group** > **All Buying Groups**.
2. Select the Buying Group record where you want to add members.
3. Go to **Buying Group Members** tab.
4. Select **New** to create a new Buying Group Member.
5. On the form, fill in the fields:

**Buying Group Member form**

| Fields | Description |
|---|---|
| Buying Group | Buying Group to which the member belongs. |
| Role | Defines the role or responsibility of the contact within the Buying Group, such as Business user, Decision maker, Economic buyer, Evaluator, Executive sponsor, or Influencer. The role indicates how the individual participates in the purchase decision. |
| Contact | References the qualified customer contact added as a member of the Buying Group. |
| Active | Indicates whether the member is currently participating in the buying decision. Inactive members remain associated for historical context but are not considered part of the active decision structure. |

6. Select **Save**.
   The new buying group member is added.

## Related topics

Using Buying Group

Buying Group

### Associate buying group to an opportunity

Associate a buying group with an opportunity to connect the opportunity to the set of decision-makers, influencers, and evaluators involved in the purchase.

## Before you begin

Role required: Opportunity Writer

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### Procedure

1. Navigate to **All** > **Buying Group** > **All Buying Groups**.
2. Select the Buying Group record where you want to associate an opportunity.
3. Go to **Opportunity - Buying Groups** tab.
4. Select **New** to create a new opportunity - buying groups association.
5. On the form, fill in the fields:

**Opportunity - Buying Groups form**

| Fields | Description |
|---|---|
| Buying Group | Buying Group being associated with the Opportunity. The selected Buying Group represents the set of stakeholders involved in the purchase decision for a specific product family and account. |
| Opportunity | Opportunity to which the Buying Group is associated. This field links the Buying Group to a specific sales opportunity and provides the context for the buying decision. |

6. Select **Save**.
   The opportunity associates to the buying group.

### Related topics

Using Buying Group

Buying Group

## Configuring Opportunity Management

Install the Opportunity Management application, which enables sales agents and account executives to get pre-sales product recommendations based on customer needs. You then assign the user roles and configure related features, such as needs analysis, used in Opportunity Management.

Admins and users with various roles, such as application admins and sales operation specialists, complete the following configuration tasks to set up Opportunity Management.

**Configuration tasks for Opportunity Management**

| Task | Description | Role |
|---|---|---|
| Install Opportunity Management | Install Opportunity Management from the ServiceNow® Store Store. | Admin |
| Configuring product offerings and catalogs | Create the product offerings and catalogs, unless they've been previously defined. | Product catalog admin |
| Configuring product pricing | Define the price lists, pricing strategies, and other pricing features that you want to | Pricing admin |

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**Configuration tasks for Opportunity Management (continued)**

| Task | Description | Role |
|---|---|---|
| | use, unless they've been previously defined. | |
| Configure needs analysis | Create the needs templates for questionnaires that sales agents complete to get product recommendations for sales opportunities. | Product catalog admin |
| Configure location-based transactions | Activate the system property for location-based transactions and set up the rule entity and product eligibility decision rules. | Admin and product catalog admin |
| Create opportunity stages | Create sales cycle stages for an opportunity. | Opportunity setup writer |
| Create a sales cycle for an opportunity | Create a sales cycle type for an opportunity. | Opportunity setup writer |
| Associate a sales cycle with the opportunity stage | Link one or multiple opportunity stages with a sales cycle. | Opportunity setup writer |
| Configure guided selling activities in a playbook | Define mandatory exit criteria per opportunity stage to enforce process compliance and prevent stage advancement until required actions are complete. | Opportunity setup writer |
| Customize the opportunity summarization skill in ServiceNow Otto for Sales Automation | Configure the opportunity summarization skill to generate AI-powered opportunity summaries in the CRM Workspace, including which data sources and fields contribute to the summary. | Admin |

**Related topics**

- Using Opportunity Management
- Opportunity Management

### Install Opportunity Management

You can install the Opportunity Management application (sn_opty_mgmt) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

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### Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Opportunity Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

### About this task

The following items are installed with Opportunity Management:

- Roles
- Tables

For more information, see Components installed with Opportunity Management.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Opportunity Management application (sn_opty_mgmt) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

### Related topics

Using Opportunity Management

Opportunity Management

## Create opportunity stages

Create sales cycle stages for an opportunity.

### Before you begin

Role required: sn_opty_mgmt_core.opportunity_setup_writer

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### Procedure

1. Navigate to **All** > **Opportunity Management** > **Opportunity Stages**.
2. Select **New** to create an opportunity stage or select an existing opportunity stage to make changes.
3. Fill in the fields in the Opportunity Stage form.

#### Opportunity Stage form

| Field | Description |
|---|---|
| Name | Name of the opportunity stage. For example, Qualify or Develop or Propose or Negotiate. |
| Order | Sequence number that determines this stage's position relative to other stages in the sales cycle. When you map this stage to a sales cycle type, fill in the same value for the Order field in the Sales Cycle Stages list. |
| Type | Type of the opportunity stages. For example, Open or Closed. |
| Active | When selected, the opportunity stage is active. |

4. Select **Submit**.
   The sales cycle stage is created for the opportunity.

### Related topics

Using Opportunity Management

Opportunity Management

## Create a sales cycle for an opportunity

Create a sales cycle type for an opportunity.

### Before you begin

Role required: sn_opty_mgmt_core.opportunity_setup_writer

### Procedure

1. Navigate to **All** > **Opportunity Management** > **Sales Cycle Types**.
2. Select **New** to start a new sales cycle type or select an existing sales cycle type to make changes.
3. Fill in the fields in the Sales Cycle Type form.

#### Sales Cycle Type form

| Fields | Descriptions |
|---|---|
| Code | Type of sales cycle. For example, NEW RENEW or NEWCUST or UPSELL. |
| Short Description | More information about the new opportunity sales cycle. |

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| Fields | Descriptions |
| --- | --- |
| Active | When the checkbox is selected, the sales cycle is active. |

4. Select **Submit**.
   The sales cycle type has been created for the opportunity.

### What to do next
Add sales cycle stages to your opportunity. To learn more, see Create opportunity stages.

#### Related topics
Using Opportunity Management

Opportunity Management

### Associate a sales cycle with the opportunity stage

Link one or multiple opportunity stages with a sales cycle.

### Before you begin
Role required: sn_opty_mgmt_core.opportunity_setup_writer

### Procedure
1. Navigate to **All** > **Opportunity Management** > **Sales Cycle Types**.
2. Select an existing sales cycle type to make changes.
3. On the **Sales Cycle Stages** related list, select **Edit**.
4. Select and move one or multiple opportunity stages from Collection on the left to Sales Cycle Stages List on the right.
5. Select **Save**.
   The sales cycle and opportunity stages have been associated.

#### Related topics
Using Opportunity Management

Opportunity Management

### Configure allocation types

Create and activate allocation types to control how sales credits are split among multiple sales users when they work on the opportunity together.

### Before you begin
Role required: sn_opty_mgmt_core.opportunity_setup_writer

### Procedure
1. Navigate to **All** > **Opportunity Management** > **Opportunity Allocation Types**.
2. Select **New**.
3. On the form, fill in the fields.

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| Field | Description |
| --- | --- |
| Name | Unique business identifier for the allocation type:<br>○ Revenue: Distributes the total opportunity amount across eligible participants for ownership, forecasting, and credit.<br>○ Overlay: Distributes product or line-level opportunity value for shared credit and forecasting.<br>**Note:** By default, Revenue and Overlay allocation types are available. |
| Order | Determines order of display on UI and related lists wherever applicable. |
| Description | (Optional) Details about the opportunity allocation type.<br>**Note:** Provides business context for administrators. |
| Allocation Table | The table or entity the allocation type applies to (Opportunity or Opportunity Line). |
| Allocation Field | The metric used for allocation (for example, Amount, Cumulative TCV). |
| Active | Determines if this allocations type is active and available for allocation processing. |
| Requires Full Allocation | Specifies whether all allocations under this type must sum to 100%. |
| Filter by | Allows to configure conditions on the Allocation object. Only records satisfying these conditions will be used for generating the final numbers. |

**Note:**

You can only modify inactive allocation types.

You can't delete allocation types if it is in use in Opportunity allocations.

4. Select **Submit**.

### Result

The opportunity allocation type is created and listed on the **Opportunity Allocation Types** page.

### Related topics

Using Opportunity Management

Opportunity Management

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### Associate allocation dimensions with allocation types

Associating allocation dimensions to allocation types enables consistent, transparent, multi-dimensional roll-ups for reporting and forecasting.

## Before you begin

Role required: sn_opty_mgmt_core.opportunity_setup_writer

## About this task

An allocation dimension defines the attributes (for example, Territory, Product Offering Family) used to group records for allocation. Use this task to create a dimension that determines how an Opportunity Allocation Type groups records and allocates amounts during allocation processing.

## Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the **Opportunity Allocation Dimension** table.
3. On the **Opportunity Allocation Dimension table** related links, select **Show List**.
4. Select **New** to create an opportunity allocation dimension record.
5. On the form, fill in the fields.

| Field | Description |
|---|---|
| Allocation Type | Specifies the type of opportunity allocation. |
| Name | Unique display name of the allocation dimension. |
| Allocation Table | The table or entity the allocation type applies to (Opportunity or Opportunity Line). |
| Allocation Table Field | The field from the source entity that is used as the basis for the allocation (e.g., product family, territory). |
| Opportunity Allocation Table | The table used to store allocation records for opportunities. |
| Opportunity Allocation Field | The field in the allocation table that references the allocation basis from the source record. |
| Active | Indicates whether the allocation dimension is available for use. |

6. Select **Submit**.

## Result

The opportunity allocation dimension is created and listed on the **Opportunity Allocation Dimensions** page.

## What to do next

- Manage allocations
- Add or edit opportunity allocations
- Split opportunity allocation

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**Related topics**

Using Opportunity Management

Opportunity Management

### Configure guided selling activities in a playbook

Define the mandatory activities that sales agents must complete at each opportunity stage by configuring a playbook. Agents cannot advance an opportunity to the next stage until all activities for the current stage are complete.

## Before you begin

The opportunity stages for your sales cycle must be defined before you configure guided selling activities. For more information, see Create opportunity stages.

Role required: sn_opty_mgmt_core.opportunity_admin

## About this task

Guided selling uses a playbook to define the activities that sales agents must complete at each opportunity stage. When an agent tries to advance an opportunity to the next stage, the system checks whether all activities for the current stage are complete. If any activities are incomplete, the system prevents the stage change and displays the outstanding actions.

The default playbook is configured for opportunities with a sales cycle type of **New Business**. You can configure additional playbooks for other sales cycle types. Each stage in a playbook requires a stage entry automation activity at the start and a stage exit automation activity at the end. Between these two automation activities, you can add any combination of activities based on your business requirements.

The system records activity completion state in the Sales CRM Progression Checkpoint table. When an agent tries to advance an opportunity, the system checks this table to determine whether all activities for the current and preceding stages are complete.

## Procedure

1. Navigate to **All** > **Playbooks Designer**.
2. Open the **Sales essentials playbook**.
   The default playbook is triggered when an opportunity is created or updated with a sales cycle type of **New Business**. Configure the trigger condition to match the sales cycle type you want to support.
3. Add and configure a stage in your playbook, for more information, see Add and configure a stage in a playbook.
4. Select the stage for which you want to configure activities, for more information see Add and configure an activity in a playbook.
   The playbook displays each opportunity stage as a lane. Each lane must contain a stage entry automation activity as the first activity in the stage lane and a stage exit automation activity as the last activity in the stage lane.
   This activity creates a record in the Sales CRM Progression Checkpoint table to track activity completion for the stage.
5. Add the mandatory and optional activities between the stage entry and stage exit automation activities.

   You can use the following default activity definitions to build activities for common use cases.

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**Activity definitions**

| Activity definition | Description |
|---|---|
| *Required Fields Activity Definition* | Fields specified on the opportunity record must not be empty. Use when agents must complete required fields, such as owner or short description, before advancing. |
| *Related Records Activity Definition* | One or more related records must exist on the opportunity. Use when agents must add a related record, such as a contact or team member, before advancing. |

For standard playbook activity types such as questionnaires and instructions, add the *Playbook Activity Event Create* subflow immediately before the activity and the *Playbook Activity Event Update* subflow immediately after it. These subflows track completion state in the Sales CRM Progression Checkpoint table.

6. Save and activate the playbook.
7. **Optional:** Enforce the win or loss reason fields when agents close an opportunity by enabling the corresponding system properties.

   (Optional) By default, agents can move an opportunity to a closed stage without completing the win or loss reason fields. Enable one or both of the following system properties to make these fields mandatory. Both properties are set to `false` by default.

**Closed stage enforcement properties**

| System property | Description |
|---|---|
| `sn_opty_mgmt_core.enable_mandatory_fields_on_closed_won` | When enabled, requires agents to complete the **Win reason** and **Outcome notes** fields before they move an opportunity to the Closed Won stage. |
| `sn_opty_mgmt_core.enable_mandatory_fields_on_closed_lost` | When enabled, requires agents to complete the **Loss reason**, **Outcome notes**, |

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| System property | Description |
| --- | --- |
| | and **Lost to** fields before they move an opportunity to the Closed Lost stage. |

When a required field is empty, the system prevents the stage change and displays a message that names the mandatory field and the target stage.

### Result
The playbook is active. When an opportunity with the configured sales cycle type is created or updated, the playbook triggers and displays the configured activities to the sales agent in the guided selling panel. Agents must complete all activities for a stage before the system allows them to advance the opportunity.

### Related topics
- Guided selling on opportunities
- Create opportunity stages
- Configuring Opportunity Management

## Revise existing opportunities after an upgrade

Run a scheduled job to modify older opportunities so they can support parent-child opportunity line items.

### Before you begin
Role required: admin

### About this task
The scheduled job helps update opportunity lines on the opportunities created on or before the Yokohama Q1 release. From Yokohama Q2 release onward, the opportunity lines follow a hierarchical parent-child structure. The hierarchy is achieved by adding new fields on an opportunity line and affects the pricing functionality. For the existing lines to incorporate the updated pricing functionality, the newly added fields must be populated and the hierarchical structure must be in place.

### Procedure
1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. On the scheduled job menu, search for the **Revise existing Opportunities on upgrade** job.
3. Open the job and select **Execute Now**.
4. Navigate to **All** > **System Logs** > **System Log** > **All**.
5. Confirm that the job has been completed by checking for the `Opportunity Upgrade Job completed` message.
   The log lists the total number of records processed, along with their success and failure count.

> **Note:** If the job is abruptly stopped, the log displays `Opportunity Upgrade Job encountered errors` in addition to the error message.

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### Result
The scheduled job updates the open opportunities (not in any of the closed stages). The job works differently for opportunities that are synced to Quote than the ones that aren't.

### Example:
For open, non-synced opportunities:

1. The scheduled job updates the newly added **Top Opportunity Line Item** and **Product Specification** fields for all the opportunity lines.
2. If a complex product offering has a child offering, the job creates child opportunity lines under the parent line. Newly created child lines contain correct values populated for the newly added fields.
3. A subsequent pricing call is made to populate pricing fields for all the lines in the hierarchy.

For open, synced opportunities:

1. A scheduled job updates the newly added **Top Opportunity Line Item** field for all the opportunity lines.
2. The **Product Specification** field, new hierarchy, and pricing fields for this line are updated only if any change is done on the corresponding synced quote line.

**Note:** After upgrading to the Yokohama Q2 release, run the scheduled job before working with Opportunity. Failure to do so results in inconsistent behavior in Opportunity and the related tables.

#### Related topics
Using Opportunity Management

Opportunity Management

## Customize the opportunity summarization skill in ServiceNow Otto for Sales Automation
Configure the opportunity summarization skill to generate AI-powered opportunity summaries in the CRM Workspace, including which data sources and fields contribute to the summary.

### Before you begin
Use the AI Admin Hub console to configure the opportunity summarization skill. For additional information, see Overview tab in AI Admin Hub.

Role required: admin

### About this task
The opportunity summary draws from the following related tables by default:

- Opportunity and opportunity line items
- Activity data: touchpoints, appointments, meetings, emails, work notes, and tasks
- Opportunity competitors and contacts
- Account or consumer table

The opportunity summary appears on the Overview page and includes the following sections:

**Opportunity overview**

Key details including the short description, opportunity amount, stage, account name, and the top three line items by value. For closed opportunities, the summary includes the outcome: won opportunities show the signed date; lost opportunities show the lost reason, competitor, and close date.

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**Customer needs and pain points**

The top two customer needs or pain points identified from the opportunity description, business goals and pain points from emails, and work notes. When sources conflict, the most recent email or work note takes precedence. The source of each need or pain point is included in the summary.

**Recent and upcoming activity**

The most recent activity from touchpoints or emails, with its date and a brief description. Also includes the next open task with its due date, or the next scheduled touchpoint or meeting.

**Risks detected from activity**

Up to two risks identified from recent emails, meetings, touchpoints, and tasks. Each risk includes the source. Risk types include unresolved technical concerns, budget uncertainty, timeline pressure, competitor activity, negative sentiment, price objections, and reduced scope.

## Procedure

1. Navigate to **All** > *AI Admin Hub* > **AI Skills**.
2. In the **Sales** workflow group, locate the opportunity summarization skill for ServiceNow Otto for Sales Automation.
3. Create a copy of the skill to customize.

   a. Select the More actions icon ••• for the **Opportunity Summarization** skill, then select **Make a copy**.
   The copy is listed in the All section.

   b. On the copied skill, select **Activate skill** to open and configure it.
   A guided setup leads you through General details, View opportunity input, Customize prompt output, Define availability, Define access, Select display, and Review and activate.

   **Note:** Only one version of a skill can be active at a time. Activating a copy deactivates any previously active version of the skill.

4. In the General details step, enter a name and description for the skill, then select **Save and continue**.

   **Note:** The **More details on the skills** fields are read-only.

5. Configure the base input table fields and related data sources for the skill.

   The skill uses the Opportunity [sfa_opportunity] table as its base input table. Select only those related tables that are available in the base system as part of the input data.

   The following table lists the base input fields and descriptions.

**Base input fields**

| Field | Description |
|---|---|
| Base input field | Field in the base input table whose value the skill uses in its response. |

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| Field | Description |
| --- | --- |
| | For example, `Number`. |
| Field description | Description of the base input field value.<br><br>For example, `Opportunity number`. |

a. Select **+New base input field** and configure the fields for the opportunity input template. Add multiple base input fields as needed.

b. Configure rule conditions using the condition builder to filter the data for the input template.

   Rule conditions determine when the input template is used. Select **New condition set** to add additional parameters.

c. Add additional data sources by selecting **New data source** for each related table to include, such as opportunity line items, emails, tasks, touchpoints, meetings, work notes, contacts, competitors, and the account table.
   Adding related table data sources provides more context to the AI model and improves summary quality.
   The selection of related table fields directly affects the quality of the generated summary.

d. Select **Save and continue**.

6. Customize the prompt output.

   Review and test the default prompt. To customize prompts, select **Edit prompt in AI Skill Kit**. For more information, see AI Skill Kit.

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

   b. Select **Save and continue**.

7. Define when the skill is available to users in the Define availability section.

   a. Configure the skill to be available to all users, or select **Customize skill availability** to set conditions using the condition builder.
      Select **New condition set** to add additional conditions as needed.

   b. Select **Save and continue**.

8. Specify which users can access the skill in the Define access section.

   Select **Roles** to restrict skill access by role. If you add a role in this step, you must also select it in the **Select display** step to make it active.

9. Configure the **In-product desktop** field to display the opportunity summary in the CRM Workspace.

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a. Select **In-product desktop** to display the skill on opportunity forms and workspaces. Select the arrow to identify which roles can use the skill in-product.

b. Select **Save and continue**.

10. Review your configuration and select **Activate** to complete the skill setup.
The opportunity summary appears on the Overview page of each opportunity in the CRM Workspace.

**Related topics**

Summarize an opportunity using ServiceNow Otto for Sales Automation

### CRM conversational query

CRM conversational query is an AI agent embedded in ServiceNow Otto. You can ask questions and issue commands in plain language and the agent performs the action without you opening a form.

The agent is accessible through the following ways:

- ServiceNow Otto panel: available on the CRM home page.
- MCP client (for example, Claude): through the Sales CRM MCP server published in Sales common. For information on how to connect to an MCP server from an MCP client, refer Connecting to an MCP server from an MCP client .

The agent supports the following operations on opportunity records and related entities, including contacts, tasks, touchpoints, meetings, line items, and competitors:

- Retrieve: view pipeline snapshots, opportunity details, tasks, touchpoints, contacts, accounts, and opportunity lines.
- Update: change field values on opportunities and related records. Multi-field updates and relative date expressions such as "end of next month" are supported.
- Create: add opportunities, contacts, tasks, touchpoints, and competitors.

**Related topics**

Manage opportunity records using an AI interface

Configuring AI capabilities in Sales CRM

### Set up ML-based opportunity scoring and insights

Give your sales team a win probability score and supporting insights on every open opportunity by training a machine learning (ML) model on your closed deals and activating the jobs that score opportunities.

## Before you begin

You must have installed the ServiceNow Otto for Sales Automation (sn_som_gen_ai) application on your ServiceNow instance. This application also installs the following applications that opportunity scoring depends on:

- Opportunity Management ML (sn_opty_mgmt_ml)
- Opportunity Management AI Features (com.sn_opty_mgmt_ai)

If either application is missing from your instance, install it using the Application Manager. For more information, see Configuring AI capabilities in Sales CRM.

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To score and test opportunities without waiting for historical data, select the **Load demo data** option during installation. Demo data populates the Opportunity Feature [sn_opty_ml_feature] table with sample opportunities that the model can train on.

The application scope must be set to Opportunity Management ML. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: admin

## About this task

Opportunity scoring rates each open opportunity from 0 to 100 based on the patterns that a machine learning model finds in your closed deals. The score comes with plain-language insights that explain the factors behind it, and both appear on the Score and Insights card on the Overview tab of an opportunity record. Each score also maps to a rating that helps sellers triage their pipeline at a glance.

The scheduled jobs that produce these scores are inactive when the application is installed. You must activate and run them in the given order. Each step prepares the data that the next one needs. The jobs fall into the following categories:

**One-time setup jobs**

The backfill, training data, and training jobs run once to build and train the model. Run them again when you switch from demo data to your own closed opportunities, or when enough new deals close to make retraining worthwhile.

**Continuous jobs**

The snapshot job and the inference job run on their own schedules after you activate them, so that the model always has current data and open opportunities keep getting fresh scores.

If you loaded demo data during installation, skip the two steps that build training data from your own opportunities.

## Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
   You activate and run the jobs in the next four steps from this list. Search for each job by name.
2. Back-fill historical snapshots.
   Capture snapshots of the opportunities that closed before you turned on scoring, so that the model can learn from complete deal histories. Skip this step if you loaded demo data during installation. Without a backfill, the model sees opportunity data only from the day you activate the snapshot job, which leaves out the closed deals that training depends on.
   a. Search for the OpportunitySnapshotBackfillJob scheduled job and select it.
   b. On the Scheduled Script Execution page, select **Active**.
   c. Save changes by selecting **Update**.
   d. Run the scheduled job by selecting **Execute Now**
   Historical snapshots are written to the Opportunity Snapshot [sn_opty_mgmt_core_snapshot] table.
3. Convert your closed opportunities into the feature rows that the model trains on.
   Skip this step if you loaded demo data during installation, because the Opportunity Feature [sn_opty_ml_feature] table is already populated. This job reads closed opportunities from the snapshot data and writes one feature row for each.
   a. Search for the OpportunityMLTrainingDataJob scheduled job and select it.
   b. On the Scheduled Script Execution page, select **Active**.

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c. Save changes by selecting **Update**.

d. Run the scheduled job by selecting **Execute Now**
Feature rows are written to the Opportunity Feature [sn_opty_ml_feature] table.

4. Train the Win Probability model on the feature rows.
The training job uses Predictive Intelligence to build a classification model that distinguishes won deals from lost ones.

a. Search for the OpportunityMLTrainingSolution scheduled job and select it.

b. On the Scheduled Script Execution page, select **Active**.

c. Save changes by selecting **Update**.

d. Run the scheduled job by selecting **Execute Now**

5. Confirm that training finished before you continue.
Scores aren't accurate if you point the feature at a solution that is still training.

a. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solutions**.

b. Check the state of the solution after each training run.

c. Wait until the state is Solution Complete.

6. Point the scoring feature at the trained solution so that it knows which model to use.

a. In the **Solutions** list, search for a string containing `PTC` (Probability to Close) and note the name of the solution.
The solution that you select must have a state of Solution Complete.

b. Set the application scope to Opportunity Management Data Model using the application picker  in the Unified Navigation bar.

c. Navigate to **All** > **System Properties**.

d. Find and select the **sn_opty_mgmt_core.ml.config** property.

e. In the **Value** field, enter the solution name that you noted earlier.

f. Select **Update**.

7. Activate ongoing snapshots so that the model and the scoring job always work with current opportunity data.
Complete this step whether or not you loaded demo data. The snapshot job takes a point-in-time snapshot of every active opportunity every four hours, and those snapshots feed both model training and scoring.

a. Search for the OpportunitySnapshotJob scheduled job and select it.

b. On the Scheduled Script Execution page, select **Active**.

c. Save changes by selecting **Update**.
The job starts running on its four-hour schedule. You don't need to run it manually.

8. Activate scoring so that open opportunities receive a score and insights.

a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.

b. Search for the OpportunityPTCInferenceJob scheduled job.

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c. On the Scheduled Script Execution page, select **Active**.

d. Save changes by selecting **Update**.
The job scores open opportunities in batches and generates the insights that explain each score.

9. Verify that scores appear for your sales team.

a. Navigate to **Workspaces** > *CRM Workspace*.

b. Select the List icon .

c. Navigate to **Opportunity** > **All**.

d. Select an opportunity record you want to test.

e. Select the **Overview** tab.

f. Confirm that the **Score and Insights** card shows a score and insight text.
If the card is empty, wait for the OpportunityPTCInferenceJob job to complete its first run.

### Result

Open opportunities show a win probability score from 0 to 100. Insights explain the factors working for and against the deal. Favorable and unfavorable factors appear with green and red caret icons respectively, so that sellers can see where to focus.

### What to do next

View opportunity scores and insights

## Configure Sales Forecasting

Use the Sales Forecasting application to project your future sales volumes and revenue based data from opportunities and pipeline analysis.

## Activate Sales Forecasting

As an admin, you can activate the following plugins to enable users to access Sales Forecasting. For more information, see Activate a plugin .

**Sales Forecasting plugins**

| Plugin | Description | Dependency |
|---|---|---|
| com.snc_sales_forecasting | Project your future sales volumes and revenue based on data from opportunities and pipeline analysis. | • com.snc_app-l2c-core<br>• com.snc_app-prd-pm<br>• com.snc_app_l2c_oppty_mgmt<br>• com.snc_app-tmt-core |
| com.sn_sales_quota_application | Assign the quota targets to the sales reps in the sales team hierarchy. | com.snc_app_l2c_oppty_mgmt |

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You need the Sales Quota Application plugin to assign the quota targets to each team and sales agent. You can view and track the targets achieved for each agent and team on the sales forecasting dashboard and the gap remaining to achieve the target.

### Related topics

Using Sales Forecasting

Sales Forecasting

## Set up a sales team for forecast hierarchy

The system administrator can create groups, sales teams, associating them with specific managers. The sales hierarchy determines how the forecast rolls up within your company and how it can be viewed.

### Before you begin

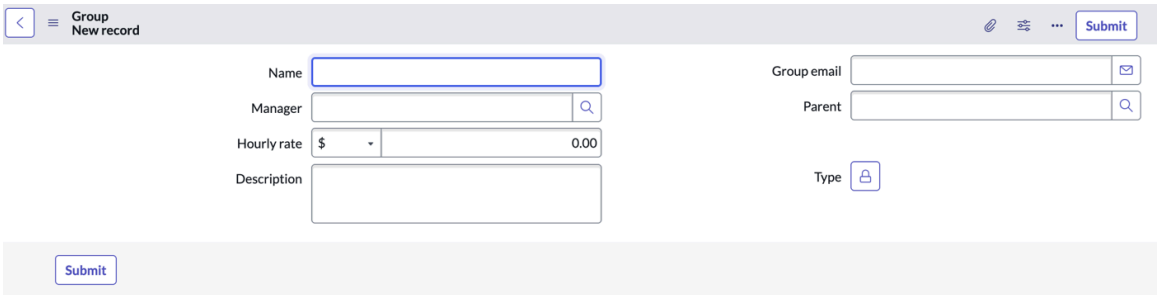
Role required: admin

### About this task

Once the users, teams, category, and opportunity data are added, you can view the sales forecast for any group or specific sales team on the Sales Forecast dashboard.

### Procedure

1. Navigate to **All** > **System Security** > **Groups**.
2. Select **New**.




3. On the form, fill in the fields.

| Field | Description |
|---|---|
| Name | Name of the team that will be visible on the Sales Forecast dashboard. |
| Group email | Email ID of the team. |
| Manager | Name of the manager of the group. |
| Parent | Parent group of the team for which you want to forecast. |
| Description | Short description about the team and its sales activities. |
| Type | Select Sales Team only. |

4. Select **Submit**.
   The new team is created and added on the Groups page.

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### Related topics

Using Sales Forecasting

Sales Forecasting

## Configure Forecast Model

The forecast model is a framework used to predict future sales based on historical data, current sales activities, and other relevant factors.

### Before you begin

Role required: admin

### Procedure

1. Navigate to **All** > **Sales Forecast** > **Forecast Model**.
2. Select#**New**.
3. On the form, fill in the fields.

| Fields | Description |
|---|---|
| Name | Name of the forecast model that you want to create. |
| Description | Short description of the forecast model. |
| Forecast Source | Entity from which forecast data is generated. For example, Opportunity and Opportunity Allocation. |
| Filter By | Conditions that limit that records from the forecast source are included in the forecast. |
| Rollup Type | Select how forecast values roll up the hierarchy. For example, cumulative and single. |
| Measure Type | Data type of the forecast value. |
| Active | Option to activate the forecast model. |
| Measure | Parameter to calculate the forecast value. |
| Order | Display order of the forecast model. |
| Primary Hierarchy Type | Select **Sales Team** or **Territory** to select the hierarchy used to roll up the forecast values. |
| Sales Team Hierarchy | Conditions that restrict which sales teams are included in the rollup. |
| Territory Hierarchy | Territories that are included in the rollup.<br>**Note:** This field is displayed when you select **Territory** from the Primary Hierarchy Type list. |
| Secondary Hierarchy Type | Select the secondary hierarchy that will be displayed within a territory or sales team, for example, Product Offering Family. |

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| Fields | Description |
| --- | --- |
| Base | Option to submit and adjust forecasts at base forecast source.<br><br>**Note:** If you select this option, **Single** is the default option for Rollup Type field. |
| Reopen Submission | Option to enable users to reopen a completed forecast submission and resubmit within the current submission window. This field remains editable even when the forecast model is active. |

**Note:** When the forecast model is active, the admin can set the attribute *`readOnlyWhenActive`* as `true` to make the fields read-only. By default, this value is `false` to make the fields editable.

4. Enter the configurations for forecast generation.
   a. Select **Forecast Configuration Overrides** related list.
   b. From the **Forecast Date Field** list, select the date from the forecast source to generate the forecast.
   c. From the **Forecast Category Field** list, select the category to generate the forecast.
   d. From the **Forecast Territory Field** list, select the field from the Forecast Source that contains the territory information.
   e. From the **Product Offering Family Field** list, select the field from the Forecast Source table that contains product offering family information.
5. Select the conditions to configure the forecast periods and submissions.
   a. Select **Period and Submissions** related list.
   b. From the **Primary Forecast Period** list, select the period for which you want to generate the forecast.
   c. From the **Additional Forecast Period** list, you can select more granular periods from the Primary Forecast Period to generate forecasts.
   d. Select the **Submission Required** check box to activate the submission period.
   e. From the **Submission Frequency** list, select the frequency to submit forecasts.
6. Configure the owner of the forecast.

   **Note:** This field is displayed only when you select **Territory** from **Forecast Hierarchy Type** list.

   a. Select **Forecast Owner Configuration** related list.
   b. From the **Forecast Owner Field** list, select the field that determines the owner of that forecast.
7. Define the rolled#up forecast at each level of the selected forecast hierarchy.

   **Note:** This field is displayed only when you select **Territory** from **Forecast Hierarchy Type** list.

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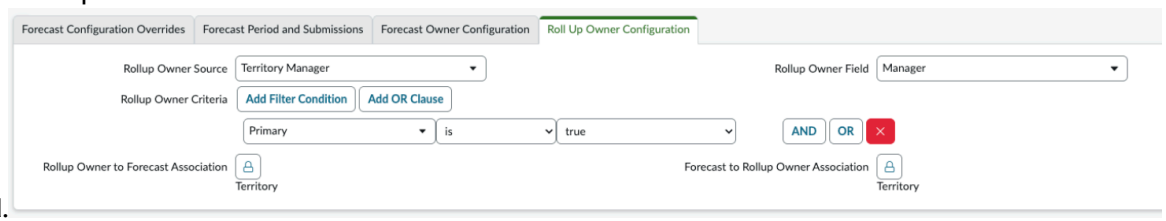
a. Select **Rollup Owner Configuration** related list.

b. From **Rollup Owner Source** list, select the table that determines the rollup owner.

c. From the **Rollup Owner Field** list, select the table field that identifies the rollup owner on the selected rollup owner source.

d. In the **Rollup Owner Criteria** field, use **Add Filter Condition** or **Add OR Clause** to refine the rollup owner selection.

e. From the **Rollup Owner to Forecast Association** field, define how the rollup owner record is associated to the forecast record.




f. From the **Forecast to Rollup Owner Association** field, define how the forecast record is associated back to the rollup owner.

> **Note:** The values in the **Rollup Owner to Forecast Association** and **Forecast to Rollup Owner Association** fields should be identical.

8. Select **Submit**.

### Result
The new forecast model is created. You can view it on the Forecast Models page.

### Related topics
Using Sales Forecasting

Sales Forecasting

## Configure Forecast Categories

Configure the forecast categories in CRM Workspace.

### Before you begin
For current opportunities in the system, the default value of the field Forecast Category is Pipeline. Every sales agent working on that opportunity, updates this field once the sales process starts. When the agents update the category, the dashboard reflects more accurate analysis and sales forecast prediction. These categories classify the sales based on the level of certainty regarding their closure. By default, six forecast categories are available. For more info, refer Forecast terminologies topic.

Role required: admin

### Procedure
1. Navigate to **All** > **Sales Forecast** > **Forecast Categories**.
2. Select#**New**.
3. On the form, fill in the fields:

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| Fields | Description |
|---|---|
| Name | Name of the forecast category that you want to create. |
| Description | Short description of the category. |
| Active | Select the **Active** check box to activate the forecast category. |
| Order | Select the order number in the current category cycle. |
| Type | From the list, select the type of category this new forecast category belongs to. |

4. Select **Submit**.
   The new category is created.

### Result
If required, users can either delete or make a forecast category inactive. When a category becomes inactive, the forecast items in that category will be deleted automatically.

### Related topics

Using Sales Forecasting

Sales Forecasting

## Set up forecast schedule

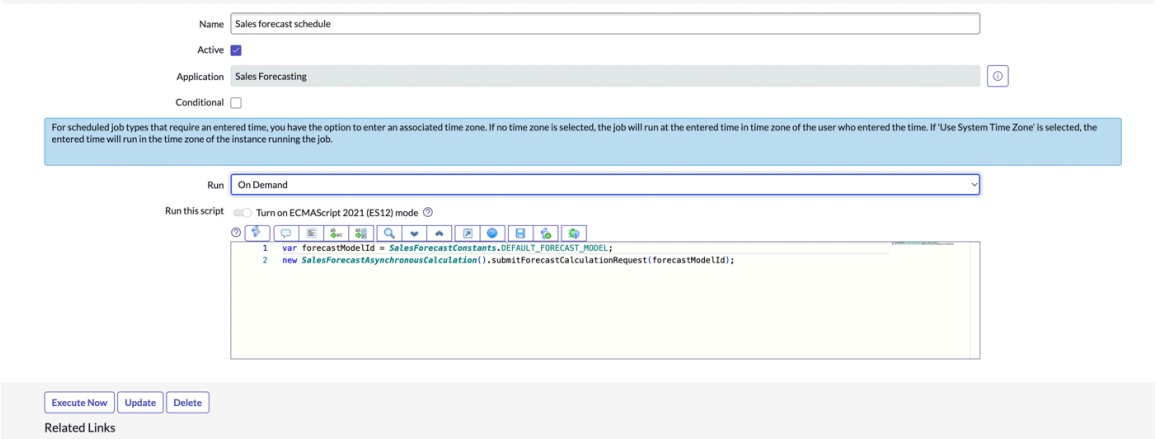
Forecast schedule automatically fetches all the opportunities in the system and generates forecast data.

### Before you begin
Create a scheduled job to update or create the forecast data at a specific time or recurring schedule. A default sales forecast scheduler is available with the Sales Forecasting application. You can edit that scheduler according to your requirements.

Role required: admin

### Procedure
1. Navigate to **All** > **System Definition** > **Scheduled Job**.
2. Enter **Sales forecast schedule** in the Search field.
3. Select **Sales forecast schedule** from the schedule list.
4. From the Run list, select the option to customize the timing of the scheduler according to your requirements.

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5. Select **Update** to save the settings of your scheduler.
6. Select **Execute Now** to run the scheduler.

### Note:

You can copy the script provided in the Run this script field to create your own scheduler.

**Related topics**

Using Sales Forecasting

Sales Forecasting

## Set up sales quota

Assign quota targets to sales representatives and managers based on their hierarchy, role, and forecast period.

### Before you begin

Sales agents and managers can set the quotas/targets for a specific period and distribute. The quota can be assigned to a sales group as well. Quotas can be imported from external sources or entered manually in the system. Bulk import can be done by system administrator only.

Role required: sn_quota_core.quota_admin

### Procedure

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

| Fields | Description |
|---|---|
| Owner | Name of the owner of the team the quota has been assigned to. |
| External ID | ID of the owner of external source from which the quota is imported from. |
| Sales team | Reference field to User Group in which the quota is assigned for. |
| Territory | Reference field to the Territory in which the quota is assigned for. |

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| Fields | Description |
|---|---|
| External Source | Name of the external source in which the quota is imported from. |
| Period | Select a specific time period to assign this quota. |
| Amount | Select the currency and the amount of money to assign as quota to a team or an individual. |
| Type | Indicates if the quota is owned by an individual or at the roll up level. |
| Forecast Model | Select the forecast model.<br>**Note:** By default, Opportunity Amount Forecast is available to the users. |
| Active | Select the **Active** check box to activate this quota. |

4. Select **Submit**.
   The sales quota has been assigned to sales team.

**Related topics**

Using Sales Forecasting

Sales Forecasting

## Configuring Sales Territory Management

Learn how to configure the features and components that help distribute accounts, consumers, leads, and opportunities to manage sales territories.

## Activate Sales Territory Management

As an admin, activate the plugin (com.sn_sales_territory) to enable users to access Sales Territory Management. For more information, see Activate a plugin.

### Sales Territory Management plugin

| Plugin | Description | Dependency |
|---|---|---|
| com.sn_sales_territory | • Provides the core territory tables and APIs that extend base Territory Planning.<br>• Provides the roles for granting access to CRM entities via Responsibility Framework.<br>• Provides Sales CRM Tracker to help to run assignment rules algorithm asynchronously. | • CRM Territory Extensions - com.sn_tp_crm_extn<br>• Sales Common - com.sn_l2c_sales_common<br>• Lead to Cash Core - com.snc.l2c_core |

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### Related information

Using Sales Territory Management

Components installed with Sales Territory Management

## Configuring Territory Level

Create territory levels to categorize territories such as regional, district, area, and global for better organization of territories.

### Before you begin

Role required: sales territory admin

### Procedure

1. Navigate to **All** > **Sales Territory Management** > **Territory Level**.
2. Select#**New**.
3. On the form, fill in the fields:

**Territory Level form**

| Fields | Description |
|---|---|
| Name | Name of the territory level that you want to create, for example: Global, Industry, Area, Region, District, and Territory. |
| Description | Short description of the level. |
| Order | Integer to define order of records for sorting purpose. |

4. Select **Submit**.
   The new territory level is created.

### Related topics

Using Sales Territory Management

Sales Territory Management

## Configuring the Territory Model

Territory model contains the territory hierarchies mapped to it and maintains the organizational structure for a territory hierarchy. Create a Territory Model to add territories that can be assigned to accounts, consumers, leads, and opportunities.

### Before you begin

Role required: admin

Set the **Application scope** to **Sales Territory Management**.

**Note:**

The Sales Territory Model is shipped by default with the necessary configurations that can be used.

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### Procedure

1. Navigate to **All** > **Sales Territory Management** > **Territory Model**.
2. Select#**New**.
3. On the form, fill in the fields:

**Territory Model form**

| Fields | Description |
|---|---|
| Name | Name of the territory model that you want to create. |
| Description | Short description of the model. |
| Territory Role | Roles that can access the sales territory model and its related territories must include Sales Territory Basic. |
| Application | Read-only field, the set value is Sales Territory Management |
| Active | Select the Active check box to use the territory model. |

4. Select **Submit**.
   The new territory model is created. You can update the new territory model with the associated **Territory Model Sources** and **Territory Model Level Mappings**.

### Related topics

Using Sales Territory Management

Sales Territory Management

## Configuring the Territory

Create territories to optimize the assignment of a territory to CRM data. Map these territories to the territory model and levels to maintain the hierarchy. Provide conditions for automated assignments, and onboard members with role-based access in a territory for restricted permissions.

### Before you begin

Role required: sales territory admin, sales territory manager

### Procedure

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

**Territory form**

| Fields | Description |
|---|---|
| Name | Name of the territory. |
| Description | Short description of the territory. |

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| Fields | Description |
|---|---|
| Model | Name of the territory model to which to map this territory. |
| Level | The associated Territory Level. |
| Parent | Name of the parent territory to create the territory hierarchy.<br><br>If no parent territory is specified, this territory will serve as the highest-level (parent) territory. |
| Rank | Rank of the territories. Helps in the automated assignment algorithm where the territory with the lowest rank becomes the primary territory. |
| Territory Code | A unique identifier assigned to each territory. |
| Active | Select the Active check box to indicate the territory is available for assignments. |
| Cascade condition | Used during assignment rules, this flag indicates whether the parent territory conditions must be evaluated for all the child territories (under its hierarchy). |

4. Select **Submit**.
   The new territory is created.

**Related topics**

Using Sales Territory Management

Sales Territory Management

### Configuring resources for territories

Territory managers and members to the territory are added with their appropriate responsibility. Managers of the territory get access to manage the members in their hierarchy. Members get access via the roles and the linked responsibility to the CRM entities that belong to the hierarchy.

**Related topics**

Using Sales Territory Management

Sales Territory Management

### Add managers to a territory

Managers get access to a territory to manage members of the assigned territory and its child territories.

**Before you begin**
Role required: sales territory admin

**Procedure**

1. Navigate to **All** > **Sales Territory Management** > **Territory**.
2. From the territories list, open the territory where you want to add managers.

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3. In the related list for the Territory Managers, select **New**.
4. On the form, fill in the fields.

**Territory Manager form**

| Fields | Description |
|---|---|
| Territory | Name of the territory. |
| Manager | Name of the manager.<br>**Note:** The added user must have Sales Territory Manager role to access the territory hierarchy. |
| From | Manage territory from the selected date. |
| Manager Type | Select the type either Territory manager or Resource manager. |
| Primary | Option to indicate whether the manager is primarily dedicated for all activities in the territory. |
| To | Manage territory until the selected date. |

5. Select **Submit**.

   The territory manager is added to the territory and can manage the territory members of the territory and child territories.

## Result

The manager appears in the Territory Managers related list when you open the territory.

### Related topics

Using Sales Territory Management

Sales Territory Management

### Add members to a territory

Add territory members with their appropriate responsibility to get access to the CRM entities belonging to the territory.

## Before you begin

Role required: sales territory admin, sales territory manager

## About this task

- A territory comprises a team, where different members play different roles.
- A member can belong to one or more territories, where they can play different/same roles.
- A member can have different roles in the same territory. Their membership and role grant them access and permission to the CRM entities. The access is driven by the responsibility framework, for additional information see Create a responsibility definition.
- Only active members during their membership period get access to the CRM entities.

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## Procedure

1. Navigate to **All** > **Sales Territory Management** > **Territory**.
2. From the territories list, open the territory where you want to add members and member roles.
3. On the Territory Members tab, select **New**.
4. On the form, fill in the fields.

### Territory Membership Override form

| Fields | Description |
|---|---|
| Territory | Name of the territory.<br><br>This field is automatically set to the territory for which the member is added. |
| User | Name of the member. |
| From | Date from which the member is available to work in the territory. |
| Membership type | Type of membership for the member, either primary or secondary. |
| Active | Option to indicate whether the member is available to work in the territory. |
| To | Date until which the member is available to work in the territory. |

The member appears in the Territory Members related list.

5. On the Territory Members tab, select ⓘ and **Open Record** of the territory member to add Territory Member Roles.
6. On Territory Membership Responsibilities, select **New**.
7. On the form, fill in the fields.

### Territory Membership Responsibility form

| Fields | Description |
|---|---|
| Territory Membership | Name of the member. |
| Member Role | Role of the team member. Following member roles (related party types) and responsibility are shipped by default:<br>○ Account Executive<br>○ Solution Sales Executive<br>○ Price Band Approver<br><br>However, more roles can be configured. For more information, see Create related party configurations. |

The member with the defined role appears in the Territory Member roles related list.

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**Related topics**

Using Sales Territory Management

Sales Territory Management

### Configure Properties

To put a sales territory model into use at the CRM entities, enter the sys_id of an active sales territory model. By default, this model and its territories will be utilized for sales territory assignments.

**Before you begin**
Role required: sales territory admin

**Procedure**

1. Navigate to **All** > **Sales Territory Management** > **Properties**.
2. On the Sales Territory Management Properties form, enter the sys_id of an active sales territory model.

   **Note:** By default, this model and its territories are used for sales territory assignments.

3. Select **Save**.

**Related topics**

Using Sales Territory Management

Sales Territory Management

### Run Assignments

Run sales territory assignments to assign CRM entities to the most eligible territory. Each territory is checked against its own or cascaded territory conditions related to the CRM entity.

**Before you begin**
Role required: sales territory admin

- Complete all prerequisite configuration steps, such as activating the sales territory model, configuring territory levels, and defining territory conditions.

**Procedure**

1. Navigate to **All** > **Sales Territory Management** > **Run Assignments**.
2. Select an active sales territory model or territory to run assignment rules:
   - If active sales territory model is selected, all selected sources and their data are evaluated against the complete territory hierarchy. Existing assigned territory will be replaced with the newly evaluated one.
   - If active territory is selected, only those entities with no assigned territory will be evaluated against the territory condition.
3. Select one or more source tables to run assignment rules on:
   - Opportunity (sn_opty_mgmt_core_opportunity)
   - Lead (sn_lead_mgmt_core_lead)
   - Consumer (csm_consumer)
   - Account (customer_account)

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4. Select **Run Assignment Rules**.

> **Note:** After an account is created, the assignment algorithm runs automatically and assigns the relevant territories to that account.

**Result**
Sales Territory Management is assigned in the CRM entities. All the Sales Territory admins will receive an email notification when the job is completed. The selected sources entities are assigned to a territory if they fulfill the territory conditions.

**Related topics**

Using Sales Territory Management

Sales Territory Management

## Configuring Activity Management

Install and configure the necessary plugins for enabling Activity Management features.

> **Important:**
>
> To use personal email mailbox in Activity Management, you must install the User Mailbox Integration plugin (com.glide.email.user_mailbox.integration) on your ServiceNow instance. For setup instructions, see Personal corporate mailbox.

The Omnichannel Callback for Customer Service Management (com.sn_omnichannel_callback) application must be installed with CRM Touchpoints to enable the click-to-call feature so agents can call customers from the touchpoint record.

## Configuring CRM Touchpoints

Install and configure the CRM Touchpoints application. It provides a unified system for capturing and tracking customer engagements for your sales and service teams while providing leadership with visibility into representative activity and engagement effectiveness.

1. Install CRM Touchpoints

   You can install the CRM Touchpoints application (com.sn_crm_touchpoint) if you have the admin role.

2. Create custom touchpoint types

   Create touchpoint types tailored to your sales organization's workflow to capture activities beyond the standard Discovery, Demo, and CBR types.

## Configuring CRM Outlook Add-in

Install and configure the CRM Outlook Add-in application to make the ServiceNow CRM for Outlook add-in available to your users.

1. Install CRM Outlook Add-in

   You can install the CRM Outlook Add-in application (com.sn_crm_outlook) if you have the admin role.

2. Configure CRM access from Microsoft Outlook

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Download and install the ServiceNow CRM for Outlook add-in to access and manage CRM records directly from your Outlook inbox, eliminating the need to switch between applications.

3. Configure email promotion rules for Activity Management

   Configure email promotion rules to automatically process staged emails for manual association through the ServiceNow CRM for Outlook add-in or to trigger AI-powered auto-association with existing sales entities.

## Configuring AI sales activity association

Install and configure the AI sales activity association application to automatically link sales-related emails to existing CRM entities such as Lead, Opportunity, Account, or Contact.

**Note:** Installing AI sales activity association also installs CRM Outlook Add-in as a dependency. This is useful when a sales representative wants to manually associate an email to a CRM entity which the agentic workflow missed or ignored for reasons such as missing CRM entity or lower confidence score.

1. Install AI sales activity association

   You can install the AI sales activity association application (com.sn_act_assoc_agent) if you have the admin role.

2. Personal corporate mailbox

   Install and configure the User Mailbox Integration plugin (com.glide.email.user_mailbox.integration) so that emails from sales representative's personal mailbox can be imported into the Staged Email [sys_email_staging] table.

3. Configure email promotion rules for Activity Management

   Configure email promotion rules to automatically process staged emails for manual association through the ServiceNow CRM for Outlook add-in or to trigger AI-powered auto-association with existing sales entities.

### Related topics

Using Activity Management

Activity Management

Activity Management reference

### Install CRM Touchpoints

You can install the CRM Touchpoints application (com.sn_crm_touchpoint) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

### Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the CRM Touchpoint application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

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### About this task

The following items are installed with CRM Touchpoints:

- Roles
- Tables

For more information, see Components installed with CRM Touchpoints.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the CRM Touchpoints application (sn_crm_touchpoint) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

### What to do next

Create custom touchpoint types

#### Related topics

Using Activity Management

Activity Management

## Create custom touchpoint types

Create touchpoint types in Activity Management tailored to your sales organization's workflow to capture activities beyond the standard Discovery, Demo, and CBR types.

### Before you begin

Role required: sn_crm_touchpoint.admin

### About this task

Several touchpoint types are available by default. To view the available options, see Create new CRM touchpoint form.

### Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. In the **Label** search field, enter `CRM Touchpoint` and select the **CRM Touchpoint** [sn_crm_touchpoint_touchpoint] table.

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3. In the **Column label** search field, enter `Subcategory` and select the record.
4. If a message appears about the application scope, select **here** to be able to edit the record.
5. Navigate to the **Choices** tab under Related Links.
6. Select **New**.
7. On the form, fill in the fields.

**Choice New record form**

| Field | Description |
|---|---|
| Label | User#visible name for the type shown in the Type drop-down menu on the CRM Touchpoints form. For example, Business Value Assessment (BVA). |
| Value | Internal value stored in the database when a choice is selected. |

8. Select **Submit**.

### Related topics

Using Activity Management

Activity Management

### Install CRM Outlook Add-in

You can install the CRM Outlook Add-in application (com.sn_crm_outlook) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

## Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the CRM Outlook Add-in application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

## About this task

User roles are installed with CRM Outlook Add-in. For more information, see Components installed with the CRM Outlook Add-in.

## Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the CRM Outlook Add-in application (sn_crm_outlook) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.

3. Select a version from the list and select **Install**.

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In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

### What to do next

- Configure CRM access from Microsoft Outlook
- Configure email promotion rules for Activity Management

### Related topics

Using Activity Management

Activity Management

## Configure CRM access from Microsoft Outlook

Download and install the ServiceNow CRM for Outlook add-in to access and manage CRM records directly from your Microsoft Outlook inbox, eliminating the need to switch between applications.

### Before you begin

The CRM Outlook Add-in must be installed on your ServiceNow instance. For more information, see Install CRM Outlook Add-in.

Role required: sn_crm_outlook.crm_outlook_admin

### About this task

This procedure describes how to install the ServiceNow CRM for Outlook add-in on your Microsoft Outlook client. For information about how to deploy and centrally manage the add-in across your organization, refer to the Microsoft Outlook product documentation on deploying and publishing Office add-ins.

### Procedure

1. Log in to your ServiceNow instance.
2. Download the manifest file.
   a. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Office Add-in Manifests**.
   b. Select **ServiceNow CRM for Outlook** from the list.
   c. Download the file on your computer by selecting **Download Manifest**.
      You can also provide the `manifest.xml` file to your agents so they can install the add-in to their Microsoft Outlook clients.
3. Install the ServiceNow CRM for Outlook add-in on your Microsoft Outlook client.

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a. Open your Microsoft Outlook client.

b. On the Microsoft Outlook client, select the See more items icon ••• and select **Get Add-ins**.

c. Navigate to **My add-ins** > **Custom Addins**.

d. From the **Add a custom add-in** drop-down menu, select **Add from File**.

e. Browse to and select the manifest file.

f. Review the warning and select **Install**.
The ServiceNow CRM for Outlook add-in is installed and available in your Microsoft Outlook client.

### What to do next
Log in to the ServiceNow CRM for Outlook add-in to start using it.

#### Related topics
Using Activity Management

Activity Management

## Install AI sales activity association
You can install the AI sales activity association application (com.sn_act_assoc_agent) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

### Before you begin
- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the AI sales activity association application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

### About this task
The following store applications and plugins are installed as a dependency with AI sales activity association:

- Opportunity Management [com.sn_l2c_oppty_mgmt]
- ServiceNow Otto for Platform [com.sn.now.platform]
- User Mailbox Integration [com.glide.email.user_mailbox.integration]
- CRM Outlook Add-in [com.sn_crm_outlook_addin]
- Notifications Email Agents [com.sn_notif_agents]

For associating emails to Lead records, install Lead Management separately.

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### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the AI sales activity association application (com.sn_act_assoc_agent) using the filter criteria and search bar.

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

   A list of the versions available to you is displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

### What to do next

- Index the Lead [sn_lead_mgmt_core_lead] and Opportunity [sn_opty_mgmt_core_opportunity] tables, so that the records from these tables are searchable by the agentic AI workflow. For more information, see Perform a full table index or reindex for a single AI Search indexed source.
- Configure email promotion rules for Activity Management

#### Related topics

Indexing content from AI Search indexed sources

Install Lead Management

## Configure email promotion rules for Activity Management

Configure email promotion rules to automatically process staged emails for manual association through the ServiceNow CRM for Outlook add-in or to trigger AI-powered auto-association with existing sales entities.

### Before you begin

**Note:** Configuring email promotion is required if you're on CRM Outlook Add-in application version 1.0.1.

Role required: admin

### About this task

Email promotion rules enable the following workflows for managing staged emails:

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- Manual email association: Agents use the ServiceNow CRM for Outlook add-in to associate emails with CRM records, triggering promotion from the Staged Email [sys_email_staging] table to the Email [sys_email] table.
- AI auto-association: When an agent receives an email with no existing CRM record association, the promotion rule triggers the AI sales activity association workflow to automatically match the email to a relevant sales entity (Lead, Opportunity, Contact, or Account) using semantic analysis and intent detection.

### Procedure

1. Log in to your ServiceNow instance.
2. Add a promotion rule.
   a. Set the application scope to **Global**.
   b. Navigate to **All** > **User Mailboxes** > **Promotion Rules**.
   c. Select **New**.
   d. On the form, fill in the fields.

**Email Promotion Rule form**

| Field | Value |
|---|---|
| Name | <promotion rule name> |
| Condition | (current.target_table == "<table_name>") && !gs.nil(current.instance)<br><br>For example, (current.target_table == "sn_lead_mgmt_core_lead") && !gs.nil(current.instance) |
| Promotion strategy | Promote and run Triggers |

   e. Select **Submit**.
3. Create a business rule on the Staged Email [sys_email_staging] table.
   a. Set the application scope to **Global**.
   b. Navigate to **All** > **System Definition** > **Business Rules**.
   c. Select **New**.
   d. On the form, fill in the fields.

**Business Rule form**

| Field | Value |
|---|---|
| Name | <business rule name> |

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| Field | Value |
|---|---|
| | For example, Trigger promotion rules on CRM emails. |
| Table | Staged Email [sys_email_staging] |
| Active | Selected |
| Advanced | Selected |

e. In the **When to run** tab, enter the following values.

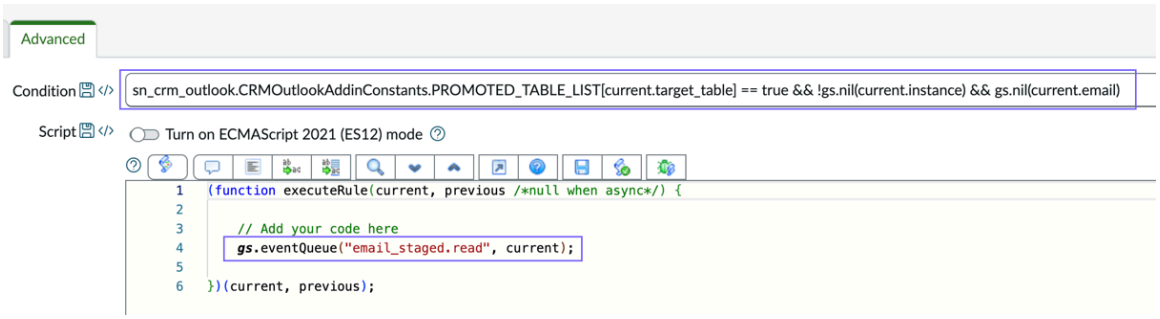
| Field | Value |
|---|---|
| When | after |
| Insert | Selected |
| Update | Selected |
| Filter Conditions | [Target] [changes] AND [Target table] [changes] |

f. In the **Advanced** tab, add the following values to trigger email promotion processing for staged CRM emails.

| Field | Value |
|---|---|
| Condition | sn_crm_outlook.CRMOutlookAddinConstants.PROMOTED_TABLE_LIST[current.target_table] == true && !gs.nil(current.instance) && gs.nil(current.email) |
| Script | gs.eventQueue("email_staged.read", current); |

The script event initiates asynchronous processing to promote the staged email and trigger the appropriate association workflow.

The following image shows the Advanced tab with Condition and Script fields populated.




g. Select **Submit**.

## Result

Staged emails that meet the specified conditions are processed according to the configured promotion rules. Promoted emails appear in the Emails tab on manually associated records or in the activity stream on AI-matched records.

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**Related topics**

Classic Business rules

Track emails linked from Microsoft Outlook

## Responsibility-based access to Sales CRM entities

Responsibility-based access grants Sales CRM users access to records based on the responsibility they hold for an opportunity, account, or sales territory. Instead of giving users broad access to every lead, opportunity, account, contact, quote, or CRM Touchpoints, the responsibility framework scopes access to records connected to the user's opportunity team or sales territory membership.

## How users get access to Sales CRM records

Sales CRM supports the following access patterns:

- Blanket access: Users with broad roles, such as the lead writer [sn_lead_mgmt_core.lead_writer] or CRM touchpoint writer [sn_crm_touchpoint.touchpoint_writer] role, can view or work with every record of that type, regardless of the opportunity, account, or sales territory that the record is associated with. Use this access pattern for users who need broad visibility across sales records.
- Responsibility-based access: Users get access based on the responsibility they hold in a sales territory or on an opportunity team. For example, users can be added as Account Executives, Solution Sales Executives, or Price Band Approvers. The responsibility framework uses those memberships to grant access only to the records that are connected to the user's responsibility. Multiple users can hold different responsibilities within the same territory. Different users can join an opportunity team, such as an overlay sales representative or a Solution Sales Executive from outside the opportunity's territory.

Users with the sales restricted agent [sn_sales_common.sales_restricted_agent] role can see and manage only the CRM records that are connected to what they are responsible for.

## How responsibility-based access works

Responsibility-based access uses multiple configuration layers to determine whether a user can access a record.

### Configuration layers for responsibility-based access

| Configuration element | Description | Example |
|---|---|---|
| Related party configuration | Defines the business relationship that a user can have with a CRM record. | Account Executive, Solution Sales Executive, Price Band Approver |
| Relationship table | Stores the record that connects the user to an opportunity or sales territory. | • Opportunity Team Member [sn_opty_mgmt_core_opportunity_team_member] table<br>• Territory Membership Responsibility [sn_tp_crm_extn_territory_membership_responsibility] table |

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**Configuration layers for responsibility-based access (continued)**

| Configuration element | Description | Example |
|---|---|---|
| Responsibility definition | Defines the responsibility assigned to the user through the relationship. | Account Executive |
| Responsibility access configuration | Defines which tables the responsibility can access, the access level for each table, the required role, and the relationship path. | Account Executive can read and write Opportunity records |
| Required role | Confirms that the user has the necessary role required for the configuration to apply. | Sales restricted agent [sn_sales_common.sales_restricted_agent] role |

When these conditions match, the user receives the configured access to records in the accessible table.

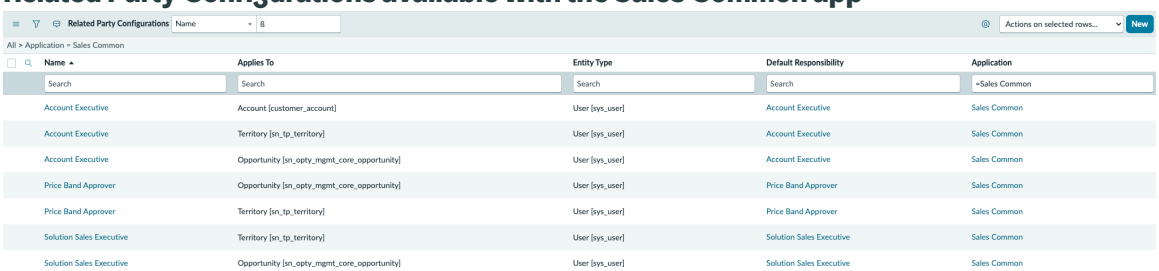
## Relationship between related party and responsibility

A related party describes the user's business relationship to a record. A responsibility determines what access the user can receive because of that relationship.

For example, when a user is added to an opportunity as an Account Executive, the record on the Opportunity Team Member [sn_opty_mgmt_core_opportunity_team_member] table connects the user to the opportunity. The Account Executive responsibility then determines which related CRM records the user can access, such as the opportunity, account, contact, quote, or CRM Touchpoints records.

The responsibility name alone does not grant access. Access is granted only when a responsibility access configuration maps the responsibility to an accessible table, access level, required role, and relationship table.

**Related Party Configurations available with the Sales Common app**

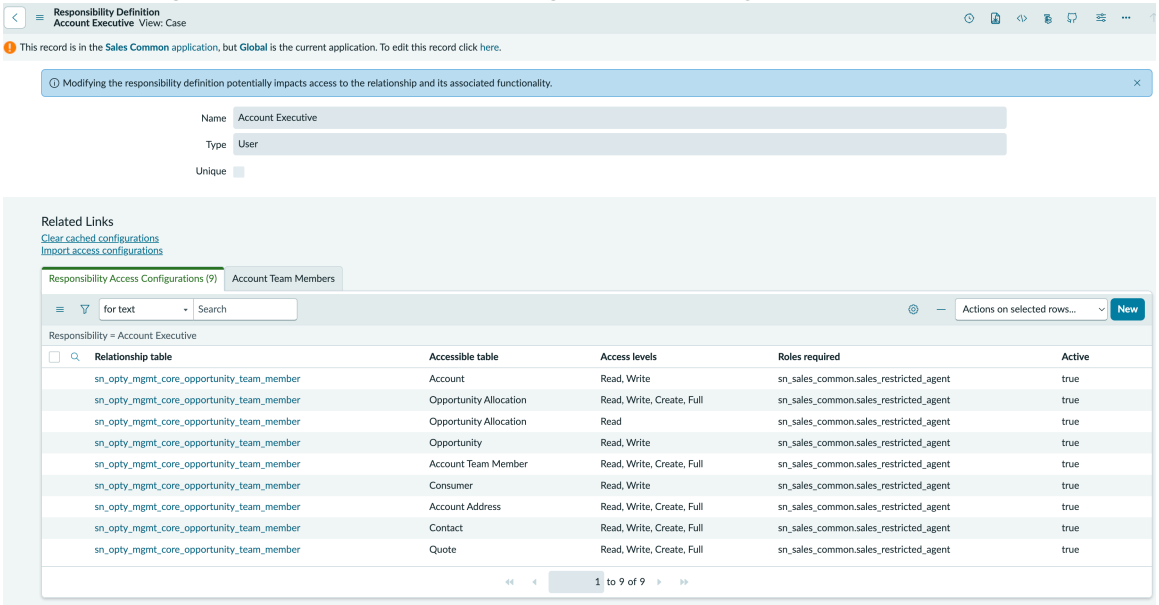



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## Example: Account Executive access

The Account Executive responsibility can have multiple responsibility access configuration records. Each configuration grants access to one accessible table through a specific relationship table.

### Responsibility Definition and Responsibility Access Configurations




For example, if a user is connected to an opportunity through the Opportunity Team Member [sn_opty_mgmt_core_opportunity_team_member] table and has the Account Executive responsibility, the responsibility access configuration can grant the user read and write access to the Opportunity tables. Other configuration rows can grant access to related tables, such as Account, Contact, Quote, Account Address, Consumer, and Opportunity Allocation.

Access levels apply to records in the accessible table, not to the responsibility or relationship table. For example, if the accessible table is Leads and the access levels are Read, Write, and Create, users with the matching responsibility and required role can read, update, and create quote records that are reachable through the configured relationship.

## Relationship tables

The relationship table identifies where the user's responsibility is recorded. In Sales CRM, responsibility-based access typically uses one of these relationship paths:

### Relationship tables for Responsibility Access Configuration in Sales CRM

| Relationship path | When it applies |
|---|---|
| Opportunity Team Member [sn_opty_mgmt_core_opportunity_team_member] | Grants access based on a user's responsibility on an opportunity team. |
| Territory Membership Responsibility [sn_tp_crm_extn_territory_membership_responsibility] | Grants access based on a user's responsibility in a sales territory. |

For example, opportunity-based access uses the Opportunity Team Member relationship path to determine whether a user is connected to the opportunity. Territory-based access uses the Sales Territory Member relationship path to determine whether a user is connected to the territory.

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## Accessible tables

The accessible table is the table on which access is being granted. A single responsibility can have multiple responsibility access configuration records, each for a different accessible table. For example, the Account Executive responsibility can grant different levels of access to these accessible tables:

- Opportunity
- Account
- Account Team Member
- Account Address
- Contact
- Consumer
- Quote
- Opportunity Allocation
- CRM Touchpoints

Each accessible table can have its own access level and optional filter. This lets administrators grant broader access to some records and more limited access to others.

## CRM Touchpoints access through the responsibility framework

The sales restricted agent [sn_sales_common.sales_restricted_agent] role inherits the lead and opportunity responsibility granular roles by default. Therefore, the responsibility framework can evaluate access to lead and opportunity records. Other CRM entities need their own granular roles added before the framework can evaluate access to them. For example, on CRM Touchpoints, the following granular roles make CRM Touchpoints available to the framework:

- CRM touchpoint responsibility read granular [sn_crm_touchpoint.touchpoint_responsibility_read_granular]: Provides read access to CRM Touchpoints through the responsibility framework.
- CRM touchpoint responsibility write granular [sn_crm_touchpoint.touchpoint_responsibility_write_granular]: Provides write access to CRM Touchpoints through the responsibility framework. This role includes the read granular role.

To extend CRM Touchpoints access to a responsibility definition, such as Account Executive or Solution Sales Executive, an administrator updates or creates a responsibility access configuration for that responsibility. The administrator selects CRM Touchpoints [sn_crm_touchpoint_touchpoint] as the accessible table, selects the access levels, and optionally adds an accessible table filter to limit access by type, state, or another condition. For more information, see Create a responsibility access configuration in Sales CRM.

For example, an administrator can configure the Solution Sales Executive responsibility so that users can edit only CRM Touchpoints of type Solution review while other CRM Touchpoints types remain read-only.

**Note:** Administrators who assign persona roles such as Solution Sales Executive or Account Executive must also ensure that sales restricted agent [sn_sales_common.sales_restricted_agent] role includes the CRM touchpoint responsibility write granular [sn_crm_touchpoint.touchpoint_responsibility_write_granular] role for the intended access.

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**Related topics**

- Components installed with Sales Common
- Components installed with CRM Touchpoints
- Related parties, responsibilities, and access included with Sales Common

### Related parties, responsibilities, and access included with Sales Common

Default related party configurations, responsibilities, and access levels included with the Sales Common app.

## Default related parties and responsibilities

The following related parties and responsibilities are available with the Sales Common (sn_sales_common) app.

**Default related parties and responsibilities**

| Related party configuration | Applies to | Default responsibility |
|---|---|---|
| Account Executive | • Territory [sn_tp_territory]<br>• Opportunity [sn_opty_mgmt_core_opportunity] | Account Executive |
| Price Band Approver | • Territory [sn_tp_territory]<br>• Opportunity [sn_opty_mgmt_core_opportunity] | Price Band Approver |
| Solution Sales Executive | • Territory [sn_tp_territory]<br>• Opportunity [sn_opty_mgmt_core_opportunity] | Solution Sales Executive |

The entity type for every related party configuration listed here is User [sys_user].

## Responsibility Access Configuration fields

Use responsibility access configurations to define what each responsibility can access. For the list of Responsibility Access Configuration form fields, see Configure access through the responsibility access configuration.

## Responsibility access summary

The following table summarizes how the default responsibilities are used for responsibility-based access. Access is granted only when the user has the required role and is connected to a record through the configured relationship table.

| Responsibility | Used through relationship | Required role | Typical access intent |
|---|---|---|---|
| Account Executive | Opportunity Team | sales restricted agent [sn_sales_common.sales_restricted_agent] | Grants working access to |

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| Responsibility | Used through relationship | Required role | Typical access intent |
|---|---|---|---|
| | Member or Territory Membership Responsibility | | opportunities and related CRM records, such as accounts, contacts, quotes, and opportunity allocations. |
| Solution Sales Executive | Opportunity Team Member or Territory Membership Responsibility | sales restricted agent [sn_sales_common.sales_restricted_agent] | Grants access to opportunities and related CRM records for solution selling responsibilities. |
| Price Band Approver | Opportunity Team Member or Territory Membership Responsibility | sales restricted agent [sn_sales_common.sales_restricted_agent] | Grants visibility to opportunities and related records that require price band review or approval. |

**Note:** The Sales Territory Management plugin must be installed on your instance to configure or use Territory Membership Responsibility.

Each of the following responsibility uses the sales restricted agent (sn_sales_common.sales_restricted_agent) role and is active by default, through either relationship table:

- Opportunity Team Member [sn_opty_mgmt_core_opportunity_team_member]
- Territory Membership Responsibility [sn_tp_crm_extn_territory_membership_responsibility]

### Account Executive

The Account Executive gets the following access:

- Read and write access to Account and Consumer.
- Read, write, create, and full access to Account Address, Account Team Member, Contact, and Quote.

Access to Opportunity and Opportunity Allocation depends on the relationship table, listed in the following table.

#### Account Executive access that depends on the relationship table

| Accessible table | Via Opportunity Team Member | Via Territory Membership Responsibility |
|---|---|---|
| Opportunity | Read, write | Read, write, create, full |
| Opportunity Allocation | Read | Read, write, create, full |

### Solution Sales Executive

The Solution Sales Executive gets read access to Account, Account Address, Account Team Member, Consumer, Contact, and Opportunity Allocation, and read,

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write, create, and full access to Quote, through either relationship table. Access to Opportunity depends on the relationship table, listed in the following table.

**Solution Sales Executive access that depends on the relationship table**

| Accessible table | Via Opportunity Team Member | Via Territory Membership Responsibility |
|---|---|---|
| Opportunity | Read, write | Read, write, create, full |

**Price Band Approver**

Price Band Approver gets read-only access to Account, Account Address, Account Team Member, Consumer, Contact, Opportunity, Opportunity Allocation, and Quote, through either relationship table.

## Custom responsibility access configurations

You can use the default configurations provided with Sales Common or create additional responsibility access configurations based on your organization's access requirements. For more information, see:

- Create a responsibility definition
- Creating a responsibility access configuration
- Create related party configurations

### Create a responsibility access configuration in Sales CRM

Grant a responsibility definition table-level access to leads, opportunities, and related entities by creating or updating a responsibility access configuration.

### Before you begin

The responsibility definition that you want to grant access for already exists. This task configures access for an existing responsibility definition. It does not create one. For the responsibility definitions provided with Sales Common, see Related parties, responsibilities, and access included with Sales Common.

Role required: admin

### About this task

A responsibility access configuration determines which records a responsibility can access. Each configuration maps a responsibility to an accessible table, access level, required role, and relationship table.

For example, you can configure the Account Executive responsibility so that users connected through the Opportunity Team Member [sn_opty_mgmt_core_opportunity_team_member] table can read and write Opportunity records and work with related Quote records. For more information about how the responsibility framework uses these records to grant access to leads, opportunities, accounts, contacts, or CRM Touchpoints, see Responsibility-based access to Sales CRM entities.

### Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Responsibility Definitions**.
2. Select the responsibility definition that you want to configure access for.

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**Example**
Solution Sales Executive

3. Set the application scope to the application containing the accessible table.

   For example, if you want to add a responsibility definition on any of the CRM Touchpoints tables, set the application scope to CRM Touchpoints.

   You can change the application scope using the application picker in the Unified Navigation bar.

   **Note:** The Sales Common application scope must be set only for the following entities: Account, Consumer, and Contact.

4. In the Responsibility Access Configurations related list, select an existing record to update it, or select **New** to create one.
   A responsibility definition can have multiple responsibility access configuration records. Each record grants access to one accessible table through one relationship path. For example, the Account Executive responsibility can have one configuration for Opportunity access, another for Quote access, and another for Account access.
5. In the **Responsibility** field, confirm or select the responsibility definition that this configuration applies to.
6. Define what this configuration grants access to, and who can use it.

   a. In the **Roles required** field, add the roles that a user must have for this configuration to apply.

      **Example**
      **sn_sales_common.sales_restricted_agent**

   b. Select the **Active** check box so the configuration takes effect.

   c. On the Grant access to tab, in the **Access levels** field, select the level of access to grant.

      The available options are:

      - Read
      - Write
      - Create
      - Full

      You can select more than one access level, such as Read and Write, depending on what the responsibility requires.

   d. In the **Accessible table** field, select the table that this access level applies to.

      **Example**

      - Opportunity
      - Account

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- Consumer
- Quote

**Note:** Access levels apply to records in the accessible table. For example, if the accessible table is Quote and the selected access levels are Read, Write, and Create, matching users can read, update, and create quote records that are reachable through the configured relationship.

7. In the **Accessible table filter** field, define the records within the accessible table that the configuration grants access to.
   This filter narrows the records within the accessible table that the access grant applies to.

   a. Select **Add Filter Condition** and use the field picker to choose the field to filter on.
   Leave the filter empty only when the responsibility should apply to all reachable records in the accessible table. Add a filter when access should be limited to records that match specific conditions, such as type or state.

   b. **Optional:** Add more filter conditions by selecting **Add OR Clause**.

8. On the Through relationship tab, define the relationship where the selected responsibility will be used to grant access.
   - Opportunity Team Member [sn_opty_mgmt_core_opportunity_team_member]
   - Territory Membership Responsibility [sn_tp_crm_extn_territory_membership_responsibility]
9. On the Using relationship association tab, define the association between the accessible and relationship tables.
   For more information, see Creating a responsibility access configuration.
10. Select **Submit**.

### Result

Users who have the required roles and are connected to a record through the responsibility's relationship table now have the access levels that this configuration grants to the accessible table.

**Note:** If existing access does not reflect your changes right away, use the Clear cached configurations or Run Point Scan related links on the responsibility access configuration record to refresh access.

### Related topics

Components installed with Sales Territory Management

Components installed with Opportunity Management

Components installed with CRM Touchpoints

Components installed with Sales Common

## Configuring the configure, price, quote applications

Learn how to configure the configure, price, quote applications to streamline complex product, pricing, and quote-to-contract workflows.

This process typically includes configuring the CPQ or the configurator, enabling quote management, and establishing contract and entitlements and sales agreement workflows to streamline complex sales cycles and improve quoting efficiency.

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1. Setting up CPQ Configurator

   Plan and configure the implementation of the advanced configurator in CPQ. The advanced configurator runs in the CRM Workspace and the Business Portal for customers placing orders.

2. Configuring CPQ Configurator
3. (Optional) Setting up the Configurator

   Set up the base configurator and control the product options displayed in the product configurator interface by using the Open State Management API framework.

4. Configuring product pricing

   Use the Pricing Management application to create the price lists and price list lines, define pricing adjustments, and manage other features that control pricing for product offerings. Product pricing is used by your sales and order agents when creating opportunities, quotes, and sales orders in Sales Customer Relationship Management.

5. Configuring ServiceNow Quote Experience

   Install the Quote Management application to enable your sales agents to generate sales quotes for products or services that a customer wants to buy.

6. Configure Customer Contracts and Entitlements

   Configure the Customer Contracts and Entitlements application to configure and display customer service contracts and entitlements.

7. Configure Sales Agreement Management

   Activate the Sales Agreement Management plugin to enable users to create and manage sales agreements. This application enables users to create sales agreements between a buyer and a seller for future transactions.

## Setting up CPQ Configurator

Set up CPQ Configurator and ServiceNow Quote Experience to define products, quotes, pricing rules, complex product bundles, and enable other capabilities.

The Configurator streamlines the quoting process by automating configuration logic, reducing manual quote creation errors, and ensuring consistent application of business rules across all quotes.

You can set up the Configurator using one of the following approaches.

- Configure CPQ Configurator using guided setup

  Use the guided setup to configure the Configurator step by step. The guided setup walks you through each required setting in a structured sequence, providing context and validation at each stage.

- Set up ServiceNow CPQ Configurator without guided setup

  Configure each setting individually without guided assistance. This approach provides full flexibility and control over configuration order and settings.

### Configure CPQ Configurator using guided setup

The CPQ Configurator guided setup provides a sequence of tasks that help you configure and implement the Configurator.

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Product catalog administrators and technicians run CPQ Configurator in the CSM Configurable Workspace, while users using self-service features use it in the Business Portal.

1. Complete the prerequisites. For more information, see Prerequisites for setting up CPQ.
2. Configure CPQ Configurator using the guided setup. For more information, see Set up CPQ using guided setup.

### Prerequisites for setting up CPQ

Verify that you have completed the prerequisites before setting up the Configurator.

#### Before you begin

Role required: admin

#### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Install the following plugins searching by name or ID; if the plugin does not appear in the results, request it from the ServiceNow Store.
   Select a version and **Load demo data** as required.
   - CSM and FSM Workspace Foundation(sn_cwf_wrkspc)
   - Order Management (sn_ind_tmt_orm)
   - Product Catalog Management Core (sn_prd_pm)
   - Price Management (sn_csm_pricing)
   - Quote Management Application (sn_quote_mgmt)
   - Product Configurator (sn_prd_config_ui)
   - Customer Life Cycle Management Workflows (sn_l2c_cust_flows)
   - Product and pricing rules (sn_csm_price_mtrx)
   - Opportunity Management Application (sn_opty_mgmt)
   - Product Offering Recommendations (sn_prd_pm_ra)
   - Order Management Portal (sn_ord_mgmt_portal)
   - Order Operations Case Management (sn_order_case)
   - Case Management for Invoice Operations (sn_csm_invoice)
   - Sales Cart (sn_sales_cart)
   - Customer Life Cycle Managment Self Service (sn_clm_selfservice)
   - Customer Service Portal (sn_csm_portal)
   - CPQ Integration (sn_cpq_intg)
   - CPQ Configurator (sn_cpq_config)
   - Contracts and Entitlement Workflows (sn_contract_ent_wf)
   - Sales Quota Application (sn_quota_app)

   The following are dependent plugins that are installed with the above mentioned plugins. Review and install the plugins if they aren't installed already.
   - Product Catalog Management Core (sn_prd_pm) - installed with Price Management, Product Configurator, Product Offering Recommendations
   - Customer Life Cycle Management Workflows (sn_l2c_cust_flows) - installed with Order management and Quote Management Application, Contracts and Entitlement Workflows

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- Price Management (sn_csm_pricing) - installed with Product and pricing rules, Sales Cart
- Order Management (sn_ind_tmt_orm) - installed with Order Management Portal, Order Operations Case Management
- CPQ Integration (sn_cpq_intg) - installed with CPQ Configurator

3. Gather information regarding your instance.

   a. Navigate to `https://<service_instance_url>/oauth_entity.do?sys_id=3b119df83b566210a0c0989e53e45a15` for the OAuth Entity record to retrieve the Client ID and Secret.

      **Note:** Replace `<service_instance_url>` with your ServiceNow instance in the URL mentioned above.

   b. Verify the CPQ Admin UI Application Registry exists with a **ClientID** and **Client secret**.

   c. Select the lock icon of the **Client secret** field to make it visible.

   d. Copy the#**Client ID** and **Client secret** if exists; use them to request a CPQ instance.

4. Request a CPQ instance using the following the steps.

   a. Navigate to Now Support.

   b. Select **Create a case**.

   c. In the ServiceNow Otto panel, select **Create a case**.

   d. Select **Service request**.

   e. In the subject field, enter `Request a new CPQ instance` and select **Next**.

   f. Choose your instance and select **Next**.

      **Note:** Contact Primary Customer Administrator (PCA) if your instance is not listed in the instances list.

   g. Select **Continue**.

   h. In the **Describe the issue** field, enter the following details.

      - Client ID and Client Secret fetched from Step 3
      - Primary Business Contact (name and email address)
      - Instance Owner (name and email address)
      - ServiceNow Instance URL

   i. Select **Continue**.

   j. Review the summary and select **Confirm and Submit**.

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### Result
You will receive an email with the CPQ details. Select the **View request** to access the support portal and set a password.

**Note:** You can proceed with the guided setup only after you receive CPQ details.

### What to do next
Set up CPQ using guided setup

#### Set up CPQ using guided setup

The guided setup organizes the configuration activities into modules and tracks completion as each activity is completed.

### Before you begin
Role required: admin

Complete the prerequisites. For more information, see Prerequisites for setting up CPQ.

### About this task
Configure the CPQ Configurator in a logical sequence and track your progress from a single. This guided setup assists you with the basic configuration that is required to start using the Configurator.

**Note:**

- You can move to the next module or an activity within a module only after completing the previous step.
- When you edit a completed module or activity, all subsequent activities and modules are marked as incomplete even if previously finished. Their configuration now depends on the updated settings. You're required to complete the subsequent modules or activities again.

### Procedure

1. Navigate to the guided setup using either of the following ways.
   - For either a new configuration or to reconfigure navigate to **All** > **CPQ Integration** > **Start guided setup**.

     **Important:** If you have already set up the Configurator using the guided setup and want to reconfigure, access the guided setup only through the navigation **All** > **CPQ Integration** > **Start guided setup**.

   - To configure for the first time, you can alternatively navigate to **All** > **System Applications** > **All Available Applications** > **All** > **CPQ Integration** > **Get started** > **Configure**.
2. Navigate to **All** > **CPQ Integration** > **Start guided setup**.

   **Note:** If you're setting up CPQ for the first time, you can also access the guided setup by navigating to **All** > **System Applications** > **All Available Applications** > **All** > **CPQ Integration** > **Get started** > **Configure**.

3. Select the **Prerequisites** module and ensure the tasks are completed.
4. Certificate setup module tasks is configured automatically.
5. Complete the CPQ Connection Setup module.

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**a.** Enter the CPQ tenant URL that was shared with you when your CPQ instance was provisioned.

**b.** Generate Admin API key in CPQ Administrator, and add the key in the guided setup; the system updates the HTTPS connection record automatically.
Consider the following points while generating the Admin API key.

- Enter the same value for both Name and User ID fields.
- Select **Admin** for the **Permissions** field.

**Warning:** The admin API key generated in the tenant displays only once. Copy the key immediately. The key can't be retrieved later.

6. In the **Setup Confirmation** section execute the steps.
7. Select **Confirm end-to-end flow works** check-box after you have verified that the Configurator works as expected.

**Important:** If the Configurator is not working as expected during workflow verification, don't select the **Confirm end-to-end flow works** check-box. Contact your administrator for assistance.

**Related topics**

Using the CPQ Configurator

### Set up ServiceNow CPQ Configurator without guided setup

Plan and configure your implementation of the ServiceNow CPQ Configurator. Product catalog admins and agents use the Configurator in the CRM Workspace, while users using self-service features use it in the Business Portal. These steps also set up the integration that ServiceNow Quote Experience requires.

Use the steps mentioned in the configuration overview to set up the ServiceNow CPQ Configurator without guided setup. The same steps establish the connection between your ServiceNow instance and the CPQ microservice that ServiceNow Quote Experience uses.
If you are implementing ServiceNow Quote Experience, complete this setup as part of the environment and instance setup. For more information, see Set up the environment and instance for ServiceNow Quote Experience.

## Configuration overview

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Install the following plugins searching by name or ID; if the plugin does not appear in the results, request it from the ServiceNow Store. Select a version and **Load demo data** as required.
   - CSM and FSM Workspace Foundation(sn_cwf_wrkspc)
   - Order Management (sn_ind_tmt_orm)
   - Product Catalog Management Core (sn_prd_pm)
   - Price Management (sn_csm_pricing)
   - Quote Management Application (sn_quote_mgmt)
   - Product Configurator (sn_prd_config_ui)
   - Customer Life Cycle Management Workflows (sn_l2c_cust_flows)

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- Product and pricing rules (sn_csm_price_mtrx)
- Opportunity Management Application (sn_opty_mgmt)
- Product Offering Recommendations (sn_prd_pm_ra)
- Order Management Portal (sn_ord_mgmt_portal)
- Order Operations Case Management (sn_order_case)
- Case Management for Invoice Operations (sn_csm_invoice)
- Sales Cart (sn_sales_cart)
- Customer Life Cycle Managment Self Service (sn_clm_selfservice)
- Customer Service Portal (sn_csm_portal)
- CPQ Integration (sn_cpq_intg)
- CPQ Configurator (sn_cpq_config)
- Contracts and Entitlement Workflows (sn_contract_ent_wf)
- Sales Quota Application (sn_quota_app)

The following are dependent plugins that are installed with the above mentioned plugins. Review and install the plugins if they aren't installed already.

- Product Catalog Management Core (sn_prd_pm) - installed with Price Management, Product Configurator, Product Offering Recommendations
- Customer Life Cycle Management Workflows (sn_l2c_cust_flows) - installed with Order management and Quote Management Application, Contracts and Entitlement Workflows
- Price Management (sn_csm_pricing) - installed with Product and pricing rules, Sales Cart
- Order Management (sn_ind_tmt_orm) - installed with Order Management Portal, Order Operations Case Management
- CPQ Integration (sn_cpq_intg) - installed with CPQ Configurator

3. Set up instance for CPQ integration.
4. Request a CPQ tenant
5. Connect your instance with CPQ instance.
6. Set up an external connection in CPQ.
7. Enable the CPQ Configurator.

   If you're currently using the Sales Customer Relationship Management product configurator and want to use the ServiceNow CPQ Configurator, enable the *enable_advanced_configuration* system property.

### Set up instance for CPQ integration

Set up a ServiceNow instance, generate a JSON Web Token (JWT), and authenticate API calls to CPQ.

**Before you begin**
Role required: admin

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### Procedure

1. Validate that the CPQ Integration application is installed on your ServiceNow instance by doing the following:

   a. Navigate to https://<service_instance_url>/oauth_entity.do?sys_id=3b119df83b566210a0c0989e53e45a15

   b. Check that the CPQ Admin UI Application Registry exists with a ClientID and secret. This information is used later.

2. In a directory on your local machine, generate the private and public certificates by using the *openssl* tool, then use *keytool* to convert the certificate from PKCS to JKS format.

   **Note:** Skip this step if the CPQ integration is above 3.1 on the Australia ServiceNow Instance

   a. Create the private key by using the command `openssl genrsa -out private.key 2048`.
   The key is created in the current folder in a file named private.key.

   b. Create a self-signed certificate that uses the private key by entering: `openssl req -new -x509 -key private.key -out publickey.cer -days 3650`
   You're prompted to enter information that is included in your certificate request. The certificate, named publickey.cer, contains the public key derived from the private key and metadata, such as subject and issuer. The certificate is digitally signed using the private key.

   c. Create a PKCS#12 keystore file (a .p12 file) by using the command `openssl pkcs12 -export -in publickey.cer -inkey private.key -out keystore.p12 -name "<cert_name>"`.
   This keystore file bundles the signed certificate and private key together and sets the alias for the key+cert entry in the keystore. The file is encrypted using a password (also called the export password). This password is required to import and export the certificate.

   d. Convert the .p12 (PKCS#12) keystore file to .jks (Java KeyStore) format by using the command `keytool -importkeystore -srckeystore keystore.p12 -srcstoretype pkcs12 -destkeystore keystore.jks`.
   - You're prompted for the export password from step 2c to read the private key and certificate from the .p12 file.
   - You're prompted to enter a new key store password to protect the JKS keystore file. Record and retain this password for later, since it's required to set up the ServiceNow instance.

3. In the ServiceNow instance, login in as admin and do the following:

   a. Set **Global** as the current scope by using the scope selection menu icon in the Unified Navigation menu.

   b. In the navigation filter, enter **sys_properties.list** and open the *glide.security.file.mime_type.validation* system property.
   Set the **Value** to false, then select **Submit**.

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**c.** Navigate to https://<service_instance_url>/sys_certificate.do?sys_id=90b3439e2beeea1001bff246f291bf4b and do the following:

- Attach the keystore.jks file created in Step 2d to the Certificate record. Enter the key store password from step 2d in the Key store password field.
- Select **Active**.
- Save the certificate.
- (Optional). Validate the certificate using the Related Link for the K509 Certificate.

**d.** Navigate to https://<service_instance_url>/jwt_keystore_aliases.do?sys_id=3ab40bde2beeea1001bff246f291bfc8.
Enter the Key Store Password from Step 2d as the Signing Key and save the record.

**e.** In the navigation filter, enter **sys_properties.list** and open the *glide.security.file.mime_type.validation* system property.
Set the **Value** to true, then select **Submit**.

**Note:** Repeat step 3 each time CPQ Integration is reinstalled.

**4.** Set up API authentication by creating the integration user roles included with the Sales Customer Relationship Management applications:

**a.** Create an integration user.

- Navigate to **All** > **System Security** > **Users and Groups** > **Users.**
- Create a new user by selecting **New**.
- Enter the UserID, First name, and Last name.
- Select **Submit**
- Open the user record, and in the Role tab, select **Edit**.
- Add the following roles:
  - snc_internal
  - sn_sales_common.sales_agent
  - sn_csm_pricing.pricing_integrator
  - sn_prd_pm_adv.catalog_integrator
  - sn_quote_mgmt_core.quote_integrator
  - sn_ind_tmt_orm.order_integrator
  - sn_opty_mgmt_core.opportunity_integrator
  - sn_sales_cart.cart_integrator

**Note:** If roles are missing, an app may have failed to properly install. Navigate to the app manager, select the app associated with the missing role, and click **Repair**.

**b.** Navigate to: https://<service_instance_url>/oauth_entity_list.do?sysparm_query=sys_id=99a63a9e2baeea1001bff246f291bf57

**5.** Personalize the list view to add the **OAuth Application User** column.
Use the **Update Personalized List** icon.

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a. In the list view, double-select the **OAuth Application User** field to edit it.

b. Set the user created in Step 4a as the OAuth Application User in the CPQ.ai API record. If you can't modify this field, verify that you're in the correct scope (CPQ Integration).

c. Open this CPQ.ai API record.

d. Select **Active** and save the record.

e. Switch to the global scope.

f. Create system property.

- In the navigation filter, enter `sys_properties.list`.
- Select **New**.
- Enter the property name `glide.oauth.inbound.client.credential.grant_type.enabled`.
- Select the edit icons for Read Roles and Write Roles and select admin for each.
- Set the **Value** to true.
- Select **Update**.

### What to do next

Request a CPQ tenant

#### Request a CPQ tenant

Submit a support ticket on Now Support to request a CPQ instance for use with your ServiceNow instance.

### Before you begin

Role required: admin

### Procedure

1. Navigate to Now Support.
2. Select **Create a case**.
3. In the ServiceNow Otto panel, select the link to open the case form.
4. Select **Service request**.
5. Enter `Request a new CPQ instance` and select **Next**.
6. Select your instance and select **Next**.

   **Note:** Contact the primary customer administrator (PCA) if your instance is not listed.

7. Select **Continue**.
8. Enter the **Client ID** and **Client secret** and the public certificate details.
9. Select **Continue**.
10. Review the summary and select **Confirm and Submit**.

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### What to do next

Connect the CPQ instance to your ServiceNow instance. See Connect your instance with CPQ instance.

If you are implementing ServiceNow Quote Experience, configure the required tenant settings on this instance. See ServiceNow Quote Experience tenant settings.

## Connect your instance with CPQ instance

Set up the connections between the ServiceNow instance and the CPQ instance.

### Before you begin

Role required: admin

### Procedure

1. Set the application scope to CPQ Integration using the scope selection menu icon in the Unified Navigation menu.
2. Navigate to `https://<service_instance_url>/oauth_entity.do?sys_id=3b119df83b566210a0c0989e53e45a15`.
   a. Update the Redirect URL to `https://<tenant-url>/login/oauth2/code/<tenant-name>-login`.
      - The tenant-name is the name of the `<service_instance>` site (for example, logiksite-som). The tenant-url is the full URL of the site (for example, logiksite-som.test.logik.io)
      - Example: `https://logiksite-som.test.logik.io/login/oauth2/code/logiksite-som-login`

      **Note:** The redirect URL details is provided in the email that you receive after the request for a new CPQ instance is complete.

   b. Select **Activate** check-box.

   c. Select **Update**.

3. Navigate to **All** and enter `sys_proprties.list` in the **Filter** search box.
   a. Open the *sn_cpq_intg.tenant_url* system property.
   b. Enter `https://<tenant-url>.logik.io` in the **Value** field.
   c. Select **Update**.
4. Navigate to **All** > **CPQ Administration** to validate the connection to CPQ.
   If CPQ fails to open, check the previous steps for any incorrect values (typing errors and trailing slashes).
5. Generate the Admin API key in CPQ using the following steps.
   a. Log in as admin and navigate to **All** > **CPQ Administration** > **Utilities** > **Admin API Keys**.

   b. Enter the values for **Name** and **User ID**.
   Enter the same value for both the fields. The default value is admin.

   c. Set an Expiration Date far in the future.

   d. Select **Admin** permissions.

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This will auto select Read, Edit, Deploy, and Bulk.

e. Select **Save** and copy the token.

> **Important:** Be sure to do this step. After closing the confirmation modal, the token will no longer be accessible.

6. Populate the Connection and Credential Aliases using the following steps.

a. In ServiceNow Sales CRM, navigate to `https://<service_instance_url>/now/workflow-studio/integration/connection`

b. Select **Advanced Setup** of the **CPQ – Sync** connection.

c. Select **CPQ –Sync Connection** in the **Connections** related list.

- Enter `https://<logik-tenant-url>.logik.io` in the **Connection URL** field. Ensure there is no ending slash added in the connection URL value.
- Select **Active** check-box (if not already).
- Select **Submit**.

d. Select the value **CPQ – Sync Token** in the **Credential** column of the **CPQ –Sync Connection** record in the **Connections** related list.

e. In the **API Key** field, enter the value Bearer {admintoken}, replacing {admintoken} with the token copied from Step 5e.
For example: Bearer _53eT_sxJHJ5rcfgXe8-8LDEK3Of1zHpQ

f. Select **Save**.

## What to do next

Set up an external connection in CPQ

### Related topics

Request a CPQ tenant

### Set up an external connection in CPQ

Set up an external connection in CPQ by copying the client ID and client secret of the CPQ.ai Auth record.

## Before you begin

Role required: admin

## Procedure

1. In ServiceNow Sales CRM, navigate to `https://<service_instance_url>/oauth_entity.do?sys_id=99a63a9e2baeea1001bff246f291bf57`.
We will use the integration we created to set up an external connection in CPQ.
2. Copy the client ID and the client secret.
3. In CPQ, navigate to **Utilities** > **External Connections**.
4. Select **New**.
5. Set the name to `pricing`.

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6. Under **Integration Type**, select **External**.
7. For **Authentication Type**, select **OAuth - Client Credentials Flow**.
8. Enter the client ID and client secret that you copied in step 2.
   The token URL is `<Your ServiceNow Instance URL>/oauth_token.do`.
9. Set the remaining details as follows:
   - Scope: useraccount
   - HTTP method: POST
   - Host: https://<your ServiceNow Instance URL> with no backslash at the end of URL
   - Path: `"/{{pricingPath}}"step`
   - Body: `"{{pricingRequest}}"`
   - Response Type: application/json
   - Timeout (milliseconds): 5000
10. Make sure that the content type is `application/json`.
11. Select **Save**.
12. Navigate to **Utilities** > **Settings** and set the pricing connection to the newly created connection.
    Pricing setup after external connection is defined.

### What to do next
Enable the CPQ Configurator

## Enable the CPQ Configurator

Use the *`sn_prd_pm.enable_advanced_configuration`* system property to turn on the CPQ Configurator, an interface for adding customizable products to Sales Customer Relationship Management transactions.

### Before you begin
Role required: admin

### About this task
If you have been using the configurator for Sales Customer Relationship Management, but you want to use the CPQ Configurator instead, set the *`sn_prd_pm.enable_advanced_configuration`* property to true. The CPQ Configurator is installed with the CPQ Integration application.

### Procedure
1. Navigate to **All**, and in the filter, enter `sys_properties.list`.
2. Open the *`sn_prd_pm.enable_advanced_configuration`* system property.
3. In the **Value** field, enter `true` to turn on the Configurator.
4. Select **Update**.
   The Configurator is displayed when:
   - Agents are adding configurable products to opportunities, quotes, orders, sold products, and contracts.
   - Customers are using the Business Portal for self-service features requiring configurable product selections.
   - Product catalog admins are generating or updating blueprints for configurable products.

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### Related topics

Configuring CPQ Configurator

Using the CPQ Configurator

### Set up the environment and instance for ServiceNow Quote Experience

Provision and configure the ServiceNow instance and the CPQ microservice instance, set up authentication between them, and configure the users and settings that ServiceNow Quote Experience requires.

### Before you begin

Role required: admin

**Important:** Complete all steps in this section before you create a quote.

### Procedure

1. Provision a ServiceNow instance, then install and configure the required applications.

   For the list of required applications, see the ServiceNow Store listing.

   **Note:** Do not install the Quote Management application. ServiceNow Quote Experience and Quote Management cannot run concurrently on the same instance. If Quote Management is already installed, complete the next step.

   Install and configure the following applications only if you use the corresponding capability:

| Application name | Application ID |
|---|---|
| Opportunity Management Data Model | `sn_opty_mgmt_core` |
| Opportunity Management Application | `sn_opty_mgmt` |
| Advanced Approval Management | `sn_adv_appr_mgmt` |

2. If the Quote Management application is installed, run the fix script that disables its objects. For more information, see Disable Quote Management application objects.
3. Provision a CPQ microservice instance.

   For more information, see Request a CPQ tenant.

   Then configure the tenant settings that ServiceNow Quote Experience requires. For more information, see ServiceNow Quote Experience tenant settings.
4. Integrate the ServiceNow and CPQ microservice instances.
   For more information, see Setting up CPQ Configurator.
5. Set up system-to-system authentication (JWT and OAuth) and add it to the connection.
   For more information, see Set up JWT and OAuth authentication for ServiceNow Quote Experience.
6. Set up the administrator user.
   ServiceNow users with the platform admin role cannot access quote records within the CSM/FSM workspace. Before accessing a quote, impersonate a user who has the required quote-access permissions but not the platform admin role. For the required permissions, see the access-control documentation.
7. Set up the integration user.

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An integration user is created and assigned a set of roles during the CPQ integration setup (see Set up instance for CPQ integration). Manually add the following additional roles:

- `sn_l2c_core.viewer`
- `sn_csm_pricing.pricing_integrator`
- `sn_adv_appr_mgmt.approval_request_writer`
- `sn_adv_appr_mgmt.approval_request_viewer`

8. Configure the transaction blueprint.
   For general transaction blueprint guidance and ServiceNow capability configuration, see Quote Experience documentation.
9. Ensure that web embeddables are enabled by setting the *`glide.uxf.lib.embeddables.enabled`* system property to `true`.

### Disable Quote Management application objects

Disable the business rules, client scripts, UI policies, and navigation items from the Quote Management application, which cannot run concurrently with ServiceNow Quote Experience on the same instance.

#### Before you begin

Role required: admin

**Note:** Review and document any customizations that you plan to re-implement before you disable the Quote Management objects.

#### About this task

ServiceNow Quote Experience and the Quote Management application are not compatible and cannot run concurrently on the same instance. If Quote Management is installed, disable its objects before you use ServiceNow Quote Experience.

#### Procedure

1. Navigate to **All** > **System Definition** > **Fix scripts**.
2. Search for `Disable objects for quote adv` in the **Name** field, then copy the script.
3. Navigate to **All** > **System Definition** > **Scripts - Background**.
4. Paste the script that you copied.
5. Uncomment the `disableObjects();` line.
6. Run the script.

#### Result

Verify that the script disabled the Quote Management objects:

1. Navigate to **All** > **System Definition** > **Business Rules**.
2. Filter the list to the **Quote** and **Quote Line Item** tables.
3. Verify that all rules are disabled. Manually set **Active** to false for any rule that is still active.

### Set up JWT and OAuth authentication for ServiceNow Quote Experience

Set up system-to-system authentication between ServiceNow and the CPQ microservice by generating a key pair, registering an OAuth application in ServiceNow, and configuring the `serviceNowJwtConnection` system connection in CPQ Administration.

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### Before you begin

Role required: admin

### Procedure

1. In ServiceNow, generate a public/private key pair.

   **Note:** Only PKCS8 format is supported, because it is widely compatible.

2. Import the public key into ServiceNow.
3. Create an OAuth Application Registry to set up the OAuth endpoint for JWT authentication.
   - Set **AuthScope** to `useraccount`.
   - Set the user field to the user name. If the user name is not available, use the user ID.

   For detailed instructions, see KB1275215.
4. Convert the private key to PKCS8 format so that you can add it to the CPQ Administration connection.

   a. Convert the JKS keystore to PKCS12 by using the following command:

   ```
   keytool -importkeystore \
     -srckeystore snclient.keystore -srcstorepass abcd1234 \
     -destkeystore snclient.p12 -deststoretype PKCS12
    -deststorepass abcd1234
   ```

   b. Extract the private key from the PKCS12 keystore to a PEM file by using the following command:

   ```
   openssl pkcs12 -in snclient.p12 -nodes -nocerts -passin
    pass:abcd1234 -out private_key.pem
   ```

   c. Force the key to unencrypted PKCS#8 format by using the following command:

   ```
   openssl pkcs8 -topk8 -nocrypt -in private_key.pem -out
    private_key_pk8.pem
   ```

   d. Print the private key to the terminal so that you can copy it by using the following command:

   ```
   cat private_key_pk8.pem
   ```

5. In CPQ Administration, configure the `serviceNowJwtConnection` system connection to enable JWT and OAuth authentication.

   a. Navigate to **CPQ Administration** > **Utilities** > **Connections**.

   b. Select the **serviceNowJwtConnection** system connection.

   c. Ensure that the **Authentication Type** is set to **JWT – Client Credentials Flow**.

   d. Enter the connection details:
      - OAuth client ID
      - OAuth client secret

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- Token URL: `<instanceurl>/oauth_token.do`
- Private key (the PKCS8 key from the previous step)
- Key ID
- Host: `<ServiceNow_instance_URL>`
- Leave **Path** null.

#### ServiceNow Quote Experience tenant settings

Configure these tenant settings on the CPQ microservice instance to enable ServiceNow Quote Experience and its capabilities.

### Required settings

Set all of the following settings to `true`, except *`optionPaginationLimit`*, which takes a numeric value:

- All CPQ Transaction Manager standard settings
- *`Transaction.oneQuoting.enabled`*
- *`allowDynamicFieldOptions`*
- *`optionPaginationLimit`* — set to a positive number. Otherwise, options do not appear in dynamic picklist fields.
- *`connections.auth.type.jwtOAuth`*
- *`enableTheme`*
- *`features.enableDynamicBom`*

### Capability-specific settings

Activate the following settings only if you use the corresponding capability:

| Capability | Setting name |
|---|---|
| Sync Quote to Opportunity | *`transaction.oneQuoting.opportunitySync.enabled`* |
| Advanced Approvals | *`transaction.oneQuoting.approvals.enabled`* |
| PDF Document Generation | *`transaction.oneQuoting.docGen.enabled`* |
| Pricing | *`transaction.oneQuoting.pricing.enabled`* |
| Subscriptions | *`transaction.oneQuoting.subscriptions.enabled`* |
| Partner Management | *`transaction.oneQuoting.partnerMgmt.enabled`* |

## Setting up the Configurator

Control the product options displayed in the Configurator interface by using the Open State Management API framework.

### Configuration overview

As an admin, you can manage the configuration states and configurator nodes displayed in the Configurator by using the Open State Management API framework and open state management extension points.

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### Open state management

The open state model is a programmatic framework in the Configuration State Model API, which lets you program variations in product options that appear in the legacy product configurator in Sales Customer Relationship Management. The API framework provides certain states and helper API methods for controlling how nodes in the legacy product configurator user interface are displayed.

As developers, you can use extension points for open state management to set the view-only or editable states on any configurator node, based on events that occur at loading or when product selections change. You can also optionally script information messages along with changing the state of the node. These messages display contextually in the product configurator user interface. Various helper API methods are available for reading and setting states on any node, eliminating the need for extensive JSON scripting.

**Note:** Check your entitlements to determine if you have access to these features.

## Use cases for configuration state management

The following table shows different ways that you can control the product options displayed in the legacy product configurator.

**Configuration state model use case examples**

| Product configurator use case | Example |
|---|---|
| Hide certain options for a customer | A product attribute selection isn't displayed for customers in California due to state safety regulations. |
| Set certain default options for a customer | For upgrades, only the Ultimate plan is displayed for existing customers who have a premium plan. |
| Allow only certain options to be selected based on other attribute options | For certain products such as laptops, display all sizes 13", 15", and 17", but display only 15" and 17" laptops if only the touchscreen feature is required. |
| Allow quantity to be set for products | Some products might have different default quantity values. Allow agents to configure the quantity as long as the value is within the bounds of a minimum quantity and maximum quantity allowed for that product. |
| Allow only certain characteristic selections to be made | Certain product selections require a particular characteristic value to be chosen. For example, upon selection of the Ultimate Internet Plan, the connectivity speed that can be chosen is 5G. |

You can manage the display of options in the legacy product configurator by using the Configuration State Model API Framework.

## Node states

Nodes in the legacy product configurator display product relationship groups, child products, and characteristic options. Nodes can have the following states:

**Visible - Yes (make node visible) or No (make node invisible)**

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Configurations that are visible or not visible to the agent in the legacy product configurator. Options might not be visible if they're incompatible with other selections made by the agent. For example, for a particular car wheel size, incompatible tire options are not visible.

**Editable - Yes (show node and make it selectable) or No (show node but make it unselectable)**

Configurations that are editable or not editable by the agent in the legacy product configurator. Agents can personalize certain aspects of the product while maintaining constraints that are necessary for the product. For example, for a specific car model, only compatible exterior colors are editable.

**Quantity - Visible (Yes/No), Editable (Yes/No)**

Configurations that set quantity on a product, enforce rules related to quantity, and show informational and error messages related to quantity at the appropriate node.

**Checked - Yes (show node selections) or No (make node selections invisible)**

Configurations that show the configuration options for selection based on the context.

**Value - Visible (Yes/No), Editable (Yes/No)**

Configurations that set a value for a characteristic, enforce rules related to the characteristic, and show informational or error messages related at the appropriate node.

**Note:** Agents can choose to set messages at a node level to provide justification for a state change.

## Events

Manage node states using the Configuration State Model API Framework. Activate these states by using the following two events in the Events Framework of the Configuration State Model:

- On Load - The state (visibility, editability) of each node is initially set to Yes (true). The open state is invoked on loading.
- On Change - This function is called whenever there’s a change in a node's value in the legacy product configurator user interface. However, this state isn’t invoked when quantity changes occur in the legacy product configurator. These states can be set programmatically in one of the following ways: on-load, during selections, or just before the instance is synchronized back to the transaction

## Helper API methods

You can use the following helper API methods to read and set states on any node.

**Apply states**

Set the visible and editable states for product relationship groups, product characteristics, and product characteristic options using Getter and Setter methods to read and change the state of the configuration model.

**Getter methods**

Obtain node paths along with the states on any configuration node:

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- `getAllNodes()`: Returns JSON with node path (reference to code) and its respective relative path with all the states.
- `getNode(nodePath)`: Returns javascript object of the node for the specified node path if it exists.
- `getNodeDetails(nodePath`: Return all the states for the specified node path if it exists.

**Setter methods**

- Set the visible and editable states for product relationship groups, product characteristics, and product characteristic options.
  - `setVisible`: True/False at all levels
  - `setVisible(True/False)`
  - `setEditable`: True/False at all levels
  - `setEditable(True)`
  - Implementation example:

```
var newHandler = configInstance.getNode(nodePath);
newHandler.setVisible(true, “This is a sample
 message for setVisible”);
newHandler.setEditable(false, “This is a sample
 message for setEditable”);
```

- Set the quantity for offers and specifications. The nodePath determines the product, and the value is the quantity to be set.
  - `setQuantity(value);`
  - Implementation example:

```
var newHandler = configInstance.getNode(nodePath);
newHandler.setQuantity(value, “This is a sample
 message for setQuantity”);
```

- Set the configuration options to see what is being selected.
  - `setChecked (value); True/False`
  - Implementation example:

```
var nodePath =
 “QUADPLAYHO1/OPTIONALPRODUCTS/CONNECTEDC2/CONNECTED
C1/VIN”
var newHandler = configInstance.getNode(nodePath);
var newHandler.setChecked(true, “This is a sample
 message for setChecked”)
```

- Set the value for a characteristic node where the input type is a single line of text.
  - `setValue( value);`
  - Implementation example:

```
var nodePath =
“QUADPLAYHO1/OPTIONALPRODUCTS/CONNECTEDC2/CONNECTED
C1/VIN”
var newHandler = configInstance.getNode(nodePath);
```

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```
newHandler.setValue("9TKN332", "This is a sample
 message for
setValue");
```

#### Getter context variable methods

Retrieve context variables inside the legacy product configurator user interface.

- `getHeaderContextVariables()`: Returns a list of all the header context variables.
- `getHeaderContextVariableValue(contextVariable)`: Returns a value and the display value of a specific context variable in the header.
- `getLineContextVariables()`: Returns a list of all the line context variables.
- `getLineContextVariableValue(nodePath, contextVariable)`: Returns the value of a specific context variable in the line.

### Use extension points for open state management

Control the options displayed in the product configurator by using extension points in Open state management.

You can use extension points to call custom scripts for managing the product configurator.

As an admin, access the available open state management extension points, by navigating to **All** > **Scripted Extension Points** and in the Extension Points list, select the appropriate extension point to view it.

#### State management extension points

| Extension points | Description |
|---|---|
| ConfigInstanceAPIImpl | Fetches open state execution for config instances during change and on load commands. |
| OpenStateValidation | Returns open state execution on config instances during change and on load. |
| SetOpenStateResponse | Updates the open state config instance to a config instance. |
| OpenStateModelExtension | Method used to return to the updated config instance. Customers can customize the process method. |

## Configuring product pricing

Use the Pricing Management application to create the price lists and price list lines, define pricing adjustments, and manage other features that control pricing for product offerings. Product pricing is used by your sales and order agents when creating opportunities, quotes, and sales orders in Sales Customer Relationship Management.

## Pricing configuration overview

As a pricing administrator or pricing manager, you complete various configuration tasks and work with your product catalog administrator and product catalog manager to set up the pricing for products and services sold by your organization. The following example workflow shows the pricing configuration tasks and how they fit within product catalog and product offering configuration. You can also work with your administrator to extend certain pricing features, such as setting up pricing extension points to access pricing information from external sources.

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# Product catalog and pricing configuration workflow

Starting with the May 2024 release of Sales Customer Relationship Management applications, you can use the CRM Workspace to configure product pricing.

**Note:** Check your entitlements to determine if you have access to these features.

## Configuration tasks for Pricing Management

| Configuration task | Description |
|---|---|
| Configurable pricing plans | Customize the default pricing plan provided with Pricing Management. You can add, change, or delete the sequence of steps in which pricing calculations and adjustments are run to determine product offering prices. |
| Create and publish a price list | Define a price list that identifies basic pricing features, such as the currency used or the customer account to which the price list applies. |
| Create a price list line | Add line items to a price list. A price list line identifies the list price for a product offering. |
| Copy a price list | Duplicate a published price list and its associated price list lines, attribute adjustments, and decision tables. |
| Control the default price list on transaction header or header line | Specify the conditions that control when a default price list is used for an opportunity, quote, or order by using the Price List Defaulting Matrix. |
| Create a product attribute-based pricing adjustment | Define pricing adjustments based on certain product characteristics. |
| Create and publish a cost book | Create a cost book that identifies the currency of the unit costs defined for a set of product offerings. |
| Create a cost book line | Add line items to a cost book. A cost book line defines the unit cost for a product offering. This feature is used in Quote Management, which uses unit costs to provide cost margins for products in sales quotes. |
| Copy a cost book | Duplicate a cost book and its cost book lines. |

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**Configuration tasks for Pricing Management (continued)**

| Configuration task | Description |
|---|---|
| Control the default cost book on transaction header or header line | Set the default cost book displayed to your sales agents on the transaction header or header line for a Sales Customer Relationship Management application by using the Cost Book Defaulting Matrix. |
| Create a non-product attribute pricing adjustment | Define pricing adjustments for products based on non-product characteristics such as shipping zip code, location, sales channel, or account segment by using the Standard Price Adjustment Matrix. |
| Create and publish a cost-based attribute adjustment | Define cost-based attribute adjustments for a cost book line or product offering. |
| Create pricing adjustments for bundled products | Define the pricing adjustments for child product offerings in a bundled product by using the Configuration Component Price Adjustment Matrix. |
| Create a matrix version | Create a version of a published price matrix when you need to update the matrix, for example to add or delete a context variable used in the price matrix. |
| Set properties to control pricing processing | Manage the processing of pricing features, such as how certain pricing calculations are made. |
| Create a custom context variable | Create a custom variable that represents an attribute that can be used in a pricing matrix, for example to create a non-product attribute adjustment. |
| Map a custom context variable to a transaction entity | Associate a custom pricing context variable to a particular transaction entity type in Sales Customer Relationship Management. |
| Use extension points in Pricing Management | Apply pricing extension points to use pricing information from external sources or extend the pricing engine logic on how list prices or adjustments are calculated. |
| Export and import pricing entities | Export and import pricing entities between ServiceNow instances. For example, you can promote pricing entities such as price lists from a non-production instance to a production instance. |

### Install Pricing Management

You can install the Pricing Management application (sn_csm_pricing) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

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### Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Price Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

### About this task

The following items are installed with Pricing Management:

- Roles
- Tables

For more information, see Components installed with Pricing Management.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Price Management application (sn_csm_pricing) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

### Related topics

Enable pricing in the ServiceNow Quote Experience

## Configurable pricing plans

Pricing Management provides a default pricing plan that defines the sequence of steps in which pricing calculations and adjustments are applied to determine final product prices.

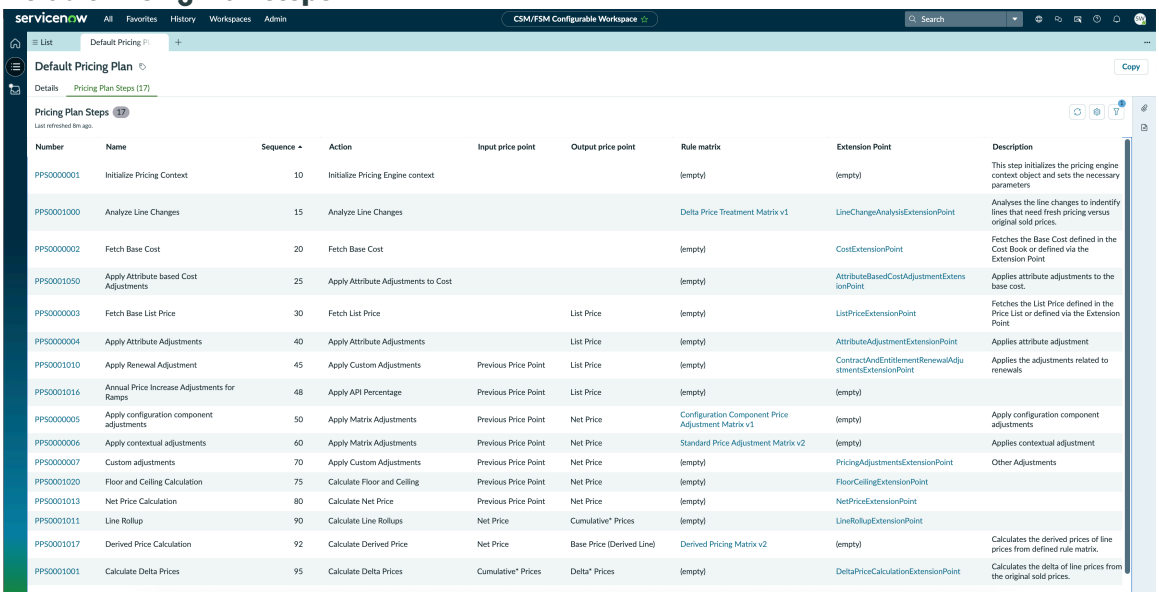
## How the pricing plan works

The default pricing plan is an active, published plan that is automatically implemented with Pricing Management. You can use the default plan, or you can copy the default plan and customize it by adding or changing the pricing steps to tailor it for your organization. You can have only one active pricing plan per domain.

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**Note:** The Pricing Management v16.0.1 release provides a default pricing plan that includes a new step. If you've been using a custom pricing plan from an earlier release, review the default pricing plan, which is in a Retired state after you upgrade to the v16.0.1 release. Determine whether you want to publish the default plan or customize the default pricing plan and then publish the custom plan to be used.

### Default Pricing Plan steps




The default plan consists of basic pricing steps in which certain actions are run to calculate product offering prices.

### Pricing steps

| Step | Action |
|---|---|
| Initialize Pricing Context | Starts the pricing engine context. The system gathers basic data required for subsequent calculation steps. For example, the system resolves context variable values, initializes the pricing cache, and performs basic validation of request payloads. |
| Analyze Line Changes | Reviews price line changes to determine whether adjustments to sold products and contracts require new pricing, as defined in the Delta Price Treatment Matrix. |
| Fetch Base Cost | Get costs from a cost book, if your organization is using cost books in Quote Management. |
| Apply Attribute based Cost Adjustments | Apply adjustments to the cost based on product offering characteristics. |
| Fetch Base List Price | Get the list price for all requested products based on the price list, unit of measurement, and data provided to the pricing API. |
| Apply Attribute Adjustments | Apply attribute adjustments based on product characteristics selected. |
| Apply Renewal Adjustment | Apply a renewal adjustment for contracts. This step determines whether a markup |

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**Pricing steps (continued)**

| Step | Action |
|---|---|
| | or markdown value, either a percentage or specific amount, such as a pricing uplift for contract renewals, is to be calculated and applied.<br><br>**Note:**<br>• Subsequent pricing adjustment steps in the pricing plan are not applied after this renewal adjustment step.<br>• You can change or remove this step in a custom pricing plan. You can also change the conditions for running subsequent steps after the renewal adjustment step. For details on changing conditions for a particular step, see Add or change a pricing plan step. |
| Annual Price Increase Adjustments for Ramps | Applies the percentage Annual Price Increase to the list price of products that have price ramps. Sales agents specify the percentage increase when they create price ramps for quote line items. |
| Apply configuration component adjustments | Apply adjustments as defined in the Configuration Component Price Adjustment Matrix for child product offerings that are bundled under a parent product offering. |
| Apply contextual adjustments | Apply adjustments as defined in the Standard Price Adjustment Matrix for product offerings based on non-product characteristics, such as billing state or shipping zip code. |
| Custom adjustments | Apply custom adjustments if implemented using the PricingAdjustmentExtensionPoint to fetch adjustments from another system or for adjustments that can't be supported via a pricing matrix. |
| Floor and Ceiling Calculation | Calculates the price floor, using the minimum price allowed for a product, and the price ceiling, using the maximum price allowed for a product. |
| Net Price Calculation | Calculates the net price for products using any automatic and manual adjustments made in quotes or orders. |
| Line Rollup | Calculates the cumulative pricing fields in quote and order lines that are rolled up to the parent line of bundled products. |
| Derived Price Calculation | Calculates the line prices using the Derived Pricing Matrix, which defines the pricing |

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**Pricing steps (continued)**

| Step | Action |
|---|---|
| | source and the unit base list price for the price list line. |
| Calculate Delta Prices | Calculates the difference in net pricing for sold products and contracts after adjustments are made. |
| Header Rollup | Calculates total pricing values, such as total annual or total monthly amounts, displayed at the header level |

For the configuration component adjustments, contextual adjustments, and custom adjustments, the **Price point** and **Calculation type** values in a step determine how multiple pricing adjustments are calculated:

- **Price point**: The price for a product or service that is calculated after the step is run, either the List Price or Net Price.
- **Calculation type**: Method for evaluating the impact of the adjustment at each step. The adjustment is applied to either the Previous Price Point or the Rolling Price.
  - When the Calculation Type is Previous Price Point and the price point is Net Price, the previous price point is List Price. The adjustment is applied to the List Price.
  - When the Calculation Type is Rolling, the adjustment calculated is based on the output of the previous step.

## Customizing a pricing plan

The default pricing plan is fixed, to preserve the default pricing logic. You can copy the default plan, and add or change steps as needed for your organization. When you finish your changes, you publish the copy so that it becomes the active plan. If needed, you can revert to the default plan at any time by publishing the default plan.

As a pricing admin or manager, follow these steps to define a custom pricing plan:

- Create a configurable pricing plan (copy the default plan).
- Add or change a pricing plan step. In your configurable pricing plan, you can add one or more pricing steps for pricing adjustments, including any conditions for running the step. You can also change the sequence of the adjustment steps, if needed.
- Delete a pricing plan step, if needed.

As you add or change pricing steps, the system validates your entries, such as the sequence number, price point, and calculation type. When you finish adding or changing steps, publish the configurable pricing plan to make it active. The former active plan is retired.

### Create a configurable pricing plan

Create a configurable pricing plan by copying the default pricing plan provided in Pricing Management.

#### Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

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### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Plans**.
3. Select the default pricing plan and select **Copy**.
   The copy of the default pricing plan opens in a new tab in the Draft state.
4. Provide the pricing plan details:
   a. Enter the **Name** of the pricing plan.
   b. If you want price adjustments to be applied after price overrides, select the **Apply adjustments after price override** option.
   If you select this option, after the system applies a price override, any remaining pricing steps are run. If you don't select this option, any pricing steps scheduled after the price override is applied are not run.
   c. Enter a new **Description** for the custom pricing plan.
5. Select **Save**.
   The configurable pricing plan is created with the **Name** that you provided.

### What to do next
Add or change a pricing plan step.

## Add or change a pricing plan step

Add a pricing plan step to a configurable pricing plan that applies either a pricing matrix or a custom adjustment using the pricing extension point. You can also change certain items in an existing step, such as the sequence or type of matrix used, as well as specify conditions for running the step.

### Before you begin
Create a configurable pricing plan.

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

### About this task
You can add or change a pricing plan step only when the configurable pricing plan is in the Draft state.

**Note:** The following steps in all pricing plans are fixed and can't be changed:

- Initialize Pricing Context
- Fetch Base Cost
- Fetch Base List Price
- Apply Attribute Adjustments

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Plans**.
3. Select the configurable pricing plan to which steps are being added or changed.
4. In the pricing plan, select the Pricing Plan Steps tab.

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- To add a step, select **New**.
- To change a step, select the step number to be updated. If you need to delete a pricing adjustment step, see Delete a pricing plan step.

5. Fill in or change certain fields in the form.

**Pricing Plan Step**

| Field | Description |
|---|---|
| Number | System assigned number for the pricing plan step. |
| Name | Name of the step to be added. |
| Description | Brief description of the step. |
| Price point | Selling price for a product or service. Select one of the following:<br>○ List Price: Standard selling price to be applied before any pricing adjustments.<br>○ Net Price: Final price to customer after predefined or negotiated adjustments have been subtracted. |
| Calculation type | Option for evaluating the result of the adjustment at each step. Select one of the following:<br>○ Previous price point: When the Price Point is Net Price, the previous price point is List Price. The adjustment is applied to the List Price.<br>○ Rolling: When multiple adjustments exist, apply the subsequent adjustment to the price resulting from the previous adjustment to calculate the final net price. |
| Sequence | Number value indicating the order in which the step is to be applied.<br>For example, if you're adding a step between two existing steps with sequence numbers 40 and 50 respectively, you could enter the sequence number 45 for the step. |
| Code | System-generated alphanumeric number based on the pricing plan step name. |
| Action | Option indicating the type of pricing adjustment to be run in the step. Select one of the following:<br>○ Apply Matrix Adjustments: Run a pricing matrix.<br>○ Apply Custom Adjustments: Run a custom pricing adjustment using the PricingAdjustmentsExtensionPoint. |

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| Field | Description |
| --- | --- |
| Rule matrix | Option that displays if you selected the Apply Matrix Adjustments action. Select the pricing matrix to be applied:<br>○ Configuration Component Price Adjustment Matrix: Use this matrix to set the price adjustments for child product offerings that are bundled under a parent product offering.<br>○ Standard Price Adjustment Matrix: Use this matrix to set a pricing adjustment for a product offering based on non-product characteristics, such as billing state or shipping zip code.<br>You can select the rule matrix link in the step to define the matrix. |
| Pricing plan | Name of the configurable pricing plan. |
| Extension point | Option that displays the PricingAdjustmentsExtensionPoint if you selected the Apply Custom Adjustments action. |

6. Specify certain conditions for running the step, if applicable.

   **Note:** Any conditions that aren't met, are ignored.

| Type of condition | Description |
| --- | --- |
| **Header condition** | Use the condition builder to add or change conditions that control when the step is run, based on the transaction header (for exam ple the header for an opportunity, quote, or or der). Specify the condition fields to be used, for example a context variable for transaction headers, product characteristics, or other ob jects such as account or product offering. |
| **Line condition** | Use the condition filter to add or change conditions that control when the step is run, based on the transaction line (for example an opportunity, quote, or order line). Specify the condition fields to be use, such as a context variable for transaction lines, product charac teristics, or other objects, such as account or product offering. |

7. Select **Save**.
8. To continue adding or changing steps, repeat steps 4 through 7.
   If you need to remove a step, see Delete a pricing plan step.
9. When you're finished adding or changing steps, select **Publish**.
   The configurable plan becomes the active pricing plan, and the former active plan is retired.

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### Delete a pricing plan step

Remove a pricing step from a configurable pricing plan when the plan is in the Draft state.

#### Before you begin

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Plans**.
3. Select the configurable pricing plan to be changed.
4. In the pricing plan, select the Pricing Plan Steps tab and then select the step number to be deleted.
5. In the More actions menu, select **Delete**, and confirm that you want to delete the step. The step is removed from the pricing plan.

### Create and publish a price list

Create a price list that defines the pricing for products and services in Sales Customer Relationship Management.

#### Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

#### About this task

You can create various types of price lists for your organization, such as price lists that are based on a standard currency or price lists that are based on a particular customer account. The first price list that you create for a specified currency is automatically set as the default price list. When you're creating a default price list, the start date must be either the current date or a date earlier than the current date. If you don’t want the price list as the default, deselect the **Default** option.

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Prices** > **Price Lists.**
3. Select **New**.
4. In the Details tab, fill in the fields.

**Create New Price List**

| Field | Description |
|---|---|
| Number | Unique system-assigned number that identifies the price list. |
| Name | Name of the price list. |
| Code | System-generated alphanumeric number based on the price list name. Although the code is system-generated, you can edit it to represent any industry-specific product code. |
| Currency | Currency of the price list, for example USD for US dollars. |
| Account | Optional. Account of the customer to which this price list applies. |

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| Field | Description |
|---|---|
| Default | Option for setting this price list as the default price list with the specified Currency or for the specified Account. |
| Sales agreement | If you're using the Sales Agreement Management application and a sales agreement was created by an agent, the unique system-assigned number that identifies the sales agreement associated with this price list. |
| Description | Description of the price list. |
| State | Stage of the price list:<br>○ Draft: Initial state of the price list. Information is still being added to the price list and hasn't been published to the catalog yet.<br>○ Published: Price list has been published to the catalog. After a price list is published, you can update, delete, retire, or archive it.<br>○ Retired: Price list has been retired and is no longer active. The price list and its price list lines cannot be updated.<br>○ Archived: Price list has been archived and is no longer available for use.<br>**Note:** A default price list cannot be deleted, retired, or archived. |
| Start Date | Starting date and time that the price list is effective. Select the Calendar icon to choose the start date and time, then select **OK**.<br>**Note:** If this is a default price list, the start date must be either the current date or a date that is earlier than the current date. |
| End Date | Ending date and time of the price list. Select the Calendar icon to choose the end date and time, then select **OK**. After the ending time, the price list is no longer active.<br>**Note:** If this is a default price list, the end date is ignored. |

5. Select **Save**.
   The price list is in the Draft state.
6. Select **Publish**.
   The price list state changes to Published. The Price List Lines tab opens for creating a price list line.

### What to do next

Create a price list line for the price list.

## Create a price list line

Create a price list line and associate it to a product offering.

### Before you begin

Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

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### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Price Lists** and select the price list to which you're adding the price list line.
3. In the Price List Lines tab, select **New**.
4. On the form, fill in the fields.

#### Price List Line

| Field | Description |
|---|---|
| Number | Unique system-assigned number for the price list line. |
| Price List | Name of the price list. |
| Code | System-generated alphanumeric number based on the price list name. |
| Product Offering | Product to which this price list is associated. |
| Unit of Measure | Unit of measure for the product. |
| Base list price | Price set for the product offering, which is the full price that a product or service is sold for, without any discounts or promotions applied. |
| Derived price | Option that enables derived pricing (also called related product pricing) for product offerings associated with this price list line. For more information, see Configuring derived pricing. |
| Start Date | Starting date and time that the price list line is effective. Select the Calendar icon to choose the start date and time, then select **OK**. |
| End Date | Ending date and time that the price list line is no longer effective. After this time, the price list line is no longer active. Select the Calendar icon to choose the end date and time, then select **OK**. |
| Pricing Method | Type of pricing selected when the product offering was created:<br>○ Recurring: Payment fee that occurs over certain intervals.<br>○ Non Recurring: one-time payment fee. |
| Periodicity | Frequency of recurring pricing:<br>○ Monthly<br>○ Annually |

5. Select **Save**.

## Copy a price list

Duplicate a published price list and its associated price list lines, attribute adjustments, and decision tables. You can copy a price list, update the pricing in the copied price list if needed, then publish it.

### Before you begin

Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

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### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Price Lists**.
3. Select the published price list to be copied and select **Copy**.
   The state changes to Copy in Progress and a message indicates that the copy is starting. You can't edit the price list, price list lines, any attribute adjustments, and related decision tables during the copy process. Each price list line and the other related pricing features are copied asynchronously. During the copy process, you can refresh the page to see the items copied. When the copy process completes, the following occurs:
   - The copied price list is available in the Draft state and opens in a new tab.
   - Any errors that occurred during the copy process, for example a price list line didn't get copied, are displayed in a message in the copied price list.
4. Select **Save**.
   When the price list copy is in the Draft state, you can add or change price list lines or delete the price list. When you finish updating the copied price list, you can publish it so that it's available for use.

## Control the default price list on transaction header or header line

Define the default price list displayed to your sales and order agents on the transaction header or header line by using the Price List Defaulting Matrix.

### Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

### About this task

For base systems, the default price list used is based on the transaction header. For example, if a sales agreement is populated on the transaction header, the sales agreement price list is used as the default. If a customer account is populated on a transaction header and a valid account-based price list exists, the header defaults to the account-based price list. If no account-based price list exists, the default currency-based price list is used.

You can change the default price list selection logic by using the Price List Defaulting Matrix.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select Price List Defaulting Matrix.
4. Select **Edit Rule**.
   The Decision Table for the Price List Defaulting Matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions to display the default price list in the header.
5. In the decision table, set the rule for displaying the default price list:
   a. In the **Header Price List Type** column in the Results section, select the **Edit** icon to add the price lists that can be applied, for example an account-based price list or a currency-based price list.
   b. In the Condition section, select **Add new decision row**.

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c. In the row, select the column for the input to be applied, such as **Account** and select the condition to make it active.

d. In the Results section, select the **Header Price List Type** column and select the price list to be applied, for example an account-based price list or a currency-based price list.

6. Select **Save**.
   Review the **Validation Status** and **Validation Message** columns to see if you're missing mandatory inputs or outputs or required information. If so, enter the appropriate information and select **Save**.
   The default price list is available to sales or order agents when working on the transaction header for opportunities, quotes, or orders or when working on the transaction line, for example a quote line or order line.

### Create and publish a cost book

Create a cost book that defines the unit costs for products and services in Sales Customer Relationship Management.

## Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

## About this task

You can create cost books that define the unit costs for a set of products and a specified currency. However, only one cost book per given currency is allowed.

You can create multiple cost books for a given currency, but the first cost book that you create for a particular currency is automatically set as the default cost book. If you don't want the first cost book as the default, deselect the **Default** option. When you're creating a default cost book, the start date must be either the current date or a date earlier than the current date.

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Prices** > **Cost Books**.
3. In the Prices - Cost Books list, select **New**.
4. In the Details tab, fill in the fields.

**Create New Cost Book**

| Field | Description |
|---|---|
| Number | Unique system-assigned number that identifies the cost book. |
| Name | Name of the cost book, for example Standard Cost Book. |
| Code | System-generated alphanumeric number based on the cost book name. Although the code is system-generated, you can edit it to represent an industry-specific code. |
| Currency | Currency of the cost book, for example USD for US dollars. |

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| Field | Description |
| --- | --- |
| Default | Option for setting this cost book as the default cost book with the specified **Currency**. |
| Description | Brief description of the cost book. |
| State | Stage of the cost book:<br>○ Draft: Initial state of the cost book. Information is still being added to the cost book and hasn't been published to the catalog yet.<br>○ Published: Cost book has been published to the catalog. After a cost book is published, you can update, delete, retire, or archive it.<br>○ Retired: Cost book has been retired and is no longer active. The cost book and its cost book lines can't be updated.<br>○ Archived: Cost book has been archived and is no longer available for use.<br>**Note:** A default cost book can't be deleted, retired, or archived. |
| Start date | Starting date and time that the cost book is effective. Select the Calendar icon to choose the start date and time, then select **OK**.<br>**Note:** If this date is for a default cost book, the start date must be either the current date or a date that is earlier than the current date. |
| End date | Ending date and time of the cost book. After the ending time, the cost book is no longer active. Select the Calendar icon to choose the end date and time, then select **OK**.<br>**Note:** If this date is for a default cost book, the end date is ignored. |

5. Select **Save**.
   The cost book is in the Draft state.

**Note:** You can continue by defining cost book lines when the cost book is in Draft state. However, you must publish the cost book to apply the cost book and its cost book lines.

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6. Select **Publish**.
   The state changes to Published. The Cost Book Lines tab opens for creating a cost book list line.

### What to do next
Create a cost book line.

#### Create a cost book line

Create a cost book line that defines the unit cost for a product offering.

### Before you begin
Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

### Procedure
1. In the CRM Workspace, access the cost book to which you're adding a cost book line.
   a. Select the **List** view.
   b. Navigate to **Prices** > **Cost Books** and select the cost book.
2. In the Cost Book Lines tab, select **New**.
3. In the Create New Cost Book Line tab, fill in the form.

#### Cost Book Line

| Field | Description |
|---|---|
| Number | Unique system-assigned number for the cost book line. |
| Cost Book | Name of the cost book to which this line is added. |
| Code | System-generated alphanumeric number based on the cost book name and the line item to be created.<br><br>Although the code is system-generated, you can edit it to represent any industry-specific code. |
| Product offering | Product to which this cost book line is associated. |
| Unit of measure | Unit of measure for the product. |
| Cost | Unit cost of the product, which is the cost incurred to produce or procure the product. |
| Start date | Starting date and time that the cost book is effective. Select the Calendar icon to choose the start date and time, then select **OK**. |
| End date | Ending date and time of the cost book. After the ending time, the cost book is no longer active. Select the Calendar icon to |

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| Field | Description |
| --- | --- |
| | choose the end date and time, then select **OK**. |
| Pricing method | Type of pricing selected when the product offering was created:<br>○ Recurring: Payment fee that occurs over certain intervals.<br>○ Non Recurring: one-time payment fee.<br>**Note:** The **Pricing Method** is auto-populated when the product offering is selected. |
| Periodicity | Frequency of recurring pricing:<br>○ Monthly<br>○ Annually<br>**Note:** The **Periodicity** is auto-populated when the product offering is selected. |

4. Select **Save**.

**Related topics**

Copy a cost book

Control the default cost book on transaction header or header line

### Copy a cost book

Duplicate a cost book and its cost book lines.

## Before you begin

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Cost Books**.
3. Select the published cost book to be copied and select **Copy**.
   The state changes to Copy in Progress and a message indicates that the copy is starting. Each cost book line is copied asynchronously, but you can refresh the page to see the cost book lines copied. When the copy process completes, the following occurs:
   - The copied cost book is available in the Draft state and opens in a new tab.
   - Any errors that occurred during the copy process, for example a cost book line doesn't get copied, are displayed in a message in the copied cost book list.
4. Select **Save**.
   When the cost book is in the Draft state, you can add cost book lines or delete the cost book. When you finish any changes to the copied cost book, you can publish it so that it's available for use and retire the former cost book.

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### Control the default cost book on transaction header or header line

Set the default cost book displayed to your sales agents on the transaction header or header line for a Sales Customer Relationship Management application by using the Cost Book Defaulting Matrix.

#### Before you begin
Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

#### About this task
The transaction header is a record that contains general information about an entity, such as a cost book. A transaction line record contains specific information about a specific item, such as a cost book line for a certain product.

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select **Cost Book Defaulting Matrix**.
4. Select **Edit Rule**.
   The Decision Table for the Cost Book Defaulting Matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions to display the default cost book in the header.
5. In the decision table, set the rule for displaying the default cost book:
   a. In the **Header Cost Book Type** column in the Results section, select the **Edit** icon to add the cost book that can be applied.
   b. In the Condition section, select **Add new decision row**.
   c. In the row, select the column for the input to be applied, such as **Currency** and set the condition to make it active.
   d. In the Results section, select the **Header Price List Type** column and select the cost book to be applied, for example a specific currency-based cost book.
6. Select **Save**.
   Review the **Validation Status** and **Validation Message** columns to see if you're missing mandatory inputs or outputs or required information. If so, enter the appropriate information and select **Save**.
   The default cost book is displayed in the transaction header or header line for the application.

### Create a product attribute-based pricing adjustment

Create a pricing adjustment for a product offering based on its product characteristics, such as the product size or color. A pricing adjustment can be a markup or markdown percentage, amount, or a pricing override.

#### Before you begin
Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

#### About this task
In this task, you specify the product characteristics to which the pricing adjustment applies. Next, you use a decision table to set the attribute adjustment rule, which defines the conditions for applying the pricing adjustment. For more information on using decision tables, see Using decision tables.

**Note:** Starting with Pricing Matrixes release v10.0.0, a decision rule row can have more than one condition.

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### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Attribute Adjustments**.
3. In the Pricing - Attribute Adjustments list, select **New**.
4. On the Attribute Adjustment form, specify the product characteristics used to determine the adjustment:
   a. Enter the **Name** of the attribute adjustment rule, for example, Make and Model selection.
   b. If you want to change the system-assigned **Code** based on the attribute adjustment name, enter a different alphanumeric value.
   c. Select Price as the **Type** of adjustment.
   d. If you want the adjustment to apply to all price lists, select **Apply to all Price Lists**.
   e. Select the **Product offering** to which this adjustment applies.
   f. If this attribute adjustment applies to a specific price list line and not all price lists, select the **Price list line**.
   g. Select the **Start Date** that this attribute adjustment begins.
   h. Select the **End Date** that this attribute adjustment ends, if applicable.
   i. In the **Product Characteristics** field, select the product characteristics to be used to differentiate the product price.
   j. Select **Save**.
5. In the Attribute Adjustment, select **Create Rule**.
   The Decision Table for the adjustment opens in Workflow Studio and displays the inputs, which are the product characteristics that you selected, and the decision table that contains the columns for setting the attribute adjustment rule conditions.
6. Set the attribute pricing rule:
   a. In the Conditions section, select **Add new decision row**.
   b. In the row, select an attribute column and select the appropriate value.
   For example, if a product has attribute columns labeled **Make** and **Model**, select each column and then select the appropriate value.

   You can enter multiple rules with multiple conditions for a given product offering.
   c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.
   d. In the **Adjustment Value** column, enter the adjustment amount.
   e. Select **Save**.
   The adjustments are made to the price lists or the price list line, depending on the options selected in step 4f.

   **Note:** At transaction time, the Attribute Adjustment table does not support rule selection criteria set as single. It supports only multiple evaluations as true.
7. **Optional:** Test your decision table.

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For more information on testing your decision table before publishing it, see Test a decision table in Workflow Studio.

8. In the **Details** tab for the attribute adjustment, select **Publish**.
   When a product offering is added to a transaction, such as a quote or order line, the pricing attribute adjustments are applied after the agent or customer selects the attribute options. For example, when agents or customers use the CPQ Configurator to add a configurable product offering, the base price of the product is displayed initially. After the appropriate attribute options are selected, the price adjustments for the selected attributes are applied to the base price of the product. The resulting price displayed is the list price of the product offering, based on attribute conditions and associated markup or markdown values set in the Attribute Adjustment decision table.

### Create and publish a cost-based attribute adjustment

Set different product costs based on product attributes, such as model or size, by applying cost adjustments for a product offering by cost book or specified cost book line. The base cost is the cost at the cost book line. Product cost is the base cost plus attribute adjustments. These adjustments are used to display the profit margins in quotes and quote lines, which can be criteria for triggering quote approval rules.

## Before you begin

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

## About this task

You select the characteristics of a product that affect the base product cost. Next, use a decision table to create an attribute adjustment rule that defines the conditions for applying the adjustments and the markup or markdown value, either a percentage or amount to be applied for specified characteristics. For more information on using decision tables, see Using decision tables.

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace* and select the List icon.
2. Navigate to **Pricing** > **Attribute Adjustments**.
3. Select **New** and fill in the fields.

### Attribute Adjustment

| Field | |
|---|---|
| Name | Name of the cost-based attribute adjustment. |
| Code | System-generated alphanumeric value based on the attribute name. |
| Type | Type of adjustment, either Price or Cost.<br><br>Select Cost. |
| Apply to all cost books | Option that applies this attribute adjustment to the product offering for all cost books.<br><br>If this attribute adjustment applies only to a cost book line for a product offering, unselect this option. |

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| Field | |
|---|---|
| Product offering | Product to which this adjustment applies. Select the field to display a list of products. The characteristics set for the product offering are displayed in the **Product Characteristics** field. |
| Number | System-generated alphanumeric value that identifies this cost-based attribute adjustment. |
| Cost book line | Option for selecting a cost book line to which the adjustment is applied. You can select this option if the **Apply to all cost books** option is unselected. |
| State | Status of the adjustment:<br>○ Draft (saved)<br>○ Published<br>○ Retired<br>○ Archived |
| Start date | Date and time that this attribute adjustment begins.<br><br>If you want to apply the adjustment to a cost book line, the **Start date** and **End date** must be the within the cost book line start and end dates. |
| End date | Date and time that this attribute adjustment ends, if applicable. |
| Product characteristics | Product attributes used to differentiate product costs. |

4. Select **Save**.
5. In the Attribute Adjustment page, select **Create Rule**.
   The Decision Table for the adjustment opens in Workflow Studio.
6. Set the attribute pricing rule:

   a. In the Conditions section, select **Add new decision row**.

   b. In the row, select an attribute column and select the appropriate value.
   For example, if an automation hub product has attribute columns labeled **4G** and **5G**, select each column and then select the appropriate value.

   c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.

   d. In the **Adjustment Value** column, enter the adjustment amount.

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e. Select **Save**.
The adjustments are made to the cost book or the cost book line, depending on the options selected in step 3.

7. **Optional:** Test your decision table.
For information on testing your decision table before publishing it, see Test a decision table in Workflow Studio.
8. If this is a product-based cost attribute adjustment, select **Publish** in the **Details** tab for the attribute adjustment to make the attribute adjustment available.
The cost-based attribute adjustments for the product offering are applied when agents add the product offering to an opportunity, quote, or an order.

### Create a non-product attribute pricing adjustment

Create a pricing adjustment for a product offering based on non-product characteristics, such as billing state or shipping zip code. You use the Standard Price Adjustment Matrix to define the pricing adjustment.

#### Before you begin
Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

#### About this task
Non-product attributes are represented as context variables, which identify non-product characteristics, such as billing state or shipping zip code. Pricing Management provides a set of default context variables for non-product attributes. You can view the list of context variables for non-product attributes in the **Context variables** field in the Standard Price Adjustment Rule Matrix. You can also review a list of system-defined context variables in the Context Variables [sn_csm_ctxrul_mgt_context_variable] table.

However, if you have a non-product attribute that is not available as a default context variable, such as sales channel, your system administrator can create a custom context variable for that attribute. You can then use the custom context variable as an input in the decision table for the Standard Price Adjustment Matrix.

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select Standard Price Adjustment Matrix.
4. If you want to remove any of the context variables in the Context variables section In the Rule Matrix Standard Price Adjustment Matrix record, delete the pills that represent context variables for non-product attributes.
5. If you have a large number of rows in the decision table and you want to optimize rule matrix performance, in **Query optimization variables**, select one or more context variables that the system uses to filter the pricing decision table rows that are evaluated.
6. Select the option in **Rule selection criteria** that indicates whether single or multiple rules are applied in the Standard Adjustment Matrix.
If multiple rules match and the option is marked true, all applicable pricing rules are applied when evaluating adjustments for product offers. If the option isn't selected, the first rule based on priority is applied for adjustment calculation.
7. Select **Edit Rule**.
The Decision Table for the Standard Price Adjustment Matrix opens in Workflow Studio and displays the inputs, which are the default non-product characteristics available, and

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the decision table section that contains the columns for setting the non-product attribute adjustment rule conditions.

8. If you have a custom context variable to add as an input, select **+Add** and add the custom variable **Label**, **Type**, **Reference** (if applicable), **Mandatory** indicator, and **Add condition column**, which adds the variable to the Conditions section.
9. In the decision table, set the pricing rule for the non-product attribute:
   a. In the Conditions section, select **Add new decision row**.
   b. In the row, select the columns for the non-product attributes to be applied, such as **Shipping State** and **Account**, and select the appropriate values.
   c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.
   d. In the **Adjustment Value** column, enter the adjustment amount.
   e. In the **Adjustment Description** column, enter a brief description of the adjustment, for example, Adjustment for state location.
   f. Select **Save**.
   g. Select **Publish**.
   The adjustments are available to agents when working on Sales Customer Relationship Management transactions, such as quotes or orders and to customers using the Business Portal.

### Create pricing adjustments for bundled products

Define price adjustments for a product when it is sold as part of a product bundle. You use the Configuration Component Price Adjustment Matrix to set the price adjustments for child product offerings that are bundled under a parent product offering.

#### Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

#### About this task

A pricing adjustment can be a markup or markdown percentage, amount, or a pricing override of the standalone product list price.

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select Configuration Component Price Adjustment Matrix.
4. Select **Edit Rule**.
   The Decision Table for the Configuration Component Price Adjustment Matrix opens in Workflow Studio and displays the inputs, which include the parent product offering and its child product offerings that comprise the bundle, and the decision table section that contains the columns for setting the conditions and the pricing adjustments to be applied to the child product offerings in the bundle.
5. In the decision table set the pricing rule for the child product offerings in the bundle:

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a. In the Conditions section, select **Add new decision row**.

b. In the row, select the columns for the product offerings to be applied and select the appropriate values.

c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.

d. In the **Adjustment Value** column, enter the adjustment amount.

e. In the **Adjustment Description** column, enter a brief description of the adjustment.
This description is copied to the adjustment record linked to the quote or order line when the product offer is added to the quote or order. Consider creating a description that is formatted with a unique ID followed by a text description. You can use the unique ID to audit the adjustment generated when the quote or order is being configured, and the agent can use the description to understand the reason for the adjustment.

f. Select **Save**.
The adjustments are available to sales or order agents when working on quotes or orders.

### Configure volume pricing

Set volume pricing rules by using the Standard Price Adjustment matrix.

#### Before you begin

Role required: sn_csm_pricing.pricelist_administrator, sn_csm_pricing.pricelist_manager

#### Procedure

1. Navigate to **Workspaces** > *CRM Workspace* and select the List icon .
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select the Standard Price Adjustment matrix and create a new matrix version.
4. In the Context variables section of the new matrix version, select the Search icon and in the list of Context variables, select the Quantity variable.
The Quantity variable is added to the Context variables section.
5. Select **Create Rule**.
The Standard Price Adjustment Matrix opens in Workflow Studio and displays the inputs available and the Decision table for entering the volume pricing conditions to be applied.
6. In the Conditions section of the Decision table, do the following:

   a. Select the item to which the volume pricing adjustment is to be applied, such as **Product Offering**.
   For example, if you're setting volume pricing for door sensors, select the Door Sensor product offering.

   b. Make the condition active by selecting the **Active** field and set it to true.

   c. Select a condition operator in the **Quantity** field and enter the quantity value to be applied.
   The following operators are available:

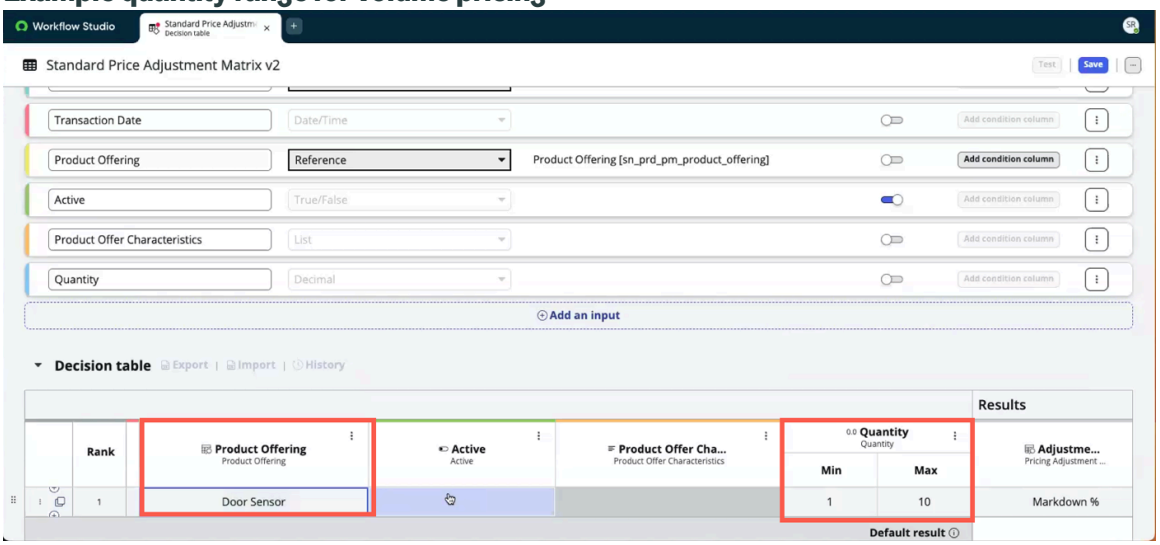
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- is
- is not
- is empty
- is not empty
- less than
- greater than
- less than or is
- greater than or is
- between

For example, selecting the operator **greater than or is** and specifying a quantity value 10 indicates that the pricing adjustment applies to a quantity that is equal to or greater than 10.

If you select the operator **between**, you specify a quantity range by entering the **Min value** and **Max value** for the range. You must set both a minimum and maximum value so that the quantity pricing adjustment applies only to the quantity of product offerings in the specified range.

**Example quantity range for volume pricing**




For example, the door sensor pricing adjustment applies only to quantities ranging from 1 through 10. The pricing adjustments are not applicable to other quantity values for door sensors.

7. In the Results section, do the following:
   a. Select the **Adjustment Type** field and choose the type of adjustment, for example Markdown % or Markdown amount.
   b. In the **Adjustment Value** column, enter the adjustment amount.
   c. In the **Adjustment Description** column, enter a brief description of the adjustment, for example, Quantity adjustment for door sensors.
   d. Select **Save**.
8. Return to the version of the Standard Price Adjustment Matrix that you created and select **Save** and then **Publish** to make the matrix version active.

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The volume pricing adjustment is available to sales or order agents as they work on quotes or orders. For example, a pricing adjustment has a quantity range for a particular product, such as 1 through 10 door sensors. When a sales agent adds five door sensors to a quote, the pricing adjustment is applied. The pricing adjustment doesn't apply to quantities outside this range.

### Blended pricing for contract consolidation of subscription renewals

When selected contract lines are consolidated into a renewal line for renewal purposes, the pricing engine uses blended pricing to calculate the renewal line pricing.

## Overview of renewal pricing in contract consolidation

Over the life of a subscription, contract quantities can change due to the following:

- **Upsells**: Changes to a customer contract that increase its value by adding more quantity, licenses, or new products or services. These changes can result in one or more new contract lines or an amendment, while the original contract remains in effect.
- **Downsells**: Changes to a customer contract that reduce the quantity of a product or service and supersedes an earlier contract line.

In renewal pricing for contract consolidation, the pricing engine does the following:

- Finds which contract lines are included in the renewal.
- Aggregates the quantities for the contract lines in the renewal.
- Blends prices and uplift increases to determine pricing for the single quote renewal line.

#### How contract line changes are handled

Agents indicate which contract lines are to be consolidated by setting the **Renewable** option on a contract line. At renewal, active upsell lines and the latest downsell lines that represent the current base quantity are combined to calculate renewal pricing. The context variable **Consolidated From Contract Lines** identifies a consolidated quote renewal line. Within those consolidated lines, if the **Include quantity for renew** field is selected, the quantity is used in the price blending.

#### How renewal quantity and prices are calculated

The pricing engine calculates prices on the quote renewal line using weighted averages, based on the quantities of the contributing contract lines. The following values are blended:

- Base price
- Unit price
- List price (after price increases, such as uplifts)

#### How contract lines with uplifts are calculated

An uplift is a price increase applied at contract renewal, typically expressed as a percentage, which raises the list price above the base price for a given term or period.

If contributing contract lines have different uplift percentages:

1. Each contract line's uplifted price is calculated first.
2. A weighted average of the uplifted prices is computed based on the current active contract lines.
3. The resulting value is set as the list price on the renewal line.

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Uplifts in contracts are handled as list price adjustments, where:

- During blending, the renewal base price is the weighted average of the unit price of the consolidated contract lines.
- The uplift is reflected in the list price.

## Controlling uplift values in contracts and renewals

You can configure the following uplift features:

- Uplift amounts: To control uplift amounts that are applied, use the Price Increase Defaulting Matrix. For details, see Create a price increase adjustment.
- Uplift renewal multiplier: To set the uplift renewal multiplier, use the *renewal_uplift_term* system property. For more information, see Set term multiplier for contract renewal uplift.

### Set term multiplier for contract renewal uplift

Use the *renewal_uplift_term* system property to select the contract duration basis used to calculate the renewal uplift term, either per year or per term.

#### Before you begin

Role required: admin or pricing admin

#### Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *renewal_uplift_term* system property.
   The default value is per term, which means the term is for a specific period of time based on the contract.
3. Do one of the following in the **Value** field:
   - To use a yearly basis for the uplift term multiplier, enter `per year` in the **Value** field.
   - To change the uplift term multiplier to per term, enter `per term` in the **Value** field.
4. Select **Update**.
   Uplift calculations use the specified multiplier to calculate the contract duration basis.

### Create a price increase adjustment

Create a price increase adjustment such as an renewal uplift. Use the Price Increase Defaulting Matrix to define conditions that control the price increase applied.

#### Before you begin

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing. pricelist_manager

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Rule Matrices**.
3. In the Rule Matrices list, select Price Increase Defaulting Matrix.
   The matrix details are displayed.
4. Select **Edit Rule** to define conditions for the price increase.
   The Decision Table for the adjustment opens in Workflow Studio and displays the inputs for the price increase, and the decision table that contains the columns for setting the price increase conditions.

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5. Set the default price increase rule.

   a. In the Conditions section, select **Add new decision row**.

   b. In the row, select the input column and set the value for the condition.
   For example, if the input is **Account**, choose the customer account to which the adjustment applies.

   c. In the **Price Increase Type** column, select the type of price increase, such as Renewal Uplift.

   d. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.

   e. In the **Adjustment Value** column, enter the adjustment amount.

   f. Select **Save**.

6. Select **Publish**.

**Result**
The pricing increases, for example uplifts for contract renewals, are applied based on the conditions set in the Price Increase Defaulting Matrix.

### Price and quantity ramps

Price and quantity ramps enable sales agents to set incremental increases in product pricing and quantity deals over the duration of a customer contract or subscription period.

## How ramps work

Different product adoption scenarios by customers can affect product pricing and quantities for subscription products or products under contract. For example, customers might want to scale their purchases over time, based on product use that increases annually as the company grows. Changes to products in subscriptions or contracts, such as changes to product characteristics or quantity, can cause pricing or quantity increases that must be applied.

Ramps provide a flexible pricing structure for sales agents to schedule pricing and quantity increases over specific time periods, called ramp segments. During the quote process, sales agents can create ramps for configurable products.

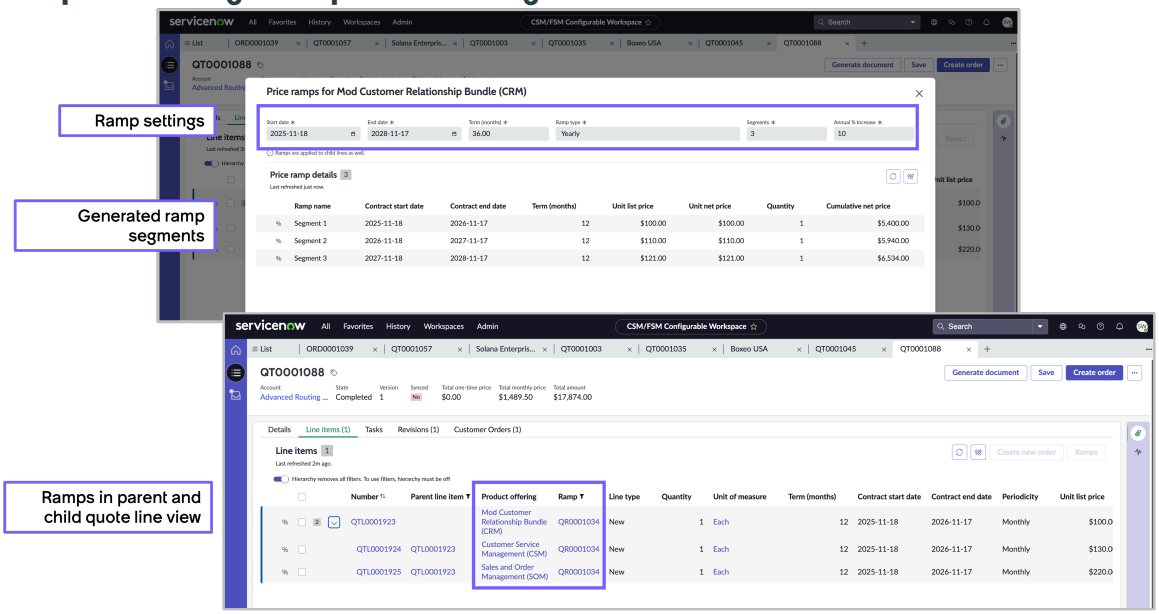
**Note:** Products that can have ramps must have the **Price method** set to Recurring and the **Enable ramps** option selected. Your product catalog admin sets those options when creating a product offering.

Ramps can be defined using yearly, quarterly, or custom structures. Yearly and quarterly ramps generate ramp segments automatically based on the selected term and frequency. Custom ramps allow agents to define ramp segments with flexible durations, rather than relying on automatically generated segments.

The following example shows the ramp settings used to create ramps for a configurable product offering. The Price ramp details section displays the ramp segments that are generated automatically for the configurable product and its child lines.

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### Ramps for a configurable product offering




Sales agents provide the following items to generate the ramps for a quote line:

- **Start date** and **End date**. The default dates come from the quote line. The agent can enter a different start or end date, which the system uses to update the settings accordingly. These dates are used with the **Term** to calculate the ramp segments. The start date is used as the starting date for the first ramp segment.
- **Ramp type**: Yearly, quarterly, or custom. Yearly and quarterly ramps generate segments automatically based on the selected frequency and term. Custom ramps allow agents to define and manage ramp segments manually.
- **Term**: Length of time, in months, for the ramps. The maximum term is 60 months. The Term is used with the Ramp type (Start date and End date) to determine the segments created.
- **Annual % increase**: The percentage increase to be applied annually. The annual percentage increase is applied after the completion of the first year and is cascaded to all quote lines.
- **Segment**: The number of time periods in the ramp to be created. Segments are determined as follows:
  - Yearly ramp type: If the **Term** is a multiple of 12, the number of segments created is equal to the term/12. Each segment term is 12 months. If the **Term** isn't a multiple of 12, the number of segments is term/12 +1, where the first segment is less than 12 months, but the other segments are 12 months each. Also, the first segment can be partial months.
  - Quarterly ramp type: If the **Term** is a multiple of 3, the number of segments isn't equal to term/3. Each individual segment term is 3 months. If the term is not a multiple of 3, the number of segments is equal to (Term/3+1) with the first segment less than 3 months while the rest of the segments are 3 months each. The first segment can be partial months, such as 8 months, 5 days based on the **Start date** and **End date**.

## Ramp generation and validation

For bundled products, the ramps generated for the parent line and its child lines have segments with the same ramp type (yearly or quarterly) and term.

- If the parent line has a ramp, ramps are created automatically for all the child lines.
- If the parent line is not ramped, all the child offers can be ramped independently.

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## Ramp benefits

Ramps provide the following benefits:

- Flexible pricing structures for customers, to align with their product adoption phases. For example, you can start with lower product pricing in the first ramp segment, to reduce initial costs and overcome buyer hesitancy.
- Scaled revenue optimized over time as product usage grows.
- Automatic calculations of ramp segments and pricing, minimizing errors in manual calculations made by sales agents.

## Ramp limitations

Ramps have certain limitations.

- Ramps aren't supported for these features:
  - Quotes of types sale agreement
  - Multiple configurations
  - Product inventory (not applicable)
- Ramps for order lines are displayed, but order changes to ramps by order agents aren't supported. Order Management supports viewing price and quantity ramps on order line items to provide visibility into planned pricing and quantity changes over time. All ramp creation and management is performed in Quote Management.
- Ramps for sold products (SP) are displayed just like any other line, but Modify, Add, Change, Delete (MACD) operations aren't supported for sold products.

## Setting up ramps

Configuring ramps involves the following tasks:

**Ramp configuration tasks**

| Task | Description | Role |
|---|---|---|
| Enable ramps in product offerings | When creating a configurable product offering:<br>• Set the **Pricing method** to Recurring, which makes the **Enable ramps** option available.<br>• Select the **Enable ramps** option, which lets sales agents create ramps for the offering in a quote line. | Product catalog admin |
| Add price ramps on a quote line item | Define the ramp settings for the quote line and generate the ramps. After creating the ramps, agents can update the settings, such as the **Ramp type** or **Annual % increase** to recalculate the ramp segments automatically. | Sales agent |

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## Renewal pricing for products with price and quantity ramps

You can control how renewal uplift pricing for product offerings with price and quantity ramps is calculated by the pricing engine. A renewal uplift is a price increase applied to a product when a contract is renewed.

## Overview of renewal pricing for products with ramps

When a product offering with ramps is up for renewal, determining the renewal unit price for the offering can be complex because a ramp may have multiple segments with different prices and quantities.

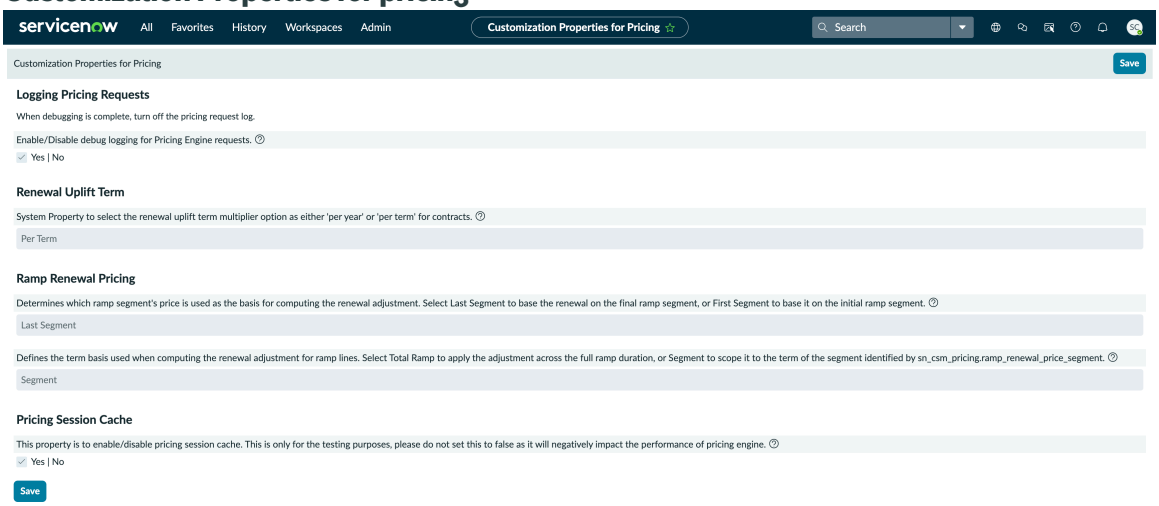
Ramp deals may also have standard (yearly or quarterly) and custom segment durations, making it difficult to choose which segment price to use as the price basis and the term for determining the renewal unit price used in uplift calculations. For non-ramped products, the uplift is calculated by taking the unit price and applying the uplift percentage over the renewal term.

### Price basis for calculating renewal unit prices

The renewal unit price is the starting price for a contract renewal line. The pricing engine supports two ways to calculate the renewal unit price using the segment and term. By default, the pricing engine uses the unit price basis from the last segment and the duration of the last segment for the term.

However, the pricing engine can use the first segment as the price basis and apply the uplift across the entire ramp term (total ramp duration). You can set the first segment as the price basis and entire ramp term by using the pricing system properties *sn_csm_pricing.ramp_renewal_price_segment* and *sn_csm_pricing.ramp_renewal_term_basis*. You set these properties by using the Customization Properties for Pricing form (navigate to **All** > **Pricing** > **Administration** > **Properties**).

#### Customization Properties for pricing




The following table shows the price basis and terms that you can control.

#### Price basis for renewal unit pricing of ramped product offerings

| Basis option | Price | Term |
|---|---|---|
| Last segment (Default used by pricing engine) | Unit price from the last ramp segment | Duration of the last segment only. |

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**Price basis for renewal unit pricing of ramped product offerings (continued)**

| Basis option | Price | Term |
|---|---|---|
| First segment | Unit price from the first ramp segment | Total ramp duration (all segments combined; apply the uplift across the entire ramp term) |

### Example of uplift calculations

The following example shows how the pricing engine uses the different price basis and term values to calculate the unit price:

**Uplift calculation example**

| Price basis and term | Calculation |
|---|---|
| Last segment + Segment term | Last segment price: $220. Last segment = 1 year. Effective uplift = 10%. Renewal price = $220 + $22 = $242 |
| First segment + Full term | First segment price: $240. Full ramp = 3 years. Effective uplift = 10% x 3 = 30%. Renewal price = $240 + $72 = $312 |

**Note:** Quantity is always sourced from the last segment regardless of which price basis method is selected. The price basis configuration affects only the unit price and term for the uplift calculation.

### Non-standard segment durations

When a ramp has non-standard segment lengths (for example, a segment that spans 18 months rather than 12), the pricing engine rounds up the segment duration to the nearest full year before computing the renewal price. This provides consistent year-over-year uplift behavior even when segment lengths do not align with calendar years.

## Overriding default renewal uplift calculations

You can override the default renewal uplift calculations for ramped products made by the pricing engine by using the *sn_csm_pricing.RampRenewalUpliftCalculationExtensionPoint*. You can use this extension point to customize the logic for calculating renewal uplift pricing. Your inputs can include segment data, unit price, and term for each ramp segment.

For example, calculate the price basis and term for both the last and first segments to determine which price basis provides the maximum uplift amount. You could have the pricing engine choose the higher value of the two calculated renewal prices to use as the renewal price.

Using the uplift calculation example from the previous section, the pricing engine determines that the first segment price and full ramp term amount ($312) is higher than the last segment and segment term price ($242).

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**Maximum uplift calculation example**

| Price basis and term | Calculation |
|---|---|
| Last segment + Segment term | Last segment price: $220. Last segment = 1 year. Effective uplift = 10%. Renewal price = $220 + $22 = $242 |
| First segment + Full term | First segment price: $240. Full ramp = 3 years. Effective uplift = 10% x 3 = 30%. Renewal price = $240 + $72 = $312 |
| Value selected by pricing engine | Max ($312, $242) = $312. The pricing engine uses the First segment price basis and Segment term to calculate the renewal price. |

## Renewal pricing for contract lines with upsells and downsells

When a contract line item is upsold or downsold during its term, the changed quantities are consolidated into a single renewal quote line rather than renewed as separate lines. Consolidation rolls multiple product changes across different terms, quantities, and pricing from the prior contract into a single line.

The pricing engine calculates the delta price amount on the consolidated renewal quote line from following values:

- The prior contract value, which includes the effect of every upsell and downsell applied to the contract line item.
- The new renewal price, which includes the renewal uplift.

Because the prior contract value accounts for the upsells and downsells, the delta price reflects the change against what the customer was paying at the end of the term, not against the value of the original contract line.

For example, Boxeo has one contract line for Product A, originally 200 units at a $15 unit net price on a 3-year term. Partway through the term, Boxeo downsells to 150 units, then later upsells to 220 units. At renewal, the pricing engine consolidates the original line and both changes into a single renewal quote line and calculates the delta price as follows:

**Renewal delta price for a consolidated contract line**

| Value | Amount |
|---|---|
| Prior contract value (blended unit net price across the original line, the downsell, and the upsell, applied over the full 3-year term) | $9,900 |
| New renewal price (220 units at the renewed unit net price, including the renewal uplift) | $11,352 |
| Delta price (new renewal price minus prior contract value) | $1,452 |

The consolidated renewal quote line carries the delta price, not the full new renewal price, because the prior contract value already reflects the downsell and the upsell. Charging the full new renewal price on top of what Boxeo already paid for those changes would double-count them.

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## Controlling renewal uplift pricing for ramped products

Manage how the pricing engine calculates renewal uplift pricing for ramped products by using the following properties and extension point:

- Uplift renewal multiplier: To set the uplift renewal multiplier, use the *renewal_uplift_term* system property. For more information, see Set properties to control pricing processing.
- Segment basis and term used by the pricing engine: Use the system properties *sn_csm_pricing.ramp_renewal_price_segment* and *sn_csm_pricing.ramp_renewal_term_basis*. To learn more, see Set properties to control pricing processing.
- Override the default renewal uplift calculations for ramped products: Use the *RampRenewalUpliftCalculationExtensionPoint* to customize the uplift calculation logic. Access the extension point by navigating to **All** > **Pricing** > **Administration** > **Scripted Extension Points** and in the Extension Points list, select *sn_csm_pricing.RampRenewalUpliftCalculationExtensionPoint*. Your inputs can include data such as the unit price and term for each ramp segment.

### Configuring derived pricing

Automatically set the pricing for a product by deriving its pricing from other products or pricing sources such as transactional values in quotes or orders.

## Derived pricing overview

As a pricing admin or manager, you can define rules for deriving product pricing dynamically, relative to other products or transactional values such as the total contract value (TCV) or annual contract value (ACV). When products with derived pricing are added to a transaction, such as a quote or order, the derived pricing is applied automatically. The system manages the lifecycle of derived lines by adding new system-generated lines when pricing rules require them, updating existing lines when pricing conditions change, and removing lines that no longer apply.

Derived pricing can be used in various scenarios. For example:

**Use cases for derived pricing**

| Pricing scenario | Industry use case |
|---|---|
| Price accessories relative to related base equipment | Manufacturing: Sell an extended warranty that is 10% of the price of a high-end industrial machine. |
| Price add-ons that are based on Product X and Y total | Telecom: Sell 24x7 support as an add-on that is 10% of all the subscription products in a quote. |
| Price add-ons based on a percentage of all products purchased | SaaS: Sell product support service as an add-on that is 15% of subscription fees for all software products purchased. |

Derived pricing for a product involves the following items, which you manage through the Derived Pricing Matrix:

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**Elements in derived pricing**

| Item | Description |
|---|---|
| Target product offering | Product offering for which pricing is derived. |
| Source product offering | One or more product offerings whose pricing is the basis for the target offering. |
| Transaction header value (context variable) | Field from the header for a transaction, such as quote, that is used as the pricing basis to calculate the derived price, such as the annual contract value (ACV). |
| Scope | Level from which the context variable is used:<br>• Bundle<br>• Cart<br>• Account |
| Formula calculation | Percentage used to calculate the derived pricing |
| Price point | Price at which the product is sold:<br>• Unit list price<br>• Unit net price<br>• Cumulative net price<br>• Monthly recurring price<br>• Annual recurring price |
| Aggregate | Formulas (SUM, MIN, MAX, AVG) used to determine a single derived product price when pricing is derived from more than one source product. Percentages and price floor and ceiling amounts are then applied as pricing adjustments to calculate the final derived product price. |

## Scope: Quotes and orders

Derived pricing applies to both quotes and orders. When you configure rules in the Derived Pricing Matrix, the system automatically applies those rules to derived line items in both transaction types. The system handles all line-level changes (adds, updates, and removals) without requiring manual edits from agents.

## Automatic generation of derived pricing lines

The pricing engine generates the derived product lines for a transaction and aligns their dates to the source lines that fund them. Sellers add the source products and the derived product to the transaction; they don't work out how many derived lines are needed or what dates each line carries. Automatic generation is enabled by default. To turn it off, see Disable auto-generation of derived pricing lines.

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The pricing engine reads source lines from one of two origins, depending on the scope set for the derived product. For bundle and cart scope, it reads the source lines on the transaction itself, such as the quote lines that a seller adds. For account scope, it reads the source lines on the account's sold product records. In either case, a source product can take any of the following shapes:

- A standalone product
- A bundle
- A product within a bundle

Before automatic generation was available, sellers added each account-scope derived line themselves with start and end dates that matched the sources, recalculated those dates whenever a source changed, and split derived lines manually when a source split. A derived line whose dates didn't align with its sources was excluded from the price calculation without warning, so a date entered incorrectly produced an undervalued quote.

The following table describes how the pricing engine responds to the source products.

**Derived line generation by source condition**

| Source condition | Result for the derived product |
|---|---|
| A source is ramped across multiple date ranges. | The pricing engine creates one derived line for each date range. When several sources are ramped, it segments the derived product on the most granular set of non-overlapping date ranges. |
| A ramp is added, changed, or removed. | The pricing engine adds, updates, or removes derived lines so that they match the new set of date ranges. |
| A seller adds a derived line whose dates don't align with the sources. | The pricing engine changes the dates on that line and creates additional derived lines to cover the remaining date ranges. |
| A contract is amended and a source line splits, such as an upsell part-way through the term. | The derived product splits the same way. A new derived line covers the period from the amendment date to the end of the term. |
| The derived product sits inside a bundle. | The pricing engine takes the most recent configuration of the derived product from the account's sold product records, then adds both the bundle line and the derived line to the transaction. |
| The sources belong to more than one contract. | The pricing engine generates the derived lines from the sold products across those contracts. A derived line can extend beyond the end date of a contributing contract. |

When derived lines already exist for the product, the pricing engine uses one of them as the reference line and copies its priced characteristics and context variables to every line it creates. On a new transaction, the reference line is the derived line that the seller added. On an amendment or a renewal, it's the most recent derived line in the account's sold product records.

The Derived Pricing Matrix v2 supports auto-generation of derived pricing lines.

## Date segments with term-aware pricing

ServiceNow uses the stateless date-segments approach to generate derived pricing. For subscriptions, this method performs the following steps:

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1. Analyzes all source product start and end dates to identify time boundaries
2. Creates one non-overlapping target segment for each distinct time interval
3. Calculates cumulative net price for active sources, accounting for monthly recurring price and months in each segment
4. Applies a fixed percentage (for example, 10%) to derive the target product price
5. Optionally applies a manual discount to the target product
6. Marks all system-generated target lines with a SYSTEM_GEN flag to prevent manual edits

For how the pricing engine calculates the derived price for each segment, including what happens on an upsell, downsell, or renewal, see Calculating derived pricing for subscription products.

## System-generated derived pricing lines

Derived lines that the pricing engine creates have the **System generated** [*system_generated*] field set to true. Derived lines that a seller adds keep this field set to false. Use the field to tell the two apart in reports, integrations, and downstream business logic.

On a system-generated line, a seller can change the start date of the first date segment. The pricing engine applies that change and recalculates the remaining segments from it. The pricing engine manages the quantity, the dates on later segments, and the priced characteristics that it copied from the reference line.

A system-generated line can span a date range that reaches past the end of one contributing contract, so date validation is relaxed for these lines.

## Limitations for derived pricing

Derived pricing does not work for quotes of type sales agreements.

## Setting up derived pricing

To implement derived pricing, complete these tasks:

**Derived pricing configuration tasks**

| Task | Description | Role |
|---|---|---|
| Enable related (derived) pricing for a price list line | When creating a price list line, select the **Derive price** option.<br><br>You can also set the **Floor price** and **Ceiling price** for a price list line. | Pricing admin or manager |
| Create rules for derived product pricing | Use the Derived Pricing Matrix to define the product relationships and calculations used when deriving product pricing. | Pricing admin or manager |

### Enable the Account scope option for derived pricing

Enable the **Account** option so that it is available for selection in the **Scope** column of the Derived Pricing Matrix. By default, this option in the Choice List table is not enabled.

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### Before you begin
Role required: admin

### Procedure
1. Navigate to **All** > **System Definitions** > **Choices**.
2. Do the following:
   - In the **Table** column, search for: var__m_sys_decision_multi_result_element_5d8794f9ff923610998fffffffffff16
   - In the **Element** column, search for **scope**.
3. Open the Account choice record.
4. Deselect the **Inactive** option.
5. Select **Save**.
   The **Account** option is displayed as a selectable option in the **Scope** column of the Derived Pricing Matrix.

## Create rules for derived product pricing

Define product pricing rules for deriving the price of a product dynamically based on the pricing of related products or a pricing source.

### Before you begin
Activate the **Account** option for the **Scope** field in the Derived Pricing Matrix. To activate the option, see Enable the Account scope option for derived pricing.

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

### About this task
Use the Derived Price Matrix to define the rules for deriving the pricing of a product offering relative to other product offerings or a price source based on a transactional header, such as items from quote headers.

The Derived Price Matrix defines pricing rules for both quotes and orders. When agents add products to a quote or order, the system automatically evaluates the rules in this matrix and generates, updates, or removes derived line items as needed. Agents cannot edit or copy system-generated lines. The system enforces these restrictions to preserve pricing integrity. When agents add products to a quote or order, the following occurs automatically:

- System-generated lines appear when pricing rules are evaluated and conditions are met.
- Existing derived lines update automatically when pricing conditions change, such as when source product prices or quantities are modified.
- Derived lines are removed automatically when they no longer meet the pricing rule conditions.
- System-generated lines display a **System generated** indicator and can't be edited, deleted, or copied. This restriction preserves pricing integrity.

Agents can review the line item for the target product to see how the derived price was calculated by checking the scope values and price point used.

**Note:** Only one rule set for a derived product is supported.

### Procedure
1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.

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3. Navigate to **Pricing** > **Pricing matrixes**.
4. In the Pricing matrixes list, select the **Derived Pricing Matrix**.
5. If you have many rows in the decision table and you want to optimize rule matrix performance, in **Query optimization variables**, select the Search icon and one or more context variables that the system uses to filter the derived pricing decision rows that are evaluated.
6. In **Rule selection criteria**, select the option that indicates whether single or multiple rules are applied in the Derived Pricing Matrix.
   If multiple rules are applied, all applicable pricing rules are applied when evaluating relationships for derived pricing. If the option is Single, the first rule based on rank is applied for the relationship.
7. Select **Edit Rule**.
   The Decision Table for the Derived Pricing Matrix opens in Workflow Studio and displays the following:
   - Inputs: Lists the default inputs (**Target Product Offering**,**Product Offering** (the source product offering), **Transaction Date**, and **Active**).

     **Note:** If you have a custom context variable that represents a pricing value to be used as a pricing source, you can add a custom context variable as an input. Context variables are a reference to the Context Variable [sn_csm_ctxrul_mgt_context_variable] table.

   - Decision table: The conditions that you specify to derive the pricing for a target product from one or more source products, and the items used to generate the results.
8. In the Decision table, enter the derived pricing conditions:
   a. In the Conditions section, select **Add new decision row**.
   b. In the **Target Product Offering** column, enter the conditions for the target offering and the source **Product Offerings** if applicable.
   c. Set other mandatory inputs as needed.
9. In the results section, do the following:
   a. In the **Scope** column, select one of the following:
      - Bundle: The target product offering can be added only inside a bundle. The derived price is based on all the source offerings in the bundle. All instances of the source product offerings in the bundle hierarchy are considered and their prices are totaled.
      - Cart: All instances of the source product offerings in the transaction are considered and their prices are totaled.
      - Account: All instances of the source product offerings for a customer account are considered and their prices are totaled.

   b. In the **Percentage Price** column, enter the percentage of the source product price to be applied.

   c. Select the **Price Point** used to calculate the derived price:
      - Unit List Price: Product price that is based on a single unit of measure.
      - Unit Net Price: Product price after all adjustments such as discounts or reductions are applied.
      - Cumulative Net Price: Product price over a specific period, which considers discounts or price adjustments applied on the total quantity purchased.

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- Monthly Recurring Price: Product price that is paid monthly for monthly subscriptions or contract fees.
- Annual Recurring Price: Product price that is paid yearly for annual subscriptions or contract fees.

**d.** In the **Header Variable** column, enter the header variable for a quote or order to be used as the pricing source, for example Total annual recurring price.

**e.** In the **Aggregate** column, select the formula that determines how multiple product source values are calculated and applied to determine a single product price for the derived product.
Any adjustments, such as percentages or floor and ceiling values, are then applied to determine the final derived product price.

- Sum: Use the sum of all the source product prices to calculate a single value for the derived product price. If the result is less than the floor price, the price is adjusted up to the floor price. If the result exceeds the ceiling price, the price is capped at the ceiling price.
- Max: Use the maximum price of the source products. For example, if Product A price is greater than Product B price, use the Product A price.
- Min: Use the minimum price of the source products. For example, if Product B price is less than Product A price, use the Product B price. The price is then adjusted to the floor price and capped at the ceiling price.

  **Note:** Floor and ceiling prices are applied after the aggregate formula is evaluated. The final derived price is within the floor-to-ceiling range defined on the price list line.

- Average: The average price between the source products (sum of all the source product prices divided by the number of products). If the Average is less than the floor price for the derived product, the Average is rounded up to meet the floor price.

**f.** Review the **Validation Status** and **Validation Message** columns to verify that the results are valid.

**g.** Select **Save**.

**10.** In the Details tab for the matrix, select **Publish**.
The derived pricing for the target product is available when the product is used in a transaction line.

**Note:** After a matrix is published, you can't make further changes to it. If you have changes, create another version of the matrix with your updates and publish the new version. However, your admin can allow changes to a published matrix by using the *allow_edit_on_published_matrices* system property. To learn more, see Allow changes to published pricing and product eligiblity matrices.

### Result

When sales or order agents add a product with derived pricing, the derived pricing for the product is automatically applied based on the conditions and the values set in the Derived Pricing Matrix. Agents can review the line item for the target product and see how the derived price was calculated, for example, by checking the scope values, such as Unit list price, Unit net price, Cumulative net price, Recurring monthly price, or Recurring annual price.

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### Calculating derived pricing for subscription products

The pricing engine calculates a derived product's price from the combined monthly recurring price of active source subscription products during each date segment. The derived price changes automatically when source products are added, reduced, or renewed.

## How the pricing engine calculates a derived price

When a Derived Pricing Matrix rule uses the sum aggregate formula with Monthly Recurring Price as the price point, the pricing engine calculates the derived product's price from the combined monthly recurring price of the active source subscription products during each date segment. To configure these fields, see Create rules for derived product pricing.

For each segment, the pricing engine does the following:

1. Calculates the net price of each source product.

   Net Price = List Price × (1 – Manual Discount %)

2. Calculates the monthly recurring price (MRP) of each source product.

   Monthly Recurring Price (MRP) = Qty × Net Price

3. Calculates the segment net price.

   Segment Net Price = MRP × Number of Months in Segment

4. Sums the MRP of every source product that's active during the segment to get the cumulative net price for that segment.

   Cumulative Net Price = Sum of (Segment Net Price) for all active sources

5. Applies the rule's Percentage Price to the cumulative net price to get the derived product's price for that segment.

   Target Product Price (pre-discount) = Cumulative Net Price × Percentage Price %

6. If a manual discount is entered on the derived product line, applies that discount to get the final price.

   Final target product price = Target Product Price × (1 – Manual Discount % on target product)

## Example: Quote with multiple source subscriptions

Boxeo buys three source subscription products on a one-year contract, each in a different bundle, with different start and end dates and a negotiated discount. The Derived Pricing Matrix rule for this example uses Account as its Scope, so the pricing engine totals every active source across Boxeo's account regardless of which bundle it's in, as listed in the following table.

**Boxeo source subscription products**

| Source product | Quantity | Start date | End date | List price | Manual discount | Net price | Monthly recurring price | Bundle |
|---|---|---|---|---|---|---|---|---|
| ITSM | 100 | January 1 | December 31 | $10 | 15% | $8.50 | $850 | Bundle 1 |
| CSM | 50 | April 1 | September 30 | $20 | 10% | $18 | $900 | Bundle 1 |

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**Boxeo source subscription products (continued)**

| Source product | Quantity | Start date | End date | List price | Manual discount | Net price | Monthly recurring price | Bundle |
|---|---|---|---|---|---|---|---|---|
| HRSD | 20 | July 1 | December 31 | $15 | 20% | $12 | $240 | Standalone |

Because the sources start and end on different dates, the pricing engine creates four segments and calculates the derived product's price for each from the sources active during that segment, including HRSD even though it's in a different bundle from ITSM and CSM. This rule uses a Percentage Price of 10%, with no discount on the derived product line, as shown in the following table.

**Derived pricing by segment**

| Segment | Active source products | Combined monthly recurring price | Months in segment | Cumulative net price | Derived price (10%) |
|---|---|---|---|---|---|
| January 1 - March 31 | ITSM | $850 | 3 | $2,550 | $255 |
| April 1 - June 30 | ITSM, CSM | $1,750 | 3 | $5,250 | $525 |
| July 1 - September 30 | ITSM, CSM, HRSD | $1,990 | 3 | $5,970 | $597 |
| October 1 - December 31 | ITSM, HRSD | $1,090 | 3 | $3,270 | $327 |

## Example: Upsell adds a source subscription mid-term

On July 1, the customer adds a fourth source subscription product, SecOps, effective from July 1 through December 31: quantity 10, $25 list price, 5% discount, giving a monthly recurring price of $237.50.

The SecOps start date falls inside the existing July 1 - September 30 and October 1 - December 31 segments, so the pricing engine adds the SecOps monthly recurring price to the cumulative net price of both segments and recalculates the derived price for each. The January 1 - March 31 and April 1 - June 30 segments are unaffected because SecOps isn't active during them, as shown in the following table.

**Recalculated segments after the upsell**

| Segment | Active source products | Combined monthly recurring price | Months in segment | Cumulative net price | Derived price (10%) |
|---|---|---|---|---|---|
| July 1 - September 30 | ITSM, CSM, HRSD, SecOps | $2,227.50 | 3 | $6,682.50 | $668.25 |
| October 1 - December 31 | ITSM, HRSD, SecOps | $1,327.50 | 3 | $3,982.50 | $398.25 |

## Example: Downsell reduces a source subscription mid-segment

On October 15, the customer reduces the ITSM quantity from 100 to 50, cutting its monthly recurring price from $850 to $425. Because the change takes effect partway through the

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October 1 - December 31 segment, the pricing engine splits that segment at the change date and prorates each part by the number of days it covers, as shown in the following table.

**Segment split at the downsell date**

| Segment | Active source products | Combined monthly recurring price | Months in segment | Cumulative net price | Derived price (10%) |
|---|---|---|---|---|---|
| October 1 - October 14 | ITSM (qty 100), HRSD, SecOps | $1,327.50 | 0.47 | $623.93 | $62.39 |
| October 15 - December 31 | ITSM (qty 50), HRSD, SecOps | $902.50 | 2.53 | $2,283.33 | $228.33 |

If the seller also enters a manual discount on the derived product line, that discount applies only to the price for the segment created by the change, not to segments that came before it. For example, a 5% discount on the October 15 - December 31 segment reduces its derived price from $228.33 to $216.92.

## Example: Renewal with updated list prices and source products

A one-year contract renews with a new source product mix and updated list prices. Because both source products span the full renewal term, the pricing engine creates a single segment for the derived product, as listed in the following table.

**Source subscription products for the renewal term**

| Source product | Quantity | Start date | End date | List price | Manual discount | Net price | Monthly recurring price |
|---|---|---|---|---|---|---|---|
| ITSM | 100 | January 1 | December 31 | $12 | 10% | $10.80 | $1,080 |
| Platform | 50 | January 1 | December 31 | $50 | 5% | $47.50 | $2,375 |

The pricing engine sums the monthly recurring prices ($1,080 plus $2,375 equals $3,455 a month), multiplies by the 12-month term to get a cumulative net price of $41,460, then applies the 10% Percentage Price to get a derived price of $4,146 for the renewal term. This is higher than the prior term's derived price of $1,020, which reflected only ITSM at its previous list price.

## Example: Sources on more than one contract

Boxeo has two active contracts. ITSM and CSM are sold on Contract 1; HRSD is sold on Contract 2. All three are source products for the same derived product, and the rule's Scope is Account, so the pricing engine totals every active source across Boxeo's account regardless of which contract it's on, as listed in the following table.

**Boxeo source subscription products across two contracts**

| Source product | Quantity | List price | Manual discount | Net price | Monthly recurring price | Term | Contract |
|---|---|---|---|---|---|---|---|
| ITSM | 250 | $10 | 10% | $9 | $2,250 | January 1 - December 31 | Contract 1 |
| CSM | 300 | $8 | 10% | $7.20 | $2,160 | January 1 - December 31 | Contract 1 |

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**Boxeo source subscription products across two contracts (continued)**

| Source product | Quantity | List price | Manual discount | Net price | Monthly recurring price | Term | Contract |
|---|---|---|---|---|---|---|---|
| HRSD | 400 | $5 | 10% | $4.50 | $1,800 | January 1 - December 31 | Contract 2 |

Because all three sources run for the same term, the pricing engine creates a single derived line spanning January 1 through December 31, with a combined monthly recurring price of $6,210. Over the 12-month term that gives a cumulative net price of $74,520, and a Percentage Price of 10% makes the annual derived price $7,452.

On July 1, Boxeo upsells ITSM on Contract 1 by adding 50 more licenses, effective through the end of the term. The pricing engine splits the derived line at July 1: the January 1 - June 30 segment keeps its original dependent source products and price, and the pricing engine creates a new July 1 - December 31 segment whose dependent source products include the upsell line in addition to ITSM, CSM, and HRSD, as shown in the following table.

**Derived line segments after the Contract 1 upsell**

| Segment | Dependent source products | Combined monthly recurring price | Months in segment | Cumulative net price | Derived price (10%) |
|---|---|---|---|---|---|
| January 1 - June 30 | ITSM (Contract 1), CSM (Contract 1), HRSD (Contract 2) | $6,210 | 6 | $37,260 | $3,726 |
| July 1 - December 31 | ITSM (Contract 1), CSM (Contract 1), HRSD (Contract 2), ITSM upsell (Contract 1) | $6,660 | 6 | $39,960 | $3,996 |

**Note:** The derived line and its segments belong to the account, not to either contributing contract. Amending one contract's source products doesn't require you to also amend the other contract, and the derived line continues to reflect every active source across the account.

### Using the DerivedProductPriceExtensionPoint

The *sn_csm_pricing.DerivedProductPriceExtensionPoint* provides an interface with specific methods that call certain business logic for using valid source products in source and target product pairs in derived pricing.

The extension point has three methods:

- `canHandleRequest(pricingEngineContext)`: Determines whether the pricing engine can handle this extension point request.
- `getAccountLevelDerivedPricedProductsEncodedQuery(pricingEngineContext)`: Custom query for account-level sold product lookup.
- `getQualifiedSourceTargetPairs(pricingEngineContext, sourceTargetPairs)`: Filter source-target pairs in derived pricing. This method receives an array of pair objects after rule matrix evaluation. Each pair contains:

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- `sourceLineDetail` - The PricingEngineContextLineDetail of the source line
- `targetLineDetail` - The PricingEngineContextLineDetail of the target (derived) line
- `isPair` - Boolean, true by default

To exclude a pair from calculation of the derived (target) product, set `pair.isPair = false` and return the modified array. If `isPair = true`, the source line price is included in the price calculation of the derived (target) product.

To access the extension point, navigate to **All** > **Pricing** > **Administration** > **Pricing Extension Points** and select the `sn_csm_pricing.DerivedProductPriceExtensionPoint`.

### Disable auto-generation of derived pricing lines

Disable automatic addition of derived product lines to quotes when sellers manage these lines manually.

#### Before you begin

Role required: admin

Starting with Pricing Management application version 18.0.3, the pricing engine automatically adds derived product lines to quotes during pricing initialization by default. Disable this feature only if sellers manage derived product lines manually. When disabled, sellers must add each derived product line and align its start and end dates with the source lines. The pricing engine excludes derived lines whose dates don't align with their source lines.

To disable automatic addition, add the *`sn_csm_pricing.auto_add_target_lines`* property in the System Properties [sys_properties] table and set its value to `false`. For instructions, see Add a system property.

**Warning:** Decide whether sellers add derived product lines automatically or manually during implementation. After sellers start adding these lines manually, don't set the *`sn_csm_pricing.auto_add_target_lines`* property back to `true`. The pricing engine can't reconcile manually added lines with its automatic date alignment, so it can change the dates on existing derived product lines or remove them.

#### Result

The pricing engine applies the updated settings on the next pricing transaction.

### Managing the price basis for MACD products

As a pricing admin or manager, you can control how prices are calculated for sold products after negotiating changes during quoting or when contract modifications occur to quote lines.

With the Delta Price Treatment Matrix, you can specify how pricing is to be handled after changes occur that affect the pricing basis. For example, you can specify the following types of pricing treatments:

- Apply Fresh Prices: Use current list pricing as the basis.
- Use Original Prices: Use original list price as basis for calculation.
- Retain Original Attribute Adjustments: Original attribute adjustments calculated from original list price.
- Set Net Prices to Zero; Zero out pricing for the line item.
- Honor Renewal Adjustments: Renew line items at prices specified in renewal adjustments.

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### Create rules for calculating pricing of sold products with MACD changes

Set different price points for calculating the pricing of sold products that undergo MACD changes.

## Before you begin

Role required: sn_csm_pricing.pricelist_administrator or sn_csm_pricing.pricelist_manager

## About this task

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select Delta Price Treatment Matrix.
4. In **Rule selection criteria**, select the option that indicates whether single or multiple rules are applied in the Delta Price Treatment Matrix.
   If multiple rules are applied, all applicable pricing rules are applied when determining the pricing for sold products. If the option is Single, the first rule based on rank is applied.
5. Select **Edit Rule**.
   The Decision Table for the Delta Price Treatment Adjustment Matrix opens in Workflow Studio and displays the inputs, which include the Line Type and Action for MACD operations. These inputs are the fields (columns) for setting the conditions in the decision table.
   - Inputs: Lists the default inputs **Line Type**,**Action**.
   - Decision table: The conditions that you specify for the line types or MACD action, such as disconnect or suspend.
6. In the Conditions section, select **Add new decision row**.

### Configuring matrix validation rules

As a product catalog admin or pricing admin, you can manage the system-defined matrix validation rules that automatically check the mandatory rule inputs or outputs in matrix decision tables. You can also define your own custom validations.

The product eligibility and pricing matrices included with the Product and Pricing Rules application have system-defined matrix validation rules, which are identified in the Details tab for each matrix. Each validation rule has a validation definition, which is a script that identifies the context variables to be validated in the matrix decision table and the corresponding error or warning messages to be displayed. The validations are run when you save your matrix decision row changes. The **Validation Status** field indicates whether the change is valid. If the change is not valid, error or warning messages are displayed in the **Validation Message** columns of the decision table.

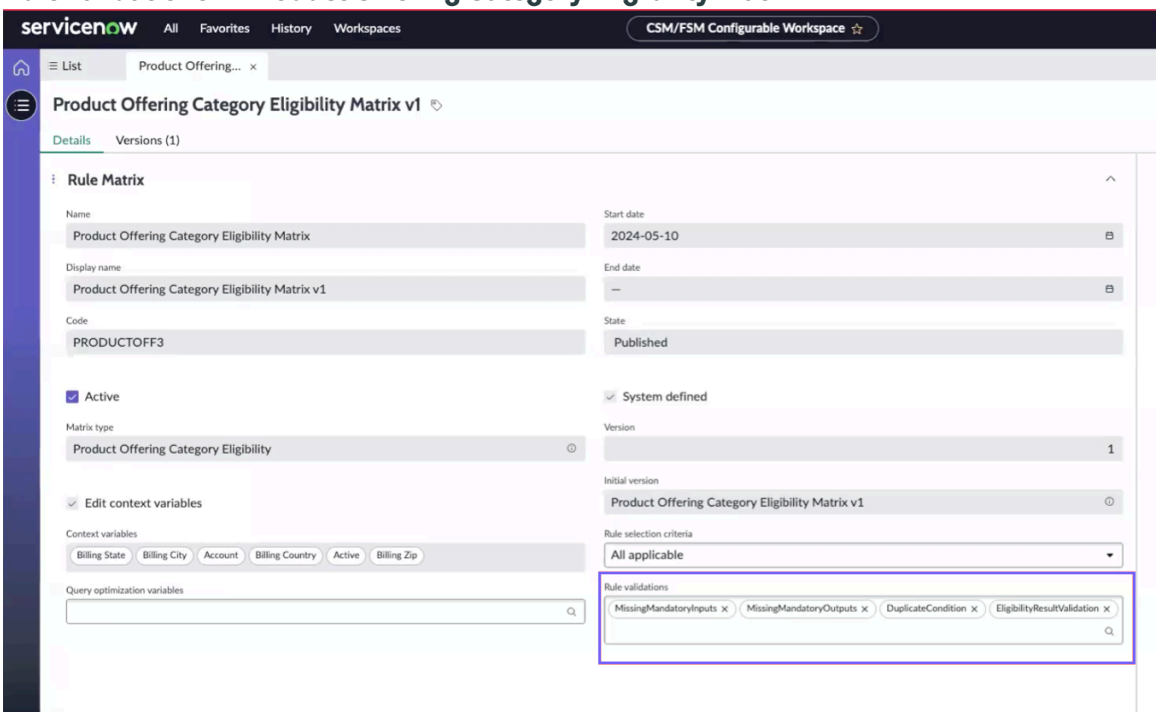
Some system-defined validation rules are applicable to all decision tables, while others apply to only certain types of matrices:

- DuplicateCondition: Checks for duplicate conditions in decision rules.
- MissingMandatoryInputs: Checks for missing required inputs.
- MissingMandatoryOutputs: Checks for missing required outputs.
- EligibilityResultValidation: Checks the product eligibility results.
- MandatoryCostBookForTypeExistingCostBook: Checks the cost book type.

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- MandatoryPriceListForTypeExistingPriceList: Checks the price list type.
- ProductOfferCharsWithoutProdOffer: Checks for product offer characteristics without product offering.

**Rule validations in Product Offering Category Eligibility Matrix**




From the Details tab for a matrix, you can also run rule validations for the entire matrix by selecting the **More actions** icon and selecting **Validate rule**.

### Update validation settings in a matrix

Change the rule validation checks for a matrix. These checks run automatically when you save changes made to the matrix decision table.

## Before you begin

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_catalog_manager

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Rule Matrices**.
3. Select the matrix to update.
4. In the **Rule validations** field, change the rule validation.
   - To add a validation rule, select the Search icon and select the rule validation.
   - To delete a validation, select the X in the validation pill.
5. Select **Save**.

### Create a custom validation definition

Provide a script that validates a context rule input or output in the decision table for a pricing or product eligibility matrix.

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### Before you begin

Role required: admin

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Validation Definitions**.
3. Select **New**.
4. In the **Script** field, enter the custom script that defines the error check, warning messages, and error messages for the validation.
5. If the decision condition won't be active by default, select **Inactivate decision condition**.
6. Enter the **Name** of the validation definition.
7. Select **Save**.
8. Associate the custom definition to a rule matrix.
   a. Navigate to **Context Rule Management** > **Matrix Validations**.
   b. Select **New**.
   c. In the **Matrix type** field, select the rule matrix to which this custom validation definition applies.
9. Select **Save**.

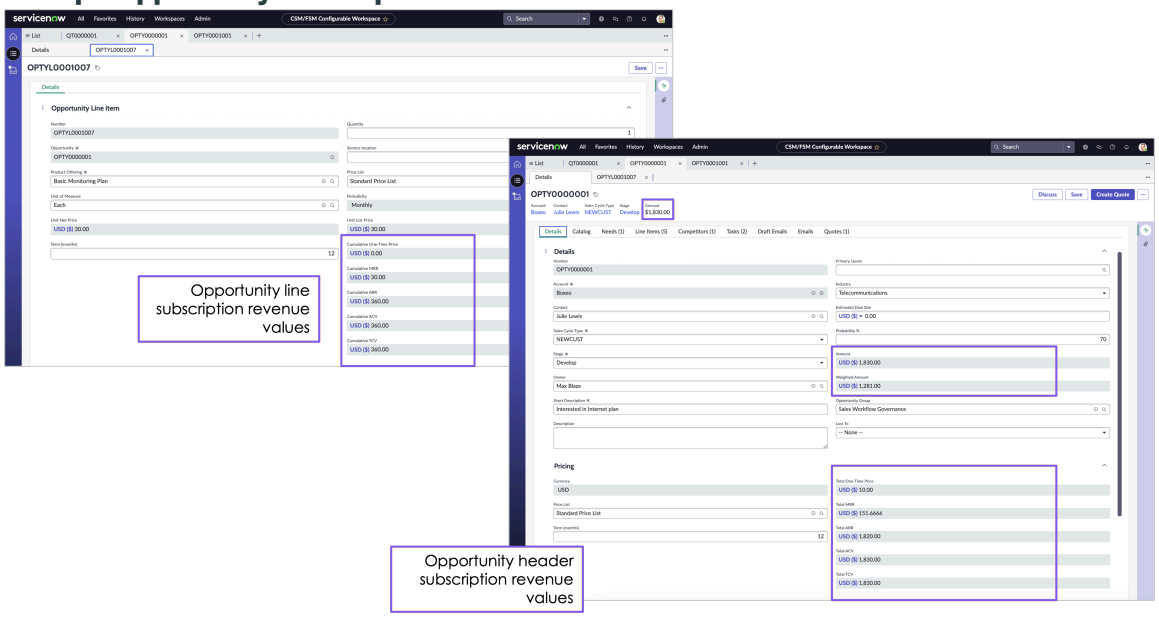
## Subscription revenue metrics

Subscription pricing is a pricing model where customers pay a recurring fee for products or services, usually at regular intervals such as monthly or annually. In Sales Customer Relationship Management, various subscription revenue amounts are calculated automatically for opportunities and quotes.

Subscription revenue amounts are metrics that help sales agents and sales managers track and analyze the revenue impact of sales deals. Sales agents and managers can view these system-calculated revenue amounts in the pricing details for opportunities and quotes, both at the header and line levels. These revenue amounts, such as monthly recurring revenue (MRR) or annual recurring revenue (ARR), are useful for monitoring sales performance, forecasting subscription revenue, and providing relevant subscription amounts when agents engage with customers.

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### Example opportunity subscription revenue details




## Subscription pricing metrics

In subscription pricing, common metrics for assessing subscription-based revenue include the following values and items:

**Monthly Recurring Revenue (MRR)**

The total revenue generated from recurring subscriptions or contracts on a monthly basis. It helps sales agents and managers assess the stability and growth of subscription-based revenue streams.

**Annual Recurring Revenue (ARR)**

The annual revenue generated from recurring subscriptions or contracts. It provides insights into the predictable revenue stream that can be expected from existing customers over a year.

**Annual Contract Value (ACV)**

The total value of a contract on an annual basis. It highlights the annual revenue impact of a deal and facilitates comparison with other contracts or revenue streams.

**Total Contract Value (TCV)**

The total value of a contract over its entire duration, including recurring and one-time charges. It provides visibility into the overall value of a deal and its impact on the organization's financial performance.

**Term**

The duration or period of a subscription or contract, in months, such as 10 months or 24 months. In Opportunity Management, agents can enter a Term value before adding line items. In Quote Management, when agents enter a Term value and the contract start date, the system uses the term value and start date to auto-calculate the contract end date. If an agent changes the contract end date, the system recalculates the Term value.

For products with monthly periodicity, the per-day price (pro-rate multiplier) is based on the Unit list price/number of days in the month. For a product with annual periodicity, the per-day price (prp-rate multiplier) that is multiplied against the decimal fields is the Unit price/365 days or 366 days if the year is a leap year.

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## How subscription pricing revenues are calculated

Product offers for products and services contain basic pricing information, such as list price and pricing method (either one-time or recurring periodicity). When agents add product lines to opportunities and quotes, the system uses basic pricing information and product line details to auto-calculate the various revenue subscription values. These values are calculated and displayed in both the header pricing details and line pricing details.

For example, when an agent adds an opportunity line, the system calculates the Cumulative Monthly Recurring Revenue (MRR) amount using the unit net price and quantity of the product. The system then sums up the cumulative revenue to the parent line in the opportunity and displays the cumulative MRR in the pricing details of the opportunity header.

When agents use the configuration UI to add customizable products to quotes, the configurator interface displays the calculated subtotal values such as the Cumulative Monthly Recurring price for the root product offer of the line item.

The following tables describe the subscription pricing revenue amounts for opportunities and quotes and how they're calculated.

### Opportunity line subscription revenue metrics

| Opportunity line subscription metric | Description | Calculation |
|---|---|---|
| Unit net price | Price of a single unit. | Unit list price - pre adjustments |
| Cumulative one-time price | One-time price of the opportunity line and any child lines. | Unit net price * Quantity |
| Cumulative MRR | Cumulative monthly recurring revenue of the opportunity line and any child lines. Not calculated for one-time products. | • If the periodicity is monthly: Cumulative MRR = Unit net price * Quantity<br>• If the periodicity is annual: Cumulative MMR = (Unit net price/12 months) * Quantity |
| Cumulative ARR | Cumulative annual recurring revenue of the opportunity line and any child lines. Not calculated for one-time products. | Cumulative MRR * 12 months |
| Cumulative ACV | Cumulative annual contract value of the opportunity and any child lines. | Cumulative One-time price + Cumulative ARR |
| Cumulative TCV | Cumulative total contract value of the opportunity and any child lines. | Cumulative One-time price + (Cumulative MRR * Term months) |

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### Opportunity header subscription revenue metrics

| Opportunity header subscription metric | Description | Calculation |
|---|---|---|
| Amount | The total contract value. | Total contract value if there are opportunity line items. If no line items exist, this amount is copied from the Estimated Deal Size. |
| Weighted amount | Value that represents the potential size of a deal. | Amount * Probability |
| Total One-Time Price | Sum of all the cumulative one-time prices of the opportunity line items. | Cumulative one-time price of the top-level parent |
| Total MRR | Total monthly recurring revenue. | Sum of the Cumulative MRR values of the top-level parent. |
| Total ARR | Total annual recurring revenue. | Sum of the Cumulative ARR of the top-level parent. |
| Total ACV | Total annual contract value. | Sum of the Cumulative ACV of the top-level parent. |
| Total TCV | Total contract value. | Sum of the Cumulative TCV of the top-level parent. |

### Quote line subscription revenues

| Quote line subscription metric | Calculation |
|---|---|
| Monthly recurring price | • If periodicity is monthly: Monthly recurring price = Unit net price * Quantity<br>• If periodicity is annual: Monthly recurring price = (Unit net price/12) * Quantity |
| Annual recurring price | Monthly recurring price * 12 months |
| Cumulative net price | Unit List Price - Total adjustment |
| Cumulative one time price | One-time price for the line item + (if parent line item) One-time price for all child line items |
| One-time price | One-time price for the line item. |

### Quote line cost and margin

| Quote line subscription metric | Calculation |
|---|---|
| One-time cost | Unit cost * quantity |
| Monthly recurring cost | • If periodicity is monthly: Monthly recurring cost = Unit cost * Quantity<br>• If periodicity is annual: Monthly recurring cost = (Unit cost/12) * Quantity |

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### Quote line cost and margin (continued)

| Quote line subscription metric | Calculation |
|---|---|
| Cumulative one-time cost | One-time cost for the line item + (if parent line item) sum of all One-time Cost for all child line items |
| Cumulative monthly recurring cost | Monthly recurring cost + (if parent line item) sum of all Cumulative Monthly Cost for immediate child lines |
| Cumulative Net Cost | Cumulative Net Cost = [One time cost + (Monthly Recurring cost * Term)] +(if parent line item) sum of all Cumulative net cost for immediate child lines |
| Cumulative margin % | (Cumulative net price – Cumulative net cost)/ Cumulative net price * 100 |

### Quote header subscription pricing

| Quote header subscription metric | Calculation |
|---|---|
| Term | The duration in months for subscription or contract. If an opportunity exists, the value comes from the opportunity. Otherwise, the default term is 12 months. |
| Total one-time price | Sum of all parent lines. |
| Total monthly recurring price | Sum of the Cumulative monthly recurring price of all root parent lines. |
| Total annual recurring price | Sum of the Cumulative annual recurring price of all root parent lines. |
| Total amount | Sum of the Cumulative net price of root parent lines. |

### Quote header cost and margin

| Quote header subscription metric | Calculation |
|---|---|
| Total one-time cost | Sum of Cumulative one-time cost of all parent lines. |
| Total monthly cost | Sum of Cumulative Monthly recurring cost of all root parent lines. |
| Total cost | Sum of Cumulative Net Cost of root parent lines. |
| Total one-time margin | (Total one-time price) - (Total one-time cost). |
| Total monthly margin | (Total monthly price) - (Total monthly cost) |
| Total margin amount | (Total amount) - (Total cost) |
| Total one-time margin % | (Total one-time margin/Total one-time price) × 100 |

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**Quote header cost and margin (continued)**

| Quote header subscription metric | Calculation |
|---|---|
| Total monthly margin % | (Total monthly margin/Total monthly price) × 100 |
| Total margin % | (Total Margin Amount/Total amount) × 100 |

To learn more about the revenue metrics in opportunity details, see Add and view the details of an opportunity and Add line items to an opportunity.

To learn more about the revenue metrics in quote details, see Add and view details of a quote.

### Create a matrix version

Create a version of a published price or product eligibility matrix when you need to update the matrix, for example to add or delete a context variable used in the price matrix.

## Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

## About this task

You can create a version of a published pricing matrix (Standard Price Adjustment Matrix, Price List Defaulting Matrix, Cost Book Defaulting Matrix, or Configuration Component Price Adjustment Matrix) and a product eligibility matrix. When you create a matrix version, the new version becomes the active version. After creating the version, you update the decision table for the matrix, then save and publish the matrix.

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select the matrix to be updated.
4. In the Details tab for the matrix, select **Create new version**.
   The following changes occur:
   - The new version of the matrix opens in another tab.
   - In the former matrix, the **State** changes from Published to Retired and the System **System defined** value changes to false.
5. Change the matrix as needed.
   For example, if you're updating context variables used in the Standard Price Adjustment Matrix, you can add or delete context variables in the **Context variables** section of the matrix.
6. Select **Save**.
7. Update the decision table for the matrix by selecting **Create rule**.
   Add the decision rows in the decision table for the matrix. You can use the decision table export feature to edit the decision table for the previous matrix version in Excel, update the Excel file, then import the updated Excel table to populate the decision table for the new version. For details, see Manage decision tables in Excel.
8. Select **Save** and then **Publish**.
   You can refresh the list of matrices to see the new matrix version.

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### Allow changes to published pricing and product eligiblity matrices

Use the *allow_edit_on_published_matrices* system property to allow changes to published pricing and product eligibility matrices.

#### Before you begin
Role required: admin

#### About this task
If your pricing admin or product catalog admins want to change a published pricing or product eligibility matrix, they must create a new version of the matrix. However, as an admin, you can allow changes to published matrices by using the allow_edit_on_published_matrices system property.

#### Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *allow_edit_on_published_matrices* system property.
3. Set the property value in the **Value** field.
   - Enter `true` to allow edits to published matrices.
   - Enter `false` so that published matrices can't be edited. You must generate a new version of the matrix to make changes.
4. Select **Update**.
   If you enable this property, published matrixes can be updated by pricing and product catalog admins.

### Set properties to control pricing processing

Activate or deactivate system properties that control how pricing features are processed in Sales Customer Relationship Management applications.

#### Before you begin
Role required: admin

#### About this task
You can control the following pricing features using pricing system properties:

- Logging of pricing engine requests for debugging.
- Multiplier term used when calculating uplifts for contract renewals.
- Ramp segment and term basis used when calculating renewal adjustments for products with ramps.

#### Procedure

1. Navigate to **All** > **Pricing** > **Administration** > **Properties**.
2. Set the following properties:

**Customization properties for pricing**

| Property | Description |
|---|---|
| Logging Pricing Requests<br><br>(sn_csm_pricing.log_pricingengine_request) | Control the logging of pricing engine requests for debugging. Select **Yes** to activate logging or **No** to turn off the pricing request log. |

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| Property | Description |
| --- | --- |
| Renewal Uplift Term<br><br>(sn_csm_pricing.renewal_uplift_term) | Set the multiplier term for contract renewal uplifts, either per year or per term. |
| Ramp Renewal Pricing<br><br>○ Set the ramp segment used as the price basis for calculating a renewal adjustment.<br><br>(sn_csm_pricing.ramp_renewal_price_segment)<br><br>○ Set the term basis used when calculating renewal adjustments for ramp lines.<br><br>(sn_csm_pricing.ramp_renewal_term_basis) | Set properties to control how pricing for ramp renewals is calculated.<br><br>○ The ramp renewal price segment property is set to **Last Segment** by default, which uses the price from the final ramp segment as the price basis.<br><br>Select **First Segment** to use the price from the initial ramp segment as the price basis.<br><br>○ The ramp renewal term basis property is set to **Segment** by default, to apply the adjustment to the term of the segment identified in the ramp renewal price segment property (sn_csm_pricing.ramp_renewal_price_segment).<br><br>Select **Total Ramp** to apply the renewal adjustment across the full ramp duration. |
| Pricing Session Cache<br><br>(sn_csm_pricing.enable_pricing_session_cache) | For testing purposes only. Turn on (select **Yes**) or turn off (select **No**) the cache for pricing sessions.<br><br>**Note:** don't set this property to **No** except for testing, as it may negatively impact pricing engine performance. |

3. Select **Save**.

### Create a custom context variable

Create custom context variables to represent product or non-product characteristics that can be used by pricing admins to apply different pricing features, such as pricing adjustments, or product catalog admins to set product offering eligibility rules.

## Before you begin

Before creating a custom variable, review the context variables available in the Context Variables [sn_csm_ctxrul_mgt_context_variable] table to verify whether you need a new one. This table identifies the system-defined variables provided with Product Catalog Management and Pricing Management and also any custom variables that have been created.

For example, the system-defined context variables provided for non-product attributes include: Account, Shipping Country, Shipping City, Shipping State, Shipping Zip, Billing Country, Billing City, Billing State, Billing Zip, and Transaction Date.

Role required: admin

## About this task

As an administrator, you can create custom context variables for items such as non-product characteristics, that your pricing and product catalog administrators can use in rule matrices

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to control pricing features or product offering eligibility. For example, your pricing administrator might want to define pricing adjustments based on sales segment, but sales segment isn't a system-defined context variable.

You create the variable name and define the variable type, so that the variable can be used in a decision rule for a rule matrix. After you create the variable, you must also map the context variable to the transaction entity, such as quote or order, from which the system retrieves the context.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Context Variables**.
3. In the Context Variables list, select **New**.
4. On the form, fill in the fields.

**Context Variable form**

| Field | Description |
|---|---|
| Type | Context variable type. Choose the type of field for the variable. For example, the choice list field type lets your user select from a predefined list of choices.<br><br>For more information on the different field types, see Field types reference.<br><br>**Note:** Depending on the **Type** selected, other fields and sections in the form are displayed. |
| Label | Name of the context variable to be displayed in the user interface, such as sales segment. |
| Column name | ID of the context variable for which the context variable type is created. The system assigns this name automatically based on the **Label** name entered, for example sales_segment. |
| Code | System-generated alphanumeric number based on the label name. You can enter your own code to replace the system-generated code.<br><br>**Note:** After the context variable is used in a published pricing or product eligibility matrix, the **Code** value can't be changed. |
| Context type | Option that indicates from where the context is retrieved. For example you can select a context type such as: |

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| Field | Description |
| --- | --- |
| | ○ Transaction Header: Context is fetched from the header record for a transaction, such as an opportunity, quote, or sales order.<br>○ Transaction Line: Context is fetched from the line record for an opportunity, quote, or sales order transaction. |
| Application | Name of the application scope. The default scope is Global. |
| System defined | Option indicating the context variable is defined by the pricing system. |
| Applicable to | Option indicating the module to which this context variable applies. Currently supports Pricing. The pricing engine uses this field to determine which context variables to resolve during pricing calculations.<br>If the context variable is used in pricing, select Pricing. Otherwise, leave this field as **None**. |
| Type of mapping | Option indicating how the context variable is mapped:<br>○ Field mapping: Map the context variable to a transaction entity.<br>○ Scripted: JavaScript that you provide in the **Script** field, which defines complex logic for computing values using the context variable. For example, a script might be used for the following:<br>▪ Calculations, such as discount percentages or account age<br>▪ Complex lookups, such as checks for accounts that have made purchases<br>▪ Business logic, such inventory check or eligibility<br>▪ Aggregrations across lines, for example, the number of products in a cart. |
| Pricing api key field | Reference field for a context variable that defines an external ID used in pricing requests in the Sales CRM Pricing API.<br>For more information on external IDs and custom context variables, see External ID support in Sales CRM Pricing API. |
| Active | Option that indicates the context variable is available for use in rule matrices. |

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5. If you're using the external ID feature in the Sales CRM Pricing API, in the Reference Specification section, select the reference table for the context variable that defines an external ID to be used in a pricing request.

   For more information on external IDs and custom context variables, see External ID support in Sales CRM Pricing API.

6. If you're no longer testing product offerings in extended life cycle states, update the value in the **Reference qual condition** field to remove the in_test and staged conditions.
   The in_test and staged conditions are present in the **Reference qual condition** field by default.
   For more information about extended life cycle states, see Validating product offerings before publishing.
7. Select **Save**.
   The tab (related list) for the **Type** that you selected in Step 4 and the **Variable Mapping** tab are displayed.
8. Depending on the **Type** you selected, create the values for the type, then select **Save**.
   For example, in Step 4, if you selected the Choice type, select **New** in the **Choices** tab and define the choices.

### What to do next
For context variables that are mapped to fields, map the custom context variable to a transaction entity.

## Sync context variables to CPQ

Sync context variables to CPQ to be associated with blueprints.

### Before you begin
Role required: admin

### About this task
Context variables provide the business data that pricing and configuration rules need to evaluate a transaction, such as the shipping country, currency, or customer tier. Before this data can be used in rules, the context variable definition must be available in the rules engine. Syncing a context variable to CPQ publishes its definition, including its type, mapping, and whether it applies at the transaction header or line level to the rules engine, where you can reference it directly in blueprint rules without writing scripts.

Administrators can sync context variables to CPQ, if not already. Context variables are synced automatically when newly created or updated. Existing context variables that are not synced can be synced manually.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Context Variables**.
3. In the Context Variables list, select the context variables that you want to sync to CPQ.

   **Note:** You can sync only the context variables that are not synced. The **Synced to CPQ** field in the Context Variables list is set to true if the context variable is synced.

4. Select **Sync To CPQ**.
   If you don't see the **Sync To CPQ** field, personalize the form and add this field.

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### Result
The **Synced to CPQ** field in the Context Variables list is set to true after the sync is successful and the context variable is can be associated with blueprints and rules.

Navigate to **All** > **CPQ Administration** > **ALL FIELDS** to verify and use the synced context variables.

#### Related topics

Create a custom context variable

## Map a custom context variable to a transaction entity

Associate a custom pricing context variable to a particular transaction entity type in Sales Customer Relationship Management.

### Before you begin
Verify that you're in the appropriate application scope for the transaction type. For example, if you're mapping a context variable for orders, the application scope is Order Management. Use the Globe icon in the navigation bar to change the application scope.

Role required: admin

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Variable Mappings**.
3. Select **New**.
4. In the form, fill in the fields.

**Lead to Cash Entity Attribute form**

| Field | Description |
|---|---|
| Entity | The Sales Customer Relationship Management entity for which the variable will be used. Select the entity, for example Opportunity or Order. |
| Table | Name of the application table for the transaction. |
| Field | Field from the application table that is related to the custom context variable. Select the field. |
| Key | Custom context variable. Select the variable from the list of pricing context variables. |
| Advanced | |

5. Select **Save**.

### Result
The custom context variable is available for use in pricing matrices.

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### Use extension points in Pricing Management

Use extension points to call custom scripts from external sources that control pricing logic used in the Pricing Management feature of the Sales Customer Relationship Management (Sales CRM) applications.

To access the available extension points, navigate to **All** > **Scripted Extension Points** and in the Extension Points list, select the desired extension point to view it.

#### Pricing Management extension points

| Extension point | Description |
| --- | --- |
| *sn_csm_pricing.DefaultCostBookExtensionPoint* | Customize the logic for determining the default cost book used by the calling application, such as Quote Management. This extension point changes the default cost book logic for both the header and line of the calling application. |
| *sn_csm_pricing.DefaultPriceListExtensionPoint* | Customize the default price list logic used by the calling Sales CRM applications such as Quote Management or Order Management. This extension point changes the default logic for both the header and line of the calling application.<br>**Note:** If you want to create additional context variables, use the Price List defaulting matrix to manage the price list default at the header level. Use this extension point only for use cases that can't use the Price List defaulting matrix. In this case, the request contains values for all the context variables, in addition to the default context variables. |
| *sn_csm_pricing.ListPriceExtensionPoint* | Customize the logic for determining a base list price. Enables you to extend the pricing engine logic and not rely on a price list and price list line to fetch the base list price. |
| *sn_csm_pricing.AttributeAdjustmentExtensionPoint* | Customize the logic that determines the attribute adjustments for a product offering. You can extend the pricing engine logic without using the Attribute Adjustment table to fetch the adjustment values. |
| *sn_csm_pricing.PricingAdjustmentsExtensionPoint* | Customize the logic that determines price adjustments for a product offering. Enables administrators (partner implementers) to extend the pricing engine logic by not relying on the Standard and Component Configuration Rule matrix to fetch the adjustment values. |
| sn_csm_pricing.RampRenewalUpliftCustomizationPoint | Customize the logic for calculating renewal uplift pricing. Your inputs can include segment |

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**Pricing Management extension points (continued)**

| Extension point | Description |
|---|---|
| | data, unit price, and term for each ramp segment. |

### External ID support in Sales CRM Pricing API

The Sales CRM Pricing API supports external IDs in pricing requests. You can use your own custom identifiers or codes for selected reference fields instead of a ServiceNow sys_id.

For example, a pricing call can originate from other CRM or ERP systems that may have different identifiers for certain objects. You can map these unique identifiers to ServiceNow reference fields using an external ID, code, or other custom field. A pricing call can then be made using these unique identifiers available on the external system.

You can use external codes for the following reference fields (objects), including but not limited to:

- Product offering
- Top-level product offering
- Unit of measure
- Price list
- Cost book
- Characteristics and characteristic options
- Pricing adjustment type
- Account

**Note:** External IDs apply to REST API pricing requests and do not affect UI#based flows. Pricing execution can use internal system IDs, external IDs, or a combination of both IDs in pricing requests. For more information on the pricing API, see Sales CRM Pricing API.

## How external IDs work in pricing requests

External IDs map to reference fields in ServiceNow reference tables. As an admin, before submitting a pricing request, create the context variables that define the reference fields for external IDs or codes that map to a column in a specified reference table. For more information, see Configure context variables for external IDs.

Processing of a pricing request with external IDs involves the following phases:

**Request intake**

The caller sends a Pricing REST API request that can include:

- External IDs or codes
- sys_ids
- A combination of both external IDs and sys_ids

In your request, you set a request flag (`"use_external_code:true"`) that enables external ID support.

**Resolution**

For each configured reference field, the system attempts to resolve the external value to an internal sys_id.

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- Resolution is driven by context variable configuration.
- If resolution fails and no sys_id is provided, the request fails.

**Account resolution using external identifiers**

Accounts are resolved using context variables rather than request payload fields.

- External account identifiers are resolved before pricing execution.
- Resolved account sys_ids are used internally for pricing execution.
- Original external identifiers are retained for response construction.

**Pricing execution**

All downstream pricing logic runs only on resolved sys_ids. Pricing logic is unaware of whether the original value was an external code or a sys_id.

**Response construction**

The response reflects the identifiers provided in the request (external codes or sys_ids). Resolved sys_ids are not exposed to the caller.

**Error handling**

The system validates all reference identifiers during request processing. Common errors include the following scenarios:

- External identifier does not exist in the reference table.
- External code usage is enabled but no context variable mapping exists for an enabled field.
- Neither a sys_id nor external code is provided.
- Identifier value is not valid.

Errors are reported at the line level and identify the failed line item. Error messages may vary depending on the configuration and validation context.

If errors occur, verify the following items:

- Context variable mappings
- External identifier values
- Request flag usage

## Context variable configuration and mapping

As an admin, before submitting a REST API pricing request that uses external IDs, create the context variables that map to columns in selected ServiceNow reference tables. For more information, see Configure context variables for external IDs.

### Configure context variables for external IDs

Set up a context variable for each external ID to be used in pricing requests and map the variable to a reference field in a ServiceNow reference table.

#### Before you begin

Role required: admin

#### About this task

The Sales CRM Pricing API supports external IDs in pricing requests. For each external ID, define a context variable that maps to the following:

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- Source reference table
- Reference field name

For information on the pricing API, see Sales CRM Pricing API.

**Note:** Only a single reference field for an external ID is supported as a key to resolve an external ID with a sys_id. To get an accurate and valid response, the external ID or code sent in a reference field must map to a unique record in the source reference table.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Set the application scope to Context Rule Management.
   Use the scope selection menu icon in the header bar to select the scope.
3. Select the List icon.
4. Navigate to **Context Rule Management** > **Context Variables**.
5. Do one of the following:
   - If creating a context variable, select **New**.
   - If updating a context variable, select the variable to be updated.
6. Define or update the context variable for the external ID:
   a. In the **Type** field, select Reference.
   b. In the **Label** field, enter the name of the context variable to be displayed in the user interface.
      The **Column name** and **Code** fields are automatically generated based on the **Label name** entered. The default value for the **Type of mapping** field is set to Field mapping.
      **Note:** You can enter your own **Code** value to replace the system-generated code. If the context variable is used in a published pricing or product eligibility matrix, the **Code** value for the context variable can't be changed.
   c. In the **Context type** field, select the context that indicates where the variable is retrieved from, for example the Transaction Header or Transaction Line for an opportunity or quote.
   d. In the **Applicable to** field, select Pricing.
   e. In the **Reference** field in the Reference Specification section, select the source reference table for the variable.
   f. In the **Pricing api key field**, select the reference field to be used from the source reference table specified in Step e.
7. Select **Save**.
   The external ID defined by the context variable can be used in pricing requests.

## Exporting and importing pricing entities

As a pricing admin, you can both export and import pricing entities between ServiceNow instances. For example, you can promote pricing entities such as price lists from a non-

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production instance to a target production instance. Each process involves a separate set of steps.

## Before exporting and importing pricing entities

Before you export your pricing entities to a target instance, note the following prerequisites:

**Import product-related entities to your target instance**

Verify that your product catalog admin has first imported the product catalog base entities, product offering catalog, and product offerings to your target instance. Your pricing entities are associated with product offerings and catalogs, so the offering and catalog information must exist before you import pricing entities. For more information on the product entities that must be imported to your target instance, see Exporting and importing product catalog entities.

**Export the update set for decision table changes to your target instance before exporting the associated pricing matrix**

If you have a new version of a pricing matrix that has decision table changes, such as a reference to a new product offering, ask your admin to export the system-generated update set that includes the decision table changes to your target instance. Next, you export the new pricing matrix, then import the pricing matrix to your target instance. For more information, see Export pricing entities and Import pricing entities.

## Export and import process for pricing entities

Follow these steps to export and import pricing entities.

**Export and import steps for pricing entities**

| Step | Description |
|---|---|
| Export pricing entities | Export pricing entities from one instance to another. The entities are exported as JSON and are downloaded to your local download directory. |
| View export job status | Check the state of the export job. |
| Import pricing entities | Import pricing entities exported as JSON files to another instance. |
| View import job status | Check the state of the import job. |

### Export pricing entities

Export pricing entities as a JSON file and save the file to your local download directory so that it can be imported to another ServiceNow instance.

#### Before you begin

Before you export a new version of a pricing matrix that has an updated decision table, ask your admin to export the system-generated update set that includes the updated decision table, to the target instance.

Role required: sn_csm_pricing_pricelist_administrator

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### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Export** > **Export Entities**.
   The Export Entities list shows the previous export jobs.
3. Start an export job by selecting **Export Hierarchy**.
   The **Export Entities** form opens in the **Export-UI** tab.
4. In **Entity Type**, select the pricing entity to be exported from your source instance.
   The pricing entities include: Rule Matrix, Price List, Price List Line, Attribute Adjustment, Cost Book, and Cost Book Line.
5. Select the items that you want to export and then select **Export**.

   **Note:**

   - Entities such as pricing matrices may have specific versions. Be sure to select a specific version of the entity to be exported and import that version to the target instance.
   - If you have new versions of pricing matrices with updated decision tables that reference new product offerings, ask your admin to export the system-generated update set that includes the updated decision tables.

6. Give the export job a file name and description and select **Submit**.
   The export process begins and a message displays the catalog export ID.
7. Find and view the exported JSON file by refreshing the **Export Entities** list and selecting the export job.

   The exported file appears in the **Attachments** pane.
8. Select the attachment to download the exported file.
   The file is downloaded as a JSON file and saved to your local download directory.

### What to do next

Import pricing entities.

## Import pricing entities

Import pricing entities to a target instance by using the ServiceNow Platform import function.

### Before you begin

Before you start, check your target instance and verify that certain required entities have been imported. For example, the product offerings and product offering catalogs associated with your pricing entities must have been previously imported to your target instance. Similarly, if you're importing price list lines or cost book lines, the price list or cost book for those lines must have been previously imported to your target instance. And if you're importing a new price list matrix, your admin must have imported the associated decision table to your target instance in a system-generated update set.

Role required: sn_csm_pricing_pricelist_administrator

### Procedure

1. Go to the target instance where you want to import the pricing data.
2. Start the import process.

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- To import pricing entities, navigate to **All** > **Pricing** > **Export/Import** > **Import**.
- To import context rules, navigate to **All** > **Context Rule Management** > **Import**.

The record for the import data source opens.

3. Attach the JSON file by selecting the **Attachments** icon in the header bar.
   The Import Data Source pop-up opens.
4. Select **Choose file** and select the JSON file you want to import.
5. When the file is uploaded, close the Attachments pop-up.
6. Under Related Links, select **Load All Records**.
   The data from the imported file loads, and a Progress bar opens showing the imported job. The imported data is loaded into the import set temporary table sn_csm_pricing_import_data_source or sn_csm_ctxrul_mgt_import_data_source if you're importing context rules.

   **Note:** During the import of a pricing matrix on the target instance, an import post script associates the reference entities in the decision table that was imported in an update set to the appropriate pricing matrix.

7. In the Next steps section, select **Run Robust Transform**, then select **Transform**.
   The progress bar shows the transform status. When the transform is complete, the imported data is loaded into the appropriate pricing tables.
8. In the Next steps section, select the import set link to view the resulting import set.
   The imported data is available in the appropriate tables.
9. In the Import Set record, open the **Import Log** tab to check for any errors and verify that the transform was completed successfully.

### What to do next

Certain imported pricing entities, such as price lists or cost books, are in the draft state in the target instance. To make the imported price list or cost book active in the instance, publish them.

## Pricing in the ServiceNow Quote Experience

ServiceNow Quote Experience integrates natively with CPQ Price Management, enabling your organization to set, manage, and optimize pricing strategies for Quotes. These pricing strategies enable your sales team to generate quotes with accurate and competitive pricing quickly.

Price evaluations can be triggered manually by a user or automatically when a price affecting field value changes. Price strategies support both user-entered and rule-driven price adjustments. For more information, see Pricing Management.

## Enable pricing for the Quote Experience

To enable pricing for the Quote Experience, complete the following steps:

1. Complete CPQ setup for Quote Experience. For more information, see Setting up CPQ Configurator.
2. Install the required Price Management plugins.
3. Submit a support ticket requesting the required tenant setting configurations for your instance:
   a. transaction.oneQuoting.pricing.enabled to 'TRUE'
   b. transaction.oneQuoting.pricing.integration.type to 'productized'
4. Export and import the quote blueprint in CPQ Administration.

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## Pricing states

The Quote Experience records a state for the quote header (`txn.pricing.state`) and for each quote line (`txn.line.pricing.state`) that indicates whether price values are up-to-date or need a reprice.

**Up-to-date**

The prices reflect the most recent pricing call. No pricing-affecting change has occurred since the last successful reprice.

**Needs reprice**

A pricing-affecting field has changed since the last successful pricing call, so the current prices might be out of date. The quote or line stays in this state until a pricing call completes successfully.

Pricing-affecting fields are the inputs that determine price, such as quantity, price list, discount, or product configuration. Changing a field that does not affect price, such as a description, does not change the pricing state.

## Last priced

The timestamp of the most recent successful pricing call is stored in the Last Priced (`txn.pricing.lastPriced`) field.

## Automatic and manual repricing

Price updates can be configured to run automatically or explicitly through an event (user- or API-triggered). Manual repricing allows sales representatives to request an updated price at any time. Automatic repricing ensures prices are recalculated when pricing-affecting fields change.

- To configure the Reprice event action, see Transaction events.
- To configure automatic repricing per stage, see Quote transaction stages.

## Context variables

Context variables bring information beyond the product itself into pricing decisions — such as customer, channel, geography, term, transaction type, or usage. A single pricing rule can condition on that context instead of requiring a separate rule for every permutation. CPQ Pricing uses context variables to execute price rules, matrices, and calculations. A set of system-defined context variables is provided, and administrators can create custom variables.

**Important:** Pricing in the ServiceNow Quote Experience uses field-mapped context variables. Variable mappings using dot-walked fields or scripted values are not supported.

To implement a custom context variable to pricing:

1. Define custom context variables in the Context Rule Management section of the CRM Workspace.
2. Set **Entity** to **Quote Advanced**.
3. Set **Table** to either Quote (`sn_quote_mgmt_core_quote`) or Quote Line Item (`sn_quote_mgmt_core_quote_line_item`)
4. Sync it to CPQ.

For more information on creating and managing context variables, see the following resources:

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- Create a custom context variable
- Map a custom context variable to a transaction entity
- Sync context variables to CPQ

## Field mapping

Custom transaction fields used by pricing must be mapped to columns on the Quote or Quote Lines tables. This mapping ensures that pricing data syncs between the transaction and the quote record. For the procedure, see Configure transaction-to-quote field mapping.

## Manual price adjustments

A sales representative can apply a manual adjustment — a fixed-amount or percentage discount or uplift, or a price override — to a line or to the header total. A manual adjustment is preserved as a distinct, rep-supplied input and is not overwritten by the next pricing call. The key fields for manual adjustments are:

- Discount Adjustment Type (txn.line.pricing.adjustment.type)
- Discount Adjustment Value (txn.line.pricing.adjustment.value)
- Discount Reason (txn.line.pricing.discountReason)

For additional field information, see Transaction line-level system fields.

**Related topics**

Enable pricing in the ServiceNow Quote Experience

Set up an external connection in CPQ

Transaction events

Quote transaction stages

Map a custom context variable to a transaction entity

Sync context variables to CPQ

Configure transaction-to-quote field mapping

Transaction-level system fields

Transaction line-level system fields

### Enable pricing in the ServiceNow Quote Experience

Enable pricing in ServiceNow Quote Experience to integrate natively with Sales CRM Pricing Management.

**Before you begin**
Role required: admin

Before you enable pricing, confirm that:

- You have access to CPQ Administration to import and export the quote blueprint.
- Complete the CPQ setup. For more information, see Setting up CPQ Configurator

**About this task**
Pricing Management is a ServiceNow® capability that Quote Experience can integrate with. When pricing is enabled, quote and line pricing fields are populated by the Pricing Management service. For more information, see Pricing in the ServiceNow Quote Experience.

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### Procedure

1. Install the Price Management plugins.
   For more information, see Install Pricing Management.
2. Submit a support ticket requesting the required tenant setting configurations for your instance.
   a. transaction.oneQuoting.pricing.enabled to 'TRUE'
   b. transaction.oneQuoting.pricing.integration.type to 'productized'
3. In CPQ Administration, export and import the quote blueprint.
   The blueprint deployment creates and stores the pricing field mappings, which are read at run time.

### Result

Pricing is enabled for the blueprint. Quote and line pricing fields are populated by the Pricing Management service, and users can reprice quotes manually or automatically.

### What to do next

To configure how and when quotes are repriced:

- To configure the Reprice event action, see Transaction events.
- To configure automatic repricing per stage, see Quote transaction stages.
- To surface the **Reprice** action and the pricing-state column on the quote layout, see Quote transaction layouts.

## Configuring ServiceNow Quote Experience

Configuration tasks and sequence for setting up the ServiceNow® Quote Experience with Quote Experience for your organization.

## Quote Experience

Using ServiceNow Quote Experience, administrators can:

- Control the quote layout and behavior for your users. The fields they see, how pricing is calculated, which approvals are required, and what actions are available at each stage of the quote lifecycle.
- Access and configure stages, associated fields, related rules, rule groups, events, layouts, views, and personas.
- Define the sales workflow stages your organization needs and define the conditions that must be true before a transaction can enter each stage.
- Identify the transaction-level (header) fields and transaction line-level fields to capture on each quote.

## Configuration overview

Complete the following tasks to configure the quoting experience for your users considering the organization and implementation requirements.

- Quote transaction stages — Stages structure the quoting process into discrete phases. Each stage can have entry criteria, rule group associations, and stage-specific layout behavior including idle timeout and behavior on open.
- Quote transaction fields — Fields store data on a quote at the transaction (header) level and the transaction line level. Quote Experience supports five field types: Text, Number, Boolean, Picklist, and Date/Time.

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- Quote transaction rules and rule groupings — Rules evaluate conditions and perform actions such as hiding fields, displaying messages, filtering picklist values, and setting or clearing field values. Rule groupings bundle rules together for assignment to stages and events.
- Quote transaction events — Events are buttons or API triggers that run rule groups, call integrations, and drive stage transitions. Quote Experience provides system events for common operations and supports custom events for business-specific actions.
- Quote transaction layouts — Layouts define the quote user interface, controlling which fields, events, and UI effects appear and how the quote is organized into tiers, columnsets, and a line item grid.
- Quote transaction views — Views control field and event access permissions for each persona at each stage. A view defines which fields are editable, read-only, or hidden, and which events are active or unavailable.
- Quote transaction personas — Personas represent distinct user types in the quoting experience. Each persona is assigned to a view that defines its permissions at each stage of the quote lifecycle.
- Quote transaction integrations — Integrations connect Quote Experience to external data sources, enabling bidirectional data exchange between quotes and third-party systems using HTTP methods, connections, and transformation templates.
- Enable pricing in the ServiceNow Quote Experience — Pricing calculates quote and line prices through an integrated pricing service, supporting manual and automatic repricing, manual and automatic price adjustments, and derived pricing. For setup steps, see Enable pricing in the ServiceNow Quote Experience.
- Advanced product filtering — Advanced product filtering dynamically controls which products appear in the quote catalog based on admin-defined rules and transaction context. Requires the `enableCatalogFilter` tenant setting.
- Quote Experience runtime API calls — Runtime APIs support headless quoting operations including initializing sessions, creating transactions, running events, and adding products via upsert.
- Quote Experience metrics API — The metrics API retrieves usage analytics including views by user, session time, and time spent in each stage, with configurable date ranges defaulting to the last 30 days.

**Related topics**

ServiceNow Quote Experience

Configuring Advanced Approval Management

Components installed with Advanced Approval Management

Quote Management reference

Using Quote Management

### Quote transaction stages

Stages represent phases in the quoting process. Each stage can have entry criteria, rule group associations, and stage-specific layout behavior in CPQ.

Stages structure the quoting process into discrete phases. A typical implementation uses stages such as Draft, Pending Approval, Approved, Contracted, and Ordered, but administrators can add or remove stages to match their organization's selling process. A transaction is in one stage at a time.

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## Stage ordering

Administrators can change the order in which stages are evaluated. In the stages list, select a stage and select the chevron icon to access reordering controls. Use the **<** and **>** buttons to move the stage in the sequence. The **+** button creates a new stage at the selected position in the sequence.

## Transitions between stages

Transitions represent structured movement from one stage to the next. A transaction cannot automatically transition between stages without an event — such as a **Submit for Approval** or **Revise** button — that explicitly triggers the transition. Stage transitions can also be defined for when a new transaction is created or edited.

## Entry criteria

Entry criteria are conditions that must be met before a transaction can advance to a stage. When an event transition is set to **forward**, CPQ evaluates the entry criteria of each succeeding stage until a stage's criteria are met. If no stage meets the criteria, no transition occurs. When an event transition is set to **backward**, the transaction moves to the stage defined by the administrator without checking entry criteria. The first stage in a process has no entry criteria.

For example, a transaction might transition to the **pending approval** stage, or, if approval is not required, it might bypass **pending approval** and move directly to the **approved** stage. This is configured using entry criteria on the **pending approval** stage.

## Stages and rule groupings

Rule groupings are associated with stages. They execute when the stage is transitioned to and when users update fields or run events while in the stage. For more information about rule groupings, see Quote transaction rules and rule groupings.

## Stages and views

Stages enable administrators to assign distinct permissions to determine how personas view and interact with field data at each stage. For more information about defining views for stages, see Quote transaction views.

## Behavior on open transaction

The **Behavior on Open Transaction** stage setting determines which event actions run when a user opens a transaction in that stage. Administrators can configure the **Refresh Product Data** toggle to refresh product data when the transaction opens, and can add one or more rule groupings or integrations to run on open.

## Behavior on idle timeout

The **Behavior on Idle Timeout** stage setting defines an event that triggers after a user remains inactive for a specified period. Administrators can define one such event per stage. If the event fails on its first execution, it is not retried or requeued. Supported action types are rule groups, integrations, and reprice (if enabled).

Note the following guidelines when configuring idle timeout behavior:

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- Set the idle time carefully to balance user convenience with session management and system efficiency.
- Test all configured rule groups and integrations in a non-production environment before enabling them in live stages.

## Stage-specific pricing behavior

When pricing is enabled, you can configure how repricing behaves at each stage:

- Behavior on Open Transaction: Runs the Reprice event action when a user opens a quote in the stage.
- Behavior on Idle Timeout: Runs the Reprice event action after a user has been inactive for the specified period.
- Allow Automatic Repricing: Reprices the quote automatically when pricing is out of date and the configured delay has elapsed since the last pricing call.

## Deleting a stage

Deleting a stage is restricted because deleting a stage that is in use by transactions can cause data issues. Contact ServiceNow Support if a stage deletion is required.

### Related topics

Pricing in the ServiceNow Quote Experience

### Create a quote transaction stage

Create a stage in the ServiceNow Quote Experience administration interface to define a phase in the quoting process, set entry criteria, and configure what happens when a user opens a transaction or remains inactive in that stage.

#### Before you begin

Role required: admin

#### About this task

A stage represents a phase in the quote lifecycle, from creation through completion. Each stage controls when and how transactions progress through the quote process. You can define entry criteria to control when a transaction can enter a stage, configure what happens when a user opens a transaction at that stage, and specify automated actions that occur if a user remains inactive for a defined period. Stages can be associated with rule groupings and integrations to apply business logic at specific points in the workflow.

When creating a stage, you assign it a variable name that serves as a unique identifier throughout the system—this variable name cannot be changed after creation. To configure stages, you can start by setting up stage properties and entry criteria first, then create and add rule groupings or integrations to the stage afterward.

#### Procedure

1. Navigate to **All** > **CPQ Administration** > **Transaction** > **Stages**.
   The Stages list is displayed by default.
2. Select **+ New Stage**.
3. In the **Name** field, enter the name of the new stage.

   As you type, the name is mirrored in the **Variable Name** field in camel case with spaces and special characters removed. For example, entering `Pending Approval` produces the

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variable name *pendingApproval*. To enter a custom variable name, select the pencil icon to the right of the **Variable Name** field.

4. Select **Save**.
   The stage editor opens with three configurable areas: rule groupings, entry criteria, and stage settings.
5. **Optional:** To associate rule groupings with the stage, use the **Rule Groupings** menu to select the rule groupings to assign.

   (Optional) Rule groupings assigned to a stage execute when the stage is entered and when users update fields or run events while in the stage.
6. **Optional:** To configure entry criteria, select **Entry Criteria** and then select **Take Action When** to choose the condition logic method.
   - Select **Always True** if the stage has no entry conditions.
   - Select **Any Conditions are Met** to advance when any condition is true (OR logic).
   - Select **All Conditions are Met** to advance only when all conditions are true (AND logic).
   - Select **Custom Logic** to combine AND and OR logic using parentheses.
7. **Optional:** Select **+ Add Condition** to add each condition.
   For each condition, select the field to test, the operator, and the test value.
8. Select **Save** to save the stage configuration.
9. In the **Behavior on Open Transaction** area of the stage editor, select **Edit Settings**.

   This area controls which rule groupings and integrations run when a user opens a transaction in this stage.
10. **Optional:** Enable the **Refresh Product Data** toggle to refresh the transaction's product data each time a user opens the transaction in this stage.
11. **Optional:** Select **Add New Action** and choose a rule grouping or integration to run when the transaction opens.

    (Optional) Repeat this step for each additional action to run on open.
12. **Optional:** In the **Behavior on Idle Timeout** area of the stage editor, activate the toggle to enable idle timeout for this stage.

    (Optional) Idle timeout defines an action that triggers after a user is inactive for a period you specify. A user is considered inactive when there are no clicks, interactions, or key presses. You can define one idle timeout event per stage. If the event fails on its first execution, it is not retried or requeued.

    **Tip:** Set the idle time carefully to balance user convenience with session management and system efficiency. Test all configured rule groupings and integrations in a non-production environment before enabling them in live stages.
13. **Optional:** Select **Edit Settings** next to **Behavior on Idle Timeout**.
14. **Optional:** In the **Idle Time Before Actions Run** field, enter the period of inactivity that must pass before the configured actions trigger.
15. **Optional:** Select **Add New Action** and choose the action type to run on timeout.

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| Action type | Use when |
| --- | --- |
| **Rule group** | You need to execute conditional logic on time out, such as updating fields or modifying the quote UI. For more information, see Quote transaction rules and rule groupings |
| **Integration** | You need to call an external API or service on timeout, such as logging inactivity events, sending notifications, or updating external records. For more information, see Quote transaction integrations |

(Optional) Repeat this step for each additional action to run on timeout.

16. Select **Save** to save all stage settings.
    The stage is saved with its rule groupings, entry criteria, and configured stage behaviors. The stage is available in the Stages list and can be associated with a blueprint layout.

### Quote transaction fields

ServiceNow Quote Experience supports five field types at two levels —transaction (header) and transaction line —enabling administrators to capture all required quote data in CPQ.

Fields in ServiceNow Quote Experience store data on a quote. Administrators create fields at the transaction level for deal-level data and at the transaction line level for product and pricing data. The level at which a field is created affects its availability in rules, which also operate at transaction or transaction line level.

## Field levels

### Field levels

| Field level | Description |
| --- | --- |
| Transaction level (header) | Transaction-level fields sit outside the quote lines grid. They capture information about the deal as a whole, such as account, addresses, list price total, total discount, and net total. |
| Transaction line level | Transaction line-level fields sit in the quote lines grid. They can appear as column fields or as fields in the Line Details UI Effect. |

## Field types

ServiceNow Quote Experience supports the following field types at both levels.

Every field, regardless of type, includes these standard attributes and settings:

- Field name — Display label that appears in the user interface
- Variable name — Unique system identifier for the field, locked after creation (select a descriptive name that does not require changes later)
- Default value — Value that automatically populates when a new transaction is created
- Required — Toggle that enforces validation so users must provide a value before proceeding
- Access Control — Settings that determine user permissions:

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- Editable — Users can view and modify the field
- Read-only — Users can view but cannot modify the field
- No Access — Field is hidden from users

For details on configuring access control rules for different user groups, see ServiceNow Quote Experience: Access Control.

### Field types

| Field type | Description |
|---|---|
| Text | Stores free-form text input, such as names, descriptions, or open-ended responses. Text fields support configurable length constraints—administrators can set a minimum character length to ensure users enter sufficient detail and a maximum character length to prevent long entries. |
| Number | Stores numeric values for quantities, amounts, or calculations.<br><br>Number fields support three distinct types: Integer (whole numbers only), Decimal (numbers with decimal places), and Currency (numbers formatted as currency). Supports configurable minimum and maximum value constraints to validate that users enter data within acceptable ranges. |
| Boolean | Stores a true or false value, typically displayed as a check box or toggle switch.<br><br>You can customize the labels for each state—for example, "Yes/No," "Enabled/Disabled," or "Active/Inactive"—to match your business terminology. You can set a default checked state so the field comes pre-checked or unchecked when a transaction is created. |
| Picklist | Stores a single selected value or multiple selected values from a defined list of options, depending on the configuration mode selected.<br><br>When defining picklist options, you control the order in which they appear. You assign a label (the user-facing name) and value (the system identifier). You can designate a default selection, provide an optional description, and include an optional image URL to visually represent the option.<br><br>Picklist fields support a comparison type setting—select Text to compare options as text strings or Number to compare them numerically. This setting affects how the system processes and sorts picklist selections. |
| Date/Time | Stores both date and time values in UTC format (YYYY-MM-DDTHH:MM:SSZ) to ensure consistency across time zones.<br><br>You can set a default date/time value that pre-fills when a transaction is created. The Not Before and Not After constraints restrict the date/time range users can select. These constraints enforce business rules such as "quotes cannot be created for dates in the past" or "expiration dates must be within 30 days."<br><br>For detailed guidance on date and time field configuration and best practices, see Date and time field fields. |

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## System-provided fields

ServiceNow Quote Experience provides a set of system-provided fields at both levels that are commonly used in transaction processing.

Transaction-level system fields cover the following categories: pricing information, opportunity information, transaction information, and account information. For a complete list, see Transaction-level system fields.

Transaction line-level system fields cover the following categories: pricing information, transaction line information, configuration information, product information, and order information. For a complete list, see Transaction line-level system fields.

## Custom fields

Custom fields can be added to a blueprint through the ServiceNow Quote Experience administration interface. Fields created through the interface are automatically associated with the blueprint.

Custom transaction fields can be created for platform capabilities such as Approvals, PDF Document Generation, or Order Creation. The field must sync from the CPQ Microservices to the Platform. For more information, see Configure transaction-to-quote field mapping.

### Related topics

- Create a transaction field
- Transaction-level system fields
- Transaction line-level system fields
- Date and time field fields

### Create a transaction field

Create a custom field in ServiceNow Quote Experience to capture additional data at the transaction (header) level or the transaction line level in CPQ.

#### Before you begin

Role required: admin

#### About this task

Fields created through the ServiceNow Quote Experience administration interface are automatically associated with the blueprint. The variable name is set at creation and cannot be changed afterward — to change a variable name, delete the field and re-add it. The field editor that opens after the initial save varies by field type — the following steps cover all five types.

#### Procedure

Create the field

1. Navigate to **All** > **CPQ Administration** > **Transaction** > **Associated Fields**.
2. Select **Create Field**.
   The **New Field** dialog opens.
3. In the **Name** field, enter the name of the new field.
   As you type, the name is mirrored in the **Variable Name** field in camel case with spaces and special characters removed. For example, entering `Customer Billing Address` produces the variable name *`customerBillingAddress`*. To enter a custom variable name, select the pencil icon to the right of the **Variable Name** field.

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4. In the **Level** field, select whether the field is a transaction-level (header) field or a transaction line-level field.
5. Select the field type: **Text**, **Number**, **Boolean**, **Picklist**, or **Date/Time**.
6. Select **Save**.
   The field editor opens. The available options depend on the field type selected. Continue with the section for your field type.

Configure common options

7. **Optional:** If the name requires updating, in the field editor, update the **Name**.

   (Optional) The variable name shown in the field editor is locked and cannot be edited here. To change it, delete the field and re-add it.
8. **Optional:** In the **Description** field, enter a description of the field.
9. **Optional:** If the field must be completed on the layout before a quote can be submitted, enable the **Required** toggle.
10. In the **Default Access** field, set the field's access in the default view.

| Option | Behavior |
|---|---|
| **Editable** | The field is read and write accessible on the quote layout. |
| **No Access** | The field is hidden from the quote layout and is not accessible through APIs. |
| **Read Only** | The field is read only on the layout. |

Configure text field options

11. **Optional:** In the **Default Value** field, enter the text that the field displays by default when a quote is created.
12. **Optional:** In the **Minimum Field Length** field, enter the minimum number of characters that a user must enter in this field.
13. **Optional:** In the **Maximum Field Length** field, enter the maximum number of characters that a user can enter in this field.

Configure number field options

14. **Optional:** Select the form the number field takes.
    - Select **Number** for a plain numeric value.
    - Select **Currency** for a monetary value. The unit label defaults to the currency symbol configured for your CPQ site.
    - Select **Percentage** for a percentage value. The unit label defaults to the percent symbol (%).
15. **Optional:** In the **Unit Label** field, enter a custom label to display alongside the number value.

    (Optional) For Currency and Percentage forms, the unit label is set automatically. Override it here only if a custom label is needed.
16. **Optional:** In the **Minimum Value** field, enter the lowest value a user can enter for this field.

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17. **Optional:** In the **Maximum Value** field, enter the highest value a user can enter for this field.
18. **Optional:** In the **Default Value** field, enter the number value that the field displays by default when a new quote is created.

Configure boolean field options

19. **Optional:** If the field should default to **True** when a quote is created, enable the **Default Checked** toggle.
    When the toggle is not enabled, the field defaults to **False**.
20. **Optional:** In the **True Label** field, enter the text to display when the field value is true.
    For example, entering `Yes` displays **Yes** on the quote layout when the Boolean value is true.
21. **Optional:** In the **False Label** field, enter the text to display when the field value is false.
22. Map fields.
    For more information, see Configure transaction-to-quote field mapping.

Configure picklist field options

23. In the **Selection Type** field, select how users choose values from this picklist.
    - Select **Single-select** so users can choose one option at a time.
    - Select **Multi-select** so users can choose more than one option.
24. In the **Comparison Type** field, select how the selected option's value is treated when used in a rule condition.
    - Select **Text** to treat the option value as a string in comparisons.
    - Select **Number** to treat the option value as a numeric value in comparisons.
25. Select **+ Add Picklist Options** to add the first option to the picklist.
26. Configure the option properties using the following fields.

**Picklist option properties**

| Property | Description |
|---|---|
| **Order** | Controls the position of this option in the picklist. Lower numbers appear higher in the list. Use increments of 10 (10, 20, 30) rather than 1, 2, 3 to leave room for inserting options later. |
| **Option Label** | The option name displayed to users on the quote layout. |
| **Option Value** | The internal value that CPQ uses to identify this option in rules and integrations. |
| **Selected** | When enabled, this option is the default selected value when a new quote is created. |
| **Description** | An optional description of the option, visible in the administration interface. |
| **Image URL** | The URL of a image to display in place of the option label text on the quote layout. |

27. Select **Save Option** to add the option to the picklist.
28. **Optional:** Select **+ Add Option** to add another option and repeat the previous two steps until all options are added.

Configure date/time field options

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29. **Optional:** In the **Default Value** field, enter the default date and time for the field.

    (Optional) The value is stored and displayed in UTC format: `YYYY-MM-DDTHH:MM:SSZ`. For more information about date and time field behavior, see Date and time field fields.

30. **Optional:** In the **Not Before** field, enter the earliest date and time a user can select for this field.
31. **Optional:** In the **Not After** field, enter the latest date and time a user can select for this field.
32. Select **Save** to save the field configuration.
    The field is saved and associated with the blueprint. It appears in the Associated Fields list and is available to add to a quote layout.

### What to do next

Add the field to the quote layout to make it visible to users on the quote interface. For more information, see Create a quote transaction layout.

### Related topics

Date and time field fields

Transaction-level system fields

Transaction line-level system fields

### Transaction-level system fields

Reference for the system-provided fields at the transaction (header) level in Quote Experience, including variable names, descriptions, who can modify each field, and default values.

## Field naming conventions

Quote Experience uses a consistent prefix convention for field variable names.

- System-generated header-level fields use the prefix `txn.` followed by the field name — for example, `txn.id`.
- Custom header-level fields created by administrators use the prefix `txn.custom.` followed by the field name — for example, `txn.custom.quoteName`.

For line-level field naming conventions, see Transaction line-level system fields.

## Modifiable by

The **Modifiable by** column in the field tables uses the following values.

**System**

The field value is set only by the application. Users cannot edit system-modifiable fields on the quote layout, and administrators cannot set field values using determination rules.

**User**

Any user with the appropriate permissions can update the field value. Determination rule actions can also modify user-modifiable fields.

## System-provided header-level fields

The following fields are available in all Quote Experience implementations.

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### Transaction-level system fields

| Variable name | Description | Default value |
|---|---|---|
| `txn.id` | UUID of the transaction. Uniquely identifies the transaction record. | Auto-generated on creation. Modifiable by: System |
| `txn.account.id` | ID of the account used when the transaction was created. | Empty. Expected to be passed in on create. Modifiable by: User |
| `txn.opportunity.id` | ID of the opportunity through which the transaction was created. | Empty. Expected to be passed in on create. Modifiable by: User |
| `txn.pricebook.id` | Pricebook associated with the products on the transaction. | Empty. A blank value is interpreted as the default pricebook. Modifiable by: User |
| `txn.pricing.currencyCode` | Currency code associated with the products on the transaction. | Empty. A blank value uses the base currency for the tenant. Modifiable by: User |
| `txn.created` | Timestamp of when the transaction was created. | Auto-generated on creation. Modifiable by: System |
| `txn.createdBy` | Name of the user who created the transaction. | Auto-generated on creation. Modifiable by: System |
| `txn.modified` | Timestamp of the most recent modification to the transaction. | Auto-generated on each update. Modifiable by: System |
| `txn.modifiedBy` | Name of the user who made the most recent modification to the transaction. | Auto-generated on each update. Modifiable by: System |
| `txn.externalId` | Unique identifier used to reference the transaction in external connections and integrations. | Empty. Expected to be passed in on create. Modifiable by: User |
| `txn.stage` | Current stage of the transaction in the quote lifecycle. | Auto-generated. Value depends on the stage configuration. Modifiable by: System |
| `txn.persona` | Persona of the user who performed the most recent request on the transaction. | Auto-generated. Value depends on the persona configuration. Modifiable by: System |

## ServiceNow SFA Fields

"The following fields are installed when ServiceNow SFA is enabled. Fields noted as "Set from opportunity" on create are populated automatically from the source opportunity when a quote is created.

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### SFA header fields

| Variable name | Description | Default value |
|---|---|---|
| `txn.displayNumber` | Transaction display number. The user-facing quote number. | Empty. Set during create quote. Modifiable by: System |
| `txn.sysId` | ServiceNow system ID of the transaction. | Empty. Set during create quote. Modifiable by: System |
| `txn.shortDescription` | Short description of the transaction. | Empty. Set from opportunity on create. Modifiable by: System |
| `txn.contact` | Contact name associated with the transaction. | Empty. Set from opportunity on create. Modifiable by: System |
| `txn.assignedTo` | User assigned to the transaction. | Empty. Set from opportunity on create. Modifiable by: System |
| `txn.assignmentGroup` | Assignment group for the transaction. | Empty. Set from opportunity on create. Modifiable by: System |
| `txn.startDate` | Start date for the transaction. | Empty. Set from opportunity on create. Modifiable by: System |
| `txn.endDate` | End date for the transaction. | Empty. Set from opportunity on create. Modifiable by: System |
| `txn.term` | Contract term in months. | Empty. Set from opportunity on create. Modifiable by: System |
| `txn.channel` | Records the channel through which the transaction originated. | `agent_assist` Modifiable by: System |

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### SFA header fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| `txn.transactionType` | Type of transaction. Values: New, Amendment, Renewal. | Empty. Modifiable by: System |
| `txn.transactionAction` | Used to derive the transaction type. Values: Add, Change. | `add` Modifiable by: System |
| `txn.isAutoGeneratedForRenewal` | Indicates whether this transaction was automatically generated for a renewal based on the expiry of the original contract. | `false` Modifiable by: System |
| `txn.isAutoRenewContract` | Indicates whether the contract resulting from this transaction should trigger automatic renewal workflows. | `false` Modifiable by: System |
| `txn.source.quote` | Reference to the quote from which this transaction was consolidated, if applicable. | Empty. Modifiable by: System |
| `txn.source.contract` | Reference to the contract used in the amendment or renewal workflow that this transaction is part of. | Empty. Modifiable by: System |

## ServiceNow Pricing fields

The following fields are installed when ServiceNow Pricing is enabled.

### Pricing header fields

| Variable name | Description | Default value |
|---|---|---|
| `txn.pricing.extendedPrice` | Total One-Time price. An aggregate of the one-time price across all lines. | Empty. Modifiable by: System |
| `txn.pricing.cost` | Total One-Time Cost. An aggregate of the one-time cost across all lines. | Empty. Modifiable by: System |
| `txn.pricing.margin.amount` | Total One-Time Margin. Calculated as Total One-Time Price minus Total One-Time Cost. | Empty. Modifiable by: System |
| `txn.pricing.margin.percentage` | Total One-Time Margin %. Calculated as Total One-Time Margin divided by | Empty. Modifiable by: System |

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### Pricing header fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| | Total One-Time Price × 100. | |
| txn.pricing.netCost | Total Cost. An aggregate of the cumulative net cost across all lines. | Empty. Modifiable by: System |
| txn.pricing.margin.total.amount | Total Margin Amount. Calculated as Total Amount minus Total Cost. | Empty. Modifiable by: System |
| txn.pricing.margin.total.percentage | Total Margin %. Calculated as Total Margin Amount divided by Total Amount × 100. | Empty. Modifiable by: System |
| txn.pricing.annualPriceRecurring | Total Annual Price. An aggregate of the cumulative annual recurring price across all lines. | 0 Modifiable by: System |
| txn.pricing.netPriceRecurring | Total Monthly Price. An aggregate of the cumulative monthly recurring price across all lines. | 0 Modifiable by: System |
| txn.pricing.costRecurring | Total Monthly Cost. An aggregate of the cumulative monthly recurring cost across all lines. | 0 Modifiable by: System |
| txn.pricing.marginRecurring.amount | Total Monthly Margin. Calculated as Total Monthly Price minus Total Monthly Cost. | 0 Modifiable by: System |
| txn.pricing.marginRecurring.percentage | Total Monthly Margin %. Calculated as (Total Monthly Price minus Total Monthly Cost) divided by Total Monthly Price. | Empty. Modifiable by: System |
| txn.pricing.netNew.amount | Total Net New Amount. An aggregate of the cumulative net price from new root lines. | 0 Modifiable by: System |
| txn.pricing.source.contract.amount | Original Contract Amount. An | 0 Modifiable by: System |

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### Pricing header fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| | aggregate of the renewal amount from lines. Represents the contract value from the original transaction being renewed. | |
| `txn.pricing.delta.upsellDownsellAmount` | Total Upsell/ Downsell Amount. An aggregate of the upsell or downsell amount from lines. | 0 Modifiable by: System |
| `txn.pricing.adjustment.renewalBasis` | Renewal Adjustment Basis. The starting renewal price from which to apply adjustments. | `list_price` Modifiable by: System |
| `txn.pricing.adjustment.renewalType` | Renewal Adjustment Type. The type of adjustment for renewal. Options: Markup %, Markdown %. Read-only when Renewal Adjustment Basis is List Price. | Empty. Set from opportunity on create. Modifiable by: System |
| `txn.pricing.adjustment.renewalValue` | Renewal Adjustment Value. The amount of adjustment to apply to the renewal price, interpreted according to the Renewal Adjustment Type. | Empty. Modifiable by: System |
| `txn.costbook` | Reference to the cost book associated with the transaction. Set in the Pricing Service response. | Empty. Modifiable by: System |
| `txn.pricing.subTotal` | Subtotal of the transaction before overall discounts and adjustments are applied. | 0 Modifiable by: System |
| `txn.pricing.total` | Total of the transaction after all pricing, discounts, and adjustments are applied. | 0 Modifiable by: System |

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**Pricing header fields (continued)**

| Variable name | Description | Default value |
|---|---|---|
| `txn.pricing.discount.amount` | Overall Discount Amount. The total discount amount applied to the transaction. | 0 Modifiable by: System |
| `txn.pricing.discount.percent` | Overall Discount Percent. The total discount percent applied to the transaction. | 0 Modifiable by: System |
| `txn.pricing.state` | Pricing State. Indicates whether the transaction's pricing is up-to-date or needs a reprice. Set to Needs reprice when a pricing-affecting field changes, and set to Up-to-date after a pricing call completes successfully. Drives the stale-pricing indicator on the quote. | Empty. Modifiable by: System |
| `txn.pricing.lastPriced` | Last Priced. Timestamp of the most recent successful pricing call for the transaction. | Empty. Modifiable by: System |

## Approvals fields

The following field is installed when ServiceNow Approvals is enabled.

**Approvals header field**

| Variable name | Description | Default value |
|---|---|---|
| `txn.approvalState` | Approval state of the transaction. | Empty. Modifiable by: System |

## PDF Document Generation fields

The following fields are installed when ServiceNow PDF Document Generation is enabled.

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### Document generation header fields

| Variable name | Description | Default value |
|---|---|---|
| `txn.docGen.template` | Document template selection for document generation. | Empty. Modifiable by: User |
| `txn.docGen.internalSigner` | Internal signer selection for document generation. | Empty. Modifiable by: User |
| `txn.docGen.externalSigner` | External signer selection for document generation. | Empty. Modifiable by: User |

## Partner Management fields

The following fields are installed when ServiceNow Partner Management is enabled.

### Partner Management header fields

| Variable name | Description | Default value |
|---|---|---|
| `txn.dealType` | Route to market / deal type of the transaction. | `direct` Modifiable by: User |
| `txn.routeToMarket` | Route to market of the transaction. | `direct` Modifiable by: User |
| `txn.channelPartner` | Channel partner associated with the transaction. | Empty. Modifiable by: User |

## Sync Quote to Opportunity fields

The following field is installed when ServiceNow Sync Quote to Opportunity is enabled.

### Sync Quote to Opportunity header field

| Variable name | Description | Default value |
|---|---|---|
| `txn.opportunity.isSynced` | Indicates whether the quote is synced to the source opportunity. | Empty. Modifiable by: System |

**Related topics**

- Quote transaction fields
- Transaction line-level system fields
- Date and time field fields

### Transaction line-level system fields

Reference for the system-provided fields at the transaction line level in CPQ ServiceNow Quote Experience, including variable names, descriptions, who can modify each field, and default values.

## Field naming conventions

ServiceNow Quote Experience uses a consistent prefix convention for line-level field variable names.

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- System-generated line-level fields use the prefix `txn.line.` followed by the field name — for example, `txn.line.id`.
- Custom line-level fields created by administrators use the prefix `txn.line.custom.` followed by the field name — for example, `txn.line.custom.agreementDiscount`.

For header-level field naming conventions, see Transaction-level system fields.

## Modifiable by

**System**

The field value is set only by the application. Users cannot edit system-modifiable fields, and administrators cannot set them using determination rules.

**User**

Any user with the appropriate permissions can update the field value. Determination rule actions can also modify user-modifiable fields.

## Line identity and audit fields

### Line identity and audit fields

| Variable name | Description | Default value |
|---|---|---|
| `txn.line.id` | UUID of the transaction line. Must be unique across sectors and regions for one tenant; may not be unique across tenants. | Auto-generated by the system. Modifiable by: System |
| `txn.line.parent.id` | ID of the parent line. Used to establish parent-child relationships between lines in the quote lines grid. | Empty. The user passes this value. Modifiable by: System |
| `txn.line.created` | Timestamp when the transaction line was added. | Auto-generated by the system. Modifiable by: System |
| `txn.line.createdBy` | Name of the user who added the transaction line. | Auto-generated by the system. Modifiable by: System |
| `txn.line.modified` | Timestamp when the transaction line was last modified. | Auto-generated by the system. Modifiable by: System |
| `txn.line.modifiedBy` | Name of the user who last modified the transaction line. | Auto-generated by the system. Modifiable by: System |
| `txn.line.isNew` | Indicates whether a line is new (`true`) or existing (`false`). The value is `true` only during the event that creates the line. | Empty. Generated when the line is added. Modifiable by: System |

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## Product fields

Product fields are populated automatically when a product is added to the quote. Fields marked with a refresh note are also updated when the **Refresh Product Data** stage setting is enabled.

### Product fields

| Variable name | Description | Default value |
|---|---|---|
| `txn.line.isProduct` | Boolean indicating whether the product to be added is available in the catalog. | `false` Modifiable by: System |
| `txn.line.product.id` | Product ID of the product added to the line. Refreshed if **Refresh Product Data** is enabled. | Auto-generated by the system. Modifiable by: System |
| `txn.line.product.name` | Name of the product added to the line. Refreshed if **Refresh Product Data** is enabled. | Auto-generated by the system. Modifiable by: System |
| `txn.line.product.externalId` | External ID of the product, as defined in CPQ Admin utilities. Refreshed if **Refresh Product Data** is enabled. | Auto-generated by the system. Modifiable by: System |
| `txn.line.product.partnerId` | Partner ID of the product, as defined in CPQ Admin utilities. Refreshed if **Refresh Product Data** is enabled. | Auto-generated by the system. Modifiable by: System |
| `txn.line.product.productCode` | Product code of the product, as defined in CPQ Admin utilities. Refreshed if **Refresh Product Data** is enabled. | Auto-generated by the system. Modifiable by: System |
| `txn.line.product.description` | Description of the product added to the line. Refreshed if **Refresh Product Data** is enabled. | Auto-generated by the system. Modifiable by: System |

## Line behavior fields

### Line behavior fields

| Variable name | Description | Default value |
|---|---|---|
| `txn.line.isVisible` | Controls whether the line appears in the quote lines grid. Set to `false` to hide a line from the user without deleting it. | `true` Modifiable by: System |
| `txn.line.isReorderable` | Indicates whether the line can be reordered within the quote lines grid. | `true` Modifiable by: System |

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**Line behavior fields (continued)**

| Variable name | Description | Default value |
|---|---|---|
| `txn.line.selected` | Used in rule conditions to perform actions on selected lines. Set to `true` when a line-level event runs on the line. Reset to `false` after all event actions complete. | `false` Modifiable by: System |

## Configuration fields

Configuration fields are populated when a configurable product is added to the quote. Fields in the `txn.line.configuration.item.*` group relate to items in the bill of materials (BOM). These fields are empty if the line has no configuration.

**Configuration fields**

| Variable name | Description | Default value |
|---|---|---|
| `txn.line.isConfigured` | Boolean indicating whether the line is a configured product or the top-level line of a parent-child configuration. Set to `true` automatically when a configuration is added. | `false` Modifiable by: System |
| `txn.line.configuration.id` | UUID of the configuration. | Empty if no configuration. Modifiable by: System |
| `txn.line.configuration.solutionId` | UUID of the solution the configuration belongs to. | Empty if no configuration. Modifiable by: System |
| `txn.line.configuration.status` | Configuration validation status. Supports the **Validate configured items** event setting. | Empty. Generated when lines are added. Modifiable by: System |
| `txn.line.configuration.validatedAt` | Date of the last configuration validation. Supports | Empty. Generated when lines are added. |

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### Configuration fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| | the **Validate configured items** event setting. | Modifiable by: System |
| txn.line.configuration.item.id | Configuration item ID in the BOM once a configuration is added. | Empty if no configuration. Modifiable by: System |
| txn.line.configuration.item.price | Price of a BOM item once a configuration is added. | 0. Does not exist if there is no configuration. Modifiable by: System |
| txn.line.configuration.item.quantity | Quantity of a BOM item once a configuration is added. | 0. Does not exist if there is no configuration. Modifiable by: System |
| txn.line.configuration.item.type | Type of a BOM item once a configuration is added. | Empty if no configuration. Modifiable by: System |
| txn.line.configuration.item.notes | Notes for a BOM item once a configuration is added. | Empty if no configuration. Modifiable by: System |
| txn.line.configuration.item.description | Description of the BOM item as defined when the configuration item was created. | Empty if no configuration. Modifiable by: System |
| txn.line.configuration.item.parentProduct | Configuration item ID of the parent product for a BOM item in a parent-child configuration. | Empty if no configuration. Modifiable by: System |
| txn.line.configuration.item.uom | Unit of measure for the BOM item, as defined when the item was created. | Empty if no configuration. Modifiable by: System |

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### Configuration fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| `txn.line.configuration.item.bomType` | BOM type of the configuration item, as defined when the item was created. | Empty if no configuration. Modifiable by: System |
| `txn.line.configuration.item.extPrice` | Extended price of the BOM item, as defined in the `extPrice` column of the configuration item. | 0. Does not exist if there is no configuration. Modifiable by: System |
| `txn.line.configuration.item.orderNumber` | Order number of the BOM item when it was added. | Empty if no configuration. Modifiable by: System |
| `txn.line.configuration.item.rollUpPrice` | Rollup price of the BOM item, as defined in the `rollupPrice` column when the item was created. | 0. Does not exist if there is no configuration. Modifiable by: System |
| `txn.line.configuration.item.uniqueIdentifier` | Unique identifier for a BOM item, used to match configuration items on reconfiguration. Cannot be changed after creation. | Empty if no configuration. Modifiable by: System |
| `txn.line.configuration.item.key` | Fallback key used to match BOM items on reconfiguration when the unique identifier cannot be used. | Empty. Generated when lines are added. Modifiable by: System |

## Fields installed with the quoting experience

The following fields are installed when the CPQ quoting experience is enabled and are available to all tenants.

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### Core quoting experience line fields

| Variable name | Description | Default value |
|---|---|---|
| `txn.line.account` | Account associated with the line. Set from the transaction header. | Empty. Set from header. Modifiable by: System |
| `txn.line.contact` | Contact name associated with the line. | Empty. Modifiable by: System |
| `txn.line.displayNumber` | User-facing display number of the line. | Empty. Modifiable by: System |
| `txn.line.sysId` | ServiceNow system ID of the line. | Empty. Modifiable by: System |
| `txn.line.parentBomLineId` | ID of the line's parent BOM line. | Empty. Modifiable by: System |
| `txn.line.product.uom` | Product unit of measurement of the line. | Empty. Modifiable by: System |
| `txn.line.product.model` | Product model associated with the line. | Empty. Modifiable by: System |
| `txn.line.product.specification` | Product specification associated with the line. | Empty. Modifiable by: System |
| `txn.line.product.characteristics` | Product characteristics of the line. | Empty. Modifiable by: System |
| `txn.line.serviceLocation` | Service location associated with the line. | Empty. Modifiable by: System |
| `txn.line.startDate` | Start date of the line. | Empty. Modifiable by: System |

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**Core quoting experience line fields (continued)**

| Variable name | Description | Default value |
|---|---|---|
| txn.line.endDate | End date of the line. | Empty. Modifiable by: System |
| txn.line.term | Difference in months between the start date and end date for the recurring product on this line. Calculated automatically from the contract start date and contract end date. | Empty. Modifiable by: System |
| txn.line.lineType | Describes the change being made to the transaction line. Values: New, Renew, Upsell, Amend, Cancel, No Change. | Empty. Modifiable by: System |
| txn.line.lineAction | Indicates the action applied to the sold product. Values: Add, Change, Disconnect, No Change. | Empty. Modifiable by: System |
| txn.line.isAutoGeneratedForRenewal | Indicates whether this line was automatically generated from a renewal workflow. | Empty. Modifiable by: System |
| txn.line.isAutoRenewContract | Indicates whether the contract line is eligible for automatic renewal based on its expiration end date. | Empty. Modifiable by: System |
| txn.line.source.entitlement | References the entitlement from which this line was renewed. | Empty. Modifiable by: System |
| txn.line.source.soldProduct | Reference to the underlying sold product record from which this line was created. | Empty. Modifiable by: System |
| txn.line.source.splitFromSoldProduct | When a line is split due to an amendment, this field contains a reference to the underlying sold product record from the original line. Used for delta pricing calculations. | Empty. Modifiable by: System |
| txn.line.source.contract | References the existing contract from which this line was derived. | Empty. Modifiable by: System |

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### Core quoting experience line fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| txn.line.source.contract.line | Reference to the contract line from which this line was renewed. | Empty. Modifiable by: System |
| txn.line.source.line | Reference to the parent line item when a line was split due to an amendment. Used in the pricing payload as split_from. | Empty. Modifiable by: System |
| txn.line.source.rootLine | Reference to the root (original) line in a split or amendment chain. | Empty. Modifiable by: System |

## Pricing fields

The following fields are installed when the Pricing tenant setting is enabled.

### Line-level pricing fields

| Variable name | Description | Default value |
|---|---|---|
| txn.line.pricebook | Reference to the price list from which this line's list price is read. | Empty. Modifiable by: System |
| txn.line.pricing.extendedPrice | Extended Price. Calculated as Unit Net Price × Quantity. | Empty. Modifiable by: System |
| txn.line.pricing.cost | One-Time Cost. Cost for a product that is not recurring. | Empty. Modifiable by: System |
| txn.line.pricing.unitCost | Unit Cost. List cost as read from the cost book. | 0 Modifiable by: System |
| txn.line.pricing.margin.amount | Unit Margin Amount. Calculated as Unit Net Price minus Unit Net Cost. | 0 Modifiable by: System |

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### Line-level pricing fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| txn.line.pricing.margin.percentage | Unit Margin %. Calculated as Unit Margin Amount divided by Unit Net Price × 100. | Empty. Modifiable by: System |
| txn.line.pricing.rollupPrice | Cumulative One-Time Price. An aggregate of the one-time price of itself and its child lines. | Empty. Modifiable by: System |
| txn.line.pricing.rollupCost | Cumulative One-Time Cost. An aggregate of the one-time cost of itself and its child lines. | Empty. Modifiable by: System |
| txn.line.pricing.rollupNetCost | Cumulative Net Cost. An aggregate of the one-time cost and monthly recurring cost over the term. | 0 Modifiable by: System |
| txn.line.pricing.rollupNetPrice | Cumulative Net Price. An aggregate of the unit net price of itself and its child lines. | 0 Modifiable by: System |
| txn.line.pricing.rollupMargin.percentage | Cumulative Margin %. An aggregate of the margin of itself and its child lines. Calculated as the rollup of Unit Margin Amount divided by | Empty. Modifiable by: System |

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### Line-level pricing fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| | Unit Net Price × 100. | |
| txn.line.pricing.netPriceRecurring | Monthly Recurring Price. For a recurring product, the monthly unit price. | Empty. Modifiable by: System |
| txn.line.pricing.costRecurring | Monthly Recurring Cost. The monthly cost of the product. Typically used in margin calculations. | Empty. Modifiable by: System |
| txn.line.pricing.annualPriceRecurring | Annual Recurring Price. Calculated as Monthly Recurring Price × 12 months. | 0 Modifiable by: System |
| txn.line.pricing.rollupExtendedPriceRecurring | Cumulative Monthly Price. Calculated as Net Unit Price per month × Quantity. | Empty. Modifiable by: System |
| txn.line.pricing.rollupCostRecurring | Cumulative Monthly Cost. An aggregate of the monthly recurring cost of itself and its child lines. | Empty. Modifiable by: System |
| txn.line.pricing.rollupAnnualPriceRecurring | Cumulative Annual Price. An aggregate of the annual recurring price of itself and its child lines. | Empty. Modifiable by: System |
| txn.line.pricing.adjustment.manual | Manual Adjustment. Stores the calculated | 0 Modifiable by: System |

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### Line-level pricing fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| | adjustment amount derived from manual adjustments on the line. | |
| txn.line.pricing.adjustment.net | Net Adjustment. Total adjustment amount for the line. Includes manual adjustments and any auto-applied adjustments per pricing rules. | 0 Modifiable by: System |
| txn.line.pricing.adjustment.unit | Unit Adjustment. Calculated as Total Adjustment divided by Quantity. | 0 Modifiable by: System |
| txn.line.pricing.priceAdjustments | JSON store for price adjustments, consumed by the adjustments UI. | Empty. Modifiable by: System |
| txn.line.pricing.isDerived | Flag indicating whether this product's price is derived from other products on the transaction. | 0 Modifiable by: System |
| txn.line.pricing.adjustment.renewalBasis | Renewal Adjustment Basis. Specifies the starting renewal price to use. List Price or | list_price Modifiable by: System |

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### Line-level pricing fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| | Net Price of last ramp segment. Overrides the header-level setting if specified. | |
| `txn.line.pricing.adjustment.renewalType` | Renewal Adjustment Type. Indicates whether the renewal adjustment value is a percentage or absolute amount. | Empty. Modifiable by: System |
| `txn.line.pricing.adjustment.renewalValue` | Renewal Adjustment Value. The percentage or amount to adjust the renewal price by, according to the Renewal Adjustment Type. | Empty. Modifiable by: System |
| `txn.line.source.rollupPrice` | Renewal Amount. Reference to the original cumulative net price prior to renewal. | 0 Modifiable by: System |
| `txn.line.pricing.delta.priceTreatment` | Delta Price Treatment. Determines the pricing treatment applied to the line based on line type, action, and whether product offer characteristics | `list_price` Modifiable by: System |

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### Line-level pricing fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| | have changed. | |
| txn.line.pricing.delta.netPrice | Delta Unit Net Price. Calculated as Current Unit Net Price minus Original Unit Net Price. | Empty. Modifiable by: System |
| txn.line.pricing.delta.price | Delta One-Time Price. Calculated as Current One-Time Price minus Original One-Time Price. | Empty. Modifiable by: System |
| txn.line.pricing.delta.rollupNetPrice | Delta Cumulative Net Price. Calculated as Current Cumulative Net Price minus Original Cumulative Net Price. | Empty. Modifiable by: System |
| txn.line.pricing.delta.rollupPriceRecurring | Delta Monthly Recurring Price. Calculated as Current Monthly Recurring Price minus Original Monthly Recurring Price. | Empty. Modifiable by: System |
| txn.line.delta.upsellDownsellAmount | Upsell or Downsell Amount. Calculated as the Current Cumulative Net Price minus Original Cumulative Net Price. | Empty. Modifiable by: System |

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### Line-level pricing fields (continued)

| Variable name | Description | Default value |
|---|---|---|
| `txn.line.pricing.state` | Pricing State. Indicates whether the line's pricing is up-to-date or needs a reprice. Set to Needs reprice when a pricing-affecting field on the line changes, and set to Up-to-date after a pricing call completes successfully. Drives the per-line stale-pricing indicator in the quote lines grid. | Empty. Modifiable by: System |
| `txn.line.pricing.lastPriced` | Last Priced. Timestamp of the most recent successful pricing call for the line. | Empty. Modifiable by: System |
| `txn.line.pricing.adjustment.type` | Discount Adjustment Type. The type of manual adjustment applied to the line. Options: Markdown Amount, Markdown %, Price Override. | Empty. Modifiable by: User |
| `txn.line.pricing.adjustment.value` | Discount Adjustment Value. The amount or percentage of the manual adjustment, interpreted | Empty. Modifiable by: User |

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**Line-level pricing fields (continued)**

| Variable name | Description | Default value |
|---|---|---|
| | according to the Discount Adjustment Type. | |
| `txn.line.pricing.discountReason` | Discount Reason. The reason a manual discount or adjustment was applied to the line. Captured for auditing. | Empty. Modifiable by: User |

## Opportunity sync fields

The following field is seeded when the Opportunity Sync tenant setting is enabled.

**Opportunity sync line field**

| Variable name | Description | Default value |
|---|---|---|
| `txn.line.opportunity.lineItem` | Reference to the opportunity line item this line is synced to. | Empty. Modifiable by: System |

**Related topics**

- Quote transaction fields
- Transaction-level system fields
- Date and time field fields

### Date and time field fields

Reference for how date and time fields behave in CPQ ServiceNow Quote Experience rules and scripts, including comparison operators, null handling, and supported aggregate functions.

## Date and time fields in quoting

Date and time fields in CPQ serve two primary purposes in a quoting context.

**Term calculations**

Calculate contract terms, start and end dates, renewal dates, and subscription lengths. Blank or null date values can affect term accuracy — use system defaults such as the current date, or flag missing values using error messages in rules.

**Audit events**

Track activities such as quote creation, pricing changes, and approval events. Missing dates indicate incomplete data and should be flagged for review.

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## Date and time formats

ServiceNow Quote Experience supports the following date and time formats.

### Date and time field formats

| Format type | Format pattern | Example |
|---|---|---|
| Date only | `YYYY-MM-DD` | `2024-11-07` |
| Date and time | `YYYY-MM-DDTHH:MM:SS` | `2024-10-22T14:30:00` |
| UTC (stored format) | `YYYY-MM-DDTHH:MM:SSZ` | `2024-10-22T14:30:00Z` |

Date-only fields are time-zone agnostic. All date and time values are stored in Coordinated Universal Time (UTC) to avoid time-zone discrepancies. Administrators can choose whether to include the time component when configuring a date/time field.

In the ServiceNow Quote Experience layout, the field type value that controls display behavior is:

- `"type":"Date"` — displays only the date component.
- `"type":"DateTime"` — displays both date and time components.

## Null and blank date behavior in scripts

Blank and null date values follow specific comparison rules in ServiceNow Quote Experience scripts and rule conditions.

- Blank/null dates compare as `false` unless compared directly to another blank value.
- The default value of a date field is empty (null) unless a default is specified in the field configuration.

The following examples show blank date comparison outcomes.

### Blank date comparison examples

| Expression | Result | Explanation |
|---|---|---|
| `date123 = ""` | `true` | A blank date compared to a blank string evaluates to true. |
| `date123 != ""` | `false` | A blank date compared as not-equal to blank evaluates to false. |

## Supported comparison operators

The following comparison operators are supported for date and time field values in rule conditions and scripts.

### Date comparison operators

| Operator | Behavior |
|---|---|
| `<` | Less than. Always evaluates to `false` when either operand is blank or null. |
| `<=` | Less than or equal to. Always evaluates to `false` when either operand is blank or null. |

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**Date comparison operators (continued)**

| Operator | Behavior |
|---|---|
| `>` | Greater than. Always evaluates to `false` when either operand is blank or null. |
| `>=` | Greater than or equal to. Always evaluates to `false` when either operand is blank or null. |
| `=` | Equal to. Evaluates to `true` only when both operands are blank. |
| `!=` | Not equal to. Evaluates to `false` when either operand is blank or null. |

## Aggregate functions for date fields

The following aggregate functions are supported for date field values. Use these in determination rule scripts to calculate date values across transaction lines.

**Supported aggregate functions for date fields**

| Function | Behavior | Notes |
|---|---|---|
| `Max` | Returns the latest date in the set. | Supported. |
| `Min` | Returns the earliest date in the set. | Supported. |
| `Count` | Counts non-empty date values in the set. | Supported. |
| `Sum` | Not applicable to date values. | Not recommended — may trigger compile-time errors. |
| `Avg` | Not applicable to date values. | Not recommended — may trigger compile-time errors. |

## Date calculation script example

The following script calculates the difference between a start date and an end date in months and days, and stores the result in a subscription term field. Use this pattern in a determination rule action to populate a summary field from two date inputs.

```
// Calculates the difference between start and end dates in
 months and
// days. Stores the result in Subscription Term (Months).

var yearsDiff =
  txn.custom.endDate.getFullYear() -
 txn.custom.startDate.getFullYear();
var monthsDiff =
  txn.custom.endDate.getMonth() -
 txn.custom.startDate.getMonth();
var totalMonths = yearsDiff * 12 + monthsDiff;

var startDay = txn.custom.startDate.getDate();
var endDay = txn.custom.endDate.getDate();
var daysInMonth = new Date(
  txn.custom.endDate.getFullYear(),
  txn.custom.endDate.getMonth() + 1,
```

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```
  0
).getDate();
var dayFraction = (endDay - startDay + 1) / daysInMonth;

totalMonths += dayFraction;
return Math.floor(totalMonths * 1000) / 1000;
```

**Related topics**

- Quote transaction fields
- Transaction-level system fields
- Transaction line-level system fields
- Create a transaction field

### Quote transaction rules and rule groupings

Rules in ServiceNow Quote Experience evaluate conditions and perform actions on quote fields and layouts. Rule groupings bundle rules together to run at stages and events in CPQ.

Rules in ServiceNow Quote Experience govern what actions occur when a user interacts with the quote interface. Rules are similar to configuration rules — each rule has three components: level, conditions, and actions.

## Rule components

**Level**

Determines whether the rule runs at the transaction level or the transaction line level. The level dictates which fields can be used in conditions and actions.

- Transaction-level rules can use transaction-level fields in both conditions and actions.
- Transaction line-level rules can use transaction-level and line-level fields in conditions, but only transaction line-level fields in actions.

**Conditions**

Determine when a rule executes its actions. If conditions evaluate to TRUE, actions execute. If conditions evaluate to FALSE, actions don't execute. The following condition logic options are available.

**Always True**

Executes the rule every time a user makes a change to the quote interface.

**Any Conditions are Met**

Executes the rule if any condition evaluates to TRUE. Conditions are logically OR'd together.

**All Conditions are Met**

Executes the rule if all conditions evaluate to TRUE. Conditions are logically AND'd together.

**Custom Logic**

Enables parentheses and a mixture of AND and OR operators to build a custom logic expression — for example, `Cond_1 AND (Cond_2 OR Cond_3)`.

**Advanced Function**

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Enables a script that returns TRUE or FALSE to control whether the rule executes.

Each individual condition tests a field against an operator and a value. Use **+ Add Condition** to add multiple conditions to a rule.

**Actions**

Define what the rule does when it executes. A rule can have one or more actions, and a single rule can include actions of different types. For full parameter details for each action type, see the Action types section below.

## Action types

The following action types are available in ServiceNow Quote Experience rules. Each type has a distinct set of parameters configured in the rule editor.

**Hiding**

Hides a field on the quote layout when the rule conditions are met. The only parameter is the field to hide — use the field search box in the action editor to select it.

**Message**

Displays a text message to the user on the quote layout. The following parameters are available.

**Message type**

Set using the **I want to display** menu. The four message types are:

- **Info** — circular blue icon and blue message text. Icon and text color cannot be changed.
- **Warning** — triangular yellow icon and yellow message text. Icon and text color cannot be changed.
- **Error** — triangular red icon and red message text. Icon and text color cannot be changed.
- **Custom** — configurable icon and text color.

**Message location**

Set using the **Show the message on** field. Messages can be attached to a field, or to a layout component such as a tier or a columnset.

**Message content**

Enter the text to display in the **Message Content** field. Enable the **Advanced** toggle to use a script to build the message content dynamically.

**Save behavior**

Use the **When Message is Displayed** field to determine whether the transaction can be saved when the message is visible.

**Exclusion**

Hides or disables one or more menu options in a picklist field. Exclusion and Inclusion actions share the same parameter set.

**Target field**

Select the picklist field whose options to exclude using the **For this Field** menu.

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#### Options to exclude

Select the picklist options to exclude using the **I want to exclude these options** menu. Select options one at a time. Enable the **Advanced** toggle to use a script to determine which options are excluded.

#### Excluded option treatment

Use the **For excluded options** menu to choose how excluded options appear:

- **Hide them** — removes excluded options from the menu.
- **Disable them** — retains excluded options in the menu in a disabled state.

#### Behavior when excluded option is already selected

Use the **If any are already selected** menu to control what happens when the user has already selected an option that the rule excludes:

- **Leave unchanged** — retains the excluded item as the selected value.
- **Deselect them** — removes the selection and requires the user to choose another option.
- **Select the first valid option instead** — removes the selection and replaces it with the first available option after the rule executes.

### Inclusion

Shows or enables one or more menu options in a picklist field. Inclusion and Exclusion actions share the same parameter set — in an Inclusion action, options not specified for inclusion are treated as excluded. For parameter descriptions, see the Exclusion action above.

### Determination

Sets or clears the value of a field. The following parameters are available.

#### Target field

Select the field to act on using the **For this Field** menu.

#### Set or clear

Under **I want to...**, define whether to set a value or clear the field, and whether to allow or prevent the user from editing the field after the rule modifies it.

#### User-modified value handling

The **If user has modified values** menu controls whether to retain a value the user already entered or override it with the rule's value. When user values are retained, the **When user values are retained** menu lets you optionally show the user a recommendation message about the field value.

#### Value to assign

Define the value in the **Use this value** field. Enable the **Advanced** toggle to use a script — including aggregate functions — to calculate the value.

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## Aggregate functions in determination actions

Aggregate functions are script functions available in determination rule actions. They perform math calculations on transaction line fields and store results in a header field or a transaction line field. Aggregates enhance automation, optimize pricing calculations, and improve data organization in quoting workflows.

**Note:** Aggregate functions always run, even when they have no child lines to aggregate. If an aggregate function has no default value set and there are no children, it returns `null`. Lookup functions without children return an empty array. To avoid downstream errors, always set a default value or handle empty array responses in any logic that depends on aggregate output.

### Avg, Count, Min, Max, Sum

Aggregate the value of a transaction line field across all lines and store the result in the target header field.

```
return
 txn.line.functions.<function>(txn.line.<fieldVarName>)
```

Values for `<function>`: `avgField`, `countField`, `minField`, `maxField`, `sumField`.

### AvgIf, CountIf, SumIf

Apply a filter to the transaction line field values, then perform the calculation on the remaining lines and store the result in the target header field. Text conditional checks are case sensitive.

```
txn.line.functions.<function>(txn.line.<fieldVarName>,
 <condition> [, <default>])
```

Values for `<function>`: `avgFieldIf`, `countFieldIf`, `sumFieldIf`.

Example condition expressions:

- `booleanField = true`
- `txn.line.functions.sumChildrenField(txn.line.<fieldVarName>) > 0`

If there are no children to aggregate and the default value is undefined, the function returns `null`.

### SumChildren

Aggregates the value of a line field across all child lines and stores the result in the immediate parent line field.

```
txn.line.functions.sumChildrenField(txn.line.<fieldVarN
ame>)
```

### Lookup functions

Retrieve values rather than computing totals. Lookup functions return either a single value or an array of values from transaction line fields, enabling dynamic use in pricing calculations, validation rules, and output documents. Lookup aggregations dynamically adjust when line items are removed — references to deleted transaction lines are cleared automatically.

Lookup functions follow a structured naming convention.

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- `lookup` returns an array. `lookupFirst` returns a single value.
- Context: no context suffix = all lines. `Children` suffix = child line items only.
- Condition: no suffix = no filter. `If` suffix = conditional filter applied.

Basic lookup functions:

- `txn.line.functions.lookupField(<field>)` — array of values from the specified field across all lines.
- `txn.line.functions.lookupFirstField(<field> [, <default>])` — first matching value, with optional default.
- `txn.line.functions.lookupChildrenField(<field>)` — array of values from child line items.
- `txn.line.functions.lookupFirstChildrenField(<field> [, <default>])` — first matching value from child line items, with optional default.

Conditional lookup functions (text comparisons are case sensitive):

- `txn.line.functions.lookupFieldIf(<field>, <condition>)`
- `txn.line.functions.lookupFirstFieldIf(<field>, <condition> [, <default>])`
- `txn.line.functions.lookupChildrenFieldIf(<field>, <condition>)`
- `txn.line.functions.lookupFirstChildrenFieldIf(<field>, <condition> [, <default>])`

Lookup functions store retrieved values in intermediate fields, making them available for further calculations and automation. Using intermediate fields offers the following benefits.

- Minimizes redundant calculations by storing commonly referenced values.
- Maintains a consistent set of field values across pricing and quoting processes.
- Enables dynamic updates to dependent fields, ensuring real-time accuracy in pricing and approvals.

Code examples:

```
var taxCodes =
  txn.line.functions.lookupFieldIf("taxCode",
 txn.line.amount > 0);

var firstPrice =
  txn.line.functions.lookupFirstField("price", 0);

var childService =

 txn.line.functions.lookupChildrenField("serviceType");

var totalTax =

 txn.line.functions.lookupFirstField(txn.line.taxAmou
nt, 0);
```

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```
return totalTax * 1.05; // Applies a 5% surcharge based
 on retrieved tax amount
```

The following example calculates the sum of list prices for lines whose BOM type is SALES. The BOM type is a system-derived line field that reflects the type set when the configuration item was created.

The determination rule uses the `sumFieldIf` function at the draft stage with this script:

```
return txn.line.functions.sumFieldIf(
  txn.line.pricing.list,
  txn.line.configuration.item.bomType == 'SALES'
);
```

**Note:** The conditional check is case sensitive. Use `'SALES'`, not `'sales'`. Incorrect casing produces no error but returns a sum of 0 because no lines match.

With lines whose BOM types are SALES (values 40,000 / 2,500 / 1,000 / 2,500) and one non-SALES line (0), the field correctly returns **$46,000**.

## Rule groupings

Rule groupings are collections of rules that execute together. A rule grouping can contain both transaction-level and transaction line-level rules. Rule groupings are assigned to stages and events. When a stage is entered or an event fires, the associated rule groupings execute — including all rules within them that meet their conditions.

For rules to execute on a quote, an administrator must associate a rule grouping with a stage or event. Using rule groupings allows the same set of rules to be reused across multiple stages and events without duplicating rule definitions.

For information about creating a rule grouping and associating rules with it, see Create a transaction rule grouping.

### Create a transaction rule

Create a rule in ServiceNow Quote Experience to define conditions and actions that control field behavior and layout presentation on a quote in CPQ.

#### Before you begin

The fields to use in rule conditions and actions must exist before creating the rule. For more information, see Create a transaction field.

Role required: admin

#### About this task

Rules are created through the ServiceNow Quote Experience administration interface and consist of a level, conditions, and one or more actions. The rule editor opens after the initial save — the name, description, and active state are all editable there. For full descriptions of each action type and its parameters, see Quote transaction rules and rule groupings.

#### Procedure

Create the rule

1. Navigate to **All** > **CPQ Administration** > **Transaction** > **Related Rules**.
2. Select **+ New Rule**.
3. In the **New Rule** window, enter the rule name and verify the variable name.

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The variable name is set in camel case from the name you enter. To use a custom variable name, select the pencil icon to the right of the **Variable Name** field.

4. Select the rule level.
   - Select **Transaction** to create a rule that uses transaction-level fields in both conditions and actions.
   - Select **Transaction Line** to create a rule that can use transaction-level and line-level fields in conditions but only line-level fields in actions.
5. Select **Save**.
   The rule editor opens. The **Name**, **Description**, and **Active** toggle are available at the top of the page.
6. **Optional:** Enter a description of the rule in the **Description** field.

Define the conditions

7. In the **Take Action When** menu, select the condition logic method.

| Option | Behavior |
|---|---|
| **Always True** | Rule executes every time a user makes a change to the quote interface. No conditions to define. |
| **Any Conditions are Met** | Rule executes if any one condition is TRUE (OR logic). |
| **All Conditions are Met** | Rule executes only when all conditions are TRUE (AND logic). |
| **Custom Logic** | Enables parentheses and mixed AND/OR log ic — for example, `Cond_1 AND (Cond_2 OR Cond_3)`. |
| **Advanced Function** | Enables a script that returns TRUE or FALSE to control rule execution. |

8. **Optional:** If using a condition-based logic method, select **+ Add Condition** and define each condition.

   (Optional) For each condition, use the field menu to select the ServiceNow Quote Experience field to test, choose the operator, then set the test value. Repeat for each additional condition.

Add a hiding action

9. **Optional:** In the **Actions** area, select **Hiding**.
10. **Optional:** In the field search box, search for and select the field to hide on the quote layout.

Add a message action

11. **Optional:** In the **Actions** area, select **Message**.
12. **Optional:** In the **I want to display** menu, select the message type.
    - Select **Info** for a circular blue icon and blue text.
    - Select **Warning** for a triangular yellow icon and yellow text.
    - Select **Error** for a triangular red icon and red text.
    - Select **Custom** for a configurable icon and text color.

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13. **Optional:** In the **Show the message on** field, specify where the message appears on the quote layout.

    (Optional) Messages can be attached to a field, or to a layout component such as a tier or a columnset.

14. **Optional:** In the **Message Content** field, enter the text of the message to display.

    (Optional) Enable the **Advanced** toggle to write a script that builds the message content dynamically.

15. **Optional:** In the **When Message is Displayed** field, set whether the transaction can be saved when the message is visible.

Add an exclusion or inclusion action

16. **Optional:** In the **Actions** area, select **Exclusion** or **Inclusion**.
17. **Optional:** In the **For this Field** menu, select the picklist field whose options to exclude or include.
18. **Optional:** In the **I want to exclude/include these options** menu, select the picklist options one at a time.

    (Optional) Enable the **Advanced** toggle to use a script to determine which options are excluded or included.

19. **Optional:** In the **For excluded options** menu, choose how excluded options appear to the user.
    - Select **Hide them** to remove excluded options from the menu.
    - Select **Disable them** to retain excluded options in the menu in a disabled state.
20. **Optional:** In the **If any are already selected** menu, choose what happens when an excluded option is already selected by the user.
    - Select **Leave unchanged** to keep the excluded item as the selected value.
    - Select **Deselect them** to clear the selection and require the user to choose another option.
    - Select **Select the first valid option instead** to clear the selection and replace it with the first available option after the rule executes.

Add a determination action

21. **Optional:** In the **Actions** area, select **Determination**.
22. **Optional:** In the **For this Field** menu, search for and select the field for the rule to act on.
23. **Optional:** Under **I want to...**, select whether to set or clear the field value, and whether to allow or prevent the user from editing the field after the rule modifies it.
24. **Optional:** In the **If user has modified values** menu, choose whether to retain the value the user entered or override it with the rule's value.

    (Optional) When user values are retained, use the **When user values are retained** menu to optionally show the user a recommendation message about the field value.

25. **Optional:** In the **Use this value** field, define the value to assign.

    (Optional) Enable the **Advanced** toggle to enter a script — including aggregate functions — to calculate the value. For aggregate function syntax and examples, see Quote transaction rules and rule groupings.

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Add additional actions and save

26. **Optional:** To add another action of any type to this rule, return to the **Actions** area and repeat the steps for the relevant action type above.

    (Optional) A single rule can contain multiple actions of different types.

27. Verify that the **Active** toggle is enabled, then select **Save**.
    The rule is saved and appears in the Related Rules list. It is available to add to a rule grouping.

### What to do next
Add the rule to a rule grouping so that it can be assigned to stages and events. For more information, see Create a transaction rule grouping.

## Create a transaction rule grouping

Create a rule grouping to bundle rules together for assignment to stages and events in CPQ.

### Before you begin
The rules to include in the grouping must exist before you create the rule grouping. For more information, see Create a transaction rule.

Role required: admin

### About this task
Rule groupings bundle transaction-level and transaction line-level rules together so they execute as a unit. A rule grouping can contain rules of both levels. Once created, rule groupings are assigned to stages and events. The grouping executes when the stage is entered or the event fires, running all rules within it that meet their conditions.

For a conceptual overview of how rule groupings relate to stages and events, see Quote transaction rules and rule groupings.

### Procedure
1. Navigate to **All** > **CPQ Administration** > **Transaction**.
2. Select **Rule Groupings** in the left menu, then select **+ New Rule Grouping**.
3. In the **New Rule Grouping** window, enter a name for the rule grouping and verify the variable name.

   The variable name is set in camel case from the name you enter. To use a custom variable name, select the pencil icon to the right of the **Variable Name** field.

4. Select **Save**.
   The rule grouping editor opens.
5. To associate rules with the grouping, select **+ Associate Rules**.
   A slide-out panel opens, showing available rules in the **Results** column.
6. Select **+** next to a rule in the **Results** column to move it to the **Selected** column.
7. Repeat the previous step for each rule to include in the grouping.
   A rule grouping can include both transaction-level and transaction line-level rules.
8. Select **Done**.
   The rule grouping editor displays the rules added to the group. The rule grouping is saved and available for assignment to stages and events.

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### Result
The rule grouping appears in the Rule Groupings list and is available to assign to a stage or event. All rules in the grouping execute when the stage is entered or the event fires, subject to each rule's own conditions.

### What to do next
Assign the rule grouping to a stage or event so that its rules execute during the quote life cycle.

- To assign to a stage, see Create a quote transaction stage.
- To assign to an event, see Create an event.

#### Transaction events

Events trigger rule groups, integrations, repricing, and stage transitions on a quote. ServiceNow Quote Experience provides system events and supports custom events in CPQ.

Events are activated by buttons on the quote layout or by API calls.

## Header-level system events

System events are standard behaviors provided by default.

Transaction-level system events:

**Create Transaction**

Triggered to create a new transaction.

**Update Transaction**

Allows editing an updating a transaction.

**Copy Transaction**

Clones a transaction and its line items.

**Upsert Lines**

Manages the creation and update of transaction lines after the user browses the catalog to add new lines or reconfigures an existing line. Upsert Lines runs automatically after the user finishes selecting products from the catalog, configuring products, or reconfiguring a line. Although it works on lines, it operates at the transaction level on all lines. When pricing is enabled, this event ships with the **Reprice** action attached so that adding or reconfiguring a product automatically reprices the quote. For more information about UI effects, see Quote transaction layouts.

**Delete Transaction**

Triggered to delete an existing transaction.

Transaction line-level system events are represented as buttons on the quote lines grid:

**Clone Line**

Clones a line and its children. Only top-level lines in the transaction can be cloned. Header-level rules also apply after cloning.

By default, cloning a line creates a single copy and no dialog appears.

To let runtime users create multiple copies of a line in a single action, submit a support request to have the tenant setting *`transaction.events.cloneLine.multiCopy.enabled`* to `true`. With the setting enabled, selecting a single line and cloning it opens a dialog in which

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the user specifies the number of copies to create. The line and its children are cloned that many times, for both standard and configurable products.

Multiple copies apply to a single selected line only. If the user selects more than one line, each selected line is cloned once and no dialog appears. The max number of copies is 10.

**Delete Lines**

Deletes one or more selected lines from the transaction. Line IDs can also be passed in headless mode.

**Reconfigure**

Re-configure one or more selected lines from the transaction. Line IDs can also be passed in headless mode.

## Repricing event actions

When Pricing is enabled, the **Reprice** action can be added to an event. The Reprice action includes a call to the Pricing Management service during the execution of an event, enabling explicit **Reprices** by a user or via API. To enable Pricing, see Pricing in the ServiceNow Quote Experience

## Event APIs

Event APIs are authorized via session cookie only.

⚠ **Warning:** Avoid building a scenario in which the user initiates an event that fires an event API on the same transaction. Because both the quote interface and the APIs act on the same record simultaneously, such an implementation can result in unpredictable behavior.

## Event setting: Validate configured items

The **Validate configured items** setting on custom header events validates product configurations in the transaction when the event executes. Validation occurs before event actions, which execute regardless of the validation outcome.

The setting includes a validity period that excludes products validated within a specified time frame. For example, if the validity period is 15 days and a product was validated 7 days ago, that product is not revalidated. If a product was validated 20 days ago, it is revalidated.

Two line-level system fields support this function: *`txn.line.configuration.status`* (Boolean) and *`txn.line.configuration.validatedAt`* (date).

**Related topics**

Create an event

### Create an event

Create a custom event in ServiceNow Quote Experience to trigger rule groupings, integrations, and stage transitions based on business-specific requirements in CPQ.

### Before you begin

Any rule groupings or integrations to assign to the event must exist before creating the event.

Role required: admin

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### Procedure

1. Navigate to **All** > **CPQ Administration** > **Transaction** > **Events**.
2. Select **+ New Event**.
3. In the **Name** field, enter the name of the new field.

   The variable name is set in camel case from the name you enter. For example, entering `Total of Manufacturing Lines` produces the variable name *`totalOfManufacturingLines`*. To use a custom variable name, select the pencil icon to the right of the **Variable Name** field.

4. Select the event level and then select **Save**.
   - Select **Transaction** for a header-level event that appears as a button at the top of the quote.
   - Select **Transaction Line** for a line-level event that appears on individual lines in the quote lines grid.

   The event editor opens. By default, new events have their event access set to **No Access**.
5. Select **Edit Event Access**, change the access level to **Active**, and select **Done**.
6. **Optional:** In the **Actions** area, select **+ Add New Action** and choose either a rule grouping or an integration to assign to the event.

   (Optional) Multiple rule groupings and integrations can be assigned to the same event.

   When pricing is enabled, you can assign the **Reprice** action to an event so that the Pricing Management service is called during the event and updates all prices. Some system events such as *`upsertLines`* ship with the **Reprice** action already assigned. The **Reprice** action can be removed from an event if pricing is not needed on the event. For more information, see Transaction events.

7. **Optional:** To configure the event to transition the quote to another stage, enable the **Transition** toggle and set the transition direction (forward or backward in the stage sequence).
8. Select **Save**.
   The new event appears in the events list at the transaction or transaction line level, depending on the level chosen.

### What to do next

Add the event to the quote layout to make it available as a button to users. For more information, see Create a quote transaction layout.

#### Quote transaction layouts

Layouts define the quote user interface in ServiceNow Quote Experience, controlling which fields, events, and UI effects are visible and how the quote is organized for users in CPQ.

Layouts in ServiceNow Quote Experience retain much of the look and feel of the configuration experience. Layouts can be managed in the administration interface using the visual layout editor or directly in YAML. The visual layout editor is selected by default. The option to edit layouts in JSON is retired in favor of the visual editor.

## Layout formats

Layouts can be edited using the visual editor or in YAML. The visual editor provides a graphical interface for building layouts without editing code. Administrators can toggle to YAML using the view toggle in the layout subheader. The YAML for each element is also accessible in the Raw Value section of the element properties. Changes take effect when the layout is saved and the blueprint is deployed.

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If errors exist in the YAML, the **Save** button is disabled. To identify errors, select the error messages button in the subheader, or check for red marks in the YAML view .

## Layout and stage mapping

A layout's variable name maps it to a stage. To associate a layout with a specific stage, use the stage variable name as the layout name. A layout named `layout` maps to any stage that has no specific layout defined. The text `default` is appended to all layout variable names.

The following example shows how stages map to layouts when stages are named Draft, Approved, and Fulfilled, and layouts are named Draft and Layout.

**Stage-to-layout mapping example**

| Stage | Layout used |
|---|---|
| Draft | `draft` |
| Approved | `layout` |
| Fulfilled | `layout` |

The Line Detail layout displays details of a selected line in the quote lines grid, opened via the Line Detail UI effect. Its variable name must end with `_linedetail` and follows the same stage mapping convention. For example, a Line Detail layout for the Draft stage must be named `draft_linedetail`.

## Layout settings

Access layout settings by selecting the gear icon in the layout subheader. The following settings are available.

**Branding**

Customizes the quote header appearance.

**Currency Display**

Sets the currency display style: code, symbol, or neither.

**When price is 0, display**

Sets the behavior when a price value is zero.

**When price is undefined, display**

Sets the behavior when a price value is undefined.

**Allow selecting disabled options**

Users can select disabled picklist options. Useful for displaying an explanation message when a disabled option is selected.

**Highlight field changes**

Briefly highlights fields when their values are updated by rules or integrations. Enable this setting when concurrent users are expected or when fields update frequently.

**Hide Header**

Hides the header section of the layout.

## Layout structure

Layouts are organized using tiers, columnsets, and a line item grid.

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**Tiers**

Tiers are the top-level sections of the layout hierarchy. Use tiers to organize transaction information into logical groups that are easier to find and understand. Columnsets, nested tiers, or a line item grid can be placed within a tier. A line item grid must be the only element in its tier. Tier types include Accordion, Expandable, Tabs, Vertical tabs, Headings, and Pages. The type and depth of a tier are configured on the Tier Definition tab.

**Columnsets**

Columnsets organize fields and events horizontally within a tier. Multiple columnsets in the same tier arrange content vertically. Fields, images, text, and buttons can be added within a columnset. Columnsets support two configuration modes:

- Responsive — The default mode. Fields automatically reflow to fit available screen space. When the window is resized or space is limited, fields wrap to a new line rather than being cut off or squeezed. No column structure is defined; you simply add fields to the columnset.
- Defined Columns — You specify a fixed number of columns (1–5), creating a structured, table-based layout. Content remains in its assigned columns and does not wrap on resize. This mode is recommended for structured layouts such as product pickers and e-commerce product grids. For detailed configuration instructions, see Configure defined column sets in layouts.

Fields are added to the elements array of a columnset. After adding a field, additional field properties can be set on the Edit Field Info tab. Changing a field display type to "text area" enables users to resize the field.

Events are represented as buttons in a columnset. To add an event, add a button to a columnset and enable the **Event Button** setting, then select the event from the Event picklist.

**Line item grid**

The line item grid displays the product and pricing information for the transaction lines. By default, the layout editor includes a line item grid with three sections:

- **Line item grid header** — buttons that appear above the grid at runtime.
- **Line item grid column** — fields that appear as columns in the grid.
- **Line level buttons** — buttons that appear on each individual line in the grid.

The following layout properties apply to the line item grid and must be defined in the main YAML editor. Each property is enabled when its value is `true`.

- `showLineNumbers` — enables user-friendly sequential line numbers for visible lines. Numbering resets when a filter or search is applied.
- `supportLongText` — enables a popover on a field when the user selects it.
- `autoScrollIntoView` — automatically scrolls the view to keep the transaction body and line item grid in sync.

## Line numbering options

Three options are available for displaying line numbers in the quote lines grid. The `showLineNumbers` layout property is the preferred option for most implementations: it performs efficiently and has no line limit .

`showLineNumbers` **layout property**

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Displays sequential line numbers for visible lines (1, 2, 3). Numbers reset when a filter or search is applied to the grid. No line limit. Use this method when there is no line limit requirement.

`txn.line.orderNumber` **system field**

Displays hierarchical line numbering for all lines — for example, 1, 1.1, 2, 2.1, 2.2, 2.2.1. Numbers do not reset when a filter or search is applied. Maximum of 2,000 lines. The field has the same layout properties as other line-level fields and is added in the `lineGrid` section of the layout.

**Note:** To enable this field, submit a request to customer support through the CPQ Support portal.

`txn.line.number` **system field**

Displays sequential line numbering for all lines (1, 2, 3). Numbers do not reset when a filter or search is applied. Maximum of 2,000 lines. The field has the same layout properties as other line-level fields and is added in the `lineGrid` section of the layout.

**Note:** To enable this field, submit a request to customer support through the CPQ Support portal.

## Line-level button icons

Line-level event buttons in the line item grid can display an icon from the SLDS Utility library. Icons must be defined in the YAML, either in the Raw Value section of the line button properties or in the main YAML editor using the `icon` property.

### Available line-level button icons

| Icon value | Description |
|---|---|
| `automate` | Hollow gear |
| `buyer_group_qualifier` | Three people with a check mark |
| `chevrondown` | Chevron pointing down |
| `chevronleft` | Chevron pointing left |
| `chevronright` | Chevron pointing right |
| `chevronup` | Chevron pointing up |
| `choice` | Option button |
| `clear` | White X on solid background |
| `clock` | Clock |
| `close` | X icon |
| `custom_apps` | Wrench |
| `delete` | Trash can |
| `down` | Triangle pointing down |
| `edit` | Pencil |
| `favorite` | Star |
| `left` | Triangle pointing left |

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**Available line-level button icons (continued)**

| Icon value | Description |
|---|---|
| `lightning_extension` | Lightning bolt and gear |
| `right` | Triangle pointing right |
| `question` | Question mark |
| `search` | Magnifying glass |
| `settings` | Solid gear |
| `target_mode` | Arrow pointing at center of target |
| `threedots` | Three horizontal dots |
| `threedots_vertical` | Three vertical dots |

## Product list search

The Product List Search object defines the runtime UI for the add lines and product search flow. Properties are configured in three locations.

**UI effect button properties**

Configure on the button that carries the Product Search UI effect.

- **UI Effect Target** — how the product search opens (slideout or modal).
- **Show Products** — adds the Products tab to the search.
- **Show Favorites** — adds the User Favorites tab to the search.
- **Action Location** — placement of action buttons on the product search display (footer, header, or both).

**Product List Search object properties**

Configure on the Product Search object in the layout.

- **Primary Default Sort** — up to two sort parameters. Available fields: `modified`, `created`, Name (default), `partnerId`, `productCode`, `description`, `unitPrice`, `externallyConfigurable`. Sort order per parameter: `asc` or `desc`.
- **Search on Submit** — determines whether search results update as the user types or only when the user selects **Submit**.

**Field-level properties**

Configure on each field in the Product List Search object.

- **Column Width** — CSS-compatible value to define the column width.
- **Alignment** — alignment of the column header and values.
- **Enable Sorting** — when enabled, the column can be sorted .
- **Enable Long Text Popover** — when enabled, displays a popover when the user selects a value in the field.

## UI effects

UI effects add specific functionality to a layout button. Users can customize existing UI effects but cannot create new ones. When a UI effect and an event are both present on the same button,

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the UI effect runs after the event. For full parameter reference, access conditions, and code examples, see ServiceNow Quote Experience layout UI effects.

The following UI effect types are available.

**URL**

Opens the associated URL inline, in a modal, in a slideout panel, or in a new tab or window. Field values can be passed dynamically into the URL using curly braces.

**Anchor**

Navigates to a specified element ID within the transaction layout. Opens related parent elements in tabs or an accordion structure.

**Product search**

Opens the product catalog and starts the Add Products flow. Must be added to a `gridHeaderButtons` element. Implicitly runs the `upsertLines` event.

**Line detail**

Opens the line detail layout for a selected line. Must be on a line-level button. Opens in a modal, slideout, or line drawer.

**Reconfigure**

Opens selected products in the Configurator for reconfiguration. Can be on a line-level or header-level button. At the header level, requires a selection of lines. Implicitly runs the `upsertLines` event.

**Add favorite**

Opens a window to describe and create a favorite from the selection. Can be on a line-level or header-level button. At the header level, requires a selection of lines.

> **Note:** To share favorites across users, a tenant setting must be enabled. Contact customer support to enable favorites sharing.

**Manage favorites**

Opens the Favorites Manager in a modal, slideout, or inline view.

**Refresh session**

Checks whether the session has been modified and, if so, refreshes the session ID and merges changes.

**Export lines**

Exports to a CSV file all lines that meet the current sort, filter, and column visibility settings. Must be on a header-level button.

**Show tier**

Opens the line item grid in full screen when `target = fullScreen` and `location = lineItems`. Can work with any tier; for full screen, set the location to the tier variable name of the line items.

## Theming

ServiceNow Quote Experience layouts can be customized with themes by setting properties in the layout YAML or JSON. Themes are enabled using the Customize Theme tab. For the full theme property reference, including button, input, label, and header styling, see ServiceNow Quote Experience layout UI effects.

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## Stage progress chevron

The Stages Progress Chevron component displays a horizontal chevron bar that shows a transaction's progression through its stages. It can be defined statically using a fixed stage list or dynamically using custom picklist fields, and is configured through the layout YAML or JSON. For configuration options, combination rules, and CSS theming variables, see Stage progress chevron.

## YAML reference snippets

Layout structure:

```
# Layout version
version: 1
# Layout identifiers
label: Example layout
variableName: default_ExampleLayout
# Tier definitions
tierDef:
  - depth: 1
    representation: BasicContainer
# Layout
layout:
  label: layoutsection
  variableName: layoutsection
  tiers:
    - label: tier1
      variableName: tier1
      depth: 1
```

Columnset with fields:

```
columnSets:
  - elements:
      - type: field
        columnOrder: 1
        variableName: txn.opportunity.id
      - type: field
        columnOrder: 1
        variableName: txn.custom.opportunityName
      - type: field
        classInfo: mw20
        columnOrder: 1
        variableName: txn.custom.primaryContact
    variableName: col1
```

Field properties:

```
fields:
  - type: Text
    label: Custom line field
    variableName: txn.line.custom.customText
  - type: ReadOnlyText
    label: TXN Number
    variableName: txn.custom.tXNNumber
```

Line item grid with line-level and header buttons:

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```
- depth: 1
  label: Line Items
  lineGrid:
    columns:
      - order: 1
        variableName: txn.line.product.name
      - order: 2
        variableName: txn.line.product.partnerId
    showLineNumbers: true
    lineLevelButtons:
      - icon: settings
        label: Line Details
        uiEffect:
          type: lineDetail
          target: slideout
        variableName: reconfig
      - event: cloneLine
        label: Clone Lines
        variableName: cloneLine
      - label: Add To Favorites
        uiEffect:
          type: addFavorite
        variableName: addFavorites
    gridHeaderButtons:
      - label: Add Lines
        uiEffect:
          type: productSearch
          target: slideout
          options:
            products: true
            favorites: true
        variableName: productSearch
      - label: Reconfigure Lines
        uiEffect:
          type: reconfigure
          target: slideout
        variableName: reconfig
    autoScrollIntoView: true
  variableName: lineItems
```

Product list search:

```
productList:
  columns:
    - label: Product ID
      sortable: true
      variableName: id
    - label: Product Name
      variableName: name
    - label: Product description
      variableName: description
      supportLongText: true
    - label: Price
      variableName: unitPrice
  defaultSort:
    - externallyConfigurable,desc
    - name
```

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### Related topics

- Create a quote transaction layout
- ServiceNow Quote Experience layout UI effects
- Stage progress chevron

## Create a quote transaction layout

Create a layout in ServiceNow Quote Experience to define the quote interface for a stage in CPQ.

### Before you begin

The stages the layout maps to must exist. For more information, see Create a quote transaction stage.

Role required: admin

### About this task

A layout's variable name determines which stage it is associated with. The variable name cannot be changed after the layout is saved — to change it, delete the layout and create a new one. An existing layout can be copied using the **Save As** function in the layout editor. For a description of layout elements and their properties, see Quote transaction layouts.

### Procedure

1. Navigate to **All** > **CPQ Administration** > **Transaction**.
2. Select **Layouts** in the left menu, then select **+ Add Layout**.
3. In the **Name** field, enter the layout name.
   To associate the layout with a specific stage, enter the stage variable name as the layout name. A layout named `layout` applies to all stages with no specific layout assigned. To create a Line Detail layout for a stage, append `_linedetail` to the stage variable name — for example, `draft_linedetail`.
   The visual layout editor opens with a default layout containing the main tier, a line item grid, and a product search capability.
4. **Optional:** Add tiers to the layout to organize the quote header sections.
   Select the tier type and depth on the Tier Definition tab. Tier types include Accordion, Expandable, Tabs, Vertical tabs, Headings, and Pages. A line item grid must be the only element in its tier.
5. **Optional:** Add columnsets within tiers to arrange fields and events horizontally.
   Fields and events are arranged vertically using multiple columnsets in the same tier. Add fields, images, text, and buttons within each columnset.
6. **Optional:** To add an event button in a columnset, use substeps to: add a button, enable the **Event Button** setting, and select the event from the Event picklist.
7. **Optional:** In the line item grid header section, add buttons to appear above the grid at runtime.
   To add a product search button, add a button and set its UI effect to **Product Search**. Configure target as a slideout or modal, **Show Products**, **Show Favorites**, and **Action Location** in the button properties. For more information about UI effect properties, see ServiceNow Quote Experience layout UI effects.
8. **Optional:** In the line item grid column section, add, remove, and order the fields that appear as columns in the grid.
   For each column field, set **Column Width**, **Alignment**, **Enable Sorting**, and **Enable Long Text Popover** in the field properties.
9. **Optional:** In the line level buttons section, add buttons to appear on each individual line in the grid.

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To add an icon to a line-level button, define the `icon` property in YAML using a value from the SLDS Utility library. For available icon values, see Quote transaction layouts.

10. **Optional:** To enable line numbering, switch to YAML view and add the `showLineNumbers: true` property to the line item grid definition.
    For a comparison of line numbering options including `txn.line.orderNumber` and `txn.line.number` system fields, see Quote transaction layouts.
11. **Optional:** Select the gear icon in the layout subheader and configure the available layout-level settings.
    Settings include **Currency Display**, **Allow selecting disabled options**, **Highlight field changes**, and **Hide Header**.
12. **Optional:** To customize the visual appearance of the layout, open the Customize Theme tab and configure theme properties.
    For the full theme property reference, see ServiceNow Quote Experience layout UI effects.
13. **Optional:** Select the view toggle in the subheader to switch to YAML view and edit the layout directly.
    If errors exist in the YAML, the **Save** button is disabled. Select the error messages button in the subheader to identify errors, or check the YAML editor for red error indicators. YAML reference snippets are available in Quote transaction layouts.
14. Select **Save**.
    The layout is saved. The blueprint must be deployed for the layout to take effect at runtime.

### What to do next
Deploy the blueprint to apply the updated layout at runtime.

## Configure defined column sets in layouts

Defined column sets enable you to organize fields in a fixed, table-based structure with explicit column widths and alignment, ideal for product pickers and ecommerce layouts.

### Before you begin
Role required: admin

### About this task
Defined column sets differ from responsive columnsets in that you explicitly control the number, width, and alignment of columns. While responsive columnsets automatically wrap fields as space is set to available, defined column sets maintain a fixed structure.

#### Comparison of columnset types

| Feature | Responsive columnsets | Defined column sets |
|---|---|---|
| Layout behavior | Fields wrap to new lines automatically based on available space | Content stays in assigned columns with fixed positions |
| Configuration | Default behavior with no setup required | Requires explicit column configuration |
| Column control | System determines column count and width dynamically | You specify exact number, width, and alignment of columns |
| Mobile display | Adapts to screen size automatically | Fixed structure may cause content to be cut off on narrow screens |
| Best for | Standard forms and flexible layouts that adapt to different screen sizes | Product grids, ecommerce layouts, and structured data requiring precise alignment |

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Defined columns sacrifice responsiveness for structural control. Content does not wrap or reflow when the window is resized.

### Procedure

1. In the layout editor, select the columnset you want to configure.
2. Click the **settings** (cog) icon in the columnset header.
   The Column Set Settings panel opens.
3. Under **Column Type**, select **Defined Columns**.
   Configuration options appear for column count, width, alignment, and flow.
4. Set the number of columns by entering a value between 1 and 5.
   The maximum is 5 columns. The live preview on the right updates to show your column structure.
5. For each column, configure the following properties:

   a. **Width:** Choose one of three options:
      - **auto** — Column size is calculated automatically based on content.
      - **pixel** — Specify an exact width in pixels (e.g., 150px, 200px).
      - **percentage** — Specify a percentage of available width (e.g., 25%, 50%).

   b. **Alignment:** Choose horizontal and vertical alignment from 9 options (top-left, top-center, top-right, middle-left, center, middle-right, bottom-left, bottom-center, bottom-right). Hover over each icon to see a tooltip showing the alignment. Default is top-left.

   c. **Flow:** Select how fields within the column are arranged:
      - **Stacked** — Fields appear one below the other (vertical stack).
      - **Inline wrap** — Fields appear on the same line and wrap if space runs out.

6. Observe the **Live Preview** pane on the right to see how your layout will appear at runtime.
   The preview updates in real time as you adjust column settings. Field names appear in the preview once you add fields to the columnset.
7. Click **Save** to apply the column settings.
   If a warning appears about mixed percentage and pixel widths, resolve it by using consistent units across all columns. See the "Warning: Mixed width units" section for details.
8. To add fields, select **Add Element** > **Field**.
   Fields are assigned to columns in the order they are added. You can drag fields between columns to rearrange them.
9. Deploy the blueprint to test the layout at runtime.
   The defined column layout is now visible to users in the Quote Experience.

### Result

Your columnset now displays in a fixed table-based structure with defined columns at runtime.

### What to do next

Field migration when removing a column: If you later reduce the number of columns (e.g., from 3 to 2), fields in the removed column(s) are automatically moved to the nearest previous column. For example, if you remove Column 3, all fields in Column 3 migrate to Column 2. No data is lost.

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**Warning:**

Don't mix percentage and pixel widths in the same columnset. If some columns use percentage and others use pixels, a warning appears: Columns with mixed percentage and pixel units. Columns manually align is expected.

While the layout will still function, runtime behavior may not match your expectations. Recommendation: Use consistent width units across all columns in a columnset (all auto, all pixel, or all percentage).

Example use cases:

Product Picker Layout (3 columns):

- Column 1: Product image (100px width, auto flow) — centered vertically
- Column 2: Product name, description, price (50%, stacked flow)
- Column 3: Quantity field (auto width, centered) — middle-center alignment

Ecommerce Product Grid (2 columns):

- Column 1: Product details (60%, stacked)
- Column 2: Price and add-to-cart button (40%, centered)

Service Configuration (4 columns):

- One column per tier of attributes: Tier 1, Tier 2, Tier 3, Price/Total
- Each column uses stacked flow for vertical field arrangement

**Related topics**

Quote transaction layouts

Defined column set reference

ServiceNow Quote Experience layout UI effects

### ServiceNow Quote Experience layout UI effects

Reference for UI effect types, parameters, access conditions, and YAML and JSON code examples for configuring button behavior in ServiceNow Quote Experience layouts in CPQ.

## UI effects overview

UI effects are layout elements that add specific functionality to a button. Administrators can customize existing UI effects but can't create new ones. When a UI effect and an event are both present on the same button, the UI effect runs after the event.

A UI effect is defined by a combination of parameters. All UI effects have a `type`. Some also have a `target`, `location`, or `options`.

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## UI effect parameters

### UI effect parameter values

| Parameter | Possible values |
|---|---|
| `type` | `url`, `anchor`, `productSearch`, `lineDetail`, `reconfigure`, `addFavorite`, `manageFavorites`, `refreshSession`, `showTier`, `exportLines` |
| `target` | `inline`, `tab`, `window`, `modal`, `slideout`, `lineDrawer`, `fullScreen` |
| `location` | A URL or an element ID in the layout. |
| `options` | Depends on the UI effect type. See the following type reference. |

**Note:** Layout JSON is not validated and some parameter combinations aren't supported. Unsupported combinations may fail without indicating errors.

## UI effect type reference

`url`

Opens a URL inline, in a tab, in a window, or in a modal or slideout iframe. Requires a `location` value containing the URL. Use curly braces to pass field values dynamically into the URL — for example, `https://example.com/search?q={txn.custom.searchTerm}`. Common use cases include passing values to output documents or opening record pages in external systems.

`anchor`

Navigates to a specified element ID in the layout. Focuses or scrolls to the element and opens related parent elements in tabs or an accordion structure. Set `target` to `inline`. Requires a `location` value containing the element ID.

`productSearch`

Opens the product catalog and starts the Add Products flow. Implicitly runs the `upsertLines` event. Must be added to the `gridHeaderButtons` element. Target options: `slideout` or `modal`.

Options:

- `products: true` — shows the Products tab.
- `favorites: true` — shows the User Favorites tab.
- `actionLocation: footer | header | both` — placement of the action buttons (Add Line, Configure, Done Configuring, Cancel). Defaults to `footer` if not specified.

`lineDetail`

Opens the line detail layout for a selected line. Must be on a line-level button. Target options: `modal`, `slideout`, `lineDrawer`.

`reconfigure`

Opens selected products in the Configurator for reconfiguration. Implicitly runs the `upsertLines` event. Can be on a line-level or header-level button. At the header level, requires a selection of lines. Target options: `modal`, `slideout`, `lineDrawer`. Supports the same `actionLocation` option as `productSearch`.

`addFavorite`

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Opens a window to describe and create a favorite from the line selection. Can be on a line-level or header-level button. At the header level, requires a selection of lines. No other properties are supported.

**Note:** To share favorites across users, a tenant setting must be enabled. Contact customer support to enable favorites sharing.

`manageFavorites`

Opens the Favorites Manager. Target options: `modal`, `slideout`, `inline`.

`refreshSession`

Checks whether the session has been modified and, if so, refreshes the session ID and merges changes. No additional parameters required.

`exportLines`

Exports to a CSV file all lines that meet the current sort, filter, and column visibility settings. Must be on a header-level button. No additional parameters required.

`showTier`

Opens a tier in full screen. To open the line item grid in full screen, set `target: fullScreen` and `location` to the tier variable name of the line items (typically `lineItems`). Works with any tier.

## Implicit event calls

Some UI effects run a related event automatically. The `productSearch` and `reconfigure` UI effects both implicitly call the `upsertLines` event when triggered.

## Access conditions

Access to a UI effect can't be controlled in the same way as access to an event. There are no UI settings comparable to the event access settings for UI effects directly.

However, access to a UI effect can be changed by its context or by related events.

- When a UI effect has an implicit event associated with it, the access conditions of that event determine the access conditions of the button and UI effect. To restrict when a `productSearch` UI effect can be triggered, apply those restrictions to the `upsertLines` event.
- A `reconfigure` button in the line item grid is hidden on lines that aren't configurable. At the header level, it is enabled only when every selected line is configurable.
- When a button has both an event and a UI effect, access is determined by the intersection of their individual access settings. If either the event or the UI effect is disabled or hidden, the entire button is disabled or hidden.

## Code examples

Product search (YAML):

```
type: button
variableName: addLines
label: Add Lines
uiEffect:
  type: productSearch
  target: slideout
```

Product search with favorites enabled (YAML):

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```
type: button
variableName: addLines
label: Add Lines
uiEffect:
  type: productSearch
  target: slideout
  options:
    products: true
    favorites: true
```

Line details drawer (YAML):

```
lineLevelButtons:
  - icon: settings
    label: reconfig
    uiEffect:
      type: lineDetail
      target: lineDrawer
    variableName: reconfig
```

Reconfigure (YAML):

```
lineLevelButtons:
  - icon: settings
    label: Reconfigure
    uiEffect:
      type: reconfigure
      target: modal
    variableName: reconfig
```

Open URL in new tab with dynamic field value (YAML):

```
columnorder: 1
label: Google it
type: event
variableName: LinkToSite
uieffect:
  type: url
  target: tab
  location: "https://google.com/search?q={txn.custom.search}"
```

Add to favorites (YAML):

```
label: Add To Favorites
uiEffect:
  type: addFavorite
variableName: addFavorites
```

Manage favorites (YAML):

```
label: Manage Favorites
uiEffect:
  type: manageFavorites
  target: slideout
variableName: manageFavorites
```

Refresh session (YAML):

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```
type: button
variableName: Refresh
label: Refresh
uiEffect:
  type: refreshSession
```

Export lines (YAML):

```
label: Export Lines
uiEffect:
  type: exportLines
variableName: exportLines
```

**Related topics**

Quote transaction layouts

Create a quote transaction layout

### Stage progress chevron

Reference for configuring the Stages Progress Chevron component in ServiceNow Quote Experience layouts, including static and dynamic configuration options, combination rules, and CSS custom property theming in CPQ.

## Purpose

The Stages Progress Chevron component displays a horizontal chevron bar that visually represents a transaction's progression through its quote lifecycle stages. The component is placed at the root level of the layout YAML or JSON, alongside `header` or `tierDef`. It can be defined statically, dynamically, or as a combination of both methods.

## Static configuration

Use static configuration to define a fixed list of stages for the chevron. Each stage requires a `value` and a display `label`.

YAML:

```
stageProgress:
  stageList:
    - value: draft
      label: Draft
    - value: stage2
      label: Stage 2
    # add more stages as needed
  currentStage: draft
```

`stageList`

Defines each stage's value and display label in the chevron.

`currentStage`

Highlights the active stage in the chevron. If omitted, defaults to `txn.stage`, which allows the same layout to be used across multiple stages.

## Dynamic configuration

Use dynamic (picklist-based) configuration to populate the chevron from custom transaction fields. This method supports exclusion rules to hide or disable specific stages and determination rules to set the current stage value.

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YAML:

```
stageProgress:
  stageListField: txn.custom.stageList
  currentStageField: txn.custom.stageList
```

`stageListField`

Specifies the custom field that provides the list of available stages.

`currentStageField`

Specifies the custom field that contains the current stage value. Determination rules are useful when multiple stages should display as a single chevron step.

## Combination and fallback rules

Static and dynamic configurations can be mixed. The following rules apply when both are present or when values are omitted.

- A static `stageList` can be combined with a dynamic `currentStageField`.
- If neither `stageList` nor `stageListField` is defined, nothing displays in the chevron.
- If neither `currentStage` nor `currentStageField` is defined, `txn.stage` is used by default.
- If both a static and a dynamic version of the same property are present, the dynamic version takes precedence.

## CSS custom property theming

The stage progress chevron supports theming using CSS custom properties. The following table lists the relevant variables. Inspect the element in your browser to explore additional custom properties.

**CSS custom properties for the stage progress chevron**

| Variable | Description |
|---|---|
| `--lgk-ProgressStep-chevron-size` | Overall chevron size. |
| `--lgk-ProgressStep-chevron-width` | Fixed width for each chevron. |
| `--lgk-ProgressStep-chevron-minWidth` | Minimum width per chevron. |
| `--lgk-ProgressStep-chevron-padding` | Padding inside each chevron. |
| `--lgk-ProgressStep-chevron-disabled-opacity` | Opacity for disabled or inactive chevrons. |
| `--lgk-ProgressStep-incomplete-backgroundColor` | Background color for incomplete steps. |
| `--lgk-ProgressStep-incomplete-chevron-color` | Chevron icon color for incomplete steps. |
| `--lgk-ProgressStep-current-backgroundColor` | Background color for the current step. |
| `--lgk-ProgressStep-current-chevron-color` | Chevron icon color for the current step. |
| `--lgk-ProgressStep-chevron-label-fontSize` | Font size for stage labels in the chevron. |

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**CSS custom properties for the stage progress chevron (continued)**

| Variable | Description |
| --- | --- |
| `--lgk-ProgressStep-chevron-label-fontWeight` | Font weight for stage labels in the chevron. |

**Related topics**

- Quote transaction layouts
- Create a quote transaction layout
- ServiceNow Quote Experience layout UI effects

### Quote transaction views

Views control how users with specific personas can view and modify fields and events at each stage of a quote in CPQ.

Views allow ServiceNow Quote Experience administrators to control how users with various personas can view and modify fields and events at various stages of a transaction. A persona can be assigned to only one view. The Views list page in the administration interface shows all configured views. Selecting a view's name displays its defined access privileges.

## Field access

The **Fields** tab in a view shows the field access privileges for that view. The leftmost column lists all field names at both transaction level and transaction line level. Stages appear in the top row, enabling per-stage access to be defined for each field. Use the **Filter** field to filter by field name or variable name, and use the adjacent menu to show all fields, transaction-level only, or transaction line-level only.

Field access values are:

- Editable (Read/Write)
- Read Only
- No Access

Persona assignment is managed by selecting the pencil icon next to **Associated Personas**. A persona can only be assigned to one view.

**Note:** Field and event access values cannot be modified in the administration interface. They can only be modified by importing a `blueprints.zip` file containing updated CSV files.

## Event access

The **Events** tab shows the access privileges for each event in the blueprint. As with fields, event access is defined per stage. Event access values are Active or No Access.

## View configuration files

Views are created and modified using three files included in the `blueprints.zip` file.

**Fields CSV file**

Defines the field access rights for each transaction-level and transaction line-level field at each stage. The file is located in the `blueprints/default/views`

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folder of the blueprint ZIP file. Modified values are entered without an asterisk (*); original values include an asterisk.

**Events CSV file**

Defines the event access rights for each transaction-level and line-level event at each stage. Located in the same `blueprints/default/views` folder. Modified values are entered without an asterisk.

**Views YAML file**

Defines the view name, variable name, the variable names of any associated personas, and the locations of the field and event CSV files within the blueprint ZIP. If multiple views are defined, the information for each view is repeated in this file.

### Create a transaction view

Create or modify a ServiceNow Quote Experience view by editing the fields CSV, events CSV, and views YAML files and importing them through the blueprint ZIP in CPQ.

## Before you begin

The personas to associate with the view must exist. For more information, see Create a transaction persona.

Access to the Matrix Loader for blueprint import is required.

Role required: admin

## About this task

View field and event access values cannot be modified in the ServiceNow Quote Experience administration interface. All changes are made by editing the CSV and YAML files in the blueprint ZIP and importing the updated file. ServiceNow Quote Experience provides a default view file set as a starting point for new views.

## Procedure

1. Obtain a copy of the default view files from the `blueprints/default/views` folder of your existing blueprint ZIP.
2. Edit the fields CSV file to set the access level for each field at each stage.
   Enter modified values without an asterisk (*). Leave unmodified values with their asterisk.
   Access level values are Editable, Read Only, and No Access.
3. Edit the events CSV file to set the access level for each event at each stage.
   Access level values for events are Active and No Access. Enter modified values without an asterisk.
4. Edit the views YAML file to define the view name, variable name, the variable names of the personas assigned to the view, and the locations of the fields and events CSV files.
5. Place the updated files in the `blueprints/default/views` folder of the blueprint ZIP file.
6. Import the updated blueprint ZIP file using the Matrix Loader.
7. Deploy the blueprint to apply the view changes.
   The updated view takes effect when the blueprint deployment completes.

### Quote transaction integrations

Integrations connect ServiceNow Quote Experience to external data sources, enabling the exchange of data between quotes and third-party systems such as Salesforce in CPQ.

ServiceNow Quote Experience integrations define the information needed to connect to an external data source, extract data from it, and map that data into ServiceNow Quote Experience

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fields. Integrations can also extract data from ServiceNow Quote Experience and send it to a third-party environment. Before an integration can be defined, the administrator must first create a connection to the target environment.

## Connection types

ServiceNow Quote Experience supports two connection types.

**Salesforce**

Connects to a Salesforce environment. No additional authentication details are required — CPQ handles authentication and knows the required endpoints automatically.

**External**

Connects to any third-party site. Supported authentication methods are None, Bearer Token, and OAuth. For Bearer Token, provide the authentication token. For OAuth, provide the Client ID, Client Secret, and Token URL. Also requires the Host URL, the Path to the endpoint, and any additional headers required by the third-party site.

## Integration settings

When creating an integration, the following settings are available in the Integration Editor.

**HTTP Method**

The operation to perform: GET, POST, PATCH, PUT, or DELETE, depending on the endpoint being used.

**Line Item Details to Include**

Defines which line items the integration works with: Selected Lines, Modified Lines, or Deleted Lines.

**Additional Path**

The query command to execute on the third-party site. For Salesforce connections, this is typically a SOQL query. For other platforms, it may be a standard SQL query.

**Timeout**

The time in milliseconds that the request waits for a response before declaring an error.

**Async**

When enabled, runs the query asynchronously in the background so the user can continue working while the integration executes.

**Headers**

Static text or ServiceNow Quote Experience header field values can be included in headers using handlebar syntax: `{{txn.fieldname}}`. Static key-value pairs can also be set, or both methods can be combined.

## Transformation template

The transformation template defines the mapping between third-party data and CPQ fields. It uses JSON with Mustache (handlebar) syntax for dynamic field extraction. The following example maps Salesforce fields to ServiceNow Quote Experience fields.

```
{
  "fields": [
    {
      "variableName": "txn.custom.tXNNumber",
```

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```
      "value": "{{#each records}}{{Name}}{{/each}}"
    },
    {
      "variableName": "txn.opportunity.id",
      "value": "{{#each
 records}}{{LGK__OpportunityId__c}}{{/each}}"
    },
    {
      "variableName": "txn.custom.primaryContact",
      "value": "{{#each records}}{{Contact.FirstName}}{{/each}}"
    }
  ]
}
```

Use the **Sample Return Data** and **Transformation Result** areas to test and troubleshoot an integration. Paste the query response from a tool such as Postman into the Sample Return Data area and select **Run Transformation** to verify that the mapping produces the expected output.

### Create a connection for ServiceNow Quote Experience calls

Add a connection in CPQ to define the host, path, and authentication credentials used when ServiceNow Quote Experience calls an external system during a transaction.

#### Before you begin
Role required: admin

#### About this task
Connections are used in transaction rules only. Each connection stores the host URL, an optional path, and authentication credentials. When you configure an integration in ServiceNow Quote Experience, you select a connection and CPQ uses the stored credentials to authenticate outbound requests during a transaction.

To call an external system from a configuration rule instead, configure an external connection.

The following authentication types are available: bearer token, OAuth client credentials, and JWT client credentials.

#### Procedure

1. Navigate to **All** > **CPQ Administration** > **Utilities** > **Connections**.
2. Select **+New** to create a new connection.
3. In the **Name** field, enter a display name for the connection.
4. In the **Host** field, enter the base URL of the external system you want to connect to.
5. In the **Variable name** field, enter a unique system identifier for the connection.

   This value must be unique across all connections in your instance.
6. In the **Path** field, enter the path to append to the host URL for the target endpoint.
7. In the **Description** field, enter additional information about the connection.
8. In the **Integration type** field, select **External**.
9. In the **Authentication type** field, select the credential method that the external system requires, then complete the fields for that authentication type.

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| Authentication type | Fields to complete |
| --- | --- |
| **Bearer token** | In the **Authentication token** field, enter the to ken used to authenticate outbound requests. |
| **OAuth client credentials** | ○ **Client ID**: the client identifier issued by the external system.<br>○ **Client secret**: the credential used with the client ID to obtain an access token.<br>○ **Token URL**: the URL on the external system where an access token is requested.<br>○ **Scope** (optional): the permissions granted to the token on the external system, if re quired. |
| **JWT client credentials** | ○ **Client ID**: the client identifier issued by the external system.<br>○ **Private key**: the private key used to sign the JWT assertion.<br>○ **Token URL**: the URL on the external system where an access token is requested using the signed JWT.<br>○ **Scope** (optional): the permissions granted to the token by the external system, if re quired. |

10. **Optional:** In the **Additional headers** field, enter any HTTP headers to include in outbound requests.

    (Optional) Enter one header per line. Use quoted keys and values in the following format:

    ```
    "header-name" "header-value"
    ```

    For example:

    ```
    "x-api-version" "2"
    "x-tenant-id" "acme-corp"
    ```

11. Select **Save**.

### Result
The connection is saved and available for selection when configuring integrations.

### Related topics

Configuring OAuth client credentials with JWT on ServiceNow

## Create a ServiceNow Quote Experience integration

Create an integration in ServiceNow Quote Experience to define the connection, settings, and field mapping that exchanges data between a quote and an external system in CPQ.

### Before you begin
A connection to the target environment must exist before you create an integration. For more information, see Create a connection for ServiceNow Quote Experience calls.

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Role required: admin

### About this task

Integrations define how ServiceNow Quote Experience exchanges data with external systems. Each integration specifies the HTTP operation, which lines to include, how to authenticate via a connection, and how to map external data to CPQ fields using a transformation template. Integrations are assigned to stages and events to trigger them during the quote lifecycle.

### Procedure

1. Navigate to **All** > **CPQ Administration** > **Transactions** > **Integrations**
2. Select **+ Add Integration**.
3. Enter a name and verify the variable name, then select **Save**.

   The variable name is set in camel case from the name you enter. To use a custom variable name, select the pencil icon to the right of the **Variable Name** field before saving.

   The Integration Editor opens.

Configure integration settings

4. In the **HTTP Method** field, select the operation to perform on the third-party endpoint.
   - Select **GET** to retrieve data from the external system.
   - Select **POST** to send new data to the external system.
   - Select **PATCH** to partially update a record on the external system.
   - Select **PUT** to replace a record on the external system.
   - Select **DELETE** to remove a record on the external system.
5. In the **Line Item Details to Include** field, select which quote lines the integration works with.
   - Select **Selected Lines** to operate on the lines the user has selected.
   - Select **Modified Lines** to operate on lines that have changed in the current session.
   - Select **Deleted Lines** to operate on lines that have been removed from the quote.
6. In the **Additional Path** field, enter the query command to execute on the third-party site.

   For Salesforce connections, this is typically a SOQL query. For other platforms, it may be a standard SQL query.

7. In the **Timeout** field, enter the number of milliseconds the request waits for a response before declaring an error.
8. **Optional:** Enable the **Async** toggle to run the integration in the background so the user can continue working while the request executes.
9. **Optional:** In the **Headers** area, configure the headers to include with the request.

   (Optional) Three approaches are available and can be combined.

   - **ServiceNow Quote Experience field values** — Reference transaction-level field values in a header using handlebar (Mustache) syntax: `{{txn.fieldname}}`. For example, `{{txn.account.id}}` passes the account ID from the quote header into the request header.
   - **Static key-value pairs** — Enter fixed header keys and values directly, such as an authorization token or a content type override.
   - **Combined** — Mix static values and field references in the same header configuration.

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10. In the connection selector, choose the connection to the target environment from the list of previously created connections.

    Connections are created in the Utilities area. If the required connection does not appear, create it first. For more information, see Create a connection for ServiceNow Quote Experience calls.

Define the transformation template

11. In the **Transformation Template** area, enter the JSON that maps external data to CPQ fields, or maps CPQ data to external system fields.

    The template uses JSON with Mustache (handlebar) syntax to extract values from the external response. Each object in the `fields` array contains a `variableName` (the CPQ field that receives the data) and a `value` (the expression that identifies the external field to extract from). Use `{{#each records}}` and `{{/each}}` to iterate over records in the query response.

    The following example maps three Salesforce fields to CPQ transaction fields.

```
{
  "fields": [
    {
      "variableName": "txn.custom.tXNNumber",
      "value": "{{#each records}}{{Name}}{{/each}}"
    },
    {
      "variableName": "txn.opportunity.id",
      "value": "{{#each
 records}}{{LGK__OpportunityId__c}}{{/each}}"
    },
    {
      "variableName": "txn.custom.primaryContact",
      "value": "{{#each
 records}}{{Contact.FirstName}}{{/each}}"
    }
  ]
}
```

    In this example, each `variableName` is a CPQ field that receives the extracted value. The `{{#each records}}` / `{{/each}}` block iterates over each record in the query response and extracts the named Salesforce field.

12. **Optional:** To verify the transformation template before saving, paste a sample query response into the **Sample Return Data** area, then select **Run Transformation** below the Transformation Template area.

    (Optional) To obtain sample response data, run the same query in a tool such as Postman where you can view and copy the full response, then paste it into the **Sample Return Data** area.

    The query response data runs through the transformation template and the mapped output is displayed in the **Transformation Result** area. If the result does not match the expected field values, review the template syntax and field variable names.

13. Select **Save**.
    The integration is saved and available to assign to stages and events.

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### What to do next
Assign the integration to an event or a stage to trigger it during the quote lifecycle.

- To assign to an event, see Create an event.
- To assign to a stage, see Create a quote transaction stage.

#### Quote transaction personas

Personas define distinct user types in the quoting experience, controlling what users can view and edit on a quote at each stage in CPQ.

ServiceNow Quote Experience uses personas to represent the distinct roles found in a sales organization, such as a sales representative or a sales manager. Each persona has customized access to data — controlling what users with that persona can view and edit and how the layout appears at each stage of the quote lifecycle.

## Persona behavior

A persona is assigned to a view, which defines the field and event access privileges for users with that persona at each stage. A user account can be assigned to only one persona. Personas are assigned to views, and a persona can only be assigned to one view.

## Personas and blueprints

Personas aren't part of the ServiceNow Quote Experience blueprint. They are not included in the blueprint export file. When a blueprint is migrated to a new environment, personas must be recreated in that environment.

## User access prerequisite

To assign a user account to a persona, the user must first be created using the User Access function in Utilities. User accounts that aren't in the User Access list can't be assigned to a persona.

#### Create a transaction persona

Create a persona in ServiceNow Quote Experience to define a user type and assign user accounts to it in CPQ.

### Before you begin
User accounts to assign to the persona must be created in the User Access function in Utilities before they can be assigned to a persona.

Role required: admin

### Procedure

1. Navigate to **All** > **CPQ Administration** > **Transaction** > **Personas**.
2. Select **+ New Persona**.
3. In the **Name** field, enter the name of the new persona.

   The name is mirrored in the **Variable Name** field in camel case with spaces and special characters removed. For example, entering `Eastern Sales Manager` produces the variable name *`easternSalesManager`*. To use a custom variable name, select the pencil icon to the right of the **Variable Name** field.
4. Select **Save**.

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5. Select **+ Associate User** to assign user accounts to the persona.
   The **Associate Users** control appears, listing user accounts eligible for assignment.
6. Select the check box next to each user account to assign, then select **Done**.

   Each user account can be assigned to only one persona in ServiceNow Quote Experience.

7. When prompted to confirm the assignment, select **Confirm**.
   The assigned user accounts appear in the **Username** list for the persona. To see the new persona in the Personas list, select **Personas** in the admin menu.

### What to do next

Assign the persona to a view to define its field and event access at each stage. For more information, see Create a transaction view.

#### Advanced product filtering for quotes

Advanced product filtering dynamically controls which products appear in the quote catalog based on admin-defined business rules and transaction context in CPQ.

Advanced product filtering enables administrators to dynamically filter the product catalog using business rules. Filtering logic runs during the Add Lines operation in ServiceNow Quote Experience. The feature supports real-time data synchronization from managed tables and maintains sub-second search performance even with catalogs of more than a million products.

## Use cases

Advanced product filtering is useful when catalog visibility must be controlled based on factors such as:

- Country, region, or compliance constraints
- Product availability or configuration status
- Transaction-specific input fields, such as customer segment or deal type

## Key features

**Advanced product filtering features**

| Feature | Description |
|---|---|
| Advanced filter rule search | Contextual product filtering with sub-second results. |
| Real-time data sync | Managed table and rule changes take effect immediately without redeployment. |
| Rule-based filtering engine | Include and exclude products using dynamic logic. |
| No-code admin experience | UI-based rule builder with column mapping and conditions. |
| Catalog scale | Performance maintained with more than one million products. |

## Prerequisites

The following must be enabled before using advanced product filtering.

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- The tenant setting `enableCatalogFilter` must be set to ON. Submit a request to DevOps to enable this setting.
- The ServiceNow Quote Experience module must be enabled to ensure the Add Lines operation uses the defined product filter rules.

## Managed table data synchronization

Product filter rules that reference managed tables do not need to be redeployed when only the managed table data changes. This behavior is enabled when the `filterrules.scheduler.enable = true` setting is active. The system syncs updated managed table data every 15 minutes, making the latest information available during product filtering.

**Note:** Any change made to a product filter rule itself — not just the referenced table data — must be redeployed for it to take effect.

### Create a product filter rule

Create a product filter rule in CPQ to dynamically include or exclude products from the quote catalog based on managed table data and transaction context.

#### Before you begin

The `enableCatalogFilter` tenant setting must be enabled. Submit a request to DevOps to enable this setting.

A managed table containing the reference data for filtering must exist. For more information, see the managed table configuration steps in Advanced product filtering for quotes.

Role required: admin

#### Procedure

1. Navigate to **Products** > **Product Filter Rules**.
2. Before creating a filter rule, define or verify the managed table that contains the reference data for filtering.
   a. Navigate to the **Tables** tab in CPQ Admin.
   b. Create or upload a table containing the business logic, such as region-to-product mapping or availability flags.
   c. Verify that the table includes at least one column that can be mapped to the product catalog, such as Region, SKU, or Product Family.
   d. Deploy the table to make it available for use in filter rules.
3. Select **Create New Rule**.
4. Enter a **Rule Name**, a **Variable Name**, and a **Description** for the rule.
5. In the **Reference Table** field, select the managed table that contains the filtering reference data.
6. Define the filter conditions using fields from the managed table and transaction data to specify when the rule applies.
7. Map the columns by matching the reference table columns to the corresponding product catalog columns.

   For example, map the `Region` column in the managed table to the `Region` column in the product catalog.

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8. Set the rule behavior.
   - Select **Include** to show only products that match the filter condition.
   - Select **Exclude** to hide products that match the filter condition.
9. Select **Save** to store the rule.
10. Toggle the **Active** button to mark the rule as ready for deployment.
11. Select **Deploy** to apply the rule.
    The rule is active. Only products matching the filter logic are displayed when users open the catalog from within a quote.

### ServiceNow Quote Experience: Access Control

ServiceNow Quote Experience controls access at two levels: record access, which determines who can view or modify a quote, and field access, which controls the fields a user sees within a quote. Record access can be managed by your CRM or natively within ServiceNow Quote Experience.

ServiceNow Quote Experience supports two approaches to record access control:

- CRM-managed access control, where the CRM system determines which records a user can access.
- Quote-managed access control, where access is controlled through functionality native to ServiceNow Quote Experience. This approach is recommended only for headless implementations.

The appropriate model depends on your implementation architecture and on which system acts as the source of truth for user access.

## Field access control

Regardless of the record-level approach you use, field access is managed in CPQ Administration through the Views and Personas features of the quote blueprint. For more information, see Quote transaction views and Quote transaction personas.

## CRM-managed access control

When ServiceNow Quote Experience is deployed with Sales CRM, record access is managed through standard ServiceNow AI Platform table access controls (ACLs). The access controls on the quote tables determine whether a user can create, read, update, or delete a quote record, and ServiceNow Quote Experience validates access based on those permissions.

For more information on the roles that govern quote access, see Components Installed with Quote Management.

**Note:** On the opportunity record, the fields shown in the quote list are governed by the quote table ACLs.

## Quote-managed access control

In quote-managed access control, access is governed by functionality native to ServiceNow Quote Experience rather than by the CRM. This approach improves security and compliance by giving you precise control over who can view and edit each quote, and is recommended for headless implementations, where it can limit a list of quotes to those the current user is authorized to access.

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Quote-managed access control is governed by a tenant setting and is turned off by default. When the setting is inactive, all users can access all quotes.

## Access levels

When quote-managed access control is active, each user has one of the following access levels.

**Admin**

- Can view and edit all quotes.
- Can grant full access to other users.
- Can revoke full access, but not owner status.
- Cannot be removed.

**Owner**

- Assigned to the creator of a quote.
- Can view and edit the owned quote.
- Can grant or revoke full access.
- Cannot be removed if they are the last owner.

**Full access**

- Can view and edit specified quotes.
- Can grant or revoke full access for other users.

## Manage quote-managed access

You manage quote-managed access from the runtime UI.

Any user with access can grant or remove access for other users. However, admins and owners cannot have their access removed. When a user without access tries to open a restricted quote, an error is displayed.

When quote-managed access control is enabled on an instance that already contains quotes, the creator of each quote automatically becomes its owner, and any user who has edited a quote receives full access.

## API support

You can grant or revoke quote-managed access through API calls. You can also use the API to retrieve the list of quotes a user can access and to return a history of users who were granted or revoked access. For a Postman collection of ServiceNow Quote Experience access control API calls, contact support.

### Quote Experience metrics API

Reference for the Quote Experience metrics API, including query parameters, default behavior, and metric definitions for views, session time, and stage time in CPQ.

## Overview of metrics

The Quote Experience metrics API retrieves usage data on transactions, including views by user, session time by user, and stage time. Administrators and implementers use this API to understand how users interact with quotes and how long transactions spend at each stage.

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You can query a single transaction by providing its transaction ID. If no transaction ID is provided, the API returns data for all transactions within the specified time period.

## Endpoint

```
GET {{baseUrl}}/api/txn/metrics/v1/overview
```

## Query parameters

### Metrics API query parameters

| Parameter | Type | Required | Description |
|---|---|---|---|
| `txnId` | String | No | The ID of the transaction to query. When provided, the response contains metrics for that transaction only. When omitted, the response contains metrics for all transactions in the specified time period. |
| `days` | Integer | No | The number of days to include in the query, counting back from `toDate`. The queried period is `(toDate - days) → toDate`. Defaults to 30 when not specified. |
| `toDate` | Timestamp | No | The end date and time for the query period in UTC format — for example, `2025-09-18T15:28:04Z`. When omitted, the current time is used. |

## Required headers

### Request headers

| Header | Value |
|---|---|
| `X-Logik-Customer-Id` | Your tenant ID. |
| `Content-Type` | `application/json` |

## Example call

```
curl -X GET \

 "{{baseUrl}}/api/txn/metrics/v1/overview?txnId={{transactionId}
}&days=30&toDate=2025-09-18T15:28:04Z" \
  -H "X-Logik-Customer-Id: <tenant-id>" \
  -H "Content-Type: application/json"
```

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## Metric definitions

### ServiceNow Quote Experience metrics

| Metric | Description | Unit | Notes |
|---|---|---|---|
| Views by user | The total number of sessions for a user in the specified time period. | Count | When filtered to a single transaction using `txnId`, sessions are counted for that transaction only. |
| Session time by user | The average time per session for each user in the specified time period. | Minutes | Sessions are calculated using activity windows based on common events, including transaction created or edited, stage enter or exit, upsert lines, and custom transaction events. A session ends five minutes after the last recorded event.<br><br>When filtered to a single transaction, the total time for a user can be calculated as: `views per user × session time per user`. |
| Stage time | The average time a transaction spends in a specified stage. | Minutes | When filtered to a single transaction, the metric reflects the time that specific transaction spent in the specified stage. |

**Related topics**

ServiceNow Quote Experience runtime API calls

### ServiceNow Quote Experience runtime API calls

Reference for the runtime APIs used in the ServiceNow Quote Experience, including their purposes, responses, and a OpenAPI Specification for testing in CPQ.

## API overview

CPQ APIs are divided into two categories: runtime APIs and admin APIs. Runtime APIs are the same APIs used in the runtime quote experience. The following table lists the runtime APIs for ServiceNow Quote Experience.

### ServiceNow Quote Experience runtime APIs

| API action | Purpose | Response |
|---|---|---|
| Initialize a session | Initializes a session to establish a context for executing transaction events, managing state, and processing subsequent API calls. Can initialize for an existing transaction. If no transaction is specified, a new transaction is created. | Returns a session ID, a transaction ID, and transaction information. |
| Delete a session | Deletes a session to securely end user activity, clear session-specific data, and free up system resources. | Session is deleted. No information is returned. |

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**ServiceNow Quote Experience runtime APIs (continued)**

| API action | Purpose | Response |
|---|---|---|
| Create a transaction | Creates a transaction, providing the object to manage the transaction lifecycle, configure and add products, and determine pricing. | Returns a transaction ID and transaction information. |
| Run events on a transaction | Triggers a specified system or custom event on a transaction to execute predefined logic or workflows, such as editing field values, initiating approvals, versioning transactions, and validating configurations. | Varies by event. |
| Add products to a transaction (upsert) | Adds one or more products to a transaction, enabling dynamic configuration and pricing updates based on the product's attributes. | Returns updated transaction data with the additional products. |
| Get a list of transactions | Retrieves a list of transactions, enabling users to view, manage, or take action on existing transactions. | A list of transactions with transaction IDs and metadata. |
| Get details of a transaction | Retrieves the header information of a transaction, including stage, account, and summary-level data. | All header field data for the transaction. |
| Get a transaction's lines | Retrieves the line item details for a transaction, including product data, quantities, pricing, and custom attributes for each line. | All line-level field data for the transaction. |

**Note:** Event APIs are authorized via session cookie only. Avoid building a scenario in which the user initiates an event that also fires an event API on the same transaction — such an implementation can result in unpredictable behavior.

## Additional APIs

For details about the API that retrieves metrics for transactions, see Quote Experience metrics API.

## OpenAPI Specification

The following OpenAPI specification describes all available REST endpoints, request payloads, response formats, parameters, and data models for the ServiceNow Quote Experience runtime APIs.

```
openapi: 3.0.3
info:
  title: Logik Transaction API 09.04.2026
  version: 09.04.2026
paths:
  /api/t:
    post:
      description: Creates or loads a transaction. If a
 transaction ID is passed in, it will load the existing
 transaction.
```

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```
      Otherwise, one will be created.
    operationId: initWorkingInstance
    parameters:
    - $ref: '#/components/parameters/personaHeader'
    - $ref: '#/components/parameters/logExecution'
    requestBody:
      content:
        application/json:
          schema:
            $ref: '#/components/schemas/InitRequest'
    responses:
      '200':
        content:
          application/json:
            schema:
              $ref: '#/components/schemas/InitTransaction'
        description: Successful
      '400':
        $ref: '#/components/responses/400error'
    summary: Initialize a transaction
    tags:
    - txnManager
 /api/t/{session}:
   get:
    description: Retrieves the full transaction state for the
given session, including fields, events, messages, layouts
      and tenant settings. No rules are re-executed.
    operationId: getWorkingInstance
    parameters:
    - $ref: '#/components/parameters/session'
    - $ref: '#/components/parameters/personaHeader'
    - $ref: '#/components/parameters/applyAccessPolicy'
    responses:
      '200':
        content:
          application/json:
            schema:
              $ref: '#/components/schemas/WorkingInstance'
        description: Successful
      '400':
        $ref: '#/components/responses/400error'
    summary: Get the current state of a working session
    tags:
    - txnManager
   patch:
    description: Runs any rules that should be run, and
returns updates to be made to view state
    operationId: patchWorkingInstance
    parameters:
    - $ref: '#/components/parameters/session'
    - $ref: '#/components/parameters/personaHeader'
    - $ref: '#/components/parameters/logExecution'
    requestBody:
      content:
        application/json:
          schema:
```

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```
            $ref:
'#/components/schemas/PatchWorkingInstanceRequest'
    responses:
      '200':
        content:
          application/json:
            schema:
              $ref:
'#/components/schemas/PatchWorkingInstance'
        description: Successful
      '400':
        $ref: '#/components/responses/400error'
    summary: Update the working session with data bits
    tags:
    - txnManager
 /api/t/{sessionId}:
   delete:
     description: Will summarily remove the instance. Saving
the instance would be responsibility of client.
     operationId: removeWorkingInstance
     parameters:
     - description: ID of the working instance
       in: path
       name: sessionId
       required: true
       schema:
         type: string
     responses:
       '200':
         description: Successful
       '400':
         $ref: '#/components/responses/400error'
     summary: Delete the working instance
     tags:
     - txnManager
 /api/t/{session}/removeSession:
   post:
     description: Will summarily remove the instance. Saving
the instance would be responsibility of client.
     operationId: removeWorkingInstanceForPost
     parameters:
     - $ref: '#/components/parameters/session'
     responses:
       '200':
         description: Successful
       '400':
         $ref: '#/components/responses/400error'
     summary: Delete the working instance
     tags:
     - txnManager
 /api/t/{session}/flightpath:
   get:
     description: Flightpath contains rule execution history
for a given transaction session
     operationId: getFlightPath
     parameters:
     - $ref: '#/components/parameters/session'
```

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```
    responses:
      '200':
        content:
          application/json:
            schema:
              items:
                items:
                  $ref:
'#/components/schemas/RuleExecutionEvent'
                type: array
              type: array
        description: OK
      '400':
        $ref: '#/components/responses/400error'
    summary: Get flightpath
    tags:
    - txn
 /api/t/{blueprintId}/revisions/{revision}/layouts/{layoutId}:
   get:
     description: Gets layout json by layout id, blueprint id
and revision.
     operationId: getLayout_1
     parameters:
     - $ref: '#/components/parameters/blueprintId'
     - $ref: '#/components/parameters/revision'
     - $ref: '#/components/parameters/layoutId'
     responses:
       '200':
         content:
           application/json:
             schema:
               type: string
         description: Successful
     summary: Gets layout json by layout id, blueprint id and
revision
     tags:
     - txnManager
 /api/t/{transactionId}/events/{eventId}:
   post:
     description: Event API. Handles custom and most system
events. Some system events may have distinct payloads, and are
       represented as separate endpoints here. If a system
endpoint does not have a specific endpoint defined, it is
handled
       by this one.
     operationId: runEvent
     parameters:
     - $ref: '#/components/parameters/transactionId'
     - $ref: '#/components/parameters/eventId'
     - $ref: '#/components/parameters/async'
     - $ref: '#/components/parameters/personaHeader'
     requestBody:
       content:
         application/json:
           schema:
             $ref: '#/components/schemas/EventPostRequest'
     responses:
```

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```
      '200':
        content:
          application/json:
            schema:
              $ref: '#/components/schemas/EventExecution'
        description: Successful
      '400':
        $ref: '#/components/responses/400error'
    summary: Execute a txn event
    tags:
    - txn
 /api/t/{transactionId}/events/{eventId}/{jobId}:
   get:
     description: This will get the status or result from an
async event execution. The jobId is returned from the call to
       execute the async event. Only the user who made the
execution request is allowed to get the status or result.
     operationId: getEventRun
     parameters:
     - $ref: '#/components/parameters/transactionId'
     - $ref: '#/components/parameters/eventId'
     - $ref: '#/components/parameters/jobId'
     responses:
       '200':
         content:
           application/json:
             schema:
               $ref: '#/components/schemas/EventExecution'
         description: Successful
       '400':
         $ref: '#/components/responses/400error'
     summary: Get result from async event execution
     tags:
     - txn
 /api/t/{transactionId}/moveLine:
   post:
     description: API to move line within a transaction by
specifying the current line, target line, and desired position.
       If currentLineId == targetLineId, line will move one
above previousLineId or one below nextLineId if targetPosition
       is specified as BEFORE or AFTER respectively. This is to
handle the scenario when a user selects the first or last
       line id on current page in UI.
     operationId: moveLine
     parameters:
     - $ref: '#/components/parameters/transactionId'
     - $ref: '#/components/parameters/personaHeader'
     requestBody:
       content:
         application/json:
           schema:
             $ref: '#/components/schemas/MoveLinePostRequest'
     responses:
       '200':
         content:
           application/json:
             schema:
```

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```
              $ref:
'#/components/schemas/MoveLineSuccessResponse'
          description: Line moved successfully.
        '400':
          $ref: '#/components/responses/400error'
      summary: Transaction Line Reordering API
      tags:
      - txn
  /api/t/{transactionId}/lines:
    post:
      description: Limited set of fields for each line. The
exact fields may depend upon the session context if there is
one.
      operationId: getLinesPost
      parameters:
      - $ref: '#/components/parameters/transactionId'
      - $ref: '#/components/parameters/search'
      - $ref: '#/components/parameters/filter'
      - $ref: '#/components/parameters/format'
      - $ref: '#/components/parameters/parentId'
      - $ref: '#/components/parameters/expand'
      - $ref: '#/components/parameters/page'
      - $ref: '#/components/parameters/size'
      - $ref: '#/components/parameters/sort'
      - $ref: '#/components/parameters/direction'
      - $ref: '#/components/parameters/lineId-2'
      - $ref: '#/components/parameters/txnSession'
      - $ref: '#/components/parameters/session-2'
      - $ref: '#/components/parameters/personaHeader'
      requestBody:
        content:
          application/json:
            schema:
              $ref: '#/components/schemas/LineResponseFilter'
        required: false
      responses:
        '200':
          content:
            application/json:
              schema:
                $ref: '#/components/schemas/LinePage'
          description: Successful
        '400':
          $ref: '#/components/responses/400error'
      summary: Get data for lines under a transaction
      tags:
      - txn
  /api/t/{transactionId}/events/upsertLines:
    post:
      description: Adds lines to the transaction. Payload is an
array of either catalog or configurable product IDs, along
        with the line ID in the case of reconfigure
      operationId: upsertLines
      parameters:
      - $ref: '#/components/parameters/transactionId'
      - $ref: '#/components/parameters/async'
      - $ref: '#/components/parameters/personaHeader'
```

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```
    requestBody:
      content:
        application/json:
          schema:
            $ref:
'#/components/schemas/UpsertLinesPostRequest'
    responses:
      '200':
        content:
          application/json:
            schema:
              $ref: '#/components/schemas/EventExecution'
        description: Successful
      '400':
        $ref: '#/components/responses/400error'
    summary: Execute a txn event
    tags:
    - txn
 /api/t/{transactionId}/messages:
   get:
     description: Get line messages under a transaction. Sort
param must be the same as for getLines to get correct line
       indexes
     operationId: getMessages
     parameters:
     - $ref: '#/components/parameters/transactionId'
     - $ref: '#/components/parameters/parentId'
     - $ref: '#/components/parameters/page'
     - $ref: '#/components/parameters/size'
     - $ref: '#/components/parameters/sort'
     - $ref: '#/components/parameters/direction'
     - $ref: '#/components/parameters/session-2'
     - $ref: '#/components/parameters/personaHeader'
     - $ref: '#/components/parameters/search'
     - $ref: '#/components/parameters/filter'
     responses:
       '200':
         content:
           application/json:
             schema:
               $ref: '#/components/schemas/MessagePage'
         description: Successful
       '400':
         $ref: '#/components/responses/400error'
     summary: Get line messages under a transaction
     tags:
     - txn
 /api/t/{transactionId}/fields/{fieldVariableName}/options:
   get:
     description: Fetch a page of options that are associated
with a field.
     operationId: getFieldOptions_2
     parameters:
     - $ref: '#/components/parameters/transactionId'
     - $ref: '#/components/parameters/fieldVariableName'
     - $ref: '#/components/parameters/txnSession'
     - $ref: '#/components/parameters/session-2'
```

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```
      - $ref: '#/components/parameters/page'
      - $ref: '#/components/parameters/size'
      - $ref: '#/components/parameters/search'
      - $ref: '#/components/parameters/personaHeader'
      responses:
        '200':
          content:
            application/json:
              schema:
                $ref: '#/components/schemas/PagedOptionSet'
          description: Successful
      summary: Fetch options for a field
      tags:
      - txn

 /api/t/{transactionId}/lines/{lineId}/fields/{fieldVariableNam
e}/options:
    get:
      description: Fetch a page of options that are associated
 with a line field.
      operationId: getLineFieldOptions
      parameters:
      - $ref: '#/components/parameters/transactionId'
      - $ref: '#/components/parameters/lineId'
      - $ref: '#/components/parameters/fieldVariableName'
      - $ref: '#/components/parameters/txnSession'
      - $ref: '#/components/parameters/session-2'
      - $ref: '#/components/parameters/page'
      - $ref: '#/components/parameters/size'
      - $ref: '#/components/parameters/search'
      - $ref: '#/components/parameters/personaHeader'
      responses:
        '200':
          content:
            application/json:
              schema:
                $ref: '#/components/schemas/PagedOptionSet'
          description: Successful
      summary: Fetch options for a line field
      tags:
      - txn
  /api/txn:
    get:
      description: Get high-level information for each
 transaction in the list
      operationId: getTxns
      parameters:
      - description: filter expression
        in: query
        name: filter
        required: false
        schema:
          type: string
      responses:
        '200':
          content:
            application/json:
```

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```
            schema:
              $ref: '#/components/schemas/HeaderPage'
        description: Successful
      '400':
        $ref: '#/components/responses/400error'
    summary: Get data for transactions
    tags:
    - txn
    x-spring-paginated: true
 /api/txn/{transactionId}:
   get:
     description: Fetches details for a specific transaction,
as well as optionally the lines associated with it.
     operationId: getTransaction
     parameters:
     - $ref: '#/components/parameters/transactionId'
     - $ref: '#/components/parameters/format'
     - $ref: '#/components/parameters/lineId-2'
     responses:
       '200':
         content:
           application/json:
             schema:
               $ref: '#/components/schemas/HeaderDto'
         description: Successful
       '400':
         $ref: '#/components/responses/400error'
     summary: Get data for transaction
     tags:
     - txn
 /api/txn/{transactionId}/lines:
   get:
     description: Limited set of fields for each line. The
exact fields may depend upon the session context if there is
one.
     operationId: getLines
     parameters:
     - $ref: '#/components/parameters/transactionId'
     - $ref: '#/components/parameters/search'
     - $ref: '#/components/parameters/filter'
     - $ref: '#/components/parameters/format'
     - $ref: '#/components/parameters/parentId'
     - $ref: '#/components/parameters/expand'
     - $ref: '#/components/parameters/page'
     - $ref: '#/components/parameters/size'
     - $ref: '#/components/parameters/sort'
     - $ref: '#/components/parameters/direction'
     - $ref: '#/components/parameters/lineId-2'
     - $ref: '#/components/parameters/txnSession'
     - $ref: '#/components/parameters/session-2'
     - $ref: '#/components/parameters/personaHeader'
     responses:
       '200':
         content:
           application/json:
             schema:
               $ref: '#/components/schemas/LinePage'
```

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```
          description: Successful
        '400':
          $ref: '#/components/responses/400error'
      summary: Get data for lines under a transaction
      tags:
      - txn
components:
  parameters:
    applyAccessPolicy:
      name: applyAccessPolicy
      in: query
      required: false
      schema:
        type: boolean
    async:
      name: async
      in: query
      description: Parameter to make event execution
 asynchronous.
      required: false
      schema:
        type: boolean
    blueprintId:
      name: blueprintId
      in: path
      required: true
      schema:
        type: integer
        format: int64
    direction:
      name: direction
      in: query
      description: Sorting direction
      required: false
      schema:
        type: string
        enum:
        - DESC
        - ASC
        default: ASC
    eventId:
      name: eventId
      in: path
      description: <TODO>
      required: true
      schema:
        type: string
    expand:
      name: expand
      in: query
      description: "A comma-separated list of line UUIDs to
 control which lines are expanded.  \n- If not provided, all
 lines\
        \ are expanded.  \n- If provided (e.g.,
`expand=line1,line2`), only those lines are expanded.  \n- If
 empty (`expand=`),\
        \ no lines are expanded.\n"
```

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```
      required: false
      schema:
        type: string
    fieldVariableName:
      name: fieldVariableName
      in: path
      required: true
      schema:
        type: string
    filter:
      name: filter
      in: query
      description: Filter parameter
      required: false
      schema:
        type: string
    format:
      name: format
      in: query
      description: Format of the response
      required: false
      schema:
        $ref: '#/components/schemas/Format'
    jobId:
      name: jobId
      in: path
      required: true
      schema:
        type: integer
        format: int64
    layoutId:
      name: layoutId
      in: path
      required: true
      schema:
        type: integer
        format: int64
    lineId:
      name: lineId
      in: path
      description: Transaction Line Id
      required: true
      schema:
        type: string
    lineId-2:
      name: lineId
      in: query
      description: Transaction Line Id
      required: false
      schema:
        type: string
    logExecution:
      name: logExecution
      in: query
      description: Parameter to enable logging to flightpath
      required: false
      schema:
```

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```
        type: boolean
    page:
      name: page
      in: query
      description: Number of the page to return if the resource
supports paged response
      required: false
      schema:
        type: integer
        default: 0
    parentId:
      name: parentId
      in: query
      description: Parent Id
      required: false
      schema:
        type: string
    personaHeader:
      in: header
      name: X-Logik-User-Persona
      schema:
        type: string
    revision:
      name: revision
      in: path
      description: revision of the blueprint
      required: true
      schema:
        type: string
    search:
      name: search
      in: query
      description: Search parameter
      required: false
      schema:
        type: string
    session:
      name: session
      in: path
      description: ID of the working instance
      required: true
      schema:
        type: string
    session-2:
      name: session
      in: query
      description: Session Id
      required: false
      schema:
        type: string
    size:
      name: size
      in: query
      description: Size of the page to return if the resource
supports paged response
      required: false
      schema:
```

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```
        type: integer
        default: 10
    sort:
      name: sort
      in: query
      description: Sorting parameter
      required: false
      schema:
        type: string
        default: txn.line.order
    transactionId:
      name: transactionId
      in: path
      description: <TODO>
      required: true
      schema:
        type: string
    txnSession:
      name: txnSession
      in: query
      description: Txn Session Id
      required: false
      deprecated: true
      schema:
        type: string
  responses:
    400error:
      description: Invalid input(s)
      content:
        application/json:
          schema:
            $ref: '#/components/schemas/error'
  schemas:
    AggregateAccessStateDto:
      title: AggregateAccessStateDto
      type: object
      properties:
        fields:
          type: array
          items:
            $ref:
'#/components/schemas/FieldAggregateVisibilityDto'
        events:
          type: array
          items:
            $ref:
'#/components/schemas/EventAggregateVisibilityDto'
    AggregateMessageStateDto:
      title: AggregateMessageStateDto
      type: object
      properties:
        messageCount:
          type: integer
        errorCount:
          type: integer
        warningCount:
          type: integer
```

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```
   CatalogItem:
     title: CatalogItem
     type: object
     properties:
       id:
         type: string
       quantity:
         type: number
         deprecated: true
         description: 'DEPRECATED: This field is no longer
respected. Use the ''fields'' array instead.

           Set quantity via: { "variableName":
"txn.line.quantity", "value": 5 }

           This field will be removed in a future release.

           '
       fields:
         type: array
         items:
           $ref: '#/components/schemas/Field'
         description: Additional line fields to set on the
transaction line
     required:
     - id
   ChangeType:
     title: Change Type
     type: string
     enum:
     - VALIDATE_CONFIGS_TASK_EXECUTED
   ConfigItem:
     title: ConfigItem
     type: object
     properties:
       configurationId:
         type: string
       lineId:
         type: string
     required:
     - configurationId
   ContextDto:
     title: ContextDto
     type: object
     description: Used to contain the context for relevant API
calls, such as init and event actions.
     properties:
       txnSession:
         type: string
         deprecated: true
       session:
         type: string
       delta:
         type: boolean
       logExecution:
         type: boolean
       lineIds:
```

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```
          uniqueItems: true
          type: array
          items:
            type: string
        copyCount:
          type: integer
          minimum: 1
          default: 1
          description: 'Number of copies to create for a
cloneLine event. Optional; defaults to 1 (single copy = legacy
behavior).
            Only honored for the cloneLine
event and only when the tenant setting
transaction.events.cloneLine.multiCopy.enabled
            is true; otherwise it is clamped
to 1. Validated against the per-tenant maximum
(transaction.events.cloneLine.multiCopy.maxCopies)
            in transaction-service, which rejects a count above
the maximum; the rules engine re-enforces the same ceiling
            for non-UI requests.

            '
    Event:
      title: Event
      type: object
      properties:
        name:
          type: string
        variableName:
          type: string
        visibilityState:
          type: string
        active:
          type: string
      required:
      - variableName
      x-class-extra-annotation: '@lombok.AllArgsConstructor

        @lombok.Builder'
    EventAggregateVisibilityDto:
      title: EventAggregateVisibilityDto
      type: object
      properties:
        variableName:
          type: string
        visibilityState:
          type: string
        active:
          type: string
      required:
      - variableName
      - visibilityState
      - active
    EventExecution:
      title: Event Execution
      type: object
      properties:
```

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```
      state:
        type: string
        enum:
        - SUCCESS
        - FAILURE
        - SUCCESS_SAVE_FAILED
        - PARTIAL_SUCCESS
      response:
        $ref: '#/components/schemas/PatchWorkingInstance'
      relatedChanges:
        type: array
        items:
          $ref: '#/components/schemas/RelatedChange'
      executionInstance:
        $ref: '#/components/schemas/Job'
    required:
    - state
  EventPostRequest:
    title: EventPostRequest
    type: object
    properties:
      context:
        $ref: '#/components/schemas/ContextDto'
      fields:
        type: array
        items:
          $ref: '#/components/schemas/Field'
      lines:
        type: array
        items:
          $ref: '#/components/schemas/PatchLine'
  ExternalCallEvent:
    title: ExternalCallEvent
    type: object
    properties:
      name:
        type: string
      startTime:
        type: integer
        format: int64
      endTime:
        type: integer
        format: int64
      externalCallType:
        type: string
  Field:
    title: Field
    type: object
    x-class-extra-annotation: '@lombok.AllArgsConstructor

      @lombok.Builder'
    properties:
      name:
        type: string
      value:
        type: object
```

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```
        x-field-extra-annotation:
"@com.fasterxml.jackson.annotation.JsonInclude(\n
com.fasterxml.jackson.annotation.JsonInclude.Include.ALWAYS\n\
          )"
      dataType:
        type: string
      visibilityState:
        type: string
      editable:
        type: string
      variableName:
        type: string
      userEdited:
        type: boolean
      uniqueName:
        type: string
      step:
        type: number
      index:
        type: integer
      selectAll:
        type: string
      set:
        type: string
      optionSet:
        $ref: '#/components/schemas/OptionSet'
    required:
    - variableName
  FieldAggregateVisibilityDto:
    title: FieldAggregateVisibilityDto
    type: object
    properties:
      variableName:
        type: string
      visibilityState:
        type: string
    required:
    - variableName
    - visibilityState
  Format:
    type: string
    enum:
    - FLAT
    - TREE
  HeaderDto:
    title: HeaderDto
    type: object
    properties:
      uuid:
        type: string
      fields:
        type: array
        items:
          $ref: '#/components/schemas/Field'
      lines:
        type: array
        items:
```

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```
          $ref: '#/components/schemas/Line'
  HeaderPage:
    title: Headers Page
    type: object
    allOf:
    - $ref: '#/components/schemas/PaginationResponse'
    - type: object
      properties:
        content:
          type: array
          items:
            $ref: '#/components/schemas/HeaderWithoutLines'
          default: []
  HeaderWithoutLines:
    title: HeaderWithoutLines
    type: object
    properties:
      uuid:
        type: string
        deprecated: true
      id:
        type: string
      txn.externalId:
        type: string
      txn.account.id:
        type: string
      txn.pricebook.id:
        type: string
      txn.opportunity.id:
        type: string
      txn.persona:
        type: string
      txn.pricing.total:
        type: number
      txn.pricing.subTotal:
        type: number
      txn.pricing.discount.percent:
        type: number
      txn.pricing.discount.amount:
        type: number
      txn.pricing.currencyCode:
        type: string
      txn.stage:
        type: string
      txn.version.number:
        type: integer
      txn.version.path:
        type: string
      txn.parent.id:
        type: string
      txn.created:
        type: string
        format: date-time
      txn.createdBy:
        type: string
      txn.modified:
        type: string
```

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```
        format: date-time
      txn.modifiedBy:
        type: string
  InitRequest:
    title: initRequest
    description: Auto generated JSON schema based on the
'bomProduct' file
    type: object
    properties:
      txnId:
        type: string
      id:
        type: string
      partnerData:
        type: object
        properties:
          account:
            type: string
          contact:
            type: string
          pricebookInfo:
            type: string
        required:
        - account
        - contact
      fields:
        type: array
        items:
          $ref: '#/components/schemas/Field'
      items:
        type: array
        items:
          type: object
          title: UpsertLinesItem
          oneOf:
          - $ref: '#/components/schemas/CatalogItem'
          - $ref: '#/components/schemas/ConfigItem'
          - $ref: '#/components/schemas/ManualConfigItem'
      stateful:
        type: boolean
    required:
    - stateful
  InitTransaction:
    title: InitTransaction
    type: object
    properties:
      txnSession:
        type: string
        description: The identifier of the working instance
        deprecated: true
      session:
        type: string
        description: The identifier of the working instance
      uuid:
        type: string
        description: The identifier of the transaction
        deprecated: true
```

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```
        id:
          type: string
          description: The identifier of the transaction
        stage:
          type: string
          description: Variable name of the stage the
transaction is in
        fields:
          type: array
          items:
            $ref: '#/components/schemas/Field'
        events:
          type: array
          items:
            $ref: '#/components/schemas/Event'
        messages:
          type: array
          items:
            $ref: '#/components/schemas/Message'
        aggregateAccessState:
          $ref: '#/components/schemas/AggregateAccessStateDto'
        aggregateMessageState:
          $ref: '#/components/schemas/AggregateMessageStateDto'
        layouts:
          type: array
          items:
            $ref: '#/components/schemas/LayoutUrlDto'
        tenantSettings:
          $ref: '#/components/schemas/TenantSettings'
      required:
      - fields
    Job:
      title: Job
      type: object
      properties:
        id:
          type: integer
          format: int64
          description: The identifier of the job
        status:
          type: string
          description: The status of the job
        errorMessage:
          type: string
          description: Error message if the job failed
        started:
          type: string
          description: When the job started
        finished:
          type: string
          description: When the job finished
    LayoutUrlDto:
      title: LayoutUrlDto
      type: object
      properties:
        url:
          type: string
```

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```
        variableName:
          type: string
        label:
          type: string
      x-class-extra-annotation: '@lombok.AllArgsConstructor

        @lombok.NoArgsConstructor'
    Line:
      title: Line
      type: object
      properties:
        uuid:
          type: string
          deprecated: true
        id:
          type: string
        fields:
          type: array
          items:
            $ref: '#/components/schemas/Field'
        events:
          type: array
          items:
            $ref: '#/components/schemas/Event'
        messages:
          type: array
          items:
            $ref: '#/components/schemas/Message'
        lines:
          type: array
          items:
            $ref: '#/components/schemas/Line'
        predecessors:
          type: array
          items:
            type: string
        visiblePredecessors:
          type: array
          items:
            type: string
        hasChildren:
          type: boolean
    LinePage:
      title: Lines Page
      type: object
      allOf:
      - type: object
        properties:
          content:
            type: array
            items:
              $ref: '#/components/schemas/Line'
            default: []
          referencePredecessors:
            type: array
            items:
              $ref: '#/components/schemas/Line'
```

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```
            default: []
      - $ref: '#/components/schemas/PaginationResponse'
    LineResponseFilter:
      title: LineResponseFilter
      type: object
      properties:
        filteredFields:
          type: array
          items:
            type: string
      x-class-extra-annotation: '@lombok.Builder

        @lombok.AllArgsConstructor

        @lombok.NoArgsConstructor'
    ManualConfigItem:
      title: ManualConfigItem
      type: object
      properties:
        configurationId:
          type: string
        lines:
          type: array
          maxItems: 200
          items:
            $ref: '#/components/schemas/ManualConfigLine'
          description: 'The hierarchy of transaction lines for
this configuration, supplied directly by the caller.

            Lines are matched against hive lines using
txn.line.configuration.item.uniqueIdentifier,

            txn.line.product.id, or
txn.line.configuration.item.key (in priority order). Where a
match is

            found, the caller''s fields are superimposed on top
of the configuration line''s fields. Configuration lines with

            no matching caller line are included unchanged.
Caller lines with no matching config line are

            dropped. The root line is stamped with
CONFIGURATION_STATUS=Valid if the persisted CBOM is

            valid, or CONFIGURATION_STATUS=Invalid otherwise.

            '
      required:
      - configurationId
      - lines
    ManualConfigLine:
      title: ManualConfigLine
      type: object
      properties:
        id:
          type: string
```

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```
        parent:
          type: string
        fields:
          type: array
          items:
            $ref: '#/components/schemas/Field'
          description: Line fields to set on this transaction
line
      required:
      - id
    Message:
      title: Message
      type: object
      properties:
        message:
          type: string
        type:
          type: string
        error:
          type: boolean
        target:
          type: string
        targetType:
          type: string
        set:
          type: string
        index:
          type: integer
        color:
          type: string
        icon:
          type: string
      required:
      - type
      - message
      x-class-extra-annotation: '@lombok.AllArgsConstructor

        @lombok.Builder'
    MessagePage:
      title: Messages Page
      type: object
      allOf:
      - type: object
        properties:
          content:
            type: array
            items:
              $ref: '#/components/schemas/MessageWithLineInfo'
            default: []
      - $ref: '#/components/schemas/PaginationResponse'
    MessageWithLineInfo:
      title: Message with Line info
      type: object
      properties:
        id:
          type: string
        lineIndex:
```

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```
        type: integer
      message:
        $ref: '#/components/schemas/Message'
  MoveLinePostRequest:
    title: MoveLinePostRequest
    type: object
    properties:
      sourceLineIds:
        type: array
        items:
          type: string
          format: uuid
          description: The IDs of the lines to be moved.
      currentLineId:
        deprecated: true
        type: string
        format: uuid
        description: The ID of the line to be moved.
        example: 42c85098-897e-4e26-938b-12ac043478cc
      targetLineId:
        type: string
        format: uuid
        description: The ID of the target line to position
around.
        example: 62c8798-897e-4e26-938b-12ac043478888
      targetPosition:
        type: string
        enum:
        - BEFORE
        - AFTER
        description: Specifies whether to move the current
line before or after the target line.
        example: BEFORE
      sessionId:
        type: string
        description: Txn session ID.
    required:
    - targetLineId
    - targetPosition
    - sessionId
  MoveLineSuccessResponse:
    title: Lines moved successfully.
    type: object
    properties:
      currentLineId:
        deprecated: true
        type: string
        format: uuid
        description: The ID of the line that was moved.
        example: 42c85098-897e-4e26-938b-12ac043478cc
      newIndex:
        type: integer
        description: The new index of the first moved line in
the list of all lines when sorted.
        example: 56
  Option:
    title: Option
```

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```
      type: object
      properties:
        label:
          type: string
        state:
          type: string
        value:
          type: string
        imageUrl:
          type: string
        orderNumber:
          type: number
      required:
      - label
      - state
      - value
      - imageUrl
      - orderNumber
      x-class-extra-annotation: '@lombok.Builder'
    OptionSet:
      title: OptionSet
      type: object
      properties:
        selectedOptions:
          type: array
          items:
            $ref: '#/components/schemas/Option'
      allOf:
      - oneOf:
        - $ref: '#/components/schemas/PagedOptionSet'
        - $ref: '#/components/schemas/UnpagedOptionSet'
    Pageable:
      type: object
      format: pageable
      properties:
        page:
          type: integer
          minimum: 0
        size:
          type: integer
          minimum: 1
        sort:
          type: array
          items:
            type: string
    PageableObject:
      title: PageableObject
      type: object
      properties:
        sort:
          type: array
          items:
            $ref: '#/components/schemas/SortObject'
        offset:
          type: integer
        pageNumber:
          type: integer
```

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```
        pageSize:
          type: integer
        paged:
          type: boolean
        unpaged:
          type: boolean
      x-class-extra-annotation: '@lombok.AllArgsConstructor
        @lombok.Builder'
    PagedOptionSet:
      title: PagedOptionSet
      type: object
      properties:
        options:
          type: array
          items:
            $ref: '#/components/schemas/Option'
        pageable:
          type: object
          $ref: '#/components/schemas/PageableObject'
        last:
          type: boolean
        totalPages:
          type: integer
        totalElements:
          type: integer
        sort:
          type: array
          items:
            $ref: '#/components/schemas/SortObject'
        first:
          type: boolean
        size:
          type: integer
        number:
          type: integer
        numberOfElements:
          type: integer
        empty:
          type: boolean
    PaginationResponse:
      type: object
      properties:
        totalElements:
          type: integer
          format: int64
          default: 0
        totalPages:
          type: integer
          default: 0
        sort:
          $ref: '#/components/schemas/Sort'
        first:
          type: boolean
        last:
          type: boolean
        number:
```

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```
        type: integer
      pageable:
        $ref: '#/components/schemas/Pageable'
      numberOfElements:
        type: integer
      size:
        type: integer
      empty:
        type: boolean
      content:
        type: array
        items: {}
  PatchLine:
    title: PatchLine
    type: object
    properties:
      uuid:
        type: string
        deprecated: true
      id:
        type: string
      fields:
        type: array
        items:
          $ref: '#/components/schemas/Field'
    required:
    - fields
  PatchWorkingInstance:
    title: PatchWorkingInstance
    type: object
    properties:
      uuid:
        type: string
        description: The identifier of the transaction
        deprecated: true
      id:
        type: string
        description: The identifier of the transaction
      errorMessage:
        type: string
        description: This will hold any messages generated
from business logik errors.
      timestamp:
        type: string
        description: This will show the timestamp when errors
occurred.
      fields:
        type: array
        items:
          $ref: '#/components/schemas/Field'
      stage:
        type: string
        description: Variable name of the stage the
transaction is in
      lines:
        type: array
        items:
```

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```
          $ref: '#/components/schemas/Line'
      events:
        type: array
        items:
          $ref: '#/components/schemas/Event'
      messages:
        type: array
        items:
          $ref: '#/components/schemas/Message'
      aggregateAccessState:
        type: object
        $ref: '#/components/schemas/AggregateAccessStateDto'
      aggregateMessageState:
        $ref: '#/components/schemas/AggregateMessageStateDto'
  PatchWorkingInstanceRequest:
    title: PatchWorkingInstanceRequest
    type: object
    properties:
      context:
        $ref: '#/components/schemas/ContextDto'
      uuid:
        type: string
        deprecated: true
      id:
        type: string
      fields:
        type: array
        items:
          $ref: '#/components/schemas/Field'
      lines:
        type: array
        items:
          $ref: '#/components/schemas/PatchLine'
    required:
    - fields
    - lines
  RelatedChange:
    title: Related Change
    type: object
    properties:
      key:
        type: string
      type:
        $ref: '#/components/schemas/ChangeType'
    required:
    - key
    - type
  RuleExecutionEvent:
    title: RuleExecutionEvent
    type: object
    properties:
      name:
        type: string
      ruleVariableName:
        type: string
      inputs:
        type: array
```

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```
        items:
          type: string
      endTime:
        type: integer
        format: int64
        writeOnly: true
      executionTime:
        type: string
        format: date-time
      actionVariableName:
        type: string
      changes:
        type: array
        items:
          $ref: '#/components/schemas/StateUpdateEvent'
      elapsedTime:
        type: integer
        format: int64
      stageRule:
        type: boolean
      eventName:
        type: string
      eventActionName:
        type: string
      externalCalls:
        type: array
        items:
          $ref: '#/components/schemas/ExternalCallEvent'
  Sort:
    type: object
    format: sort
    properties:
      sorted:
        type: boolean
      unsorted:
        type: boolean
      empty:
        type: boolean
  SortObject:
    title: Sort
    type: object
    properties:
      empty:
        type: boolean
      sorted:
        type: boolean
      unsorted:
        type: boolean
    x-class-extra-annotation: '@lombok.AllArgsConstructor'
  StateUpdateEvent:
    title: StateUpdateEvent
    type: object
    properties:
      source:
        type: string
        enum:
        - USER_INPUT
```

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```
          - RULE
        event:
          type: string
          enum:
          - CREATE
          - DELETE
          - UPDATE
        type:
          type: string
          enum:
          - FIELD
          - DETERMINATION
          - MESSAGE
          - PRODUCT
          - SOLUTION_PRODUCT
          - EXCLUSION
          - INCLUSION
          - VISIBILITY
          - EDITABLE
          - EVENT_ACTIVE
          - EVENT_VISIBILITY
          - TRANSACTION_LINE
        identifier:
          type: string
        oldValue:
          type: object
        newValue:
          type: object
        baseStateIdentifier:
          type: string
    TenantSettings:
      title: TenantSettings
      type: object
      x-class-extra-annotation: '@lombok.AllArgsConstructor

        @lombok.Builder'
      properties:
        autosaveTxn:
          type: boolean
        sessionTTL:
          type: integer
        sessionKeepAlive:
          type: integer
        allowCosmoConverse:
          type: string
        showConverseRlhf:
          type: boolean
        trainConverseRlhf:
          type: boolean
        accessControlEnabled:
          type: boolean
        favoritesSharingEnabled:
          type: boolean
        oneQuotingEnabled:
          type: boolean
          x-field-extra-annotation:
"@com.fasterxml.jackson.annotation.JsonInclude(\n
```

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```
 com.fasterxml.jackson.annotation.JsonInclude.Include.NON_NULL\n
\
            )"
        oneQuotingApprovalsEnabled:
          type: boolean
          x-field-extra-annotation:
 "@com.fasterxml.jackson.annotation.JsonInclude(\n
 com.fasterxml.jackson.annotation.JsonInclude.Include.NON_NULL\n
\
            )"
        oneQuotingSubscriptionsEnabled:
          type: boolean
          x-field-extra-annotation:
 "@com.fasterxml.jackson.annotation.JsonInclude(\n
 com.fasterxml.jackson.annotation.JsonInclude.Include.NON_NULL\n
\
            )"
        multiCopyEnabled:
          type: boolean
          x-field-extra-annotation:
 "@com.fasterxml.jackson.annotation.JsonInclude(\n
 com.fasterxml.jackson.annotation.JsonInclude.Include.NON_NULL\n
\
            )"
        multiCopyMaxCopies:
          type: integer
          x-field-extra-annotation:
 "@com.fasterxml.jackson.annotation.JsonInclude(\n
 com.fasterxml.jackson.annotation.JsonInclude.Include.NON_NULL\n
\
            )"
    UnpagedOptionSet:
      title: UnpagedOptionSet
      type: object
      properties:
        options:
          type: array
          items:
            $ref: '#/components/schemas/Option'
    UpsertLinesPostRequest:
      title: UpsertLinesPostRequest
      type: object
      properties:
        context:
          $ref: '#/components/schemas/ContextDto'
        items:
          type: array
          items:
            type: object
            title: UpsertLinesItem
            oneOf:
            - $ref: '#/components/schemas/CatalogItem'
            - $ref: '#/components/schemas/ConfigItem'
            - $ref: '#/components/schemas/ManualConfigItem'
          maxItems: 200
    WorkingInstance:
      title: WorkingInstance
```

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```
      type: object
      properties:
        txnSession:
          type: string
          description: The identifier of the working instance
          deprecated: true
        session:
          type: string
          description: The identifier of the working instance
        uuid:
          type: string
          description: The identifier of the transaction
          deprecated: true
        id:
          type: string
          description: The identifier of the transaction
        stage:
          type: string
          description: Variable name of the stage the
transaction is in
        fields:
          type: array
          items:
            $ref: '#/components/schemas/Field'
        events:
          type: array
          items:
            $ref: '#/components/schemas/Event'
        messages:
          type: array
          items:
            $ref: '#/components/schemas/Message'
        aggregateAccessState:
          $ref: '#/components/schemas/AggregateAccessStateDto'
        aggregateMessageState:
          $ref: '#/components/schemas/AggregateMessageStateDto'
        layouts:
          type: array
          items:
            $ref: '#/components/schemas/LayoutUrlDto'
        tenantSettings:
          $ref: '#/components/schemas/TenantSettings'
      required:
      - fields
    error:
      title: error
      description: Every error has this format
      type: object
      properties:
        errorMessage:
          type: string
        errorCode:
          type: string
        timestamp:
          type: string
```

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### Sync Primary Quote to Opportunity

Designate a quote as primary and sync the quote's lines to the opportunity. When sync is enabled, any changes to the quote's lines are synced to the source opportunity lines. An opportunity can have only one quote marked as primary and enabled for sync.

## Before you begin

Role required: admin

Before configuring the sync feature, complete the following instance setup:

1. Activate the Quote Experience plugin (App ID: sn_quote_mgmt_adv).
2. Submit a support ticket requesting to enable the **Sync Quote to Opportunity** tenant setting.
3. When the tenant setting is enabled, export and import the transaction blueprint.

## About this task

The sync feature uses the following system objects to control the sync between a primary quote and its source opportunity.

### System objects for sync to opportunity

| Type | Display name | Variable name |
|---|---|---|
| Field | Is Synced to Opportunity | `txn.opportunity.isSynced` |
| Field | Opportunity Line Item | `txn.line.opportunity.lineItem` |
| Event | Enable Sync to Opportunity | `txn.syncToOpportunity.enable` |
| Event | Disable Sync to Opportunity | `txn.syncToOpportunity.disable` |
| Integration | Sync to Opportunity | `txn.syncToOpportunity.updateStatus` |

To configure the feature, add a button for each sync event to the layout, configure the event properties, and optionally restrict event access by stage.

## Procedure

Add buttons to the layout

1. Navigate to **All** > **CPQ Administration** > **Transaction** and open the blueprint.
2. Select **Layouts**.
3. Add a button to the layout for each sync event: **Enable Sync to Opportunity** and **Disable Sync to Opportunity**.

Configure the **Enable Sync to Opportunity** event

4. Open the properties for the **Enable Sync to Opportunity** event.
5. Add the **Sync to Opportunity** integration (`txn.syncToOpportunity.updateStatus`) to the event.
6. Set the **Event Access** for the event.

Configure the **Disable Sync to Opportunity** event

7. Open the properties for the **Disable Sync to Opportunity** event.
8. Add the **Sync to Opportunity** integration (`txn.syncToOpportunity.updateStatus`) to the event.
9. Set the **Event Access** for the event.

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(Optional) Restrict event access by stage

10. **Optional:** In **Views**, adjust the access to the sync events for each stage.
    This configuration lets you set the sync events to **No Access** on specific stages.

### Result

When a user selects **Enable Sync to Opportunity**, the quote's lines sync to the source opportunity lines, and subsequent changes to the quote's lines continue to sync. When a user selects **Disable Sync to Opportunity**, the sync stops.

## Configure transaction-to-quote field mapping

When you use Sales CRM capabilities such as opportunity management, advanced approvals, or PDF document generation, CPQ Microservices sync data to the ServiceNow platform. This sync is set up automatically, but custom transaction fields require you to configure the data mapping.

### Before you begin

Role required: admin

Verify that you have the permissions required to add columns on ServiceNow tables.

Activate the Quote Experience plugin (App ID: sn_quote_mgmt_adv).

### About this task

Custom transaction fields are mapped to columns on one of two ServiceNow tables:

- **Quote** — captures header-level quote data.
- **Quote Lines** — captures individual line data.

To configure the mapping, create a column on the target ServiceNow table, create the corresponding field on the blueprint, map the field to the column, and then deploy the blueprint. Complete the following phases in order.

Consider the following when you map transaction fields:

- Header-level transaction fields can be mapped only to the **Quote** table.
- Line-level transaction fields can be mapped only to the **Quote Lines** table.
- The **External Field Mapping** options are filtered to the column types supported by the current field type.
- Columns that are already mapped to a field aren't displayed.
- If you use a ServiceNow table column that has a list specification, you must add all valid choices for data to sync properly. For example, the choices for the **State** column on the **Quote** table must be updated to match the values of the `txn.stage` field.

### Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Search for and select the table to add the column to.

   Select **Quote** for header-level data or **Quote Lines** for line-level data.
3. On the table record page, in the **Table Columns** related list, select **New**.
4. Configure the new column and select **Save**.
5. Navigate to **Product Catalog Management** > **Offerings** > **CPQ Administration**.
6. Select the transaction.

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7. Add a new field on the blueprint.
   For more information, see Create a transaction field.
8. Open the field properties page for the new field.
9. In the **External Field Mapping** property, select the **Quote** or **Quote Lines** column to map the field to.
10. Select **Save**.
11. Deploy the blueprint.

### Result
The custom transaction field is mapped to the selected ServiceNow table column, and data syncs between the transaction and the quote record.

## Enable order creation from a quote

Add the **Create Order** event to a blueprint layout so that users can create an order from a quote in the CPQ Quote experience.

### Before you begin
Role required: admin

Activate the following plugins:

- Quote Experience plugin (App ID: sn_quote_mgmt_adv).
- Order Management plugins

Configure the following dependencies:

- Enable the `transaction.oneQuoting.orders.enabled` tenant setting.
- Configure the **serviceNowJwtConnection** connection in **CPQ Administration** > **Utilities** > **Connection**.

### About this task
The integration and event that create an order from a quote are seeded in your blueprints. To make the capability available to users, add the seeded **Create Order** event to the layout, set its access, and then deploy the blueprint.

### Procedure
1. Navigate to **All** > **CPQ Administration** > **Transaction**.
2. Navigate to **Events**, select the **Create Order** event, set **Event Access** to **Active**, and save the event.
3. Add the **Create Order** event to the layout.
   a. Add a button to the layout.
   b. Open the button properties.
   c. Toggle the **Event Button** property to **Active**.
   d. From the **Event** picklist, select the **Create Order** event.
   e. Save the button properties.
   f. Save the layout.
4. In **Views**, adjust the access to the **Create Order** event for each stage.

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5. Select **Deploy** on the blueprint.
   **Create Order** is enabled on the quote, and the **Create Order** button appears on the Quote user interface.

### Result
The **Create Order** button is available on the quote layout for the stages you configured. Users can now create an order from a quote.

### What to do next
After you deploy the blueprint, configure the quote-to-order field mapping to define how quote data maps to the resulting order.

#### Related topics
Create an order from a quote line item

#### Configure quote PDF documents

As a sales operation specialist, you can generate professional-looking PDF templates that present quotes in a standardized format that reflects company branding and logos. You can also set up Docusign to enable signers to sign quotes electronically and send them through email.

## Create quote PDF document templates

Add customized templates to quote PDF documents using the ServiceNow document template function.

A standard template is included with the base installation of Quote Management.

See Set up PDF document templates to learn more about PDF document templates and how they work.

## Link quote PDF documents to Docusign

Sales operation specialists can link quote PDF documents to Docusign so that signers can sign PDF documents electronically.

See Configure DocuSign for PDF documents for more information about how to set up Docusign.

## Set up quote PDF document signers
Sales operation specialist can set up PDF document signers in Quote Management. Signers can be emailed PDF documents for review and electronic signatures. There are two types of signers, external and internal signers.

- Contacts listed in an account linked to the quote can be external signers.
- Internal signers are all the users that have either sales_agent or sales_ops_specialist roles in Quote Management.

See Set up PDF document signers for more information.

#### Configure quote document generation

The Generate PDF Document feature generates a PDF document of the current quote based on the selected template. After the document is generated, it is available in the **Attachments** section of the Contextual Side Panel (CSP). To enable this feature, an administrator configures a custom integration and a custom event that initiate the document generation process.

### Before you begin
Role required: admin

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Before you configure the document generation feature, complete the following instance setup:

1. Activate the Quote Experience plugin (App ID: sn_quote_mgmt_adv).
2. Submit a support ticket requesting to enable the **Document Generation** tenant setting.
3. When the tenant setting is enabled, export and import the transaction blueprint.

You must also create a document template before you configure this feature. Document templates are created and managed outside CPQ Administration. For instructions, see Configure quote PDF documents.

## About this task

The document generation feature uses the following system fields to determine the template and signers for the generated document.

**System fields for document generation**

| Type | Display name | Variable name |
|---|---|---|
| Field | Document Template | `txn.docGen.template` |
| Field | Document External Signer | `txn.docGen.externalSigner` |
| Field | Document Internal Signer | `txn.docGen.internalSigner` |

To configure the feature, update the system fields, create a custom integration and a custom event in the blueprint, and then deploy the blueprint. Complete the following phases in order.

## Procedure

1. Navigate to **All** > **CPQ Administration** > **Transaction**.
2. On the blueprint, select **Fields**.
3. For each system field listed in the preceding table, set the **Default Access** to **Editable**.
4. Add each system field to the transaction layout.
5. Create a custom integration.
   For more information, see Quote transaction integrations
6. Configure the following integration settings.

**Integration settings**

| Setting | Value |
|---|---|
| HTTP Method | `POST` |
| Additional Path | `/api/sn_quote_mgmt_adv/v1/quotes/{{txn.id}}/documents` |
| Timeout | `5000` |
| Line Item Details to Include | None |
| Async | Disabled |
| Headers | Not applicable |

7. Leave the **Request Transformation** unconfigured.
   No request transformation is required for this integration.

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8. For **Connection to Endpoint**, select **serviceNowJwtConnection**.
9. Leave the **Response Transformation** unconfigured.
   No response transformation is required for this integration.
10. Create a custom event.
11. In the event properties, set **Event Access** to **Active**.
12. Associate the integration you created with the event.
13. Add a button to the layout to trigger the event.
    a. Enable the event button.
    b. From the **Event** picklist, select the event you created in Phase 3.
14. In **Views**, adjust the access to the event for each stage.
15. Select **Save**.
16. Select **Deploy** to deploy the blueprint.

### Result

When a user selects the generate-document button on a quote, the integration generates a PDF document from the selected template and attaches it to the quote. The document is available in the **Attachments** section of the Contextual Side Panel (CSP).

## Set up PDF document signers

Sales operations specialists can set up signers in Quote Management so that PDF quotes can be sent to either internal and external signers for review and signatures.

### Before you begin

Role required: sales_operations_specialists

### About this task

Contacts listed in the account for a quote can be external signers. The email listed with the contact is used to send the PDF.

Internal signers are all the users that have either sales_agent or sales_ops_specialist roles.

### Procedure

1. Navigate to **All** > **Customer Service** > **Accounts** and select **New** to create an account or select an existing account to add contacts.
2. For a new account, fill in the account information and select **Save**.
3. Add a contact to an existing account by selecting the account and opening the **Contact** tab.
4. Select **New**.
5. Fill in the information for the new contact.
6. Select **Save**.
   When the quote is created and the account selected, the contacts in the account are available as signers for the PDF documents. The email associated with the contact is used to send the PDF document.

## Set up PDF document templates

Sales operation specialists can set up templates for PDF documents in Quote Management.

### Before you begin

Role required: sales_operation_specialist

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### Procedure

1. Navigate to **All** > **Quote** > **Quote templates**.
2. Select **New**.
3. Choose **HTML template**.
4. Use the following links to build customer PDF templates:

**Links to create PDF templates**

| Link | Description |
|---|---|
| Document Templates | Explanation of document templates and how the work in ServiceNow. |
| Configuring Document Templates | Steps to configure documents templates. |
| Reference for Document Templates | Additional information about document templates. |
| Using Document Templates | How to use document templates. |

## Customize a quote summarization skill in ServiceNow Otto for Configure, Price, Quote (CPQ)

Configure the ServiceNow Otto for Configure, Price, Quote (CPQ) application so that the agent can use the generative AI skills in the CRM Workspace and Business Portal.

### Before you begin

Role required: admin

### Procedure

1. Navigate to **All** > *AI Admin Hub* > **AI Skills**.
2. In the **Customer** workflow group, view the skills for ServiceNow Otto for CPQ under Sales CRM.
3. Make a copy of an active quote summarization skill by selecting the More actions icon ••• and then select **Make a copy** to create a version that you can customize.
4. In the General details step, fill in the fields.
   a. Enter a name and description for the skill.
   b. Select **Save and continue** to go to the next step.

   **Note:** The **More details on the skills** fields are read-only.

5. In the View quote input step, configure the base input table fields and related lists for the Quote template.

   **Note:** The **Choose base table** field is ready-only.

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

   a. Add base input table fields by selecting **New base input field**.

      The following table lists the base input table fields and descriptions.

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**Base input fields**

| Field | Description |
|---|---|
| Base input field | Field in the base input table whose value this skill uses in its response.<br><br>For example, `Number`. |
| Field description | Description of the base input field value.<br><br>For example, `Quote number`. |

**b.** Configure the rule conditions to filter the data by using the condition builder.

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

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

**c.** Select the **New data source** field to configure the additional input data sources, as needed.

Adding input data sources (such as the related tables, activity streams, and relationships) provide more context to the *`Now LLM Service`* in a related list.

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

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

The selection of the related table fields has a direct impact on the quality of the corresponding prompt header.

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

**6.** Customize the prompt output.

Review and test the default prompt provided. The prompt is fixed and can't be customized directly within this step or from the AI Admin Hub screen.

To customize or create prompts, select **Edit prompt in AI Skill Kit**. You are redirected to the AI Skill Kit, where you can manage prompt configurations for the skill. For more information, see AI Skill Kit.

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

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

**7.** Use the Define availability section to define how the skill is available to users.

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

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Select the **New condition set** field to configure additional conditions, as needed.

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

**8.** Specify which users can access the skill in the Define access section.

By selecting specific roles, you're controlling who can use the skill. The roles that you choose will also be available in the Select display step.

Default and Custom roles:

- If no changes are made, the default role automatically appears in **User access - Access Control List (ACL)**.
- Apply role restrictions when the skill is invoked by selecting **Roles** and defining which data and resources (for example, tables) the user can access in **Role restrictions to skill**.

> **Note:** If you add a role in the Define Access step, you must manually select it in the **Select Display** field to make it active.

**9.** Configure the **In-product desktop** field to display the quote summarization.

**a.** Display Now Assist skills on the forms and workspaces by selecting the **In-product desktop** field.
For the skills that appear in-product, select the arrow to identify the roles that can use the skill.

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

**10.** Review and activate the skill.

**a.** Review your choices and select **Activate** to complete the skill customization.

**b.** Generate the quote summary by selecting **Summarize** in a quote.

### Agentic AI application for quote generation

The Quote AI Agent is part of ServiceNow Otto for CPQ that interprets sales representative intent, retrieves opportunity and contract data, configures products, applies pricing and discounts, generates quote documents, and drafts client emails. Sales representatives review and approve each step before the agent proceeds. The Quote AI Agent uses an orchestrator that coordinates seven specialized agents.

The agent compresses the quote-building lifecycle by handling repetitive, deterministic work autonomously. A single prompt can drive multiple actions in one turn—for example, adding several products, configuring one of them, and applying a discount—without requiring the sales representative to issue each action separately.

> **Note:** The Quote AI Agent uses AI to interpret intent and retrieve context. Outputs may not reflect the full complexity of a deal. Review all agent-generated quotes before sharing them with customers.

The Quote AI Agent operates in two modes:

**Autonomous**

The agent completes the full sequence—opportunity context retrieval, product addition, configuration, discounting, and document generation—without pausing for confirmation. Use this mode for well-scoped, low-risk requests.

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**Human-in-the-loop**

The agent pauses at predefined decision points and asks the sales representative to confirm or adjust before continuing. Decision points include applying a discount that exceeds a threshold, adding a product with ambiguous configuration, and generating the final quote document.

When creating a quote from an opportunity, the agent retrieves relevant opportunity context—including customer needs, products of interest, and expected commercial terms—to ground the quote in the opportunity data. This context retrieval uses the Opportunity Summarization skill when it's installed and entitled on the instance. When that skill isn't available, the agent retrieves opportunity fields directly and constructs a structured context object without AI inference, so the agent remains functional regardless of entitlement.

For configurable products, the agent starts a configuration session, applies your inputs as configuration field values, and reads back the resulting bill of materials. The configured product is added to the quote with full configuration lineage retained, so you can reconfigure it later.

The agent applies discounts at two levels:

- **Header level**: A discount applied to the overall quote.
- **Line level**: A discount applied to a specific line item.

Discounts can be in percentage or absolute terms. They can be explicit where you state the amount directly, or implicit where the agent derives the discount from context such as a previously negotiated rate. The agent surfaces the applied discounts back to you as part of its response. When a discount exceeds the approval threshold, the agent notifies you and starts the approval workflow automatically.

## Quote Experience configuration for subscriptions

Subscription workflows provide the data that Quote Experience uses to process amendments and renewals. A system-provided blueprint defines the fields and rules that Quote Experience uses to populate, represent, and validate the data.

The system-provided blueprint components work together to enable Quote Experience to process amendments and renewals accurately. Subscription workflows provide and assign the data, while Quote Experience uses the blueprint to populate the quote, apply business rules, and prevent invalid changes.

## Transaction fields

Transaction fields define the information that Quote Experience uses to represent a subscription amendment or renewal. The fields include transaction header-level and line-level information.

Subscription workflows process the subscription data and pass it to Quote Experience, which uses the system-provided blueprint to populate transaction fields.

Line type and line action data add context to the transaction fields, indicating how the quote represents the change.

## Line type and line action

Subscription workflows assign the line type and line action based on the amendment or renewal and pass these values to Quote Experience with the subscription data.

For configurable product offerings, the CPQ Configurator processes the changes by splitting lines and assigning line types and line actions. For more information about the CPQ Configurator, see CPQ Configurator.

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For non-configurable product offerings, Quote Experience uses the line type and line action values to represent the change on the quote and to support downstream workflows. For example, an upsell requiring additional quantity creates a split line. The workflow sets the line type to **Amend** and the line action to **Add** for the additional quantity.

Line type and line action values identify the type of change and the action required for specific amendment and renewal use cases. The use cases include upsells, downsells, end date changes, product swaps, and standard and early renewals.

## Business rules

Business rules define how Quote Experience processes the data that subscription workflows provide. For example, a business rule clears the renewal adjustment type and value when the renewal basis is not set to Contracted Price.

Business rules work with the transaction fields, line type, and line action to support consistent and accurate quote processing and valid downstream workflows.

## Guardrails

Quote Experience applies guardrails to prevent changes that would make an amendment or renewal invalid. For example, a guardrail resets an upsell line quantity to `1` if it was set to less than `1`. It also resets the line end date if it is earlier than the start date.

Guardrails work with the transaction fields, line type, line action, and business rules to maintain the validity of the quote.

## Quote Experience and subscription workflow integration

Subscription workflows process amendments and renewals for non-configurable product offerings, package the data, and assign the line type and line action for Quote Experience.

Quote Experience uses the system-provided blueprint to populate the transaction fields, and the line type and line action to represent the change and support downstream workflows.

Quote Experience applies business rules and guardrails to process the quote and prevent changes that would make the amendment or renewal invalid.

Together, subscription workflows and the Quote Experience blueprint provide the data, processing rules, and controls required to process the quote accurately and support downstream workflows.

**Related topics**

Subscription Management in Quote Experience

### Transaction header-level system fields for subscriptions

Transaction header-level system fields are system-provided header fields in Quote Experience, some of which support subscription processing for amendments and renewals.

## Header-level system fields

Transaction header-level system fields are available through the Quote Experience administration interface. Navigate to **All** > **CPQ Administration** > **Transaction** > **Associated Fields** and select **Transaction**.

The following table summarizes the transaction-level header system fields that are relevant for subscriptions in Quote Experience.

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### Transaction header-level system fields

| Variable name | Description |
|---|---|
| `txn.startDate` | Start date for the transaction. |
| `txn.endDate` | End date for the transaction. |
| `txn.term` | Term in months from contract. |
| `txn.transactionType` | Type of transaction: New, amendment, or renewal. |
| `txn.transactionAction` | Choice field with options for add or change. Determines transaction type. |
| `txn.isAutoGeneratedForRenewal` | Indication of whether the transaction was automatically generated from a renewal, based on the expiry of the original contract. |
| `txn.isAutoRenewContract` | Indication of whether the resulting contract from the transaction should trigger automatic renewal workflows. |
| `txn.pricing.adjustment.renewalBasis` | Starting renewal price from which to apply adjustments. Valid values are Contracted Price or List Price. |
| `txn.pricing.adjustment.renewalType` | Type of adjustment for the renewal with options of Markup % and Markdown %. If the renewal adjustment basis is List Price, this field is read-only and empty. |
| `txn.pricing.adjustment.renewalValue` | Amount of adjustment to apply to the renewal depending on whether the Renewal Adjustment Type is Markup or Markdown. |
| `txn.source.quote` | Reference to the quote from which this was consolidated. |
| `txn.source.contract` | Reference to the contract used in the amendment or renewal workflow for this transaction. |

For more information about transaction-level header system fields, see Transaction-level system fields.

### Transaction line-level system fields for subscriptions

Transaction line-level system fields are system-provided line fields in Quote Experience, some of which support subscription processing for amendments and renewals.

## Line-level system fields

Transaction line-level system fields are available through the Quote Experience administration interface. Navigate to **All** > **CPQ Administration** > **Transaction** > **Associated Fields** and select **Transaction Line**.

The following table summarizes the transaction line-level system fields that are relevant for subscriptions in Quote Experience.

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### Transaction line-level system fields

| Variable name | Description |
|---|---|
| `txn.line.startDate` | Start date of the line. |
| `txn.line.endDate` | End date of the line. |
| `txn.line.term` | Difference in months between the start date and end date for recurring products. Automatically calculated using the contract start date and contract end date. |
| `txn.line.lineType` | Description of the changes made to the transaction line. Valid values include New, Renew, Upsell, Amend, Cancel, or No Change. |
| `txn.line.lineAction` | Action applied to the Sold Product. Valid values include Add, Change, Disconnect, or No Change. |
| `txn.line.quantity` | Quantity of the line. |
| `txn.line.isAutoGeneratedForRenewal` | Indication of whether this line was automatically generated from a renewal workflow. |
| `txn.line.isAutoRenewContract` | Indication of whether the contract line is eligible for automatic renewal, based on its expiration date. |
| `txn.line.pricing.adjustment.renewalBasis` | Starting renewal price to which adjustments are applied. Overrides the header-level setting if specified. |
| `txn.line.pricing.adjustment.renewalType` | Indication of whether the adjustment value is a percentage or absolute amount when calculating a renewal price. |
| `txn.line.pricing.adjustment.renewalValue` | Percentage amount to adjust the renewal as indicated by renewal adjustment type when calculating a renewal price. |
| `txn.line.pricing.delta.priceTreatment` | Pricing treatment applied to a transaction line based on line type, line action, and whether the product offering characteristics have changed. |
| `txn.line.source.soldProduct` | Reference to the underlying Sold Product record from which this line was created. |
| `txn.line.source.splitFromSoldProduct` | Reference to the underlying Sold Product record when a line is split due to an amendment. The Sold |

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**Transaction line-level system fields (continued)**

| Variable name | Description |
|---|---|
| | Product record is from the Sold Product field of the original line. Used for delta pricing calculations. |
| `txn.line.source.entitlement` | Reference to the entitlement from which this line was renewed. |
| `txn.line.source.contract` | Reference to the existing contract from which this line was derived. |
| `txn.line.source.contract.line` | Reference to the contract line from which this line was renewed. |
| `txn.line.source.consolidation.lines` | List of contract lines from which this line was consolidated. |

For more information about transaction line-level system fields, see Transaction line-level system fields.

### Line type and line action fields for subscriptions

Line type and line action fields are system-provided fields in Quote Experience that define the type of change and the action required for subscription amendments and renewals.

## Line type and line action

Line type and line action fields vary depending on the amendment or renewal use case. Subscription amendment and renewal workflows set the line type and line action fields, and the system populates the corresponding transaction fields in Quote Experience.

The line type field indicates the nature of the change being made to a quote line. The line action field indicates the operation being performed.

## Quantity changes

The following table summarizes the line type and line action field settings for quantity changes.

**Quantity changes**

| Use case | Line type/ Line action | Description |
|---|---|---|
| Upsell quantity: active line | | |
| Original line | No Change/ No Change | No changes on the existing line. Additional quantity handled on the new split line. |
| Split line | Amend/ Add | Creation of a new line to carry the additional quantity from the effective date forward. |
| Downsell quantity: active line | | |
| Original line | Cancel/ Change | Active line closed off at the effective date (end date set). A split line carries the reduced quantity forward. |

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**Quantity changes (continued)**

| Use case | Line type/ Line action | Description |
|---|---|---|
| Split line | Amend/ Add | New line segment to represent the modified (lower) quantity from the effective date. |
| Downsell quantity: future-dated line | | |
| Original line | Amend/ Change | Amendment not a cancellation of the original line since the line had not yet started. Creation of a split line depends on whether the effective date equals the start date. |
| Split line (if any) | Amend/ Add | Creation of a new line segment if the effective date is between the start date and the end date of the future-dated line. |
| Quantity to 0: early termination | | |
| Original line | Cancel/ Change | Reduction of quantity to 0 equivalent to removing the product. End date set to the day before the effective date. No split line. |

## Product modifications

The following table summarizes the line type and line action field settings for adding, removing, and swapping products. It also includes product characteristic changes.

**Product modifications**

| Use case | Line type/Line action | Description |
|---|---|---|
| Product additions or removals | | |
| Add product: amendment quote | | |
| New line | Upsell/ Add | Addition of a new product to an existing subscription. Quote type set to Amend/Renew and line type set to Upsell to distinguish from a new sale. |
| Remove product: active line | | |
| Original line | Cancel/ Change | Ending of the product at the effective end date and the setting of the end date set accordingly. No split line due to no ongoing amendment version. |
| Remove product: future-dated line | | |
| Original line | Amend/ Change | Setting of the line type to Amend and an update to the end date because the future line has not yet started. No split line needed. |
| Full product swap | | |
| Original product line | Cancel/ Change | Termination of the original product at the effective date. |
| New product line | Amend/ Add | Addition of a replacement product as a new amended line. |
| Partial product swap | | |

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**Product modifications (continued)**

| Use case | Line type/Line action | Description |
|---|---|---|
| Original: Original line | Cancel/ Change | Reduction of the original product quantity to 0 and termination of the original product quantity for the swapped portion. |
| Original: Split line | Amend/ Add | Split line for remaining quantity of the original product carried forward. |
| New product line | Amend/ Add | Addition of a new product as part of the swap. Setting of the line type to Amend and not Upsell because of the downsell action. |
| Characteristic changes | | |
| Original line | Cancel/ Change | Closing of the original line and creation of a line with the updated product characteristic whenever a product characteristic changes. |
| Split line | Amend/ Add | Creation of a split line to carry the same product with the updated characteristic from the effective date. |

## Date changes

The following table summarizes the line type and line action field settings for date changes, including an early end date and an end date extension.

**Date changes**

| Use case | Line type/ Line action | Description |
|---|---|---|
| Early termination or early end date | | |
| Original line | Cancel/ Change | Movement of the end date to an earlier date and cancellation of the line at the new end date. No split line needed. |
| End date extension | | |
| Original line | Amend/ Change | Extension of the end date with the existing line amended. No termination or split line needed. |

## Renewals

The following table summarizes the line type and line action field settings for various renewal scenarios.

**Renewals**

| Use case | Line type/ Line action | Description |
|---|---|---|
| Quantity change | | |
| Renewed line | Renew/ Add | Renewal of line as is. |

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**Renewals (continued)**

| Use case | Line type/ Line action | Description |
|---|---|---|
| Quantity set to 0 on line | Cancel/ Disconnect | Removal of product from renewal when reducing the quantity to 0 or swapping the product. Cancellation of line. |
| Date change | | |
| Renewed line | Renew/ Add | Renewal of line as is. |
| Characteristic change | | |
| Renewed line | Renew/ Add | Renewal of line as is. |
| Product addition | | |
| New product line | New/Add | Addition of product to the renewal. |
| Product removal | | |
| Original product line | Cancel/ Disconnect | Removal of the product from the renewal and the cancellation of the line at the renewal effective date. |
| Product swap | | |
| Original product line | Cancel/ Disconnect | Cancellation of the original product as part of the swap. |
| New product line | New/Add | Addition of the replacement product as New, not Amend. |

## Quote and unmodified line changes

The following table summarizes the line type and line action field settings for new quotes and unmodified lines.

**Quote and unmodified line changes**

| Use case | Line type/Line action | Description |
|---|---|---|
| New quote | | |
| New product line | New/Add | Addition of a product from a catalog, resulting in a quote type of New and a line type of New. |
| No change | | |
| Unmodified line | No Change/No Change | No action required if there are no modifications to the line. |

### Header-level and line-level business rules for subscriptions

Business rules for subscriptions are system-provided rules in Quote Experience that enforce the integrity and validity of subscription-related transaction fields.

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## Business rules for subscriptions

Business rules are available through the Quote Experience administration interface. Navigate to **All** > **CPQ Administration** > **Transaction** > **Rule Groupings** and select `txnSubscriptionsBRs`.

Business rules validate subscription dates, term, line type, and renewal adjustment transaction fields and provide defaults, where applicable. They are included in the transaction blueprint.

The following table summarizes the system-provided business rules for subscriptions.

### Business rules

| Variable name | Description |
|---|---|
| Header-level business rules | |
| `resetAdjustmentValuesWhenBasisChangesFromContractedPrice` | Clears the renewal adjustment type and value when the adjusted basis changes away from Contracted Price. Avoids stale adjustment settings from being applied to a new basis. |
| `contractStartDateBeforeEndDate` | Validates the contract start date does not fall after the contract end date. Blocks saves with invalid date ranges to avoid downstream term calculation errors. |
| `contractEndDateBeforeToday` | Helps prevent users from saving a contract end date earlier than the current date during |

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### Business rules (continued)

| Variable name | Description |
| --- | --- |
| | interactive sessions. |
| `nonNegativeRenewalAdjustmentValue` | Blocks negative renewal adjustment values, which would invert pricing logic and create discounts instead of increases. |
| `defaultValuesContractedPrice` | Populates the default renewal adjustment type (percentage) and value (0) when the basis is Contracted Price and either field is missing. Avoids missing required inputs for Price Management. |
| `setTermAndContractEndDateHeader` | Auto-derives the contract end date from the start date and term, or derives the term from the date range. Keeps the three fields in sync and avoids quote lines inheriting invalid or inconsistent data. |

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### Business rules (continued)

| Variable name | Description |
|---|---|
| Line-level business rules | |
| `backCalculateContractStartDate` | Back-calculates the contract start date from the contract end date and term when the start date is missing. Helps prevent date range errors that would corrupt the renewal quote term. |
| `clearAutoRenewContractFlag` | Clears the auto-renew flag when the contract dates are incomplete on a top-level quote line. Helps prevent silent renewal failures due to missing trigger dates. |
| `clearRenewalAdjustmentTypeAndValue` | Clears the renewal adjustment type and value when the basis changes from Contracted Price on a quote line. Helps prevent stale adjustments from corrupting child line renewal pricing. |

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### Business rules (continued)

| Variable name | Description |
| --- | --- |
| renewalAdjustValueCannotBeNegative | Blocks negative renewal adjustment values on quote lines. Helps prevent negative values from inverting pricing logic and creating unintended discounts. |
| setDefaultValuesForContractedPriceQLI | Populates default renewal type (percentage) and value (0) on quote lines when the basis is Contracted Price and fields are missing. Enables renewal pricing to be calculated. |
| setHeaderInfoOnLineItemOnInsert | Copies quote header information (account, dates, renewal settings) to new quote line items on insert. |
| setQuoteLineTypeWhenEmpty | Sets the line type to New or Upsell based on the header Quote Type when a new line is added from the Catalog. |

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### Business rules (continued)

| Variable name | Description |
| --- | --- |
| `setTermAndContractEndDate` | Auto-derives the term and the contract end date based on supplied fields, keeping dates and terms in sync. |
| `dateValidationsMessageBR` | Validates contract date ranges on quote lines: Start date before end date, end date not in the past, child dates within parent bounds, line dates within header bounds. Helps prevent date hierarchy violations and expired contracts. |
| `validateStartDateNotRetroactive` | Helps prevent setting a past contract start date on amendment-type quotes during interactive sessions. Blocks retroactive amendments that could corrupt billing and audit trails. |

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### Guardrail rules for subscriptions

Subscription guardrail rules are system-provided rules in Quote Experience that prevent invalid changes to non-configurable transaction lines during amendments and renewals.

## Guardrail rules

Subscription guardrails are available through the Quote Experience administration interface. Navigate to **All** > **CPQ Administration** > **Transaction** > **Rule Groupings** and select `txnSubscriptionsGuardrails`.

Guardrails are part of the business rules for subscriptions and are included in the transaction blueprint.

The following table summarizes the system-provided rules for subscription guardrails.

### Guardrails

| Variable name | Description |
|---|---|
| `subscriptionsUpsellStartDateLock` | Set upsell line start date to read-only |
| `subscriptionsUpsellEndDateReset` | Reset upsell line end date if less than its start date |
| `subscriptionsUpsellQuantityReset` | Reset upsell line quantity to `1` if less than `1` |
| `subscriptionsDownsellStartDateReset` | Reset downsell line start date if less than original line start date |
| `subscriptionsDownsellEndDateLock` | Set downsell line end date to read-only |
| `subscriptionsDownsellQuantityReset` | Reset downsell line quantity if it is less than or equal to `1` or greater than or equal to the original line quantity |
| `subscriptionsStandardRenewalStartDateLock` | Set renewal line start date to read-only |
| `subscriptionsStandardRenewalEndDateReset` | Reset renewal line end date if less than its start date |
| `subscriptionsStandardRenewalQuantityReset` | Reset renewal line quantity to `1` if less than `1` |
| `subscriptionsEarlyRenewalStartDateLock` | Set renewal line start date to read-only |
| `subscriptionsEarlyRenewalEndDateReset` | Reset renewal line end date if less than its start date |
| `subscriptionsEarlyRenewalQuantityReset` | Reset renewal line quantity to `1` if less than `1` |
| `subscriptionsGeneralEndDateSet` | Set the original line end date to one day before the amendment line start date on change |

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## Quote creation via Self-Service

The Quote Self-Service plugin (com.sn_quote_self_service) enables users to create and manage quotes. Users can track quote status, browse catalogs, configure items, and apply discounts through a guided quote creation playbook.

## Key benefits of creating quotes via Self-Service

The Quote Self-Service application (com.sn_quote_self_service) offers the following benefits:

- A guided quote creation playbook simplifies the quoting process.
- Self-service catalog browsing, product configuration, and quote building reduces quote turnaround time from days to minutes.
- Users can directly edit, revise, apply discounts, and download without requesting changes through internal teams.
- Audit trail and version history for revised quote prompting trust and transparency.

For information about the Quote creation via Self-Service fields, see Quote creation via Self-Service fields.

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## Set up Quote Self-Service

To install Quote Self-Service, see Install Quote Self-Service.

### Install Quote Self-Service

Quote Self-Service is automatically installed when you install the Quote Management application. If you install a different application, you must add the Quote Self-Service as a plugin dependency before installation.

### 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.

Depending on your entitlements, you must install demo data after installation.

Role required: admin

### About this task

The following items are installed with Self-service quote.

- Plugins
- Store applications

For more information on viewing components that are installed with an application, see Find components installed with an application.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Quote Self-Service application (`com.snc.quote_self_service`) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

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Dependent plugins and applications are listed if they are already installed or require installation.

4. Install demo data based on your entitlements.

| Demo data install task | Description |
| --- | --- |
| **If demo data is available and you want to in stall it** | **a.** Select the **Load Demo Data** option.<br>**b.** Select **Install**.<br>**Warning:** If you don't load the demo data during installation, it's unavailable to load later. |
| **If the Load Demo Data option isn't available but you want demo data** | Load the demo data after installing.<br>**a.** Install `com.sn_quote_self_service.`.<br>**b.** In the filter, enter `v_plugin.list` and press Enter.<br>**c.** Under Related Links, select **Install Demo Data Only**. |

## Configuring Advanced Approval Management

Install the Advanced Approval Management application to build workflows that automate the approval process for Sales Customer Relationship Management entities such as customer quotes.

### Configuration overview

### Advanced Approval Management configuration overview

Configuring the Advanced Approval Management involves the following sections:

- Environment Setup: Establish the system foundation by installing required plugins, enabling approval functionality, and configuring the user interface.
- Approval Configuration: Create business-specific approval rules, conditions, and workflows for your entities (for example, quotes, orders) that requires approval management.

**Prerequisite**: Ensure the necessary roles are added and configured, if not already, to configure Advanced Approval Management and manage approvals. For more information, see Advanced Approval Management reference and Components installed with Sales Common.

1. Install Advanced Approval Management.

   You can install the Advanced Approval Management application (sn_adv_appr_mgmt) if you have the admin role.

   **Note:** The plugin for the Sales Customer Relationship Management application for which you are creating workflows, such as Quote Management, must also be installed.

2. Create an approval configuration.

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Create an approval configuration for a Sales Customer Relationship Management entity, such as quotes. An approval configuration contains the approval elements that you define to automate approval workflows: conditions that trigger approval workflows, approval rules, approval chains, and approval users and groups. Starting with the 1.0.1 release, you can enable certain features for the configuration, namely approval request consolidation, escalations, and email reminder features.

3. Create conditions that trigger approval workflows.

   Define one or more conditions that apply company policies, such as legal or pricing guidelines, to trigger an approval workflow. Also enable the smart reapprovals feature, which allows previous approvals to be used for a resubmitted approval.

4. Create approval rules.

   Create approval rules that define the approval criteria and approvers for an approval step.

5. Create approval chains.

   Optionally create approval chains that control the sequence in which two or more approvals are run.

6. Define an approval user.

   Define the approver and the associated approval rule that they review during the approval process.

7. Define an approval group.

   Define the group that can approve requests for a specified approval rule.

8. Set up approval notifications to deliver approval status to requesters and inform approvers of approval rejections.

   You can customize these system notifications if needed.

9. Configure granular delegation rules for an approver if your organization uses Employee Service Management and your approvers want to delegate approval tasks when they're not available or away from work.

## Configuration workflow

The following workflow illustrates the end-to-end process for configuring the Advanced Approval Management:

1. Complete all environment setup tasks to establish the system foundation.
2. Create an approval configuration for your entity (quote, order, or other Sales Customer Relationship Management entity).
3. Define trigger conditions that specify when approval workflows should be initiated.
4. Create approval rules that define approval criteria and assign approvers.
5. Optionally create approval chains to orchestrate complex multi-step approval sequences.
6. Assign individual approvers and approver groups to approval rules.
7. Configure system notifications to inform requesters and approvers of approval status.
8. Configure granulation delegation if your organization is using Employee Service Management and your approvers want to delegate their approval tasks to another employee.

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### Related topics

- Advanced Approval Management
- Using Advanced Approval Management
- Notifications in Advanced Approval Management
- Advanced Approval Management reference

## Install Advanced Approval Management

You can install the Advanced Approval Management application (sn_adv_appr_mgmt) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

### Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Advanced Approval Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

### About this task

The following items are installed with Advanced Approval Management:

- Roles
- Tables
- Scheduled jobs

For more information, see Components installed with Advanced Approval Management.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Advanced Approval Management application (sn_adv_appr_mgmt) using the filter criteria and search bar.

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

   A list of the versions available to you is displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

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### What to do next
Create an approval configuration

### Related topics
Using Advanced Approval Management

Advanced Approval Management

## Set up the environment to manage approvals

Complete the setup tasks before creating approval configurations and workflows. These prerequisites enable the approval system for a CPQ implementation.

### Before you begin
Role required: admin or sn_adv_appr_mgmt.approval_rule_admin

### About this task
Set up the environment to administer and manage approvals.

### Procedure
1. Install the required plugins.
   a. Navigate to **All** > **System Definitions** > **Plugins**.
   b. Search for and install the following plugins, if not already installed:
      - Advanced Approvals Plugin: Provides the core approval management framework. For more information, see Install Advanced Approval Management
      - Quote Management - Advanced (App id: sn_quote_mgmt_adv): Required for approving transactions.
   c. Confirm that all plugins show as active in the Plugins list.

   All required plugins are installed and active in your system.
2. Enable the approval tenant setting in your microservices instance.
   a. Contact ServiceNow Customer Support to enable the approval tenant setting for your microservices instance.
   b. When contacting support, provide the following information:
      - Your ServiceNow instance name
      - Request to enable: "Microservices Approval Tenant Setting"
      - Confirmation that Advanced Approvals and Advanced Code plugins are installed
   c. Wait for the support team to confirm the setting is active.
   d. After the setting is enabled, verify that the approval interface and approval-related UI components are visible by navigating to the approval configuration areas.

   The approval tenant setting is enabled in your microservices instance, and the approval system is ready for configuration.
3. Export and re-import the blueprint to seed approval system fields, events, and integrations.

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a. Navigate to **All** > **CPQ Administration** > **Transaction** > **Blueprint**.

b. Select **Export**.
The export process creates a backup of your current blueprint configuration.

c. Navigate to **All** > **CPQ Administration** > **Utilities** > **Matrix Loader**.

d. Import the blueprint.
The components such as system events (Preview, Request, Approve, Cancel/Reject, View), integrations (Data flow integration between your microservices and the approval system), rules (Validate Approval Submission, Validate Approval Completion, Validate Approval Revision), rule groups (Approval Submission, Approval Completion, and Approval Revision), and field (Approval state) are added.

e. Verify that approval events and integration rules are now available in the UI by navigating to **All** > **CPQ Administration** > **Transaction**.

The blueprint import completes, and all approval system events and integrations are seeded in your instance. These system events and integrations are now available for use in approval rules and configurations.

4. Configure UI effects and layout for the approval experience.
For more information, see Configure approval events.
5. Set up stage transitions for the approval workflow.
For more information, see Configure stages and entry criteria.
6. Create the web embeddable module for the approval interface.

a. Navigate to **All** > **Web Embeddables** > **Home Page**.

b. Create a web embeddable module.
Web embeddables are reusable UI components that can be embedded in multiple places. For approvals, this creates a reusable approval interface component.

c. Name the module (for example, "Advanced Approvals" or "Approval Interface").

d. Select **Advanced Approvals** as the component type.

e. Configure the component properties and save.
The web embeddable is created, and a SYS ID is generated for the module.

f. Copy the SYS ID of the created embeddable module.

g. Navigate to **All** > **UI Builder** > *`CRM Workspace`*.

h. Select **Quote Transaction Default** component.

i. Locate the seismic_components_property_list field.

j. Add an entry with the embeddable SYS ID for approvals.

The web embeddable module for approvals is created and configured. The approval interface is now embedded in your microservices instance and ready for use.

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7. Verify all prerequisites are complete.
   a. Confirm all plugins are active and installed.
   b. Verify that the approval tenant setting is enabled in your instance.
   c. Check approval system events and integrations are visible in the Advanced Approvals configuration area.
   d. Confirm UI buttons and approval interface components are visible in your quote or order forms.
   e. Verify stage transitions are correctly configured and appear in the configuration UI.

   All prerequisites are verified and complete. Your instance is now ready for approval rule configuration.

### What to do next

Proceed with the following tasks:

- Create an approval configuration
- Create conditions that trigger approval workflows
- Create approval rules
- Create approval chains
- Define an approval user
- Define an approval group

After approvals are configured, end users can submit approval requests using the approval interface. For user-facing tasks, see Review and approve a submitted quote.

## Configure approval events

Configure the approval system events that control the approval buttons and stage transitions for a CPQ implementation.

### Before you begin

Role required: admin or sn_adv_appr_mgmt.approval_rule_admin

The environment setup must be complete so that the approval system events, integrations, rules, and fields are seeded in your instance. For more information, see Set up the environment to manage approvals.

### About this task

Configure these events. Don't create additional ones. The events fall into two groups based on how they are triggered.

**Approval event groups**

| Event | Trigger type | What you configure |
|---|---|---|
| Preview Approval (*txn.approval.preview*) | Layout button | Event access rules that control when the button is visible, plus a layout button with a UI effect that opens the embedded SN approval component. |
| View Approval (*txn.approval.view*) | Layout button | |
| Request Approval (*txn.approval.request*) | Fired by the | The stage transition that occurs after the action completes. No layout button is needed. |

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**Approval event groups (continued)**

| Event | Trigger type | What you configure |
|---|---|---|
| | embedded component | |
| Approve Approval (*txn.approval.approve*) | Fired by the embedded component | |
| Cancel Approval (*txn.approval.cancel*) | Fired by the embedded component | |

## Procedure

Configure the Preview Approval event (*txn.approval.preview*). The UI effect on the Preview Approval button opens the embedded SN approval component in Preview mode, showing the seller which approvals are triggered and who the approvers are before submitting. The **Request Approval** button inside this component triggers the Request Approval event.

1. Configure the event access that controls when the Preview Approval button is visible.
   a. Navigate to **CPQ Administration** > **Transaction** > **Events**.
   b. Open the Preview Approval event (*txn.approval.preview*).
   c. Select **Edit Event Access** in the top right.
   d. Configure the visibility condition to show this event when txn.approvalState equals empty ("") or draft.
   The Preview button appears only when no approval is in progress.
   e. Select **Save**.

   **Tip:** The preceding conditions reflect the default. Adjust them to match your stage structure—for example, if there are additional stages where the Preview button should or should not appear, add or modify conditions accordingly.

2. Add the Preview Approval button to the layout.
   a. Navigate to **Transaction** > **Layouts** and open your layout.
   b. In the **Header Buttons** section, add a new button and label it **Preview Approval** or a label of your choice.
   c. In **Button Properties**, enable the **Event Button** toggle, then in the **Event** field select **Preview Approval**.
   This links the button visibility to the event access rules you configured.
   d. Enable the **UI Effect Button** toggle, then set the UI effect properties:

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- Set **UI Effect Type** to **Approvals**.
- Set **UI Effect Target** to **Modal** or **Slideout**, depending on your preferred display.
- Set **Mode** to **Preview**.

**e.** Select **Save**.

The Preview Approval button appears in draft state and opens the embedded approval component in Preview mode.

Configure the View Approval event (*txn.approval.view*). The UI effect on the View Approval button opens the embedded SN approval component in Status mode, showing the current approval status, approver details, history, and a **Recall** button for pending approvals. The **Recall** button inside this component triggers the Cancel Approval event.

**3.** Configure the event access that controls when the View Approval button is visible.

**a.** Open the View Approval event (*txn.approval.view*).

**b.** Select **Edit Event Access** in the top right.

**c.** Configure the visibility condition to show this event when txn.approvalState is not empty and not draft—for example, when it equals requested, approved, recalled, or rejected.
The View button appears only after an approval is initiated.

**d.** Select **Save**.

**Tip:** You control which approval states cause this button to appear. For example, if you do not want the View button visible after an approval is fully completed, you can exclude the approved state from the condition.

**4.** Add the View Approval button to the layout.

**a.** In your layout, go to **Header Buttons** and add a new button.

**b.** Label it **View Approval** or a label of your choice.

**c.** In **Button Properties**, enable the **Event Button** toggle, then in the **Event** field select **View Approval**.

**d.** Enable the **UI Effect Button** toggle, then set the UI effect properties:

- Set **UI Effect Type** to **Approvals**.
- Set **UI Effect Target** to **Modal** or **Slideout**.
- Set **Mode** to **Status**.

**e.** Select **Save**.

The View Approval button appears after an approval is initiated and opens the embedded approval component in Status mode.

Configure the stage transitions for the action events. The Request Approval, Approve Approval, and Cancel Approval events are fired automatically by the embedded SN component when the seller or approver takes an action. Each event runs *txn.approval.getState*—a

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built-in integration that fetches the current approval state from ServiceNow—and updates the *txn.approvalState* field. No layout button is needed for these events.

5. Configure the stage transition for the Request Approval event (*txn.approval.request*).

   This event is triggered when the seller selects **Request Approval** inside the embedded SN component.

   a. Navigate to **Transaction** > **Events**.
   b. Open the Request Approval event (*txn.approval.request*).
   c. Scroll to the **Stage Transition** section.
   d. Enable the **Transition after actions** toggle.
   e. Set **After all actions run, transition to forward**.
   f. Select **Add New Action**.
   g. To add rule group to an event, select the **Rule grouping** and then assign the **txn.approval.submission** rule grouping.
   h. Select **Save**.

   **Tip:** If your stage sequence differs from the default, verify the forward transition points to the correct next stage. You can also add a Rule Grouping action on this event if additional rules need to run at submission time.

   When a seller submits a request, the transaction moves forward to the Pending Approval stage.

6. Configure the stage transition for the Approve Approval event (*txn.approval.approve*).

   This event is triggered when all required approvers approve the request, either inside the embedded SN component or by email. It updates *txn.approvalState* to approved.

   a. Open the Approve Approval event (*txn.approval.approve*).
   b. Scroll to the **Stage Transition** section.
   c. Enable the **Transition after actions** toggle.
   d. Set **After all actions run, transition to forward**.
   e. Select **Add New Action**.
   f. To add rule group to an event, select the **Rule grouping** and then assign the **txn.approval.completion** rule grouping.
   g. Select **Save**.

   **Tip:** If you have additional stages between Pending Approval and Approved, verify the forward transition lands on the correct destination. Entry criteria on the Approved stage validates the state before allowing entry regardless.

   When all approvers approve, the transaction moves forward to the Approved stage.

7. Configure the stage transition for the Cancel Approval event (*txn.approval.cancel*).

   This event is triggered when the seller selects **Recall** inside the embedded SN component (Status mode), or when an approver rejects the request, ending the approval cycle. It updates *txn.approvalState* to recalled or rejected accordingly.

   a. Open the Cancel Approval event (*txn.approval.cancel*).
   b. Scroll to the **Stage Transition** section.
   c. Enable the **Transition after actions** toggle.

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d. Set **After all actions run, transition to backward**.

e. Set **If available from current stage, go back to Draft**.

f. Select **Add New Action**.

g. To add rule group to an event, select the **Rule grouping** and then assign the **txn.approval.revision** rule grouping.

h. Select **Save**.

**Tip:** If you want the transaction to return to a different stage on recall or rejection—for example, a dedicated Rejected stage rather than Draft—change the target stage here and verify that stage exists in your blueprint with appropriate entry criteria.

On recall or rejection, the transaction returns to the Draft stage so the seller can make changes and resubmit.

## Result

All five approval events are configured. The Preview and View buttons appear in the layout according to the approval state, and each action event moves the transaction to the correct stage.

## What to do next

Configure the stages and entry criteria that validate each approval state transition. For more information, see Configure stages and entry criteria.

### Configure stages and entry criteria

Configure the stages and entry criteria that validate each approval state transition, ensuring a transaction can enter a stage only when its approval state confirms it belongs there.

## Before you begin

Role required: admin or sn_adv_appr_mgmt.approval_rule_admin

Configure the approval events and their stage transitions. For more information, see Configure approval events.

## About this task

Stage entry criteria act as the validation gate for each approval state transition. When an action event fires and updates txn.approvalState, the stage transition configured on that event attempts to move the transaction. The destination stage accepts the transaction only if its entry criteria conditions are met—ensuring the transaction cannot enter a stage unless the approval state confirms it belongs there. Rule groups are assigned to events to run the appropriate approval validation rules each time an event is triggered. For more information, see Configure approval events.

Stages are fully customizable and managed by your admin. You can create as many stages as your process requires and name them as needed. This guide uses the following example structure: Draft → Pending Approval → Approved → Completed.

#### Example stage configuration

| Stage | Entry criteria (txn.approvalState) |
|---|---|
| Draft | None (initial stage) |
| Pending Approval | Equals requested |
| Approved | Equals approved |

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**Example stage configuration (continued)**

| Stage | Entry criteria (txn.approvalState) |
|---|---|
| Completed | Per your process |

## Procedure

1. Navigate to **All** > **CPQ Administration** > **Transaction** > **Stages**.
   The Stages list opens.
2. Create or confirm your stages, then configure each one with its entry criteria.
   For the example structure, ensure the following stages are present: Draft, Pending Approval, Approved, and Completed. Configure each stage and its associated event as described in the following substeps.

   a. Configure the Draft stage and assign the **Cancel Approval** event (txn.approval.revision) and then select **Save**.
   No entry criteria are required because the Draft stage is the initial stage. The Draft stage is the starting point and the stage a transaction returns to after a recall or rejection. The Approval Revision rule group is assigned to the Cancel Approval event so that the correct validation rules run whenever that event fires and returns the transaction to Draft.

   > **Tip:** If you have chosen a different stage as the recall or rejection destination, point the Cancel Approval event's stage transition at that stage. The Approval Revision rule group remains on the event.

   b. Configure the Pending Approval stage.

      i. Open the stage.

      ii. Set **Allow Entry When** to **All Conditions Are Met** with the condition Approval State (txn.approvalState) Equals requested.

      iii. Assign the **Request Approval** event (txn.approval.submission) on the stage.

      iv. Select **Save**.

      The transaction enters this stage after the seller submits a request for approval. The entry criteria validates that txn.approvalState has been set to requested by the Request Approval event before allowing entry—preventing a transaction from being manually moved to this stage without a legitimate approval request in flight. The Approval Submission rule group is assigned to the Request Approval event so its validation rules run when the event fires.

      > **Tip:** Set this entry condition on whichever stage you designated as the submission destination in the Request Approval event transition, and keep the Approval Submission rule group on the event. You can also add further entry conditions here if your process requires additional validation before an approval request can proceed.

   c. Configure the Approved stage.

      i. Open the stage.

      ii. Set **Allow Entry When** to **All Conditions Are Met** with the condition **Approval State** (*txn.approvalState*) **Equals approved**.

      iii. Assign the **Approve Approval** event (*txn.approval.completion*) on the stage.

      iv. Select **Save**.

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The transaction enters this stage after all required approvers have approved. The entry criteria validates that txn.approvalState has been set to approved by the Approve Approval event. The Approval Completion rule group is assigned to the Approve Approval event so its validation rules run on the event fires.

**Tip:** Set this entry condition on whichever stage you designated as the approval completion destination in the Approve Approval event transition, and keep the Approval Completion rule group on the event.

Each stage accepts a transaction only when its entry criteria are met, and the assigned rule group runs its validation rules each time the stage is entered.

### Result

The approval stages are configured with entry criteria and rule groups. Each stage accepts a transaction only when the approval state confirms it belongs there, and the appropriate validation rules run on entry.

### What to do next

After approvals are configured, end users can submit approval requests using the approval interface. For user-facing tasks, see Submit a quote for approval and Review and approve a submitted quote.

## Create an approval configuration

Create an approval configuration for a Sales Customer Relationship Management entity, such as quotes.

### Before you begin

Role required: sn_adv_appr_mgmt.approval_rule_admin or sn_adv_appr_mgmt.approval_rule_writer

### About this task

An approval configuration is a container for the workflow elements that you define for a specified entity, such as the conditions that trigger approval workflows for related approval rules. You can also enable certain features for the configuration:

- **Allow email consolidation**: Option that consolidates multiple, separate approval request emails for the same approver (or group) into a single approval request email, instead of sending multiple individual approval request emails. Consolidated email approval requests are held until the final relevant approval sequence for that approver is ready. The approval engine then routes the consolidated request to the approver (or group).
- **Escalations**: Enable escalations, which is a mechanism for reassigning an approval request to another approver when the original approver does not take action within a defined time. If you enable this feature, you also define the escalation details in approval rules, such as the escalation assignee and length of time allowed for approval completion before the request is reassigned.
- **Auto reminders for approval tasks**: Option that enables approval reminder notifications to be sent automatically to approvers, based on a reminder schedule that you set.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Advanced Approvals** > **All Approval Configurations**.
4. Select **New**.

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On the Approval Configuration form, fill in the fields to create a configuration for an entity, such as quotes. For field descriptions, see the Approval Configuration form.

5. Select **Save**.
   The approval configuration for the specified entity is created.

> **Note:** A Sales Customer Relationship Management entity can have only one approval configuration.

### What to do next
Create conditions that trigger approval workflows

#### Create conditions that trigger approval workflows

Define one or more conditions that apply company policies, such as legal guidelines or pricing rules, to trigger an approval workflow. Also enable the smart reapprovals feature, which allows previous approvals to be used for a resubmitted approval.

### Before you begin
Before creating conditions, consider the business thresholds that determine when an approval is required, such as a certain discount percentage for quote line items or a minimum deal size amount.

Verify that you have the associated items (fields) that represent the business thresholds in the entity table for the approval configuration, such as the Quote [sn_quote_mgmt_core_quote] table or through dynamic attributes defined in a Dynamic Schema. For more information on dynamic attributes, see Dynamic Schema.

Role required: sn_adv_appr_mgmt.approval_rule_admin, sn_adv_appr_mgmt.approval_rule_writer

> **Note:** If you have the admin role, you can use scripts to specify approval conditions if the **Advanced condition** option is turned on. Only users with the admin role can enter scripted conditions.

### About this task
Use conditions to define company policies or guidelines for certain functional areas such as finance or legal departments. The advanced approval engine evaluates these conditions and if applicable, triggers the appropriate approval workflow.

Conditions are based on attributes for a Sales Customer Relationship Management entity or dynamic attributes defined in a Dynamic Schema. For example, quote attributes are derived from the Quote [sn_quote_mgmt_core_quote] table and can include items such as discount percentage, total quote value (ACV or ARR), total margin, payment terms, contract term length, country or geographic location, currency, product SKUs, customer risk flags, ramp pricing indicators, and custom fields.

> **Note:** If you have the admin role, you can turn on the **Advanced condition** option to specify trigger conditions using scripts. If you use the advanced condition feature, you can't enter conditions using the condition builder.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to **Advanced Approvals** > **Approval Trigger Conditions**.
4. In the **Name** field, enter the name for the conditions that trigger an approval.

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For example, if you want to trigger approvals for quotes that have low margins, you might name the condition `Low Margin Quote`.

5. In **Approval configuration**, select the configuration for the Sales and Order Management entity, such as Quote.
   The Condition section opens for adding trigger conditions.
6. If you don't want the trigger condition to be active, unselect the **Active** field.
   By default, the trigger condition is Active.
7. In the Condition section, add one or more conditions that must be met to trigger approvals.
   Specify a condition by selecting the **Field** and **Operator**, and entering a value for the operator.
   For example, you can specify a condition that requires approvals when the discount for a quote line item is 20% or higher: *`[Discount percentage] [greater than or is] [20]`*

   For basic information on setting conditions, see Condition builder. For more information on the available operators, see Operators available for filters and queries.
8. If you have the admin role and want to specify trigger conditions using scripts, turn on the **Advanced condition** field.
   The Condition section is replaced by the following fields for entering scripted conditions:
   - **Description**: Enter the name of the scripted condition.
   - **Scripted condition**: Use the JavaScript Syntax Editor to enter the script with the trigger conditions.
9. For approval resubmissions, indicate whether approvals granted previously for an approval request can be used by selecting **Smart re-approval**.
   The Smart condition section opens for specifying any conditions that must be met for previous approvals to be reused for resubmitted approval requests.
10. In the Smart condition section, add one or more conditions for Smart approval resubmissions that must be met to control whether previous approvals can be reused for the approval request.
    For example, you could specify a condition that reapproval is required only if the discount increases by more than 2% from the last approved value.
11. If you have the admin role and want to specify trigger smart conditions using scripts instead of using the condition builder, turn on the **Advanced condition** field.
    The Smart condition section is replaced by the following fields for entering scripted conditions:
    - **Description**: Enter the name of the scripted condition for Smart re-approvals.
    - **Scripted condition**: Use the JavaScript Syntax Editor to enter the script with the conditions for the re-approvals.
12. Select **Save**.

### What to do next

Create approval rules.

## Create approval rules

Define rules for approval workflows. An approval rule identifies the functional approver for the workflow, such as a Finance Manager or Operations Manager. The rule also associates approvers with the appropriate approval trigger conditions, and defines escalation details for reassigning approvals to another approver for the rule.

### Before you begin

Role required: sn_adv_appr_mgmt.approval_rule_admin or sn_adv_appr_mgmt.approval_rule_writer

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**Note:** To use the **Advanced rule** option to define the functional approver using a script, you must have the admin role.

### About this task

Approval rules define the approvers for the rule, associate the trigger conditions to the rule, and provide escalation rules for the rule if escalations are enabled in your configuration. The escalation feature enables you to reassign an approval request to another approver when the original approver does not approve or reject a request within a timeframe that you define.

**Note:** If you have the admin role, you can use a script to identify the functional approver for the rule. For details, see the Create Approval Rule form.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Advanced Approvals** > **Approval Rules**.
4. Select **New**.
5. On the Create New Approval Rule form, fill in the fields.
   For field descriptions, see Create Approval Rule form.
6. Select **Save**.

### Result

The approval rule, when used in an approval workflow, is depicted as a step (card) in the workflow interface. The card provides details of the rule and approvers in the approval step. You can also review the steps in an approval configuration by navigating to **Advanced Approvals** > **Approval Steps** in the workspace.

### What to do next

Create approval chains (optional).

## Create approval chains

Optionally create approval chains that control the sequence in which two or more approval rules (steps) are run.

### Before you begin

Role required: sn_adv_appr_mgmt.approval_rule_admin, sn_adv_appr_mgmt.approval_rule_writer

### About this task

Use chains to control the execution of approval steps that are run based on the approval rule order:

- Within a chain, steps run sequentially.
- Across chains, chains can run sequentially or in parallel, based on the chain order value. Chains with the same order value run in parallel.
- If you don't define chains, approval rules run in parallel.

### Procedure

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

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3. Navigate to **Advanced Approvals** > **Approval Chain**.
4. Select **New**.
5. Enter the **Name** of the approval chain.
6. Enter the **Order** in which the approval chain is to be run.
   For example, entering 1 as the **Order** indicates that this chain is run first in the approval workflow sequence.
7. Select the **Approval configuration** that identifies the Sales Customer Relationship Management entity for the approval workflows, such as Quote.

### Define an approval user

Define an approver in Advanced Approval Management and the associated approval rule that they review during the approval process.

#### Before you begin

Create the approval rule to be associated with the approver.

Role required: sn_adv_appr_mgmt.approval_rule_admin, sn_adv_appr_mgmt.approval_rule_writer

#### About this task

An approval user is a user of your instance as defined in the User [sys_user] table. An approval user can be a dynamic approver, who can approve requests based on certain conditions that you set. For example, a dynamic user could be a user tied to a particular territory or a manager based on your organization's hierarchy.

#### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Advanced Approvals** > **Approval Users**.
4. Select **New**.
5. In the **Approval rule** field, select the approval rule associated with the approver user.
6. In the **User** field, select the user who is the approver for the specified approval rule.

   **Note:** Approval users must have the sn_adv_appr_mgmt.approval_request_approver role assigned to them.

7. Select **Save**.

#### What to do next

Define an approval group.

### Define an approval group

Define the approval group, such as a contract or finance group, and the associated approval rule that they review during the approval process.

#### Before you begin

Define the approval rule associated with this approval group.

Groups are set up in the Group [sys_user] table. For more information on creating groups, see Create a user group.

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Role required: sn_adv_appr_mgmt.approval_rule_admin, sn_adv_appr_mgmt.approval_rule_writer

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Advanced Approvals** > **Approval Groups**.
4. Select **New**.
5. In the **Approval rule** field, select the approval rule associated with the approver.
6. In the **Group** field, select the group who approves the approval step controlled by the selected approval rule.

   **Note:** The members of the group must have the sn_adv_appr_mgmt.approval_request_approver role assigned to them.

7. Select **Save**.

## Override an approver

Override the approver in an approval step if the approval is no longer required, to help prevent the approval workflow from being blocked.

### Before you begin

Role required: approval_admin (platform role) and sn_adv_appr_mgmt.approval_request_writer

### About this task

As an approval admin with the approval request writer role, use this procedure to bypass or override the approver in an approval step that is no longer needed. The approval step must be in the Requested state.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the ☰ List icon.
3. Navigate to the approval request.
   Access the request by navigating to the transaction entity and selecting the Approvals tab for the transaction. For example, navigate to **Quotes** > **All**, select the quote, and select the Approvals tab to open the approval workflow.
4. In the approval step card, select the More options menu and select **Override**.
5. In the Override approval dialog box, select **Approve** or **Reject** in the **Approval decision** field.

   a. If you select **Approve**, enter a comment and select **Submit**.
   The step record is updated and the workflow advances to the next step, which is in a requested state.

   b. If you select **Reject**, enter a comment explaining the reason for rejection and select **Submit**.
   The step record is updated and the step state changes to Canceled, and the workflow stops. A rejection notification is sent to the requester, to change the approval request as needed and resubmit.

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### Notifications in Advanced Approval Management

In Advanced Approval Management, as an approval request moves through the approval process, notifications about the status of the approval request are sent automatically to approval requesters and approvers.

## Overview of approval notifications

The notification framework handles various approval scenarios in the approval process, including approvals for simple or consolidated approval requests, approval reminders, escalations, and approval overrides. The following system notifications are automatically activated with Advanced Approval Management:

- Advanced Approval Request
- Approval Reminder
- Approval Escalation
- Approval Request for Override
- Notify approval req requester
- Notify approval req approvers

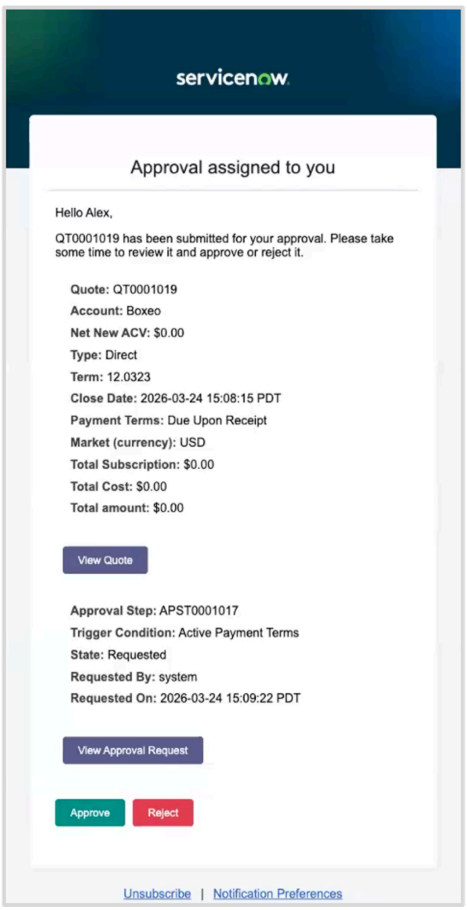
#### Advanced Approval Request notifications

The Advanced Approval Request notification informs approvers when an approval request has been submitted by a sales agent (requester). There are two types of approval request notifications: simple and consolidated.

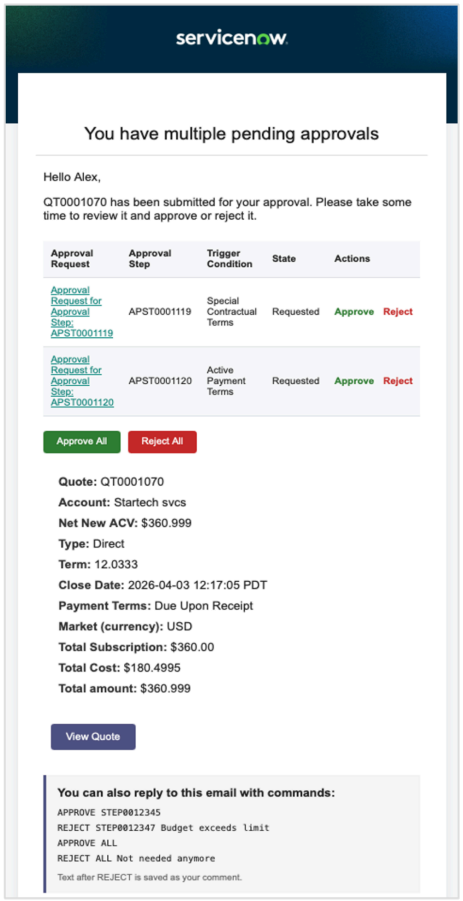
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### Approval request notification examples

Simple approval notification




Consolidated approval notification




- Simple approvals: A notification is sent to each approver when an approval request is submitted, as shown in the following example. The approver can approve or reject the approval request from the notification.

  **Note:** Ad-hoc approvers receive a simple approval notification and can approve or reject the request from the notification. Ad-hoc approvers can also approve or reject a request from a step in the General chain in the approval workflow interface. For more information on configuring ad-hoc approvers, see Add ad-hoc approvers to an approval request.

- Consolidated approvals: When an approver receives multiple approval requests for approvals within the same set of approvals, the system can consolidate those requests into a single notification email, if your approval rules admin has turned on the email consolidation feature in your approval configuration.

  An approver can use the links in the consolidated notification to accept or reject requests individually or approve all or reject all requests. Approvers can also reply to the consolidation email and use reply-based commands to approve or reject individual requests or all requests. When approvers approve or reject a request, the body of the reply notification is prefilled, indicating approval or the reason for rejection.

Both simple and consolidated approval emails are handled through a single notification definition, with different rendering logic used to generate the

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appropriate message format. These approval request emails can be delivered as mobile push notifications, if approvers are using the ServiceNow Mobile app, and Advanced Approval push notifications is set as a push notification channel in their notification preferences.

**Note:** Ad-hoc approvers receive a simple approval notification. Or they can approve or reject a request from a step in the General chain in the approval workflow interface. For more information on ad-hoc approvers, see Add ad-hoc approvers to an approval request.

**Approval Reminder**

Approval Reminder notifications are sent to approvers automatically when the **Send auto reminders** and **Reminder schedule** features are set in the approval configuration by your approval rule admin. Each reminder is a separate email and is sent at the time specified in the reminder schedule, which is triggered by a scheduled job.

The system generates the first reminder, subsequent reminders, and a final reminder that could lead to escalation, if the escalation feature is set for the approval configuration. For details on setting approval reminders, see Create an approval configuration.

**Approval Escalation**

If the escalation feature is enabled in your approval configuration, an Approval Escalation notification is sent to an approver when they do not act on an approval request within the scheduled timeframe. The notification indicates that the approver no longer needs to approve the final request. Escalation assignees also receive an escalation notification from which they can accept or reject the request.

**Approval Request for Overrides**

With overrides, an approval admin for the ServiceNowAI platform who also has the requester role can approve or reject an approval request on behalf of other approvers. For example, the approval admin might need to unblock an approval step when the step is no longer needed. The approval admin uses the **Override** option in the step card in the approval workflow interface.

When an override occurs, original approvers receive a notification stating that their action is no longer required because the approval was overridden. For more information on overrides, see Override an approver.

**Notify approval request approvers**

When a requester recalls an approval request, the Notify approval request notification informs approvers that the approval request has been recalled.

**Notify approval request requester**

When changes in the state of an approval request occur, the Notify approval request notification informs requesters when the state changes to approved, rejected, or recalled.

## Notification prerequisites

For successful delivery of advanced approval notifications to approvers and requesters, verify that certain notification properties and notification preferences are set.

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- As an admin, do the following:
  - Enable the email sending (Outbound Email Configuration) and email receiving (Inbound Email Configuration) properties. For information on setting these properties, see Email properties.
  - Consider reviewing the default notifications for Advanced Approval Management by navigating to **All** > **Notifications** > **System Notifications** and filter the list by Advanced Approval Management.

    For example, if you want to control conditions for sending a notification, review the conditions in the **When to send** related list for a notification. If you want to change content in a notification, review the associated email template for the notification. To learn more, see Email and SMS notifications.
- As approvers and requesters, verify that you're receiving the default system notifications in the Advanced Approvals notification category and that the notifications are being delivered using your preferred channels.

  For example, if you're an approver and you want Advanced Approval Request notifications to be delivered as push notifications on the Now® Mobile application, verify that push notifications are set up as a channel preference for the Advanced Approval Request notification.

  To learn more about managing notification categories and setting notification preferences and channels, see Exploring preferences.

**Related topics**

Configuring Advanced Approval Management

Create an approval configuration

Email properties

Email and SMS notifications

Components installed with Advanced Approval Management

Configuring ServiceNow Quote Experience

### Configure granular delegation rules for an approver

Set up delegation rules that enable an approver in Advanced Approval Management to assign a delegate who can accept or reject approval requests on behalf of the approver.

## Before you begin

The Granular Delegation (com.glide.granular_service_delegation) application must be installed and configured on your instance.

Set the application scope in your instance to Advanced Approval Management.

Role required: admin or delegation_admin

## About this task

As an admin, setting up granular delegation involves identifying the advanced approval records to which a delegation rule applies. You then specify the conditions that identify the type of approvals that can be delegated and the users who can approve or reject delegated approval tasks.

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### Procedure

1. Navigate to **All** > **Granular Delegation** > **Delegation Rule Tables**.
2. Select **New** to specify the Advanced Approval Management table that defines the approval steps for which the delegate will be an approver.
   Fill in the form.
   a. In the **Table** field, select the Approval Step [sn_adv_appr_mgmt_approval_step] table.
   b. Turn on the **Active** field.
   c. Select **Submit**.
3. Navigate to **All** > **Granular Delegation** > **Delegation Rules**.
4. Select **New** to define the delegation rule that identifies the approver for whom the delegate will replace.
   a. In the **Name** field, enter the functional role, for example `Sales manager`.
   b. Enter the conditions that determine the role for which delegation occurs in the Approval Step [sn_adv_appr_mgmt_approval_step] table.

      **Example**
      For example, you can specify delegation for the Sales Manager by specifying the condition **[Approval rule] [is] [Sales Manager]**.

   c. Turn on the **Approvals** field and the **Assignments** field.
   d. Select **Submit**.
      The **Short description** field is automatically populated, identifying the delegation for the Approval Step table and the conditions you entered.
5. Create the new delegate to define the employee who will be the delegate for the approver.
   For details on defining the delegate see, Create a delegate. You specify the employee who will serve as the delegate, the start and end dates for delegation, and other options, such as the option to send the delegate a copy of the notifications that the approver receives.

### Result

After setting up the delegation capability for an approver, the approver can delegate advanced approval requests to another employee by using Employee Center, if both the approver and delegate use Employee Center. For information on delegating tasks to another employee, see Delegate on-demand tasks.

## Configuring Advanced Approval Management AI

Install and set up the Advanced Approval Management AI application, which enables advanced approval users to manage quote approvals by using an MCP-compatible client such as Claude.

## Configuration overview

1. Install Advanced Approval Management AI.
2. Connect Sales CRM server to an AI assistant.

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### Install Advanced Approval Management AI

You can install the Advanced Approval Management AI application (sn_adv_apr_mgt_ai) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they're not already installed.

## Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Advanced Approval Management AI application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

## About this task

The MCP tools for Advanced Approval Management AI are installed with Advanced Approval Management AI:

For more information on the MCP tools installed, see Components installed with Advanced Approval Management AI.

## Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Advanced Approval Management AI application (sn_adv_apr_mgt_ai) 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.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

## What to do next

- Assign the MCP-related roles to your requesters and approvers. For information on the MCP roles available, see Components installed with MCP Server Console.
- Verify that your MCP server is connected to an MCP client. For more information, see Connect to an MCP server from an MCP client.

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### Connect Sales CRM server to an AI assistant

Connect the Sales CRM server to an AI assistant so that the assistant can manage advanced approval tasks directly from your ServiceNow instance.

#### Before you begin

- The Advanced Approval Management AI application is installed. For details, see Install Advanced Approval Management AI.
- Confirm that the Sales CRM server is enabled on your instance by navigating to **All** > **MCP Server Console**. The Sales CRM server must be Active. If you don't see the server or want to create another MCP server, see Create a Model Context Protocol server.
- Confirm that the Advanced Approval Management AI tools are enabled on your instance by navigating to **All** > **MCP Server Console** > **Tools**. The following MCP tools must be Active (set to True):
  - Approver Actions
  - Get Approval Details
  - Get Pending Approvals List
  - Get Quote Details (this is an MCP tool for Quote Management)
  - Requester Actions

Role required: admin or sn_mcp_server.admin

#### Procedure

Connect the Sales CRM server to your AI assistant.
For instructions, see Connecting to an MCP server from an MCP client.

## Configure Customer Contracts and Entitlements

Use the Customer Contracts and Entitlements application to configure and display customer contracts and entitlements.

## Activate Customer Contracts and Entitlements

As an admin, you can activate the following plugins to enable users to create and manage Customer Contracts and Entitlements. For more information, see Activate a plugin.

**Customer Contracts and Entitlements plugins**

| Plugin | Description | Dependency |
|---|---|---|
| Customer Contracts and Entitlements<br><br>[com.sn_pss_core] | Provides foundational objects to manage Customer Contracts and Entitlements and APIs for integration. | • Customer Service Install Base Management<br><br>[com.snc.install_base]<br><br>• Product Catalog Management Core<br><br>[com.sn.prd_pm] |
| Entitlements Verification | Provides APIs to verify entitlement. | Customer Contracts and Entitlements |

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**Customer Contracts and Entitlements plugins (continued)**

| Plugin | Description | Dependency |
|---|---|---|
| [com.sn_ent_verify] | | [com.sn_pss_core] |
| Contracts and Entitlement Workflows<br>[com.sn_contract_ent_wf] | Provides workflows to manage changes on Customer Contracts and Entitlements. | • Customer Contracts and Entitlements Foundation<br>[com.sn_pss_core]<br>• Lead to Cash Primitives<br>[com.sn_l2c_core]<br>• Customer Life Cycle Management Workflows<br>[com.sn_l2c_cust_flows] |

With the activation of Customer Contracts and Entitlements, the existing contracts are available for viewing only.

For more information on the installed roles and tables, see Components installed with Customer Contracts and Entitlements.

## Request apps from the ServiceNow Store

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

### Components installed with Customer Contracts and Entitlements

Several types of components are installed with the Customer Contracts and Entitlements application, including tables and roles.

The following roles are added with the activation of the Customer Contracts and Entitlements plugins.

**Roles installed**

| Role | Description | Contains role | Targeted per |
|---|---|---|---|
| sn_pss_core.service_contract_viewer<br>Service contract viewer | Performs read operation on:<br>• customer contracts<br>• Contract lines<br>• Entitlements<br>• Characteristics<br>• Entitlement usages | • sn_prd_pm.characteristics_viewer<br>Characteristic viewer<br>• sn_prd_pm.product_catalog_viewer<br>Product catalog viewer | • sn_custor<br>Consume<br>• sn_custor<br>Customer<br>• sn_custor<br>Customer |

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**Roles installed (continued)**

| Role | Description | Contains role | Targeted per |
|---|---|---|---|
| sn_pss_core.service_contract_manager<br><br>Service contract manager | Performs create/ read/update operations on:<br>• Customer contracts<br>• Contract lines<br>• Entitlements<br>• Characteristics<br>• Entitlement usages | sn_pss_core.service_contract_viewer<br><br>Service contract viewer | sn_custome<br><br>CSM Manag |
| sn_pss_core.pss_integrator<br><br>Integration user | Performs create/ read operations by using rest endpoints on customer contracts and entitlements. | sn_customerservice.manager<br><br>CSM Manager | sn_pss_core<br><br>Integration U |

The following tables are added with the activation of the Customer Contracts and Entitlements application.

**Tables installed**

| Table name | Description |
|---|---|
| Characteristics<br><br>[sn_pss_core_entitlement_characteristic] | Stores the characteristic values for entitlements or customer contract lines. |
| Entitlement Usage<br><br>[sn_pss_core_contract_entitlement_usage] | Stores the values used by end customers for entitlement characteristics. |
| Service Contract<br><br>[sn_pss_core_service_contract] | Stores runtime contracts. |
| Service Contract Line<br><br>[sn_pss_core_service_contract_line] | Stores the runtime contract lines like a service plan. |

You can assign roles to users and groups using the ServiceNow AI Platform user administration features. For more information, see:

- Assign a role to a user
- Assign a role to a group

The default view on customer contracts and entitlements in Customer Service Management workspace is Service Contract Workspace view. It can be changed by an administrator.

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### Configuring Contracts and Entitlement Workflows

Configure the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf) to generate and modify contracts using order management.

As an admin, you can activate the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf). For more information, see Activate a plugin.

The following plugins are prerequisites for activating the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf):

#### Required plugins

| Plugin | Description |
|---|---|
| Product Configuration UI (com.sn_prd_config_ui) | Graphical interface that enables to configure complex products or services according to specific needs and requirements. |
| Order Management (com.sn_ind_tmt_orm) | Captures, enhances, and oversees the complete life cycle of the product and customer orders. With this plugin, you can efficiently handle the order orchestration, data enrichment, and composition to ensure an accurate and timely fulfillment. |

After installing the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf), the following plugins are automatically installed:

#### Dependent plugins

| Plugin | Description |
|---|---|
| Customer Contracts and Entitlements (com.sn_pss_core) | Provides foundational objects to manage customer contracts and entitlements. |
| Lead to Cash Core (com.snc.l2c_core) | Enables customers to compose Sales CRM flows. |
| Customer Life Cycle Management Workflows (com.snc.l2c_cust_flows) | Provides workflows to manage the life cycles of sold products and install base items. |

### Creating contracts and entitlements using workflows

After a product offer is selected by the customer and the product is sold to the customer, this workflow creates contracts and entitlements based on the services associated with that sold product and the extra services that the customer has purchased.

There are the product offering scenarios and their configurations.

#### Offering types and workflows

| Offering types | Description |
|---|---|
| Offers for entitlements | The workflow creates entitlement records for such offerings. These entitlements can be associated with existing sold products, install base items, product inventory records, or the customer. |
| Offers for services (contract lines) | The workflow enables automatic creation of a customer contract, customer contract lines, and the entitlements for those contract lines. |

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**Offering types and workflows (continued)**

| Offering types | Description |
|---|---|
| Implicit offerings | Implicit entitlements and customer contract lines are not shown on order lines. These offers can be marked as implicit when they do not need to be configured while capturing the order and are available as part of a package. These entitlements and customer contract lines are automatically created as a part of this workflow. |

## Creating a contract from an order

For every order with multiple product offerings, a single contract with multiple contract lines is created. As part of the order processing, a sold product is generated for every order line.

## Creating contracts from product inventory records

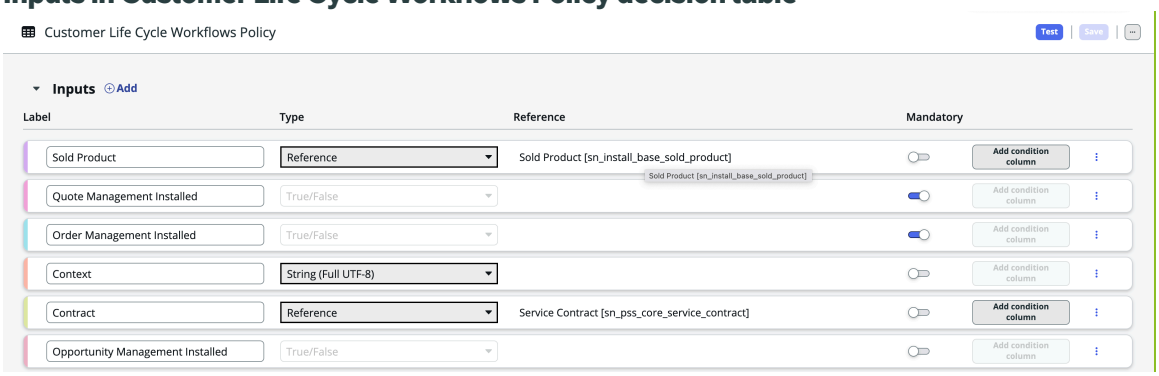
If the system property sn_ind_tmt_orm.enable_prod_invt_for_order_management is set to true, order fulfillment workflows create product inventories based on customer orders, product offerings and specifications. On creation of a product inventory, contract lines and entitlements will be created. When a product inventory undergoes a state change, the associated contract lines and entitlements are synced. For more information, see Product inventory configurations. Product inventory records trigger updates to contracts and entitlements under the following conditions:

- Process Telecom Order Line flow: The ADD flow creates contract and entitlement records from the product inventory. The MODIFY flow updates the states of the contract line items and entitlements.
- Post Process Telecom Top Domain Order flow: The MODIFY flow updates the states, fields, and characteristics for contract line items and entitlements.
- Product Inventory Operations record: Depending on the scheduled date and time, the DISCONNECT, RESUME, and SUSPEND flows cancels, activates, or suspends the contract line items and entitlements.

## Configuring Customer Life Cycle Workflows Policy decision table

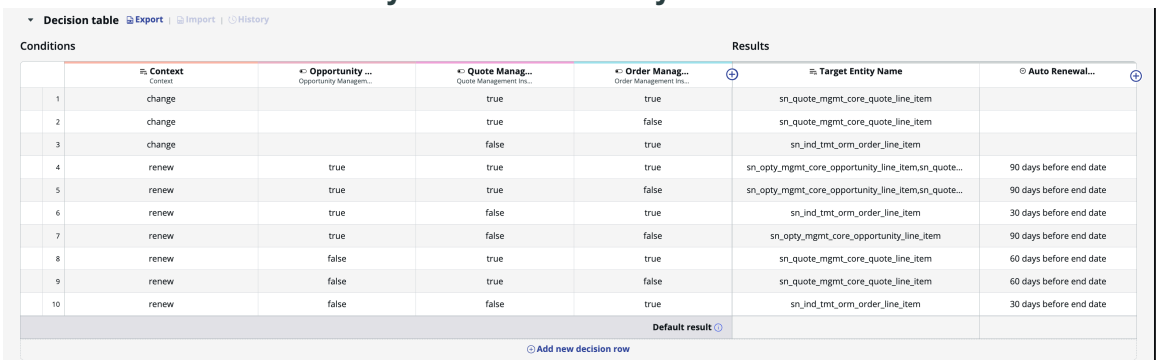
Customer Life Cycle Workflows Policy decision table decides the target entity while renewing and modifying customer contracts, customer contract lines, and entitlements. Based on this decision table, you can create a quote, an order, an opportunity, or an opportunity and a quote together while renewing or modifying a customer contract. For a target entity, you can also select when you want to initiate the renewal of the customer contract.

### Inputs in Customer Life Cycle Workflows Policy decision table




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### Conditions in Customer Life Cycle Workflows Policy decision table



Decision table Export | Import | History

Conditions | Results

| | Context | Opportunity ... | Quote Manag... | Order Manag... | Target Entity Name | Auto Renewal... |
|---|---|---|---|---|---|---|
| 1 | change | | true | true | sn_quote_mgmt_core_quote_line_item | |
| 2 | change | | true | false | sn_quote_mgmt_core_quote_line_item | |
| 3 | change | | false | true | sn_ind_tmt_orm_order_line_item | |
| 4 | renew | true | true | true | sn_opty_mgmt_core_opportunity_line_item,sn_quote... | 90 days before end date |
| 5 | renew | true | true | false | sn_opty_mgmt_core_opportunity_line_item,sn_quote... | 90 days before end date |
| 6 | renew | true | false | true | sn_ind_tmt_orm_order_line_item | 30 days before end date |
| 7 | renew | true | false | false | sn_opty_mgmt_core_opportunity_line_item | 90 days before end date |
| 8 | renew | false | true | true | sn_quote_mgmt_core_quote_line_item | 60 days before end date |
| 9 | renew | false | true | false | sn_quote_mgmt_core_quote_line_item | 60 days before end date |
| 10 | renew | false | false | true | sn_ind_tmt_orm_order_line_item | 30 days before end date |
| | | | | Default result | | |

Add new decision row

You can configure rules based on the six available input parameters to a required target entity while renewing and modifying contracts. Select the following values in the Target Entity Name column to create the corresponding target entities.

https://player.vimeo.com/video/1143586505?h=0a306a1773&badge=0&autopause=0&player_id=0&app_id=58479

#### Values of target entities

| Value | Target Entity |
|---|---|
| `sn_ind_tmt_orm_order_line_item` | Order |
| `sn_quote_mgmt_core_quote_line_item` | Quote |
| `sn_opty_mgmt_core_opportunity_line_item` | Opportunity<br><br>**Note:** You cannot create opportunities for modifying process. |
| `sn_quote_mgmt_core_quote_line_item,sn_opty_mgmt_core_opportunity_line_item` | Opportunity and quote together<br><br>**Note:** You cannot create opportunities and quotes for modifying process. |

**Note:** To create an opportunity or opportunity and quote together during renewal, the admin needs to set up the following records:

- Sales Cycle Type: In the Code field, enter **RENEW** and set the Active option to **True**. For more info, see Create a sales cycle for an opportunity.
- Opportunity Stage: In the Name field, enter **Develop** and set the Active option to **True**. For more info, see Create opportunity stages.

If the user selects an opportunity and a quote as target entities, a renewal opportunity and a quote is created. The opportunity and the quote are associated to each other.

For any target entity, select one of the following options in the Auto Renewal Initiation column to indicate when you want to automatically renew the contract: 90, 60, 30 days before contract end date or on the contract creation date. For target entity as opportunity and quote together, you can also select the following options to create the renewed opportunity and quote on separate dates:

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- With contract, 12 months before end date respectively: Opportunity is auto renewed on the contract creation date and the quote is renewed 12 months before the contract expiry date.
- 90, 90 days before end date respectively: Opportunity and quote both are renewed 90 days before the contract expiry date.

### Setting up the Customer Contracts and Entitlements application

Configure the features and components of Customer Contracts and Entitlements to enable a seamless, end-to-end service experience including after sales services for your customers.

As a user with the admin role, you can set up the Customer Contracts and Entitlements application to enable users to create entitlements and customer contracts for users.

| Task | Description |
|---|---|
| Create a characteristic | Create a characteristic to add to an entitlement. A characteristic refers to the specific attributes or properties that define the entitlement. |
| Create a user | Add a user to your instance to enable them to log in and use designated application features. After adding the user, you make them approver to review customer contracts. |
| Assign a role to a user | Assign roles to users. Use this feature to grant the sn_customerservice_manager (CSM manager) role to a newly added user and authorize them to make an informed judgment to review a customer contract. |
| Create customer accounts<br>**Note:** On the Accounts form, to view the customer contracts, remove the contract-related lists and configure the customer contracts related list. | Create an account and associate it to a customer contract. |
| Create a consumer record | Create a consumer record in Customer Service Management. A consumer can be associated with a customer contract in the Customer Contracts and Entitlements application. |
| Create a sold product | Create a record for a product that is sold to an account or a consumer. A sold product can be associated with multiple contracts. |
| Create an install base item | Create a record for an install base item that is sold to an account or a consumer. An install base item can be associated with multiple contracts. |

### Create a characteristic

Create a characteristic that can be associated with an entitlement or customer contract line.

**Before you begin**
Role required: sn_customerservice_manager

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### About this task

A characteristic is used for defining the service coverage that is provided to customers. These characteristics might include the scope of the service, the time period, and any limitations or exclusions such as geographical location and other attributes.

### Procedure

1. Navigate to **All** > **Product Catalog Management** > **Characteristics** > **Characteristics**.
2. Select **New**.
3. On the form, fill in the fields.

**Characteristic form**

| Field | Description |
|---|---|
| Name | The name of the characteristic for the entitlement. |
| Input type | The type of input for the coverage value related to this characteristic. For example, Choice and CheckBox. |
| Description | The short overview of the entitlement characteristic. |

4. Select **Submit**.

## Configure Sales Agreement Management

Use the Sales Agreement Management application to create sales agreements between a buyer and a seller for future transactions.

## Activate Sales Agreement Management

As an admin, you can activate the following plugins to enable users to create and manage sales agreements. For more information, see Activate a plugin.

**Sales Agreement Management plugins**

| Plugin | Description | Dependency |
|---|---|---|
| Sales Agreement Data Model [com.sn_sales_agmt_core] | This plugin provides foundational objects to manage sales agreements. | • Product Catalog Management Core[com.sn_prd_pm]<br>• Price Management [com.sn_csm_pricing] |
| Sales Agreement Management [com.sn_sales_agmt_wf] | This plugin provides workflow to create and manage sales agreements. | • Sales Agreement Data Model [com.sn_sales_agmt_core]<br>• Lead to Cash Core [com.sn_l2c_core] |

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**Sales Agreement Management plugins (continued)**

| Plugin | Description | Dependency |
|---|---|---|
| | | • Quote Management Application [com.sn_l2c_quote_mgmt]<br><br>**Note:** You need to install the Quote Management Application plugin separately. |

For more information on the installed roles and tables, see Components installed with Sales Agreement Management. To view sales agreements from an account, you must manually configure the sales agreement related list on the Account form.

## Request apps from the ServiceNow Store

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

## Single sign-on (SSO) integration

If you intend to use CPQ for a headless use case (such as exposing CPQ on a website or eCommerce platform), please fill out and submit an SSO Setup Request Form that details the identity provider (IdP) you are using for single sign-on (SSO).

This process involves:

- Creating an app for CPQ in your IdP tool of choice. See the steps and links below.
- Sharing parameters and users from the app with the CPQ team. The team will complete the provisioning process using the parameters that you send.
- Testing and confirming that the SSO redirect works as expected.

Note the following considerations:

- CPQ can now support SSO with any IdP that supports OAuth2 with OpenID Connect (OIDC).
- CPQ is not compatible with SAML.
- Your IdP client must be up to date.
- Users who have been added to CPQ before SSO was implemented may need to be added again.
- These steps are not required if you are using CPQ with Salesforce.

## Configuring Google SSO

CPQ supports Google for both personal and business single sign-on. If you use Google IdP for identity verification, all we need are the names and email addresses of your users.

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## Configuring Okta SSO

To set up an application that supports the Authorization code flow for CPQ, start by following the Okta Developer instructions: Implement authorization by grant type: set up your app

For the redirect URL, specify your CPQ URL, append `/login/oauth2/code/`, and then append your `-okta` subdomain. So if your URL is `example.test.logik.io`, your redirect URL would be `https://example.test.logik.io/login/oauth2/code/example-okta`.

Note your client ID, client secret, redirect URL, and Okta domain.

**Note:** To confirm that your Okta domain is accurate, you can confirm that the OpenID connection metadata is visible by visiting `https://{oktaDomain}/.well-known/openid-configuration`. You should see a JSON file with information about the authorization server endpoints.

Provide these values together with any user details, such as name and email, for users that you want to test with. The CPQ team will schedule a brief call with you to obtain your client secret. The team will complete the provisioning process from there.

**Note:** Users' email addresses will be used for authentication. These are case sensitive, so make sure that the email addresses you provide are accurate.

When your CPQ point of contact has confirmed that setup is complete, try to visit your tenant-specific CPQ URL. You should see a redirect flow that brings you to an Okta consent screen to allow access to your CPQ app.

## Configuring Entra ID SSO

Register an app by following the instructions on the following Microsoft Entra documentation website:

Register an application in Microsoft Entra ID

In the **Redirect URI** section of the Microsoft Entra registration page, in the **Select a platform** menu, select **Web**. For the redirect URI, enter your tenant-specific URL, append `/login/oauth2/code/`, and then append `<your subdomain>-entra`. For example, if your URL is `example.test.logik.io`, your redirect URI is `https://example.test.logik.io/login/oauth2/code/example-entra`.

Make sure to select **ID tokens** on the Authentication tab of your app. For more information about OIDC, see the following Microsoft Entra documentation website: OpenID Connect on the Microsoft identity platform.

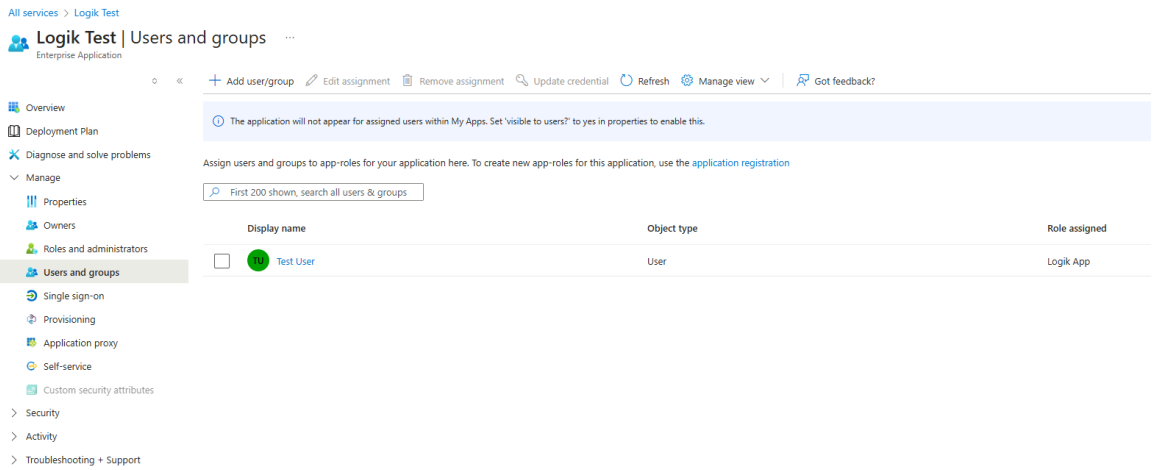
Note your client ID, client secret, and your Authority URL.

**Note:** Make sure you note the client secret at this time. It won't be available to you later.

For information about how to validate your Authority URL, see "Find your app's OpenID configuration document URI" at the Microsoft Entra documentation website: OpenID Connect on the Microsoft identity platform. To get the correct issuer in the metadata, make sure to include `/v2.0` at the end. You should be able to see the metadata and validate your issuer URL by visiting it in a browser with `/.well-known/openid-configuration` appended to it. For example: `https://login.microsoftonline.com/c7dd9346-1cfc-4bd8-a34c-a066c8bc0477/v2.0/.well-known/openid-configuration`.

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**Note:** It may be possible to directly associate your users with the application via the **Manager** > **Users and groups** > **Add user/group** option in your application.




Optionally, add an app role for the users whom you wish to test with. For more information, see "Add a user account to your directory, and add that account to an appRole" on the following Microsoft Entra documentation website: Add sign-in with Microsoft Entra account to a Spring web app

On the SSO Setup Request Form, provide the client ID, Authority URL, and redirect URI together with user details (email, name) for the users you wish to test with. The CPQ team will schedule a brief call with you to obtain your client secret.

By default, each user's emails will act as their identifiers, but it may be possible to use a different identifier in a user profile. The fields that can be used as identifiers are limited by what's available at the `user_info` endpoint defined in the well-known/openid-configuration URL described above. For more information about the `user_info` endpoint, see the following Microsoft Entra documentation website: Microsoft identity platform UserInfo endpoint.

Once your CPQ point of contact has confirmed that setup is complete, try to visit your tenant-specific CPQ URL. You should see a redirect flow that brings you to an Entra ID consent screen to allow access to your CPQ app.

### Troubleshooting

| Issue | Resolution |
|---|---|
| The issuer does not match the expected value. For example, the issue is `sts.microsoft.net` instead of `login.microsoftonline.com`. | • Make sure that your issuer URL includes `/v2.0` after the tenant ID.<br>• Update the application manifest to set the *`accessTokenAcceptedVersion`* to *2*. |
| Admin is redirected to http://logik.ai, despite being set up correctly. | In your manifest, set the *`acceptMappedClaims`* parameter to *`true`* in your manifest. |

## Configuring another IdP

CPQ can now support SSO with any IdP that supports OAuth2 with OpenID Connect (OIDC). In the SSO Setup Request Form, provide details about your preferred IdP tool and our team will connect with you to ensure it is properly integrated with CPQ.

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## Configuring CPQ Configurator

Learn how to set up products, rules, pricing, and layouts in CPQ using configuration engine. You can define how users select, customize, and validate products during the quoting process.

## Configuration workflow

The following workflow describes the tasks involved in configuring and using CPQ to configure customizable products when embedded in Sales Customer Relationship Management.

### CPQ workflow for generating product blueprints and configuring customizable products

1. If upgrading from a release before Zurich, the system admin enables the system property that runs the configurator in Sales Customer Relationship Management applications.
2. The product catalog admin creates and saves a configurable product offering in Product Catalog Management.
3. The product catalog admin generates the product offering blueprint.
4. The product catalog admin publishes the configurable product offering so that it is available in the product catalog and deployed as a blueprint.
5. The agent creates a transaction, such as a quote or order, in the CRM Workspace. Alternatively, a customer uses the Business Portal for a self-service transaction, for example, placing an order.
6. The agent or customer selects a configurable product from the product catalog.
7. The agent or customer configures the product using CPQ.
8. The agent or customer saves and closes the product offering configuration. The offering is added as a line item for the transaction, such as a quote line or order line item.

## Key components of the Commerce Logic Engine

The Commerce Logic Engine is built from modular components that define how products are configured and presented.

### Key components of the configurator

| Component | Description |
|---|---|
| Configured products | Salesforce objects that require configuration in CPQ before being added to the Quote Line Editor (QLE). |
| Blueprints | Containers for all components needed to render the UI. |

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**Key components of the configurator (continued)**

| Component | Description |
|---|---|
| Fields | Attributes that capture user inputs. |
| Layouts | Define how the configuration UI is displayed. |
| Rules | Ensure products are configured correctly. |
| Sets | Dynamic arrays that adapt to user selections. |
| Product pickers | Menus for selecting products without running the rules engine. |
| Picklist extensions | Extend the capabilities of picklists. |
| Product lists | Display the configuration BOM to the user. |
| Tables and table queries | Store and retrieve supporting data during configuration. |
| Set repeaters | Combine set functionality with flexible layouts. |
| Associated picklist sets | Dynamically sized sets based on menu choices. |
| Field grids | Tabular field groups for structured data entry. |
| Advanced product actions | Scripts to define which line items are sent to the configuration BOM. |
| Twinning | Copies Salesforce quote data into CPQ fields. |
| Enrichments | Scripts that run outside the rules engine during configuration. |
| External connections | Connect to third-party data sources to retrieve configuration data. |

## Build your first configuration

To build your first configuration:

- Upload a sample blueprint using the Matrix Loader. See Configure the Matrix Loader.
- Create a configurable product in Salesforce CPQ (SFDC) and associate it with your blueprint, or create a configurable product offering in Product Catalog Management. See Create configurable product offerings and associated blueprints.
- Launch the configuration experience by adding the product to a quote and verifying that the blueprint-driven UI works as expected. See Set up blueprints.

## Examples of commerce logic in action

**Sales enablement**

A sales rep enters requirements, such as the number of users. CPQ applies rules and generates a valid configuration instantly, and the results flow into Salesforce CPQ quotes.

**Headless eCommerce**

A customer answers guided questions in a web storefront, CPQ delivers a tailored recommendation, and the customer purchases without sales intervention.

**Manufacturing integration**

A complex product configuration produces both a Sales BOM and a Manufacturing BOM. The Sales BOM passes to Salesforce CPQ, and the Manufacturing BOM flows to ERP for production planning.

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### Setting up configurable products

A configurable product links a blueprint to the configuration experience for the product. You can set up configurable products in headless environments using CSV uploads or in Salesforce-integrated environments through product associations.

Configurable products serve as the bridge between CPQ blueprints and the configuration experiences that end users interact with. The setup process varies depending on your environment type.

## Headless environment setup

In headless environments, configurable products link blueprints to configurations that launch when end users select products. You set up configurable products by uploading a CSV file with product information through the Products tab in the Utilities section of the CPQ navigation pane. When you set the "configurable" field to TRUE in the CSV file, the configurable product is automatically created in the CPQ environment.

## Salesforce integrated environment setup

In Salesforce-integrated environments, configurable products link CPQ blueprints to Salesforce Product2 records. In the context of Salesforce CPQ, a configurable product serves as the entry point to a CPQ configuration experience. After you define the configurable product, end users see the appropriate CPQ configuration experience when they select the Product2 record from the Product Selection step in Salesforce CPQ.

The setup process depends on when your CPQ Salesforce Managed Package was installed:

- June 2022 or later: Associate Product2 records with blueprints through the SFDC Products tab and the Associate Blueprint function.
- Before June 2022: Enable external configuration on the Salesforce Configurable Products tab and add blueprints through the View Setup link.

Multiple Salesforce Product2 records can be linked to one blueprint, but a configurable product cannot be associated with more than one blueprint.

**Related topics**

Set up a configurable product in a headless environment

Set up a configurable product in a Salesforce-integrated environment

Set up blueprints

### Set up a configurable product in a headless environment

A configurable product links a blueprint to the configuration experience for the product. Learn how to set up a configurable product in a headless environment.

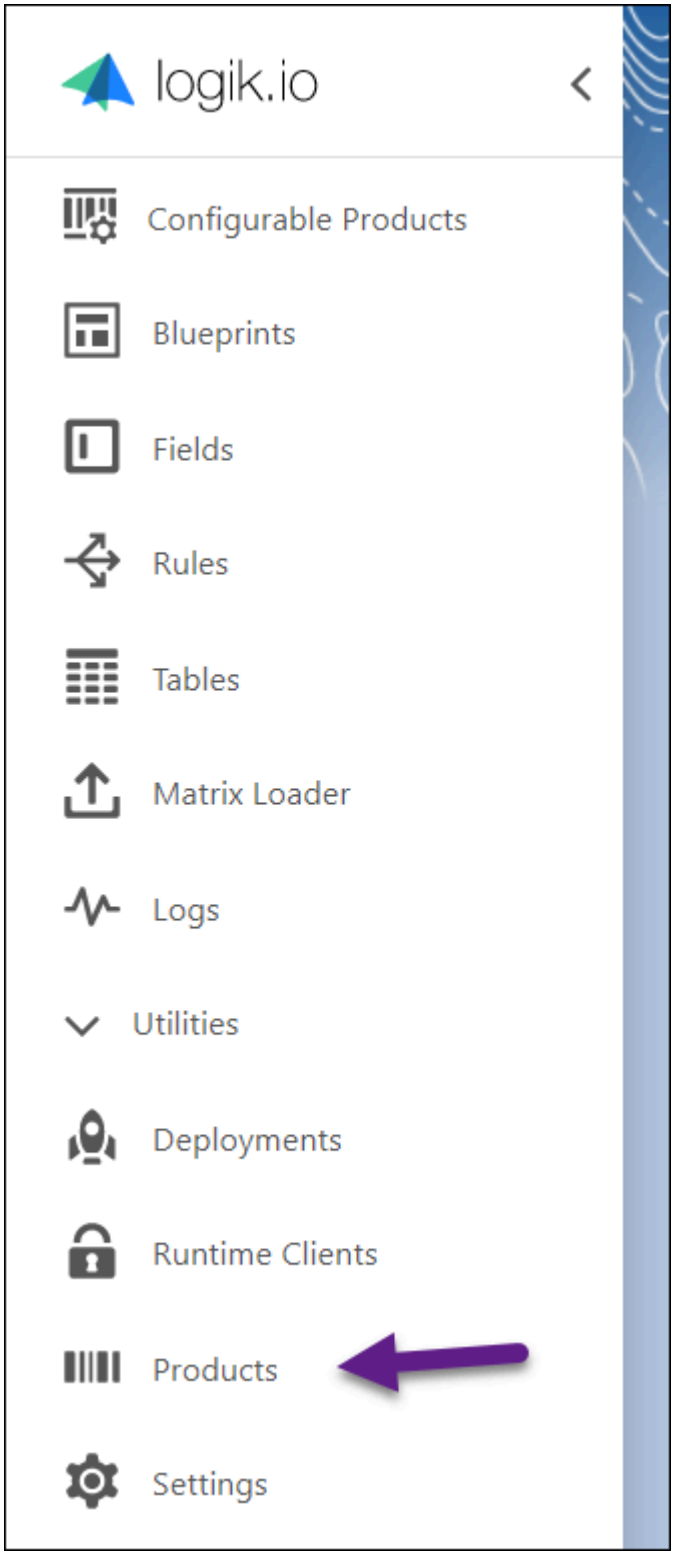
## Before you begin

Role required: Admin

## About this task

In headless use cases, the configurable product is the link between the blueprint that you have created in CPQ and the configuration that launches for end users when they select the product. A Products tab appears in the Utilities section of the CPQ navigation pane.

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**Procedure**

1. Click the tab for the product that you want to configure.
2. Upload a CSV file with the following headers and the appropriate information for your product.

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| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | name | description | productCode | partnerId | unitPrice | configurable |
| 2 | Test Product | Product for Testi | testProduct | testProduct1 | 0 | TRUE |

If "configurable" is set to TRUE, the configurable product is automatically created in the CPQ environment.

### Set up a configurable product in a Salesforce-integrated environment

A configurable product links a blueprint to the configuration experience for the product. Learn how to set up a configurable product in an environment that is integrated with Salesforce. This procedure is valid for users whose Salesforce Managed Package was installed in June 2022 or later.

#### Before you begin
Role required: Admin

#### About this task
If your CPQ SF Managed Package was installed in June 2022 or later, follow these steps to associate a configurable product with a blueprint.

**Note:** If your CPQ SF Managed Package was installed before June 2022, see Set up a configurable product in a Salesforce-integrated environment (older managed package).

#### Procedure
1. On the Salesforce Products tab, find the Product2 record to connect to a CPQ configuration experience (blueprint).
2. Associate the Product with a Price Book entry.
   The amount can be $0.00, but a value must be entered.
3. Set the product to **Active** and **Enabled**, and then click **Save**.
4. On the SFDC Products tab, select the list view to CPQ View.
5. Find the Product Name of the Product2 record created in step 3, and click the **Click Here** link under View CPQ Setup column.
6. Click **Associate Blueprint**.
7. Select the desired blueprint, and then click **Save**.

#### Related topics
Set up a configurable product in a headless environment

Set up blueprints

### Set up a configurable product in a Salesforce-integrated environment (older managed package)

A configurable product links a Blueprint to the configuration experience for the product. Learn how to set up a configurable product in an environment that is integrated with Salesforce. This procedure is valid for users whose Salesforce Managed Package was installed before June 2022.

#### Before you begin
Role required: Admin

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### About this task

If your SF Managed Package was installed before June 2022, follow these steps to associate a configurable product with a Blueprint.

### Procedure

1. On the Salesforce Configurable Products tab, click **Enable/Disable external configuration**.
2. Find the Product2 record to connect to a CPQ configuration experience (blueprint), and set the corresponding Enable/Disable Externally Configurable checkbox to true, and save.
3. Click **Save**.
4. On the Configurable Products page, click the **View Setup** link associated with the product name of the Product2 record created in step 1.
5. Click **Add Blueprint**.
6. Select a Blueprint, and then click **Save**.

### Related topics

Set up a configurable product in a Salesforce-integrated environment

Set up a configurable product in a headless environment

Set up blueprints

### Set up blueprints

Blueprints define the structure of a configuration experience in CPQ. They act as containers that bring together fields, rules, layouts, and configurable products, enabling administrators to design, deploy, and manage complete configuration workflows across environments.

The blueprint defines the configuration experience. It acts as a container for all the parts necessary to be plugged in for the end- user interface. Because CPQ rules and fields are global, they can be used to facilitate any number of configuration experiences. The blueprint record allows the administrator to associate the subset of the fields and rules that are relevant to the configuration experience it represents. Further, the blueprint defines layouts and configurable products.

Unlike fields and rules, layouts can only be associated with one blueprint. A layout is defined and built in the context of, and to explicitly support, one blueprint — one configuration experience. However, a blueprint may have multiple layouts.

For Salesforce-integrated organizations, the configurable product element determines the SFDC Product2 record that, when quoted in Salesforce, launches the configuration experience defined by a blueprint. Multiple configurable products can launch the same blueprint. However, each configurable product can only be associated with one blueprint.

For a step-by-step guide to creating a blueprint, see Create a blueprint.

## The blueprint definition page

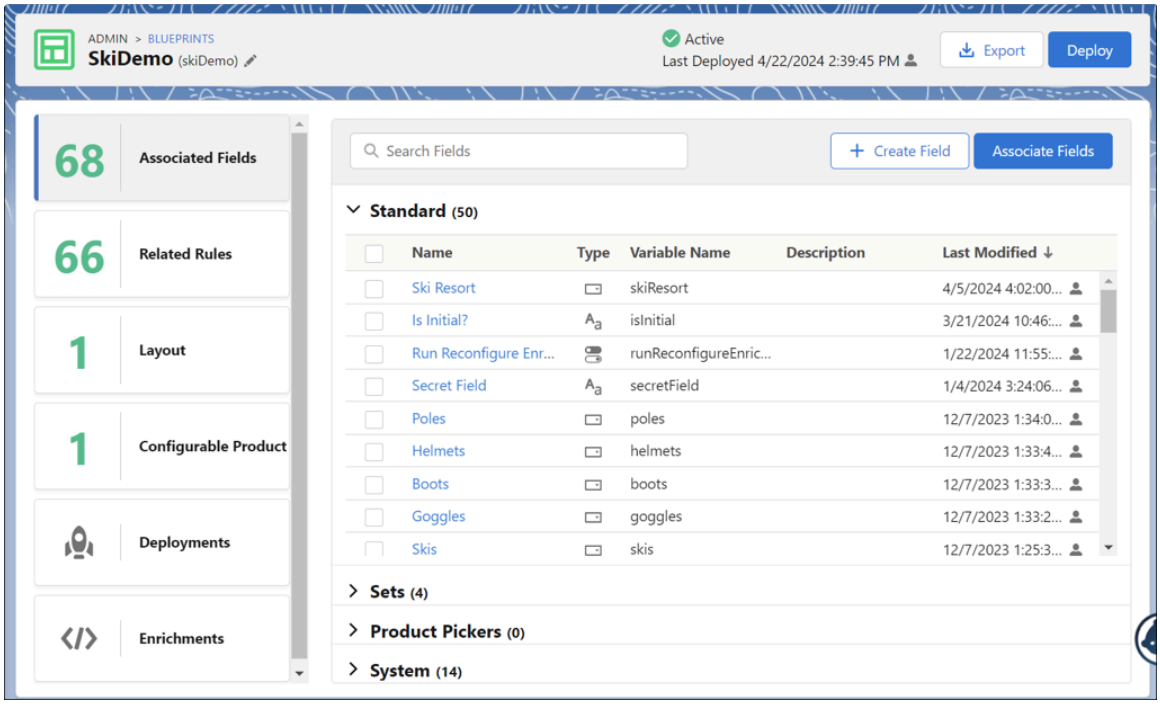
The blueprint definition page holds all of the different elements that are associated with the blueprint. Each tab indicates the number of elements associated if relevant. Clicking each shows specific metadata and lets you search by name or variable name, or edit each element in the blueprint.

## The Associated Fields tab

This tab shows all of the fields that have been associated with the blueprint. The name, type, variable name, description, and last modified date of the fields are shown to the admin on this

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page, as well as the username of the user that last modified the field. You can also drill down to specific field types associated to the blueprint, such as sets, product pickers, and system fields.



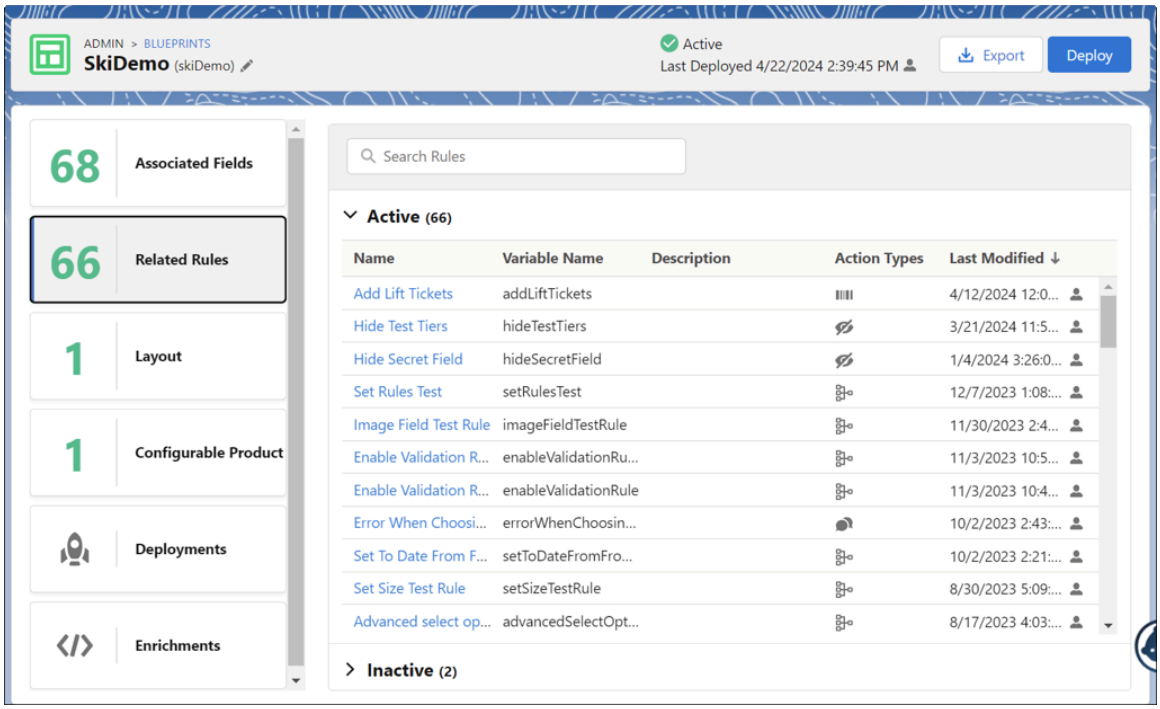

- Standard: Shows global fields associated with the blueprint.
- Sets: Shows the sets and set subfields associated with the blueprint. Once a set is associated, each subfield added is automatically associated with the blueprint.
- Product Pickers: Shows the product pickers and product picker subfields associated with the blueprint.
- System: Automatically associated with each blueprint. If integrated with Salesforce, these fields pull data automatically upon initialization without the need to specify it in an external connection.

To learn more about fields and how to associate them with blueprints, see Configure fields.

## The Related Rules tab

This tab shows all of the rules that are related to the blueprint. Unlike fields, rules connect to a blueprint automatically as long as every field referenced by the rule is associated with the blueprint. The name, variable name, description, action types, and last modified date of the rules are shown to the admin on this page, as well as the username of the user that last modified the rule.

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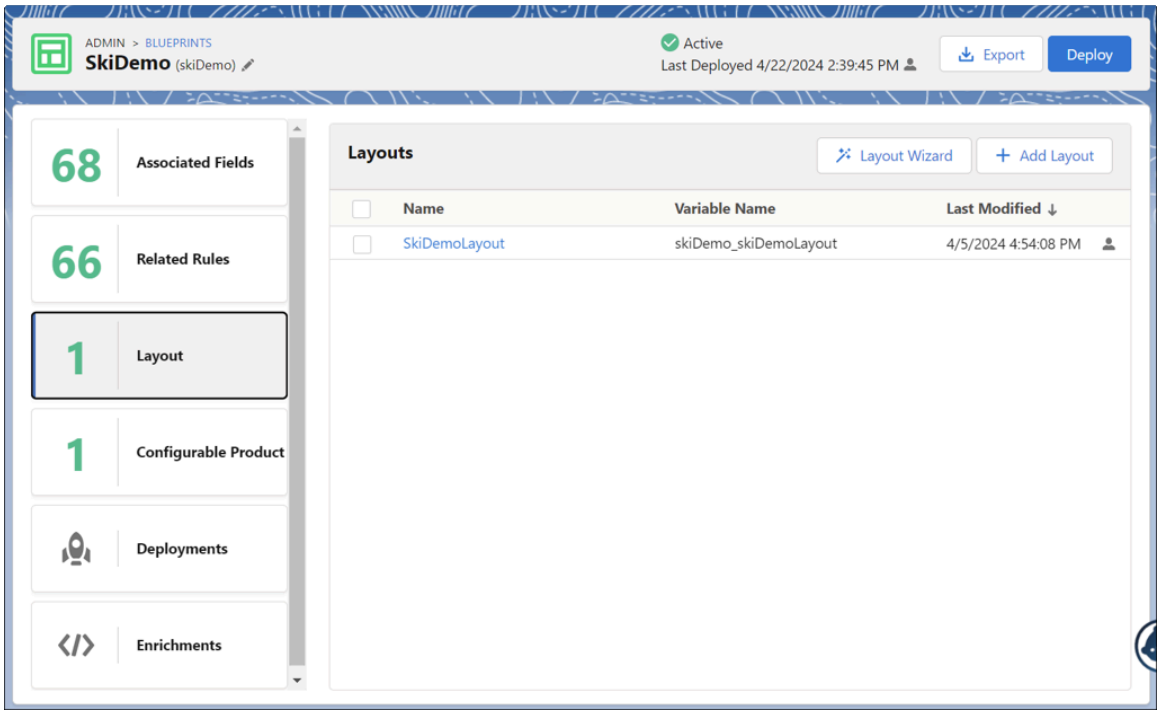

Active: Shows what rules are currently set to active in their definition. When a rule is active, it is included as a valid rule during deployment and enacts its Actions when its Conditions are fulfilled during runtime.

Inactive: Shows what rules are currently set to inactive in their definition. They are still related to the blueprint and is included if the blueprint is exported, but they aren't valid when deployed and don't enact their actions during runtime.

## Layout

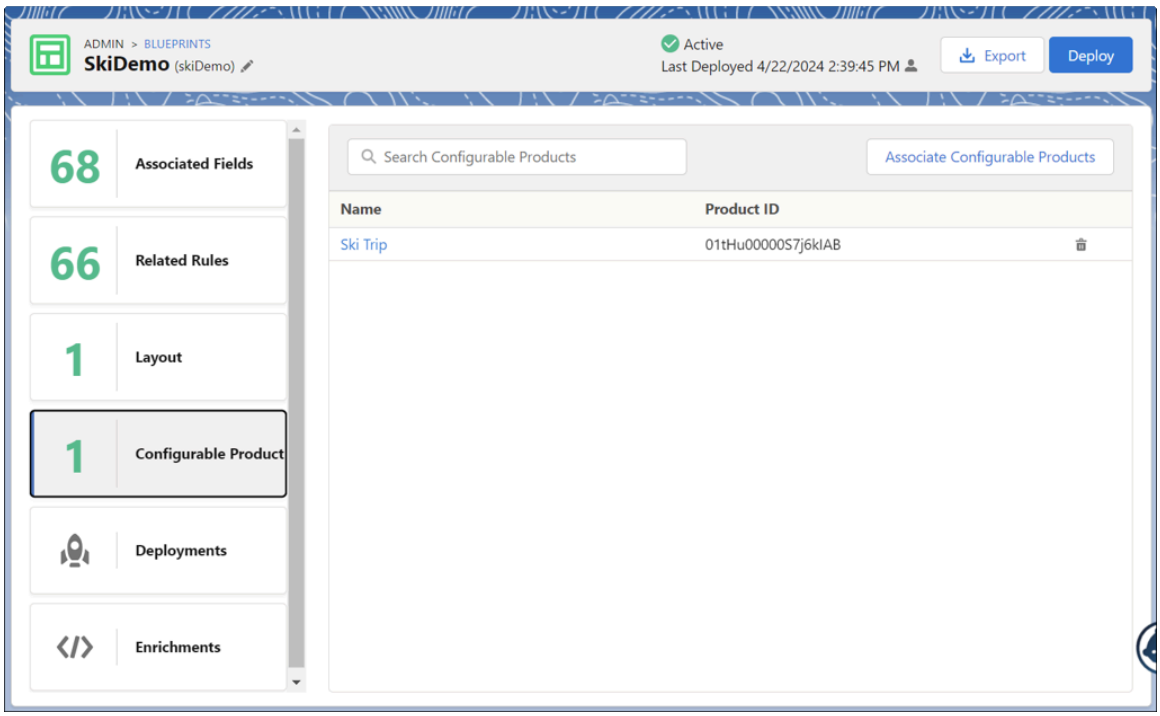
This tab hows all of the layouts that have been created for the blueprint. The most recently modified layout is the layout generated unless otherwise specified. The name, variable name, last modified date, and the username of the user that last modified the layout are located on this page.

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## The Configurable Product tab

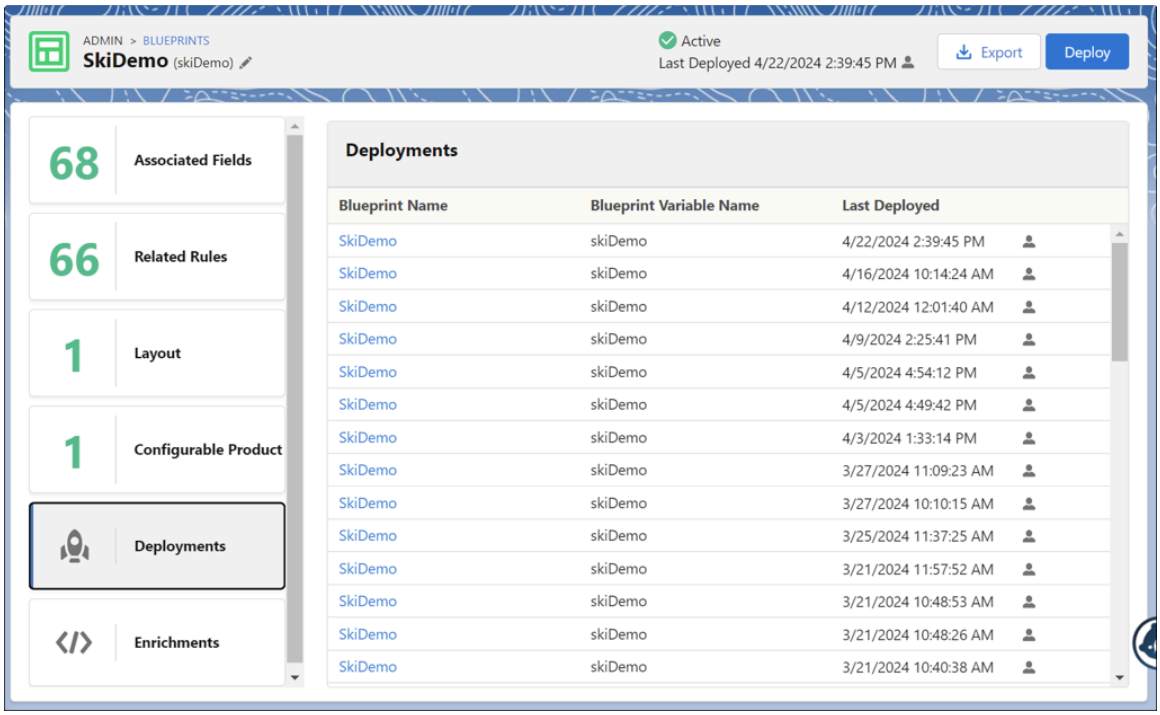
This tab shows the configurable products that are linked to the blueprint. Calling a runtime API with any of the associated configurable products with the blueprint, or configuring from the product through a third-party such as Salesforce, immediately launches the blueprint. The name and product ID are present, and an admin can delete a product by clicking the Trash icon on the left.




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## The Deployments tab

This tab shows the fifty most recent deployments for the blueprint. The blueprint name, variable name, and last deployment date and time are visible here, along with the username of the user that last deployed the blueprint.

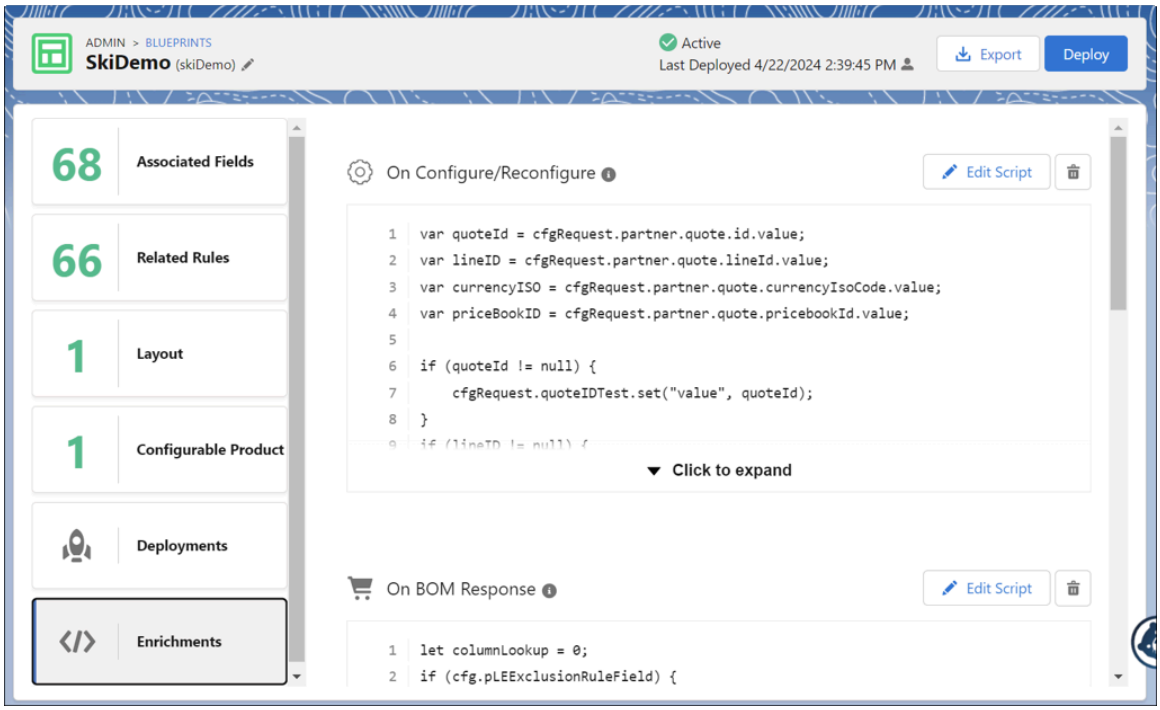



You can also see a list of the environment's most recent deployments in the Utilities menu on the Deployment page. See Viewing blueprint deployments.

## The Enrichments tab

This tab shows the enrichment scripts that have been created for the blueprint. These scripts run outside of the rules engine and enact their functions on their own areas, such as on initialization, BOM response, validation, or picklist extension pricing. An admin can edit these scripts or delete them using the Trash icon on the far left. For more information about enrichment scripts, see Using external connections with OAuth support.

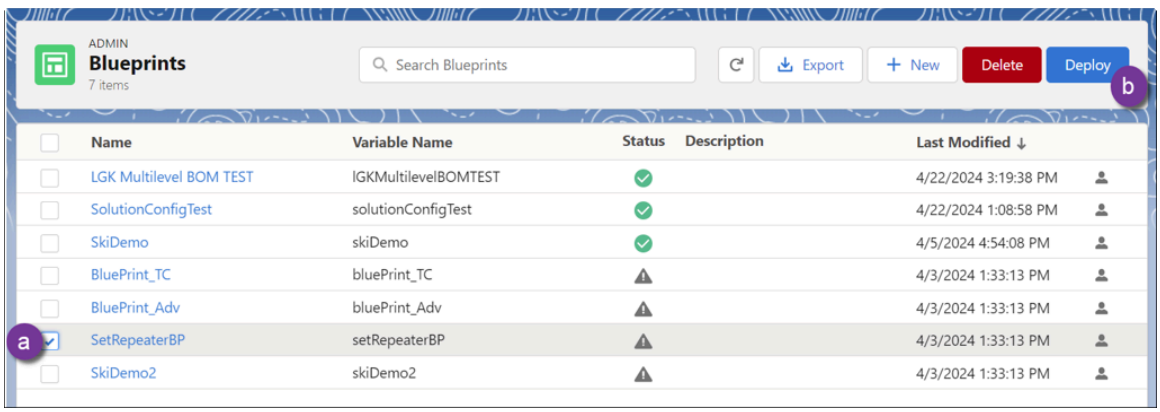
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## Deploying a blueprint

CPQ configuration experiences are deployed (made available to application end users) at the blueprint level. Administrator edits to fields, rules, layouts, and configurable products are not visible to the end user until deployed.

To deploy a blueprint, in the Blueprints list administration page, check the box to the left of the blueprint to deploy, and then select **Deploy**. (You can also select **Deploy** in the blueprint itself.)




The blueprint administration list page shows the deployment status of each blueprint. Icon key:

Deployed

Not deployed

Expiring Soon

In production sector environments provided to CPQ customers, once a blueprint is deployed, it remains deployed, no matter its end-user activity.

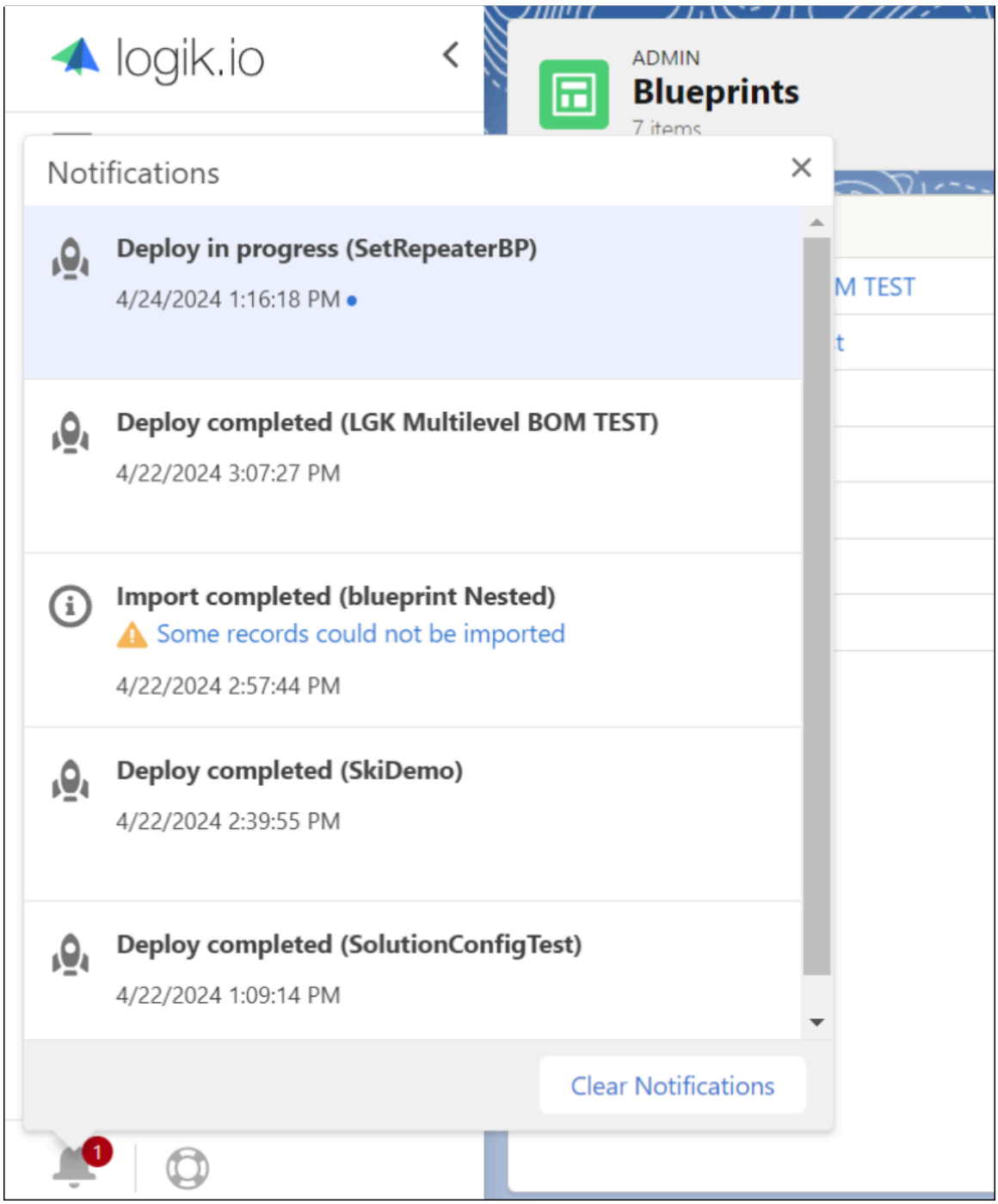
In test sector environments provided to CPQ partners, blueprints are automatically un-deployed after a period of thirty days with no end-user engagement. Redeploying the blueprint or

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launching a configuration of the blueprint resets the thirty-day period after ServiceNow's database syncs each evening.

In demo sector environments, blueprints are automatically un-deployed every weekend.

After a blueprint is deployed, a notification alerts you to the status of the deployment process (either In Progress or Completed).




**Related topics**

- Create a blueprint
- Testing in non-production environments before migration
- CPQ fields, system fields, and partner fields

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Configure fields

Boundaries and limits

### Create a blueprint

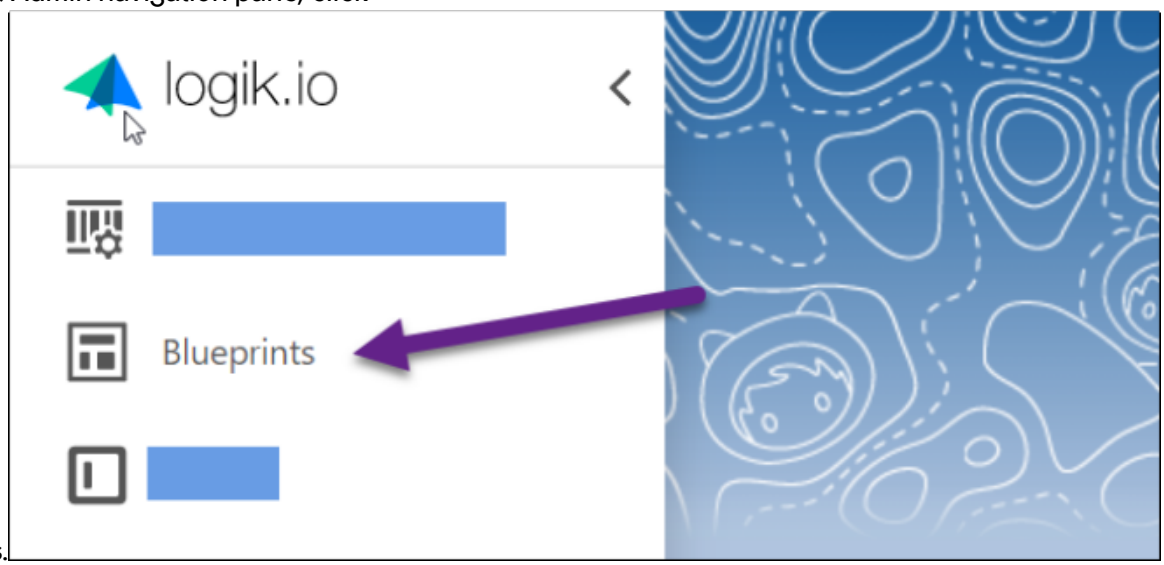
Create a blueprint to define the structure, behavior, and configuration experience for your product model.

## Before you begin

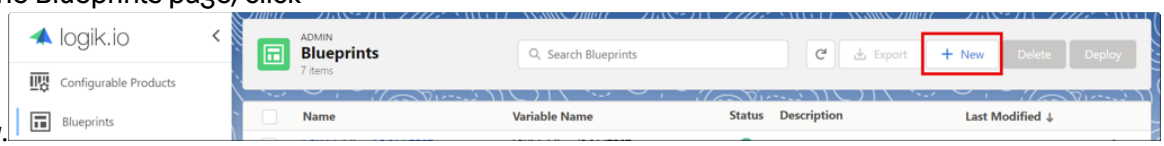
Role required: Admin

## Procedure

1. In the CPQ Admin navigation pane, click **Blueprints**.




2. On the Blueprints page, click **New**.




## Related topics

Export a blueprint

Import a blueprint

### Export a blueprint

Export a blueprint by downloading it as a ZIP file.

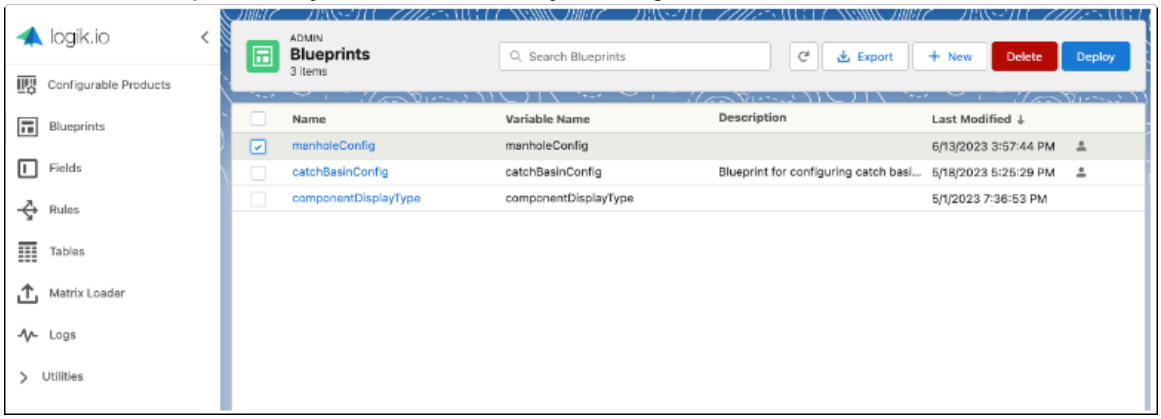
## Before you begin

Role required: Admin

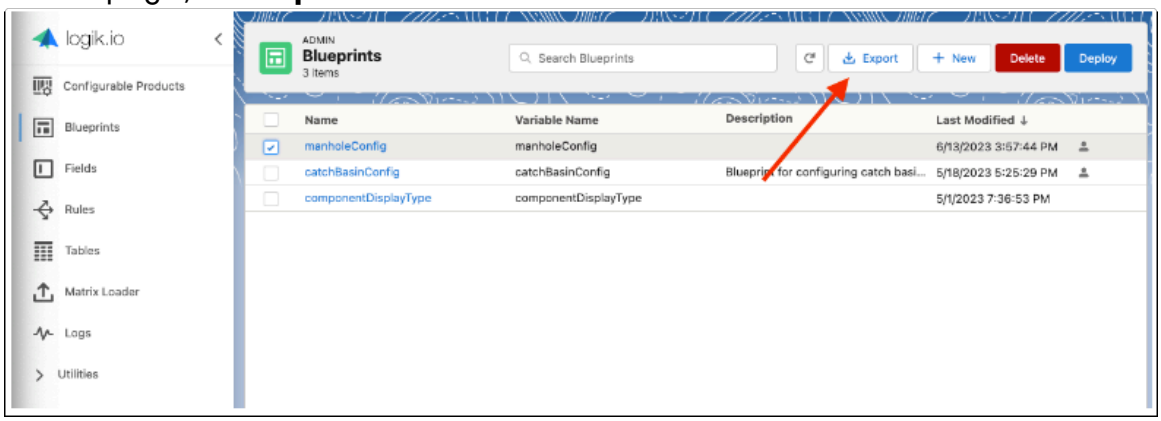
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## Procedure

1. Select the blueprint that you want to move by clicking the check box next to its name.

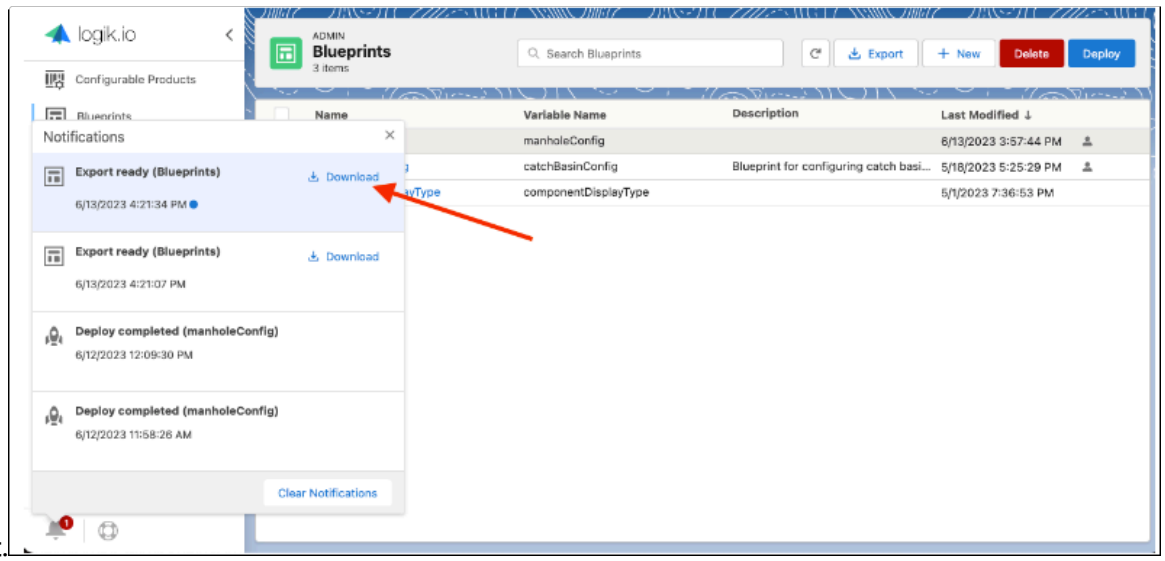



2. In the top right, click **Export**.




Keep an eye on the bell icon in the lower-left corner. Notifications appear there. The first notification indicates that the export process has started. When the export is complete, a second notification indicates that the blueprint is ready for download.

3. In the Notifications menu, click **Download** to download the blueprint.




## What to do next

Import a blueprint

## Related topics

Testing in non-production environments before migration

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## Import a blueprint

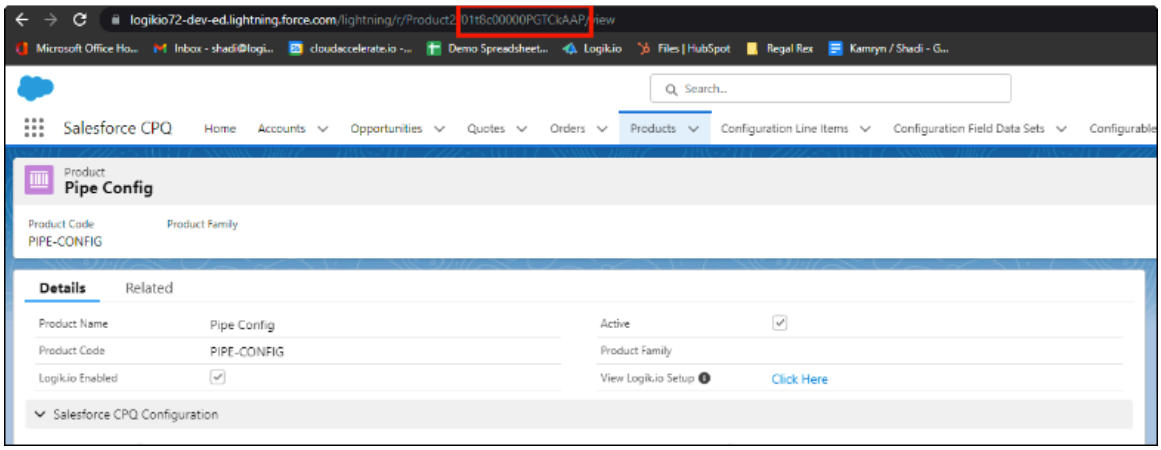
Import a blueprint by uploading it as a ZIP file.

### Before you begin

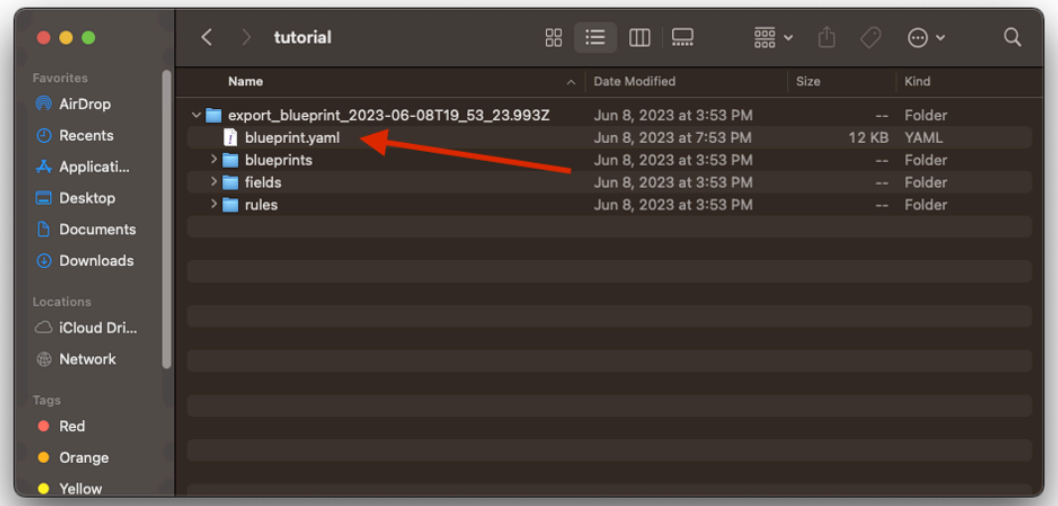
Role required: Admin

### Procedure

1. In your SFDC org, create the configurable product that you want to migrate the configuration to.
2. Note the Product2 ID of the product in the org.
   You can find the Product2 ID by selecting the product in Salesforce and checking the URL.




3. Unzip the blueprint ZIP file you downloaded.
4. In the unzipped blueprint folder, open the blueprint.yaml file for editing.



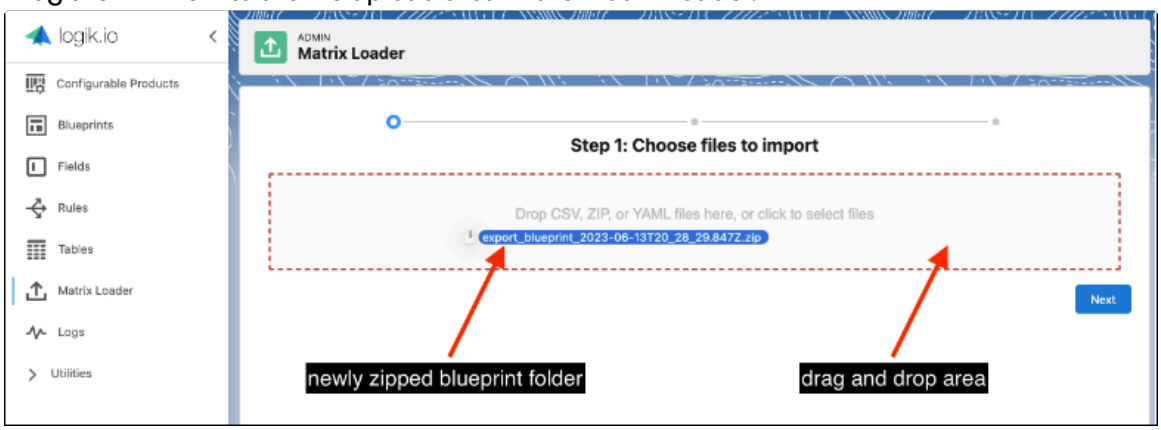

Near the end, a line reads `-id: <oldProduct2Id>`.

5. In the line just mentioned, replace the Product2 ID from the old org with the new one you just created, and save the blueprint.yaml file.



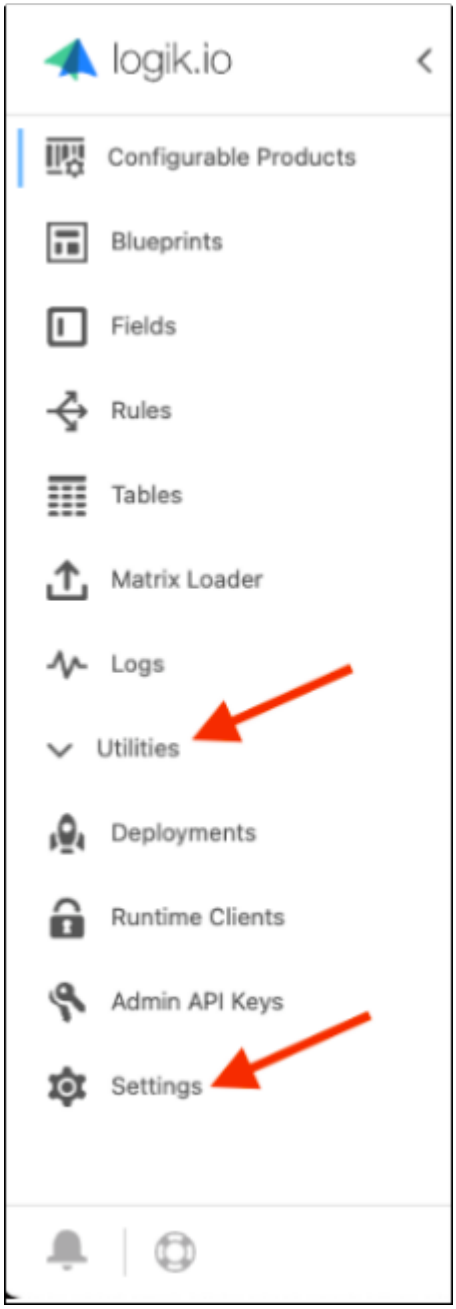

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6. Rezip your exported blueprint with the updated blueprints.yaml file, blueprints folder, fields folder, and rules folder included together, then drag the ZIP file into the designated area for file upload in the Matrix Loader.
7. Open the Matrix Loader from the Admin area of the environment you are migrating the blueprint into.
8. Drag the ZIP file into the file upload area in the Matrix Loader.

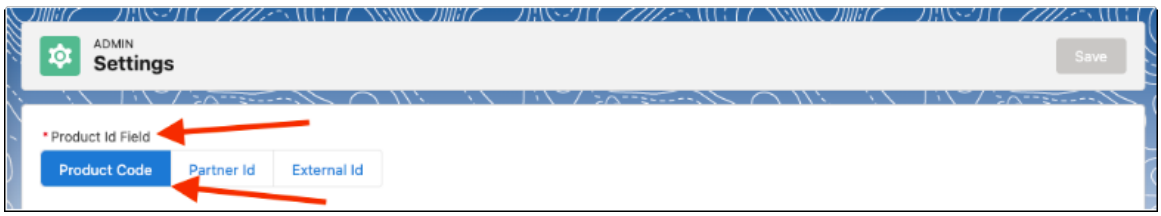



9. In the new org, click to open the **Utilities** menu, and then click **Settings**.

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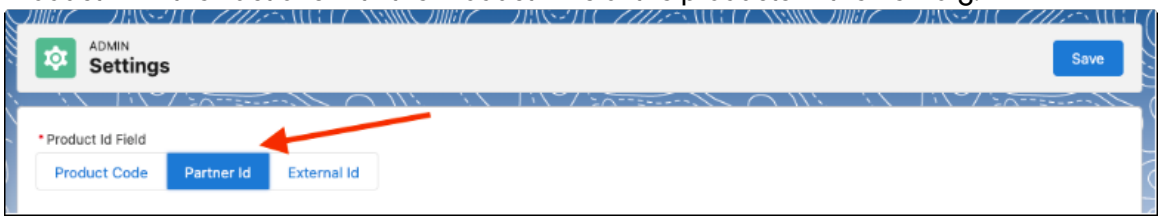



**10.** Check the value of the Product ID field.
If it#s set to “Product Code,” the process is complete.




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11. If the Product ID field is set to Partner Id, for all the product rules in your blueprint, replace the Product ID in their actions with the Product2 IDs of the products in the new org.




### What to do next

Keep the following notes in mind:

- After the import, configurable product IDs will not be the same as in the original blueprint—they are unique across organizations. To keep the references in rules accurate, if the setting for the Product Id field is set to Product Code, you can create new configurable products as needed and assign them the same product code.
- Importing a blueprint does not replace the current blueprint if it already exists in the target environment. Any items removed in the older environment, such as rules, also need to be manually removed in the target environment unless they are specified in the YAML file.

### Related topics

Migrate a blueprint from environment to environment

Export a blueprint

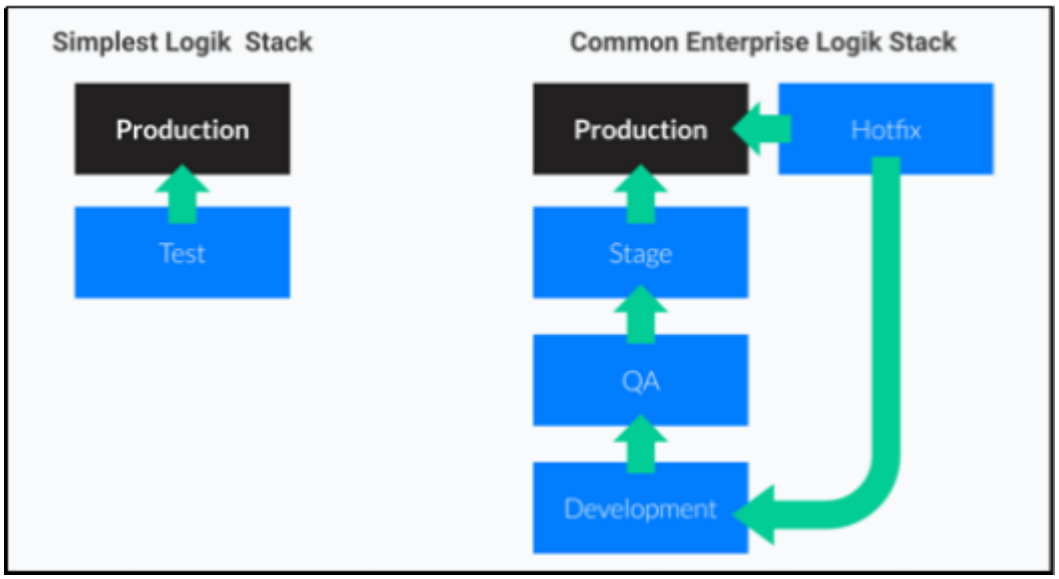
## Testing in non-production environments before migration

Test configurators in a non-production environment before migrating them to production. The configurators support revenue-critical processes, validate all changes outside production and promote them using controlled environment-to-environment migrations.

CPQ configurators should be tested in non-production environments before they are migrated to a production environment and made available to end users.

CPQ configurators are key to organizations' revenue production processes. Therefore, you must take care to ensure all configurators work as expected before they are introduced to sales users, partners, and customers. All CPQ implementations have at least one non-production environment for this purpose. Some customer IT organizations have development processes that require a larger development stack.

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Because all maintenance and development must be tested in a non-production environment before promotion, this also means that:

- Migrations must take place only in the production environment. No manual work ever occurs there.
- Environment-to-environment migration is an essential element of any administration project.

**Related topics**

Migrate a blueprint from environment to environment

Migrate a blueprint to an SFDC-integrated destination

The fullBlueprintMigration parameter

### Migrate a blueprint from environment to environment

Migrate blueprints between CPQ environments to ensure consistent configuration management. Export, update, and import blueprint packages safely using the Matrix Loader to promote tested configurations from development to production.

## Before you begin

Understand CPQ upgrade windows, described in CPQ Upgrade Schedule. Schedule your migration to avoid published upgrade windows. If you have questions regarding this topic, reach out to your Customer Success Manager.

The following terms are used in this task:

**Source**

The environment from which functionality is migrated.

**Destination**

The environment to which functionality is migrated.

**Migration package**

The file or files exported from the source environment to be imported to the destination environment.

This task assumes that migration is performed on one or more blueprints at a time.

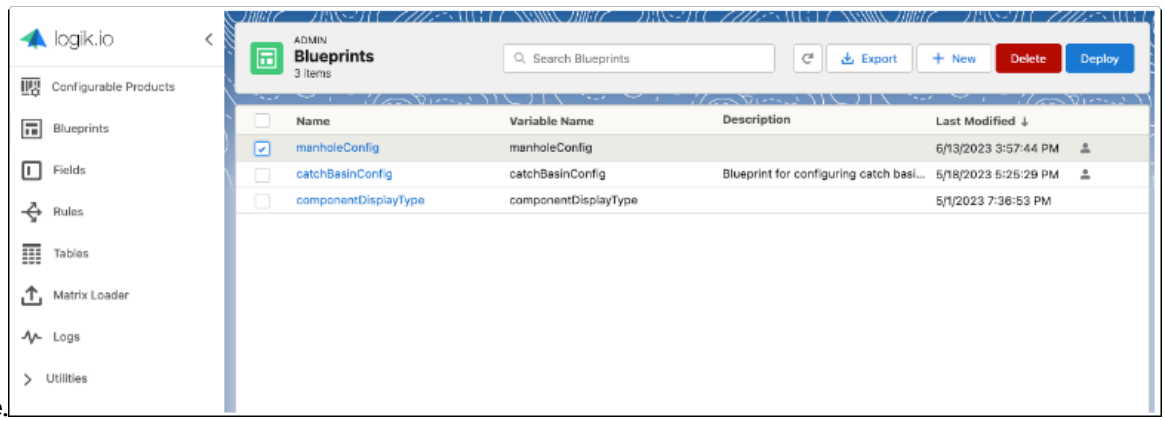
Role required: (unknown)

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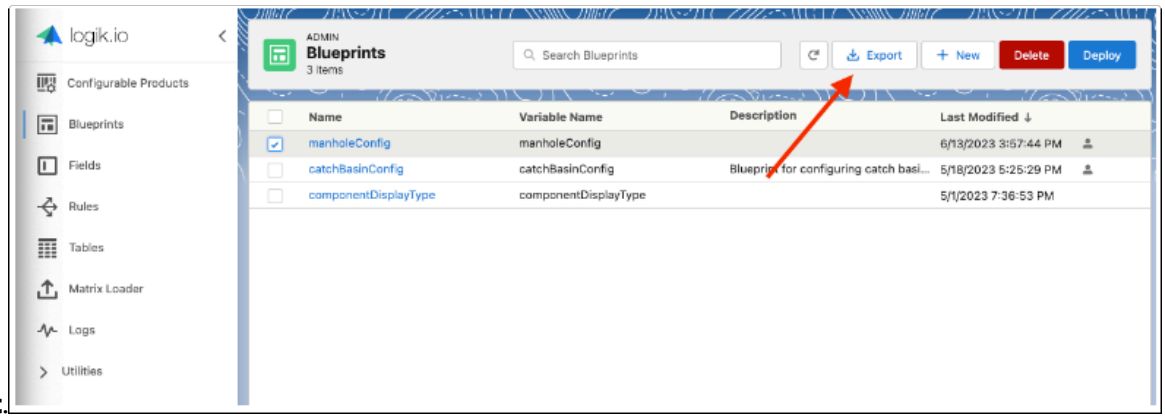
## Procedure

1. Export the blueprint from the source.

   a. In the source environment, select the blueprint you want to move by clicking the check box next to its name.

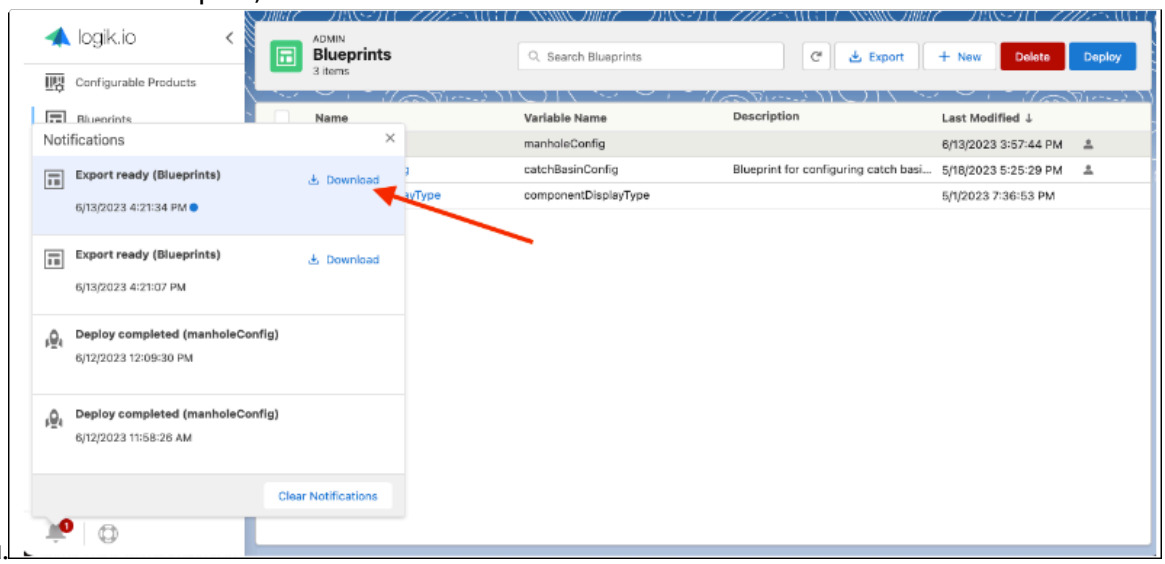



   b. Click **Export**.




   Watch for notifications on the bell icon located in the lower-left corner. The first notification indicates that the export process has started. After the export is complete, a second notification indicates that the blueprint is ready for download.

   c. To download the blueprint, click the **Download** link in the bell icon menu.



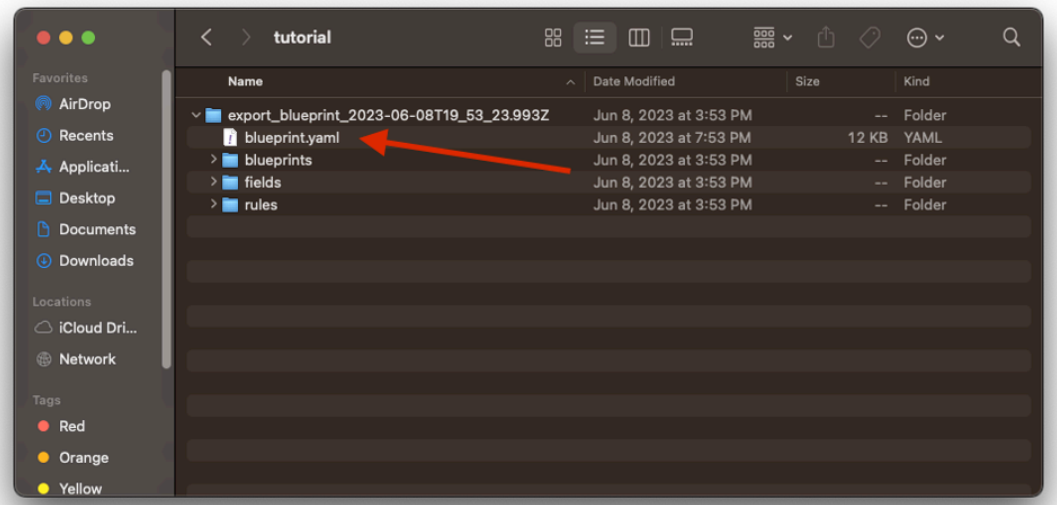

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**d.** Save the blueprint to your local machine or a central repository such as Git.

**e.** If your environment is integrated with Salesforce and you are migrating the blueprint for the first time, confirm the prerequisites and perform step 1 in Migrate a blueprint to an SFDC-integrated destination.

**2.** Modify the migration package.

**a.** Unzip the blueprint ZIP file you downloaded in step 1.
The file unzips to a blueprint.yaml file.




**b.** Open the blueprint.yaml file in a text editor.

When migrating a blueprint to a destination in which an earlier version of the blueprint resides, we recommend adding the following line to the bottom of the file:

```
fullBlueprintMigration: true
```

Sample edited blueprint.yaml file:

```
---
blueprints:
- variableName: someBlueprint
  related Fields:
  - field1
  - field2
  - field3
  lastModifiedBy: dev5@dev.logik.io
  name: someBlueprintName
  description: BP description goes here
  relatedSets: null
  scripts: null
  layouts: null
  products: null
productPickers: /fields/productPickers.yaml
sets: null
```

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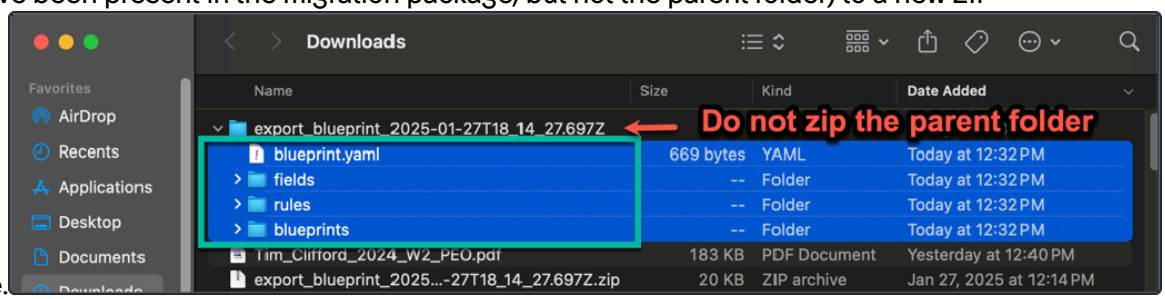
```
fieldOptions: /fields/fieldOptions.csv
rules: /rules/rules.csv
fields: /fields/fields.csv
fullBlueprintMigration: true
```

For a description of how this parameter affects the blueprint migration, see The fullBlueprintMigration parameter.

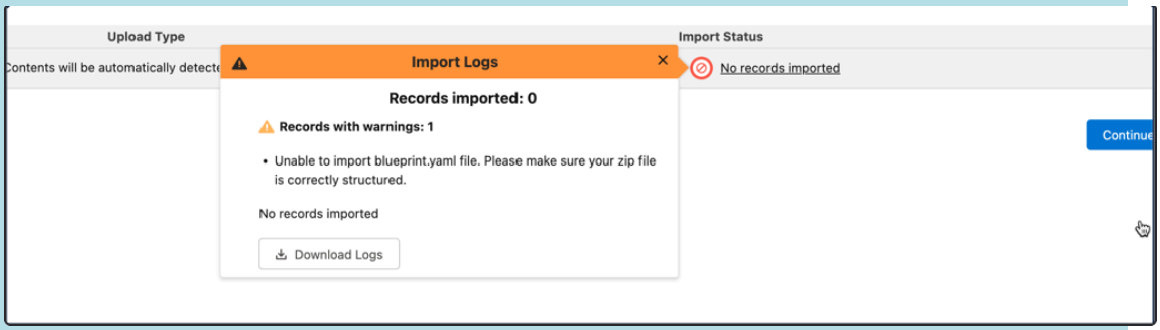
**c.** If your environment is integrated with Salesforce and you are migrating the blueprint for the first time, perform step 2 in Migrate a blueprint to an SFDC-integrated destination.

**d.** Save your edits and close the blueprint.yaml file.

**3.** Compress all components of the migration package (including blueprint.yaml, the blueprints folder, the fields folder, the rules folder, and any other artifacts that may have been present in the migration package, but not the parent folder) to a new ZIP file.




**Important:** When compressing, make sure to select only the contents of the unzipped blueprint export, and not the parent folder itself. If the parent folder is selected, you will receive an error when you upload it to the CPQ Admin.




**4.** Migrate components related to the blueprint you are migrating (for example, managed tables and external connections used by the blueprint) to the production tenant.

**5.** Import the blueprint to the destination.

**a.** Log into the administration area of the CPQ destination environment.

**b.** Open the Matrix Loader.

**c.** Drag the edited migration package ZIP file into the Matrix Loader drop area.

**d.** Click **Next**, and then click **Import**.
If you encounter errors after the import, follow the on-screen instructions to review the error logs.

**6.** Test the migration.

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a. If your environment is integrated with Salesforce and you are migrating the blueprint for the first time, perform steps 3 and 4 in Migrate a blueprint to an SFDC-integrated destination.

b. Review your migrated blueprint from the end-user UI in the destination CPQ environment.

**Related topics**

CPQ Upgrade Schedule

Migrate a blueprint to an SFDC-integrated destination

### Migrate a blueprint to an SFDC-integrated destination

Learn how to migrate a CPQ blueprint to a Salesforce-integrated CPQ environment. Recreate configurable products, update Product2 IDs, and verify connections to ensure accurate data mapping and seamless integration between Salesforce and CPQ.

## Before you begin

If necessary, perform the steps in Migrate a blueprint from environment to environment.

If necessary, install the CPQ Managed Package for Salesforce in the destination. For installation instructions, see Set up environments linked to Salesforce orgs.

Ensure that the appropriate Salesforce users have access to CPQ.

Role required: (unknown)

## Procedure

1. In your destination SFDC org, recreate the configurable product that is associated with the blueprint on the source SFDC org.

   a. Note the Product2 ID of this product in the new org.
   To view the Product2 ID, select the product in Salesforce and view the value in the URL.

   b. In the migration package, open the blueprint.yaml file.

   c. In the blueprint.yaml file, locate the line that reads `-id: <oldProduct2Id`.

   d. Replace the Product2 ID from the old org with the the new one that you just created, and save the blueprint.yaml file.

2. Add all other products from the old org that were referenced in any product rules.
   Don't forget to create pricebook entries for all your products! These records will be auto-replicated in our CPQ product cache every fifteen minutes. Wait at least fifteen minutes before continuing with the tests described below.
3. Test the destination by walking through quote creation and configuration, and investigate and resolve any errors that you encounter.
4. Verify that external or SFDC API calls complete successfully and point to the right external system endpoints.
   See External Connections setup in CPQ Admin.

## What to do next

After the import, configurable product IDs will not be the same as in the original blueprint—they are unique across organizations. To keep the references in rules accurate, if the setting for the ProductId field is set to Product Code, you can create new configurable products as needed and assign them the same product code.

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**Related topics**

- Testing in non-production environments before migration
- Migrate a blueprint from environment to environment
- Set up environments linked to Salesforce orgs

### Migrating a blueprint from test to production

You can migrate a blueprint from a test environment to a production environment using the Matrix Loader or REST API automation.

CPQ administrators have two ways to migrate a blueprint from test to production: by using the Matrix Loader, and by using REST API automation.

- Matrix Loader migration: From CPQ admin interface, an admin can export a blueprint or blueprints to a ZIP file. The admin can then import these artifacts into the production environment. Create configurable product and associate it with the blueprint in the production environment. You can do this afterward or create the product and edit the blueprint yaml file with the new SFDC product2 id, product code, or partner id before deployment.
- REST API automation: Robust REST API capabilities enable implementers and customers to automate test-to-production migration in a CI/CD process.

**Related topics**

- Testing in non-production environments before migration

### The fullBlueprintMigration parameter

Learn the effects of enabling or disabling the fullBlueprintMigration parameter on sources in various configurations. The fullBlueprintMigration parameter controls how thoroughly a blueprint is updated during migration.

## The fullBlueprintMigration parameter

When migrating an edited blueprint from a source environment to a destination environment where an earlier version of the same blueprint exists, `fullBlueprintMigration: true` instructs the destination environment to perform the migration more aggressively than it otherwise would. In the matrix below, common scenarios performed on the source environment blueprint are noted in the first column. The destination environment performs the corresponding migration task according to the true or false setting of fullBlueprintMigration, corresponding to the rightmost columns.

**Effects of the fullBlueprintMigration parameter**

*The effect of the fullBlueprintMigration parameter when set to true or false*

| Activity on source before migration | Parameter = false | Parameter = true |
|---|---|---|
| Picklist option deleted | Picklist option retained on destination | Picklist option deleted on destination |
| Rule removed from blueprint [see Note below] | The rule remains associated to | Rule removed from blueprint on destination |

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**Effects of the fullBlueprintMigration parameter**

*The effect of the fullBlueprintMigration parameter when set to true or false*

**(continued)**

| Activity on source before migration | Parameter = false | Parameter = true |
|---|---|---|
| | blueprint on destination | **Note:** If the rule is not associated with any other blueprint on the destination, the rule is removed from the global rule list on the destination, |
| Rule action removed from rule | Rule Action retained on destination | Rule Action deleted on destination |
| Product is removed from ProductList on Simple Product Action | Product remains in ProductList on destination | Product is removed from ProductList on destination |

## Notes

CPQ administrators do not directly associate or remove rules to or from blueprints. Instead, a rule is associated with a blueprint only if all its referenced fields are associated with the blueprint. Therefore, the admin manipulates a rule's association with a blueprint by associating or removing (deassociating) its fields. A rule will be removed from a blueprint in several circumstances, including:

- A field referenced by the rule is removed from the blueprint.
- In the rule, the admin adds a reference to a field that is not associated with the blueprint.
- A new rule action that references a field not associated with the blueprint, is added to the rule.
- The rule condition is modified to include a reference to a field that is not associated with the blueprint.

### Related topics

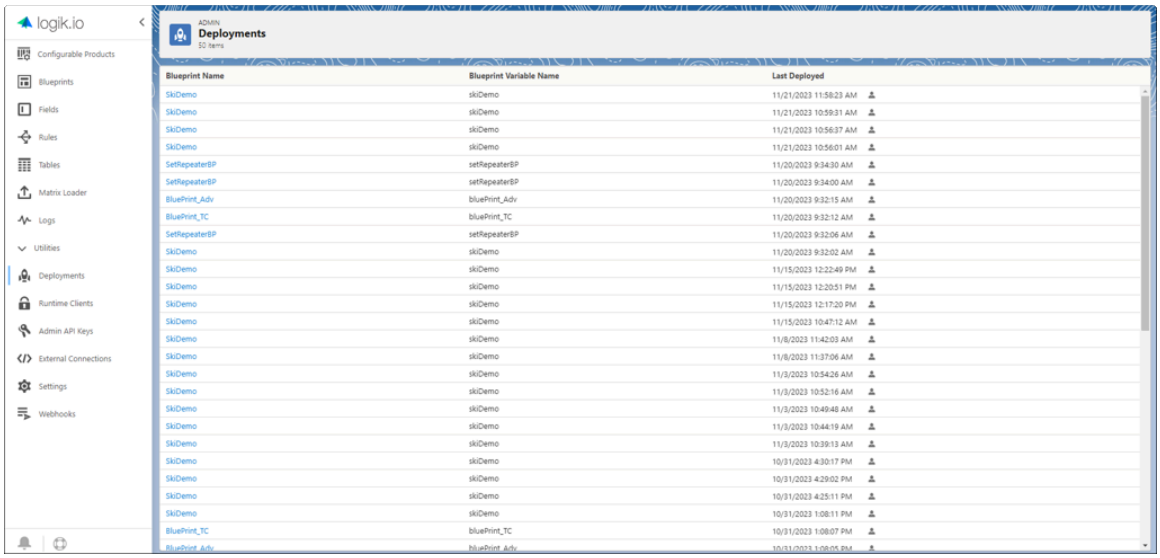
Testing in non-production environments before migration

### Viewing blueprint deployments

The Deployments page shows the fifty most recently deployed blueprints together with their timestamps and associated users.

In CPQ Admin's Utilities menu, the first visible page is the Deployments page.

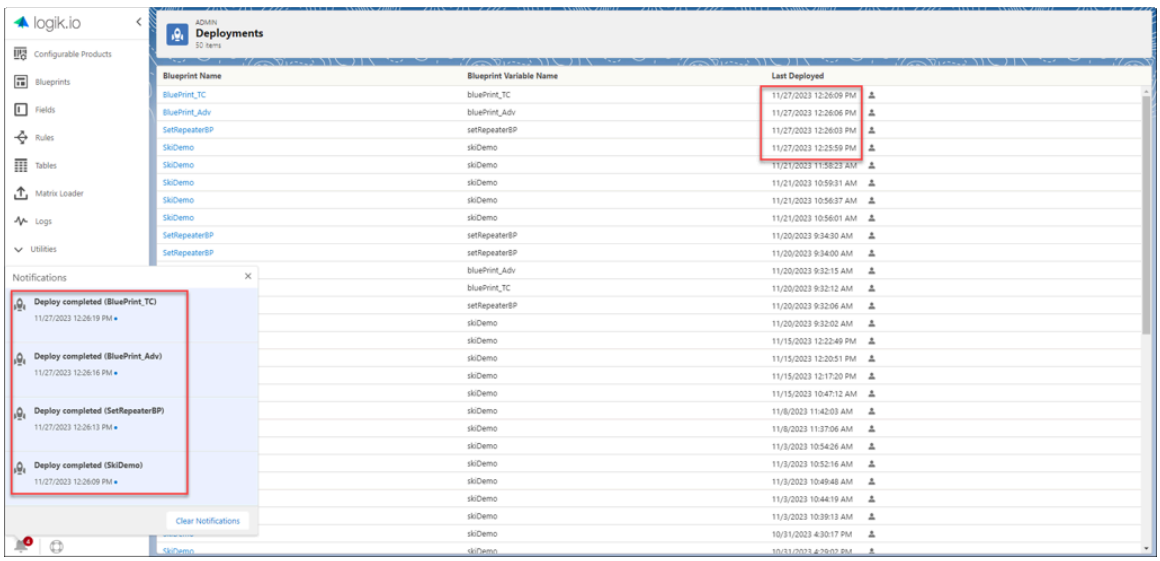
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This page shows the fifty most recent blueprints by the date and time of the deployment, together with the user responsible.

Because the configuration's behavior can change depending on the rules, fields, and enrichments that have changed since the last deployment, this page is useful for troubleshooting. Noting the last time that a deployment behaved as intended is useful for both the admin implementing CPQ and for our support team when helping solve an issue.

Note that the Last Deployed column's date and time will differ from the completion date and time as viewed from the notification bell. This is because the Last Deployed column shows the last time a blueprint was submitted for deployment, not when the deployment was completed. This is helpful in determining how long a deployment takes to complete, especially for large blueprints with hundreds or thousands of fields and rules.




If your blueprints take longer than thirty minutes to complete, create a support ticket by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

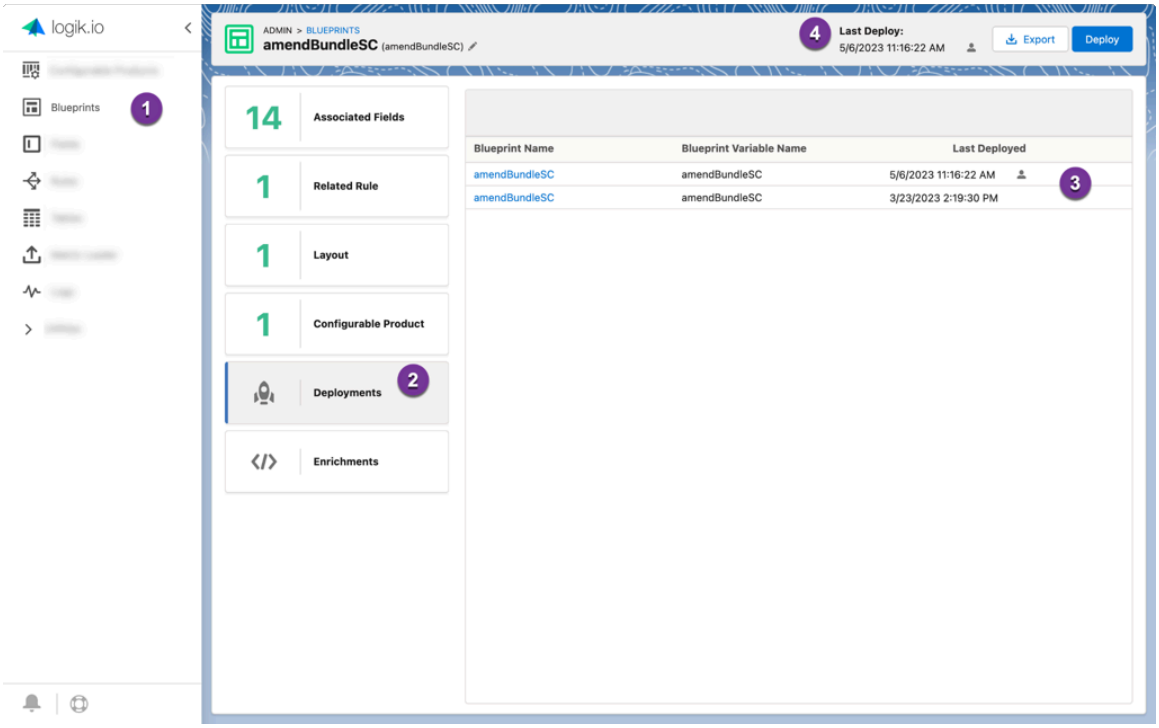
**Related topics**

Tracking a blueprint's deployment history

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### Tracking a blueprint's deployment history

Track the deployment history of blueprints in CPQ Admin. View details like deployment date, time, and user for troubleshooting and reference.




1. To access the blueprint deployment history, click Blueprints in CPQ Admin.
2. On the Blueprints tab, the Deployments tile lets you view the deployment history for a selected blueprint.
3. The Deployments tile shows the most recent fifty deployments with the name, the blueprint variable name, and the date and time of last deployment. To see the user that initiated the deployment, hover the mouse cursor over the avatar icon.
4. The most recent deployment details also appear in the header section of the blueprint.

#### Related topics

Viewing blueprint deployments

### Associate multiple fields to a blueprint

You can associate any number of fields to a blueprint by using the Blueprint Import function in the Matrix Loader.

#### Before you begin

Role required: Admin

#### Procedure

1. Create or edit a blueprint.yaml file and define the blueprint variable name and name in the following format (removing the angle brackets around the variable names).

```
blueprints:
-variableName: <variableNameOfBlueprint>
 relatedFields:
 -<fieldVariableName1>
 -<fieldVariableName2>
```

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```
 -<fieldVariableName3>
 -<etc...>
name: <Name of Blueprint>
```

2. Add the variable names of the desired fields.
3. Import the YAML file into the Matrix Loader.
   Choose Blueprint as the upload type.

> **Note:** Any existing fields or configurable products in the blueprint will be disassociated from it unless they are also defined in the YAML file.

**Related topics**

Enable Markdown in text fields

### Circular references in rules and fields

Circular references in a blueprint may result in an error.

CPQ Admin allows administrators to define a blueprint whose rules and fields result in a circular reference. If the end user enters configuration inputs that initiate an endless loop, an error state occurs.

For example, suppose rule 1 consists of a condition on field A and a determination action that sets field B, while rule 2 has a condition on field B and a determination action that sets field B. These interacting rules would create an endless loop.

Loops may also be composed of many fields and rules. In more complex use cases, it is common for testers and end users to successfully operate the configuration blueprint without encountering the error state. The CPQ Rule Cycle Report identifies potential loops so that the administrator can understand their risk and correct them.

To identify endless loops in a blueprint, use the Rule Cycle Report. See Identify endless loops in blueprint rules.

**Related topics**

Identify endless loops in blueprint rules

### Configure fields

Learn about how fields in CPQ help structure data collection efficiently and about the various types of field. Associate fields with blueprints for consistent use across configurations, layouts, and rules.

A field is a designated space where users can enter specific information. Imagine fields as sections in a questionnaire, each awaiting a particular piece of data.

The usefulness of fields lies in their ability to structure data collection, making it easier for both users to enter values and admins to set them up efficiently and effectively. Without fields, the process of gathering information would be a chaotic jumble of function parameters, lacking the coherence necessary for meaningful data storage or the ability to enact rules.

In CPQ, fields are global. This means a field may be reused in any blueprint, rule, or layout without having to create a unique field for each.

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- Layouts
  - Fields are the most granular component that make up a layout. A layout consists of many fields arranged into a navigational flow or page.
  - Tabs, expandable sections, column sets, field grids, and headings provide additional organization to the fields in a configuration experience.
- Rules
  - Rules leverage fields as inputs to conditions, calculations, and logic.
  - Rules act on fields. A rule may determine the value of a field, display a message associated with a field, hide a field, control the options available in a field, and send the information in a field to the Product List, all in the same rule.
- Blueprints
  - Because fields are global across an environment, the only way for them to be a part of a specific configuration is to be associated with a blueprint.
  - When all of the fields referenced by a rule are associated with a blueprint, the rule is associated with the blueprint without the need to specify it.
  - When a field is associated with a blueprint, the field can be added to the layouts of the blueprint.

When you associate a field to a blueprint, the application automatically associates all rules that leverage the field to the same blueprint. Fields and rules may be reused on any number of blueprints.

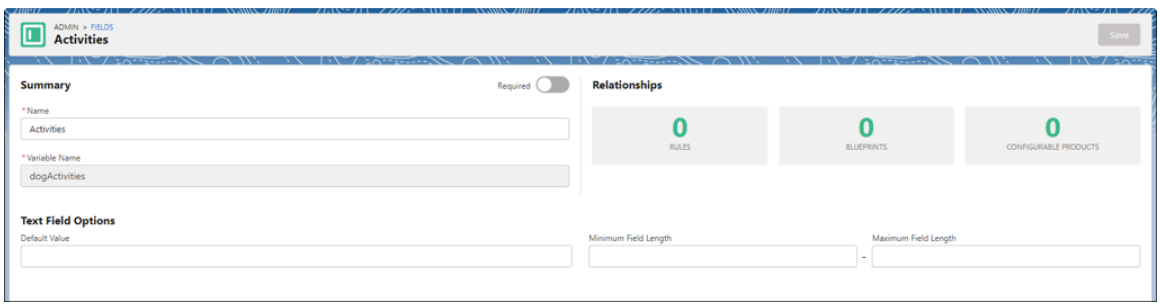
## Field types

Many field types are available, each with constraints and rules for entered values. For example, a number field is more suitable than a text field as a quantity field, since the only inputs it accepts are numbers.

Similarly, if there are only a few options that a user should be allowed to enter, a picklist field should be used to limit the options for the end user.

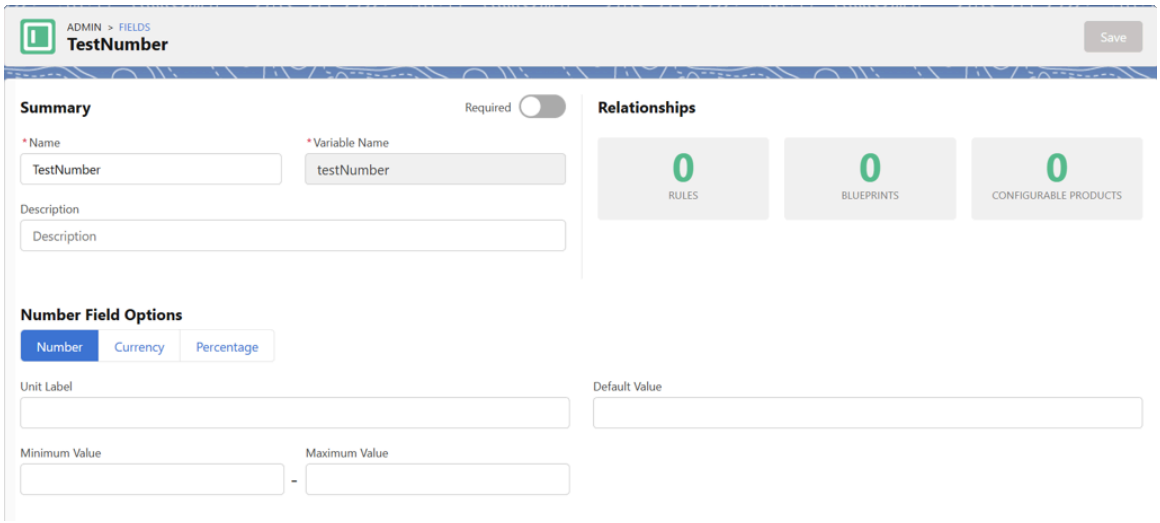
Because fields are global across an environment, all fields need a unique variable name when they are created. They can also be set as required during configuration, so that if the field is associated with a blueprint, it must be filled out before the configuration can be saved.

Text fields accept any characters entered into the field up to 2000 characters. The field definition allows the admin to specify minimum and maximum field lengths and a static default value.

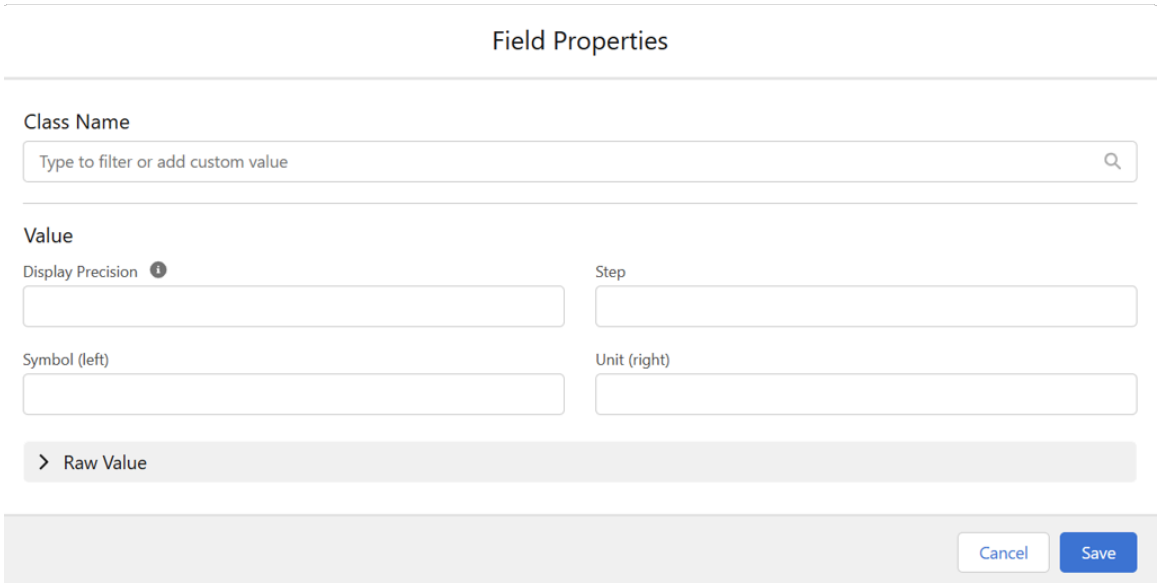



Numbers fields accept only numeric characters in their fields. The field definition requires the admin to specify whether the field will be used as a number, currency, or percentage. Optional settings include minimum and maximum values and a default value. The unit label setting is not currently used in the application.

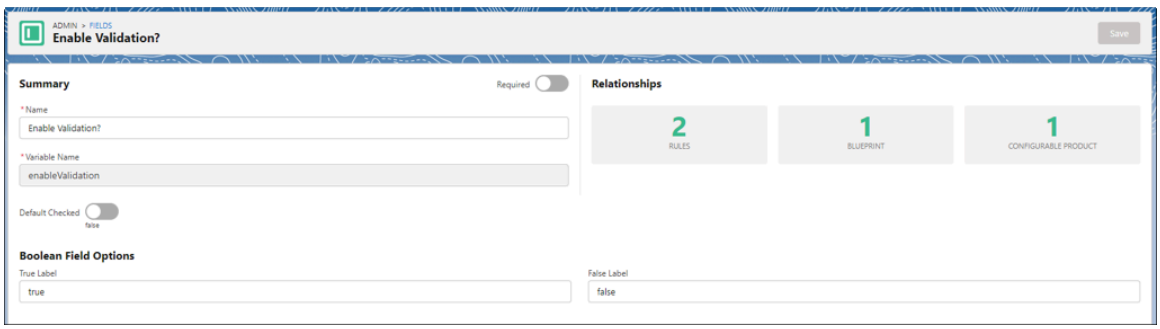
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To specify the display precision of a numeric value, in the CPQ layout, click the gear icon in the number field. Then, set the precision in the Display Precision field.



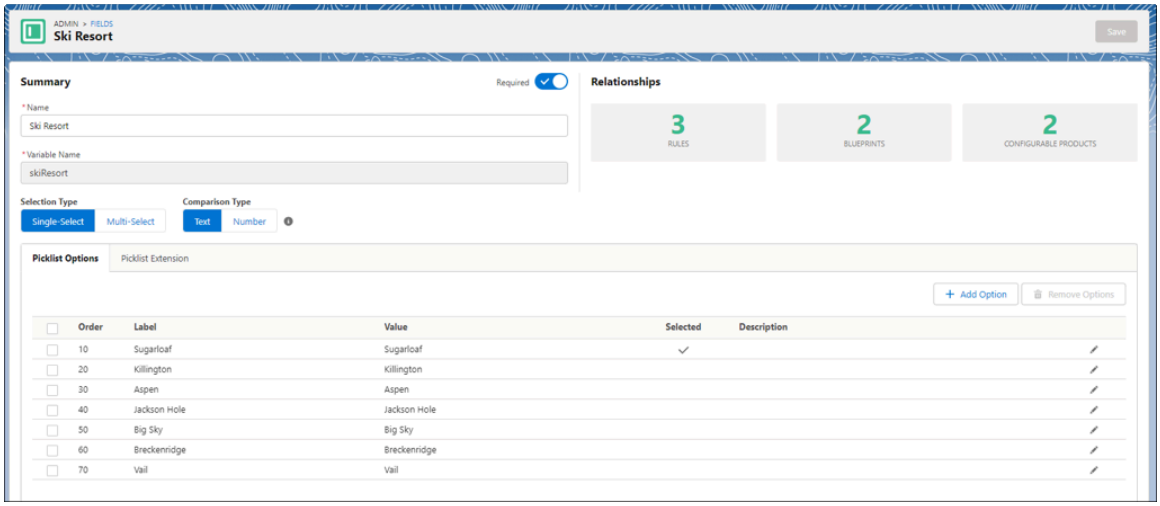

Boolean fields accept only two values: true and false. The field definition allows the admin to specify a true label, a false label, and a default value. Unless specified, the default true label is Enabled and the default false label is Disabled. The default state is false.



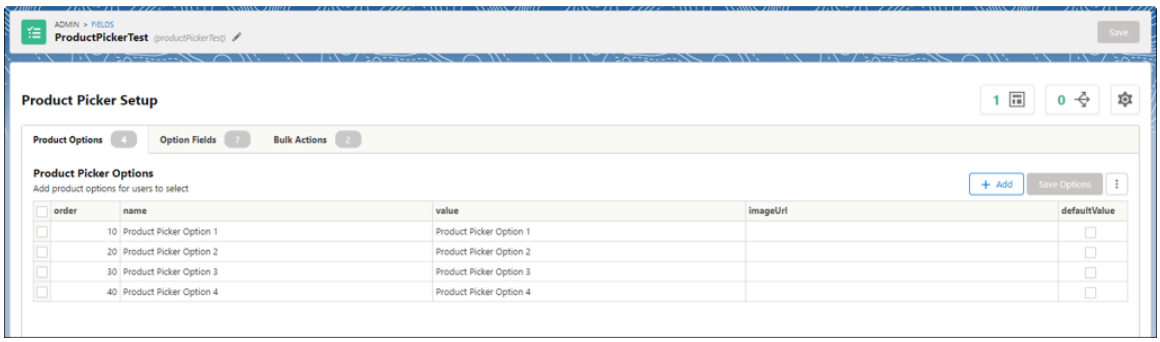

Picklists are fields that only allow specified options to be selected, such as catalog items. When defining the field, the admin must specify whether the field is single-select, where the user must select one value, or multi-select, where the user can select as many values as desired. If the field is single-select, the admin must also specify whether the option values should be evaluated as a

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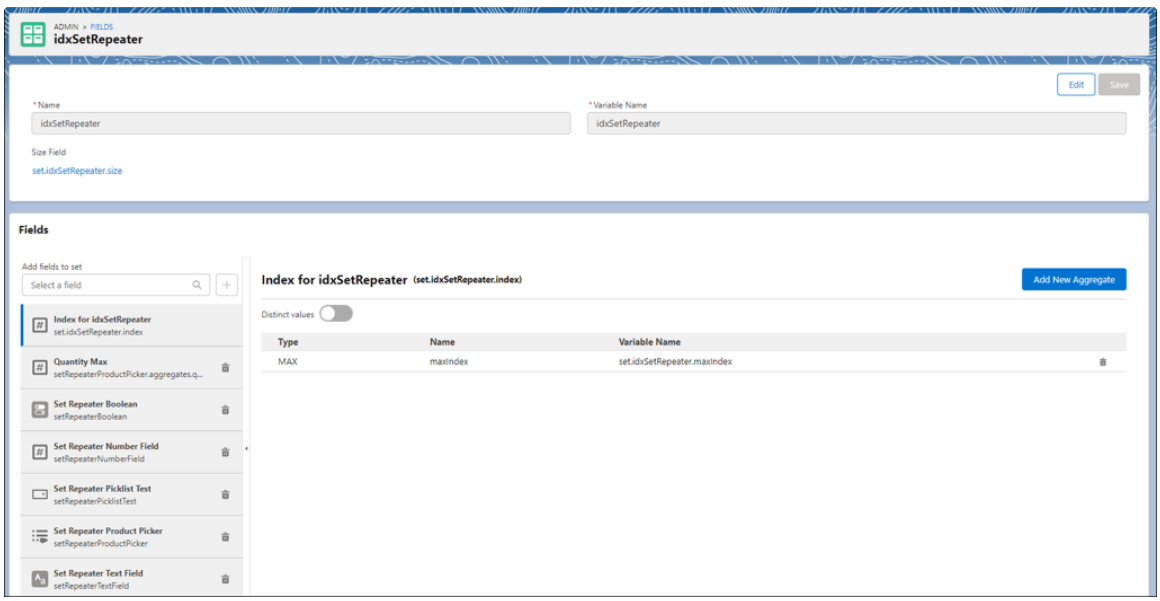
text field or a number field. The admin can also add field options, set an order, or a default value or values, and add picklist extension data if necessary.




A product picker is like a picklist with extended data. product pickers can add products to a bill of materials and map additional data to product list fields, including extended data, without writing standard rules.




A set is a collection of fields that interacts only with the fields in their own row and column.




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## Sample blueprint showing field options and display variations

The following blueprint includes all the different field options and display variations. This ZIP file contains the layout CSV files that show how to set the component display types for each option.

Component Display type blueprint

### Related topics

- CPQ fields, system fields, and partner fields
- Field type display options
- Grid-style fields and field collections
- Boundaries and limits

### Create a field using the Administration UI

Learn how to create a field in the CPQ UI for use in Blueprint.

### Before you begin

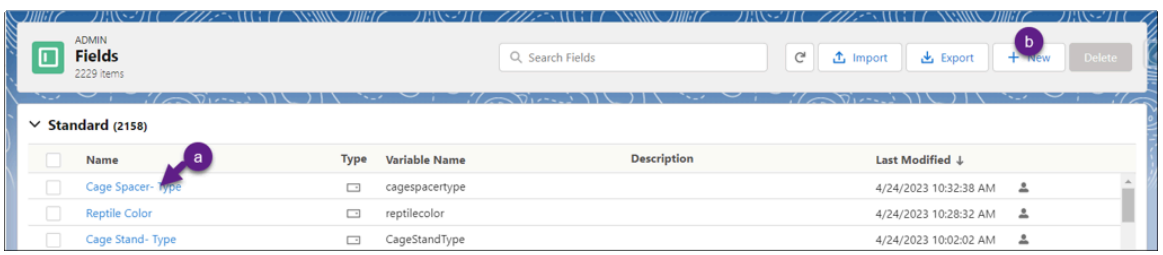
Role required: Admin

### Procedure

1. In the CPQ navigation pane, click **Fields**.



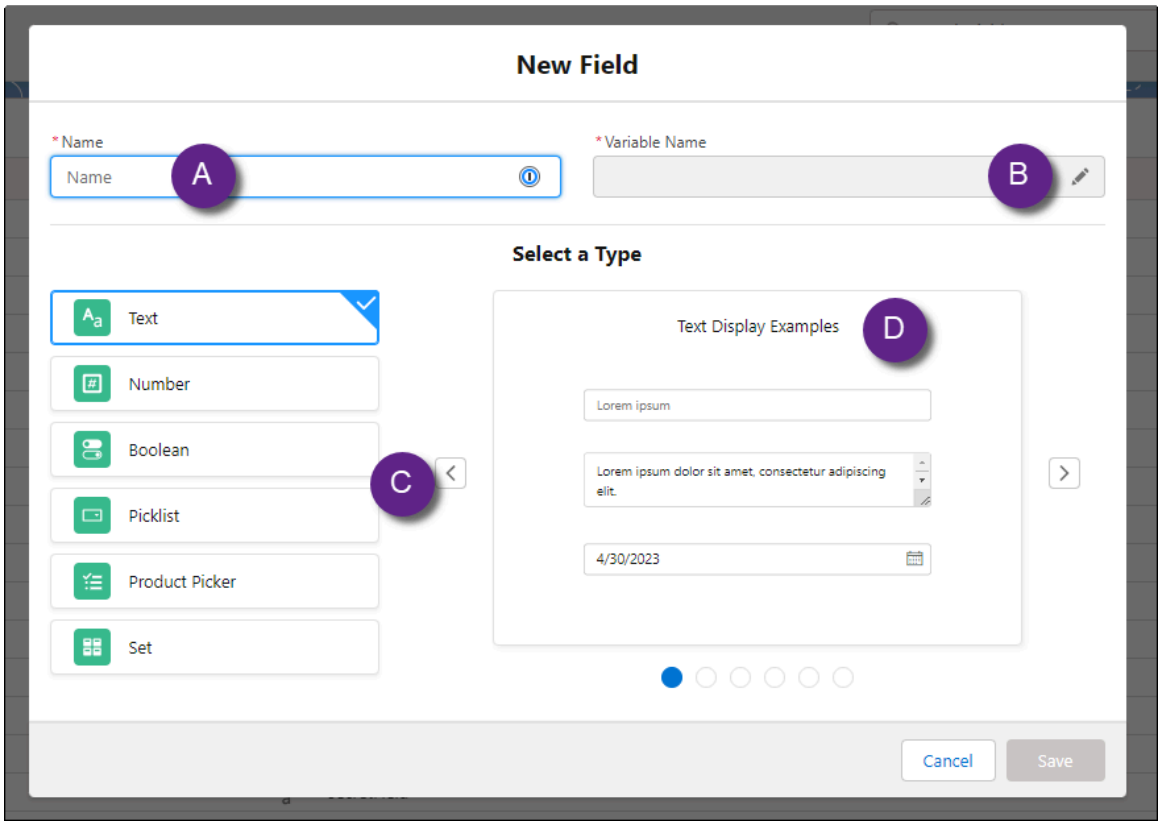

The Fields administration page opens, listing the fields in the current environment.




To edit a field, click its name (a). To create a new field, click **+ New** (b).

2. Click **+ New**.
3. In the New Field window, name the field and select a field type.

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- (A) Valid field names can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: { } [ ] ( ) | \ ~ ` _ ^ @ ? < = > ; : / . - , + * ' & % $ # " !
- (B) The variable name is automatically populated. To set a different variable name, click the pencil icon. (You cannot edit the variable name later.) Valid field variable names consist of letters, numbers, and underscores. The first and last character must be a letter or number.
- (C) Fill in the type-specific details, as necessary.
- (D) The New Field window shows the Component Display Types available for the field type.

4. Click **Save**.
   If you need to create a large number of fields or field options, use the Matrix Loader.

   When you create a field, it becomes available to any layout or rule in the environment. However, you must associate a field with a blueprint so that the field can be used in a configuration experience.

## What to do next

Associate a field with a blueprint

### Related topics

Configure the Matrix Loader

### Associate a field with a blueprint

Associate a field with a blueprint so that the field can be used in a configuration experience.

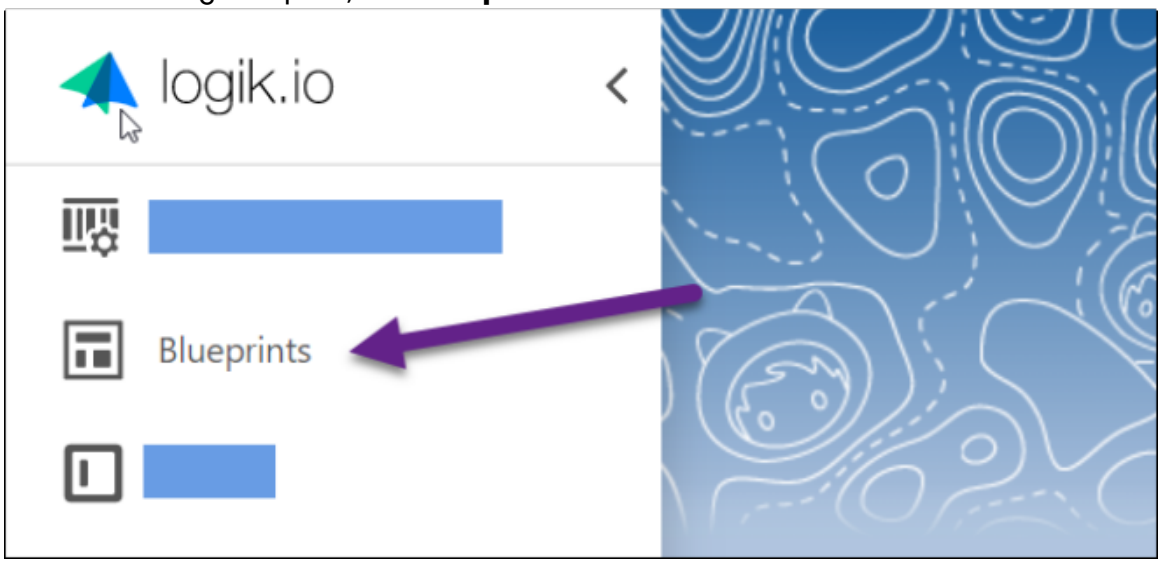
## Before you begin

Role required: Admin

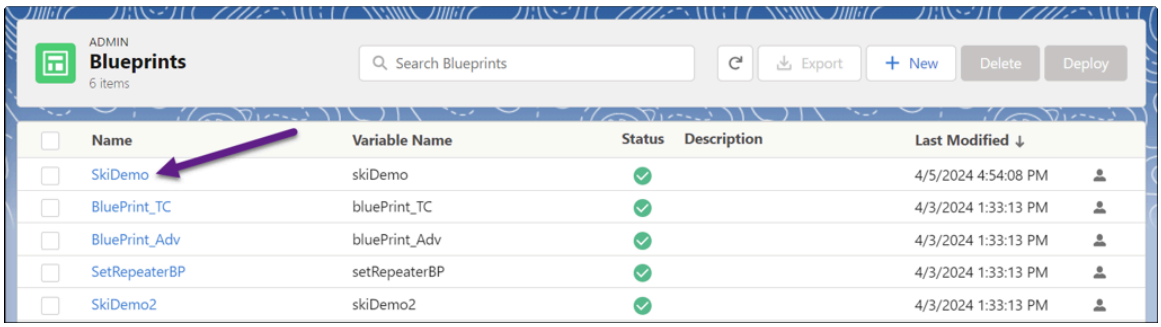
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## Procedure

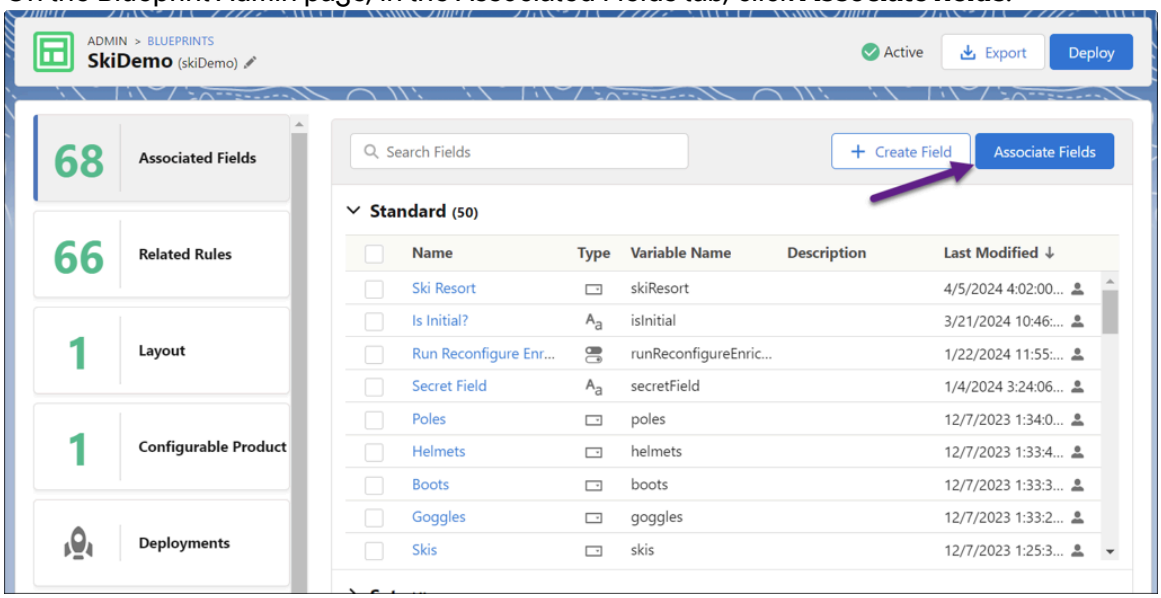
1. In the CPQ navigation pane, click **Blueprints**.




2. On the Blueprints page, click the name of the blueprint with which you intend to associate your field.

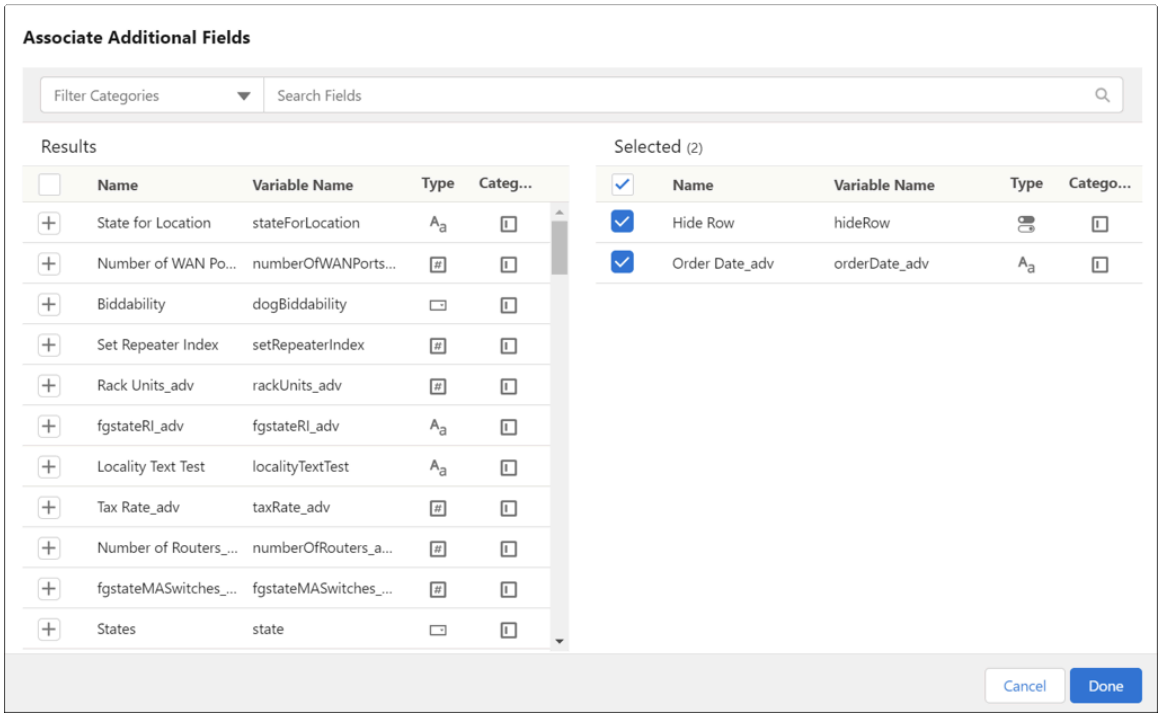



3. On the Blueprint Admin page, in the Associated Fields tab, click **Associate fields**.

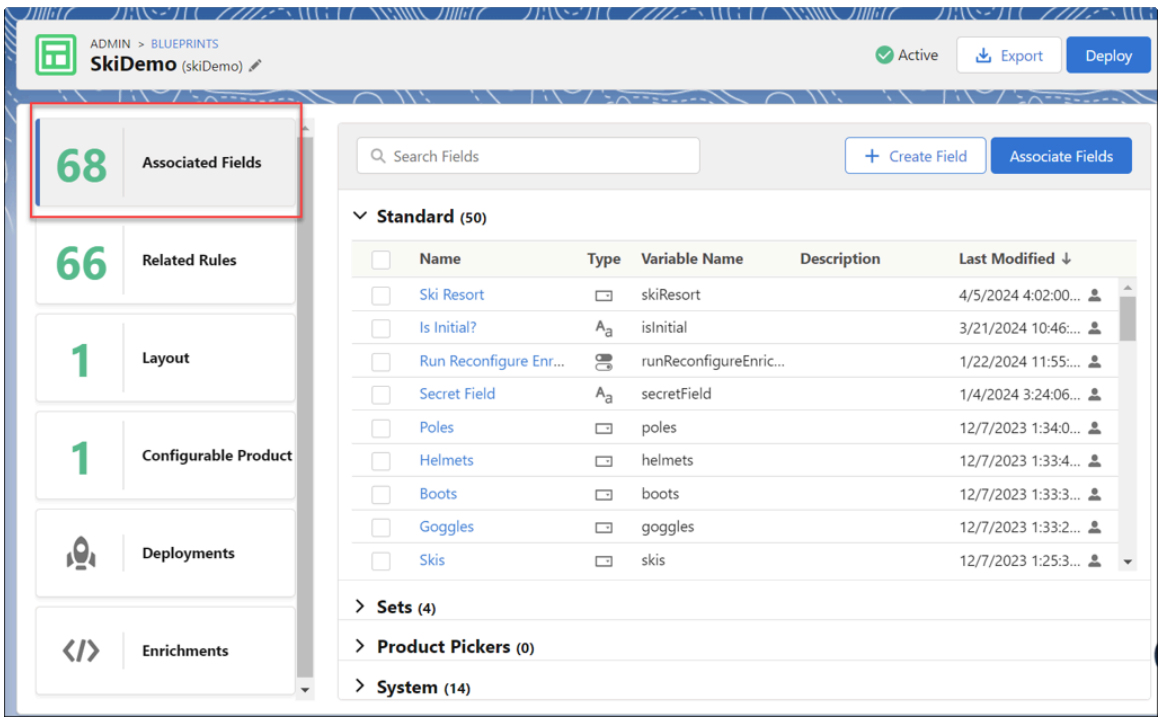



4. In the Associate Additional fields window, select the fields to associate with the blueprint, and then click **Done**.

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The fields associated with the blueprint are listed on the Fields tab of the blueprint administration page.




## Related topics

Create a field using the Administration UI

## Enable Markdown in text fields

Markdown lets you format rich text using an easy-to-remember plain text syntax.

### Before you begin

Role required: Admin

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### About this task

CPQ text fields support Markdown, a widely used, lightweight markup language for formatting text using plain-text syntax.

### Procedure

1. In the layout editor, click the gear icon.
2. Enter the following JSON text as the raw value for the field properties:

```
{
  "enableMarkdown": true
}
```

3. Click **Edit Field Info**.
4. Select ReadOnlyText as the display type for the field that will accept Markdown text.

### Related topics

- Markdown syntax
- Markdown options for read-only text

### Markdown syntax

Markdown provides a simple way to format content using plain text syntax. Use Markdown to apply basic text styling, insert links, and add images by using a small set of intuitive symbols that render consistently across supported CPQ experiences.

## Text formatting

Add asterisks or underscores around the text to bold or italicize.

- A single layer of marks italicizes: *italic* or _italic_
- A double layer of marks emboldens: **bold** or __bold__
- A triple layer both italicizes and emboldens: ***bold and italic*** or ___bold and italic___

## Links

The following syntax creates a clickable URL:

`[link text](URL)`

[The ServiceNow home page](https://www.servicenow.com/)

## Images

The following syntax inserts images via a URL:

`![alt text](image URL)`

### Related topics

- Enable Markdown in text fields
- Markdown options for read-only text

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## Markdown options for read-only text

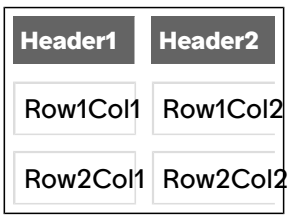
Enable markdown formatting for ReadOnlyText components in CPQ layouts to enhance text presentation. Use syntax for bold, italics, lists, links, images, and dynamic field values to create clear, engaging, and context-aware display text in configurations.

This article describes the markdown syntax and behaviors available to administrators when a text field is defined on a native CPQ UI layout with component display type ReadOnlyText. For a broader discussion of layout options, see CSV layout upload.

To apply markdown formatting to a ReadOnlyText component:

1. In the layout editor, open the field properties (button with cog icon)
2. Add the following as the raw value: `{ "enableMarkdown": true }`
3. Use the following markdown syntax in the text field value.

### Markdown formatting options

| Formatting Option | Syntax | Output | Notes |
|---|---|---|---|
| Bold | **this will be bold** | **bold text** | A double underscore instead of the double * will also work |
| Italics | *this will be italic*<br>_this will be italic_ | italic text | A single underscore instead of the single * will also work |
| Unordered List | Item\r- Item\r- Item | • Item<br>• Item<br>• Item | |
| Ordered List | 1.Item\r2. Item\r3. Item | 1. Item<br>2. Item<br>3. Item | |
| Newline | \n | | |
| Link | [link display text] (https://www.example.com) | link display text | Any JavaScript entered will be sanitized |
| Image | ![alt text](image url, "title text") | N/A | |
| Table | \| Header1 \| Header2 \| \n\|---\|---\|\n\| Row1Col1 \| Row1Col2 \|\n\| Row2Col1 \| Row2Col2 \| |  | By default, columns are left-aligned. To right-align, use `- - - :`. To center, use `: - - - :`.<br>By default, table borders are off. To add borders, add |

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**Markdown formatting options (continued)**

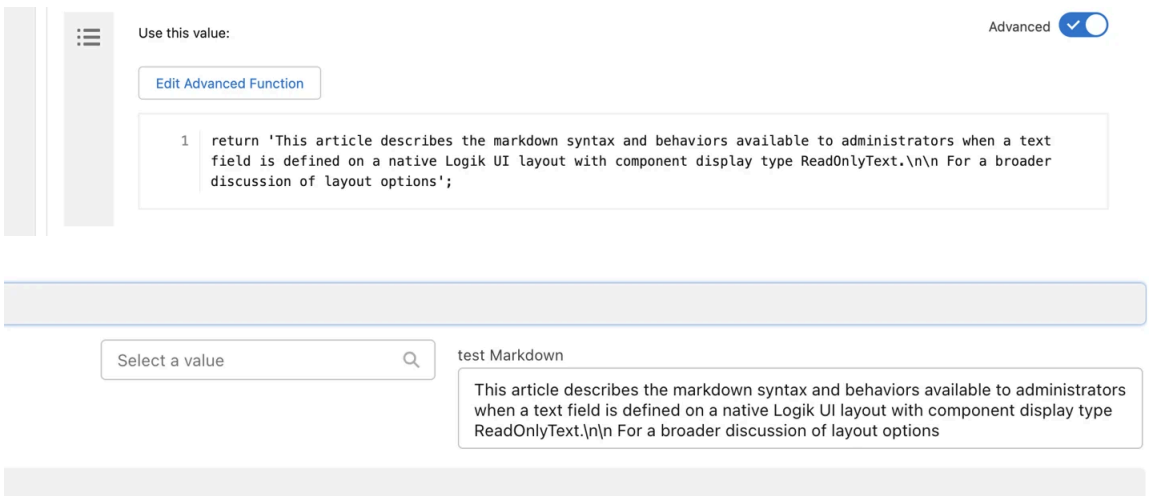
| Formatting Option | Syntax | Output | Notes |
|---|---|---|---|
| | | | theme property `Markdown-table-borderWidth: 1px`. |
| Dynamic Text | {{fieldVariableName}} | | Outputs the value of the selected field in the text |
| Dynamic Non- Field Text | {{txn#rowNumber}} | | Outputs the value of the dynamic text based on context<br><br>Currently, only rowNumber in a txn line is supported |

This markdown syntax is the same as that available for field help popups.

## Returning strings with Markdown

When you return a string with Markdown, enclose the string in double quotes, especially when using escaped characters such as `\n` for line breaks. Using single quotes may prevent Markdown from rendering properly and can lead to unexpected results.

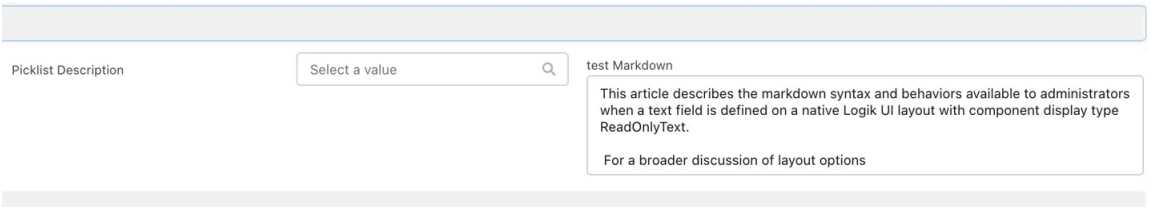
For example, when the following return function is entered, it leads to the escaped characters appearing in the output:




When the return function encloses the same text in double quotes, the output appears as intended:




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### CPQ fields, system fields, and partner fields

Learn about the three types of fields in CPQ—CPQ, system fields, and partner fields. Understand how each type stores, retrieves, and displays data in configurations, and how they interact with Salesforce and partner systems for seamless data integration.

There are three categories of fields in the CPQ environment: CPQ fields, system fields, and partner fields.

## CPQ fields

A CPQ field is a user-defined field that is custom to the CPQ environment. Its type can be number, text, picklist, set, or product picker. When users create fields in CPQ, they can manually assign default values in the field definition, or they can set values through determination actions.

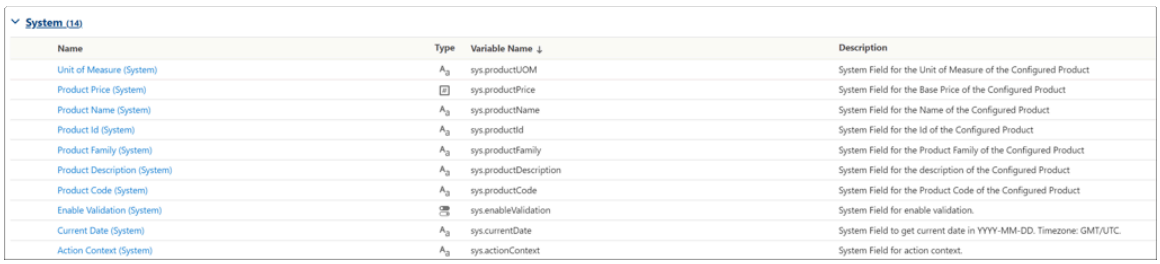
The following example shows how a user would set a CPQ field in an On Configure/Reconfigure enrichment:

```
cfgRequest.testField.set("value", "Hello World");
```

For a more complete description of CPQ fields, see Configure fields.

**Note:** In organizations that do not use Salesforce for their launch-point into CPQ, all fields must be initialized in their API call.

## System fields



System (14)

| Name | Type | Variable Name | Description |
|---|---|---|---|
| Unit of Measure (System) | | sys.productUOM | System Field for the Unit of Measure of the Configured Product |
| Product Price (System) | | sys.productPrice | System Field for the Base Price of the Configured Product |
| Product Name (System) | | sys.productName | System Field for the Name of the Configured Product |
| Product Id (System) | | sys.productId | System Field for the Id of the Configured Product |
| Product Family (System) | | sys.productFamily | System Field for the Product Family of the Configured Product |
| Product Description (System) | | sys.productDescription | System Field for the description of the Configured Product |
| Product Code (System) | | sys.productCode | System Field for the Product Code of the Configured Product |
| Enable Validation (System) | | sys.enableValidation | System Field for enable validation. |
| Current Date (System) | | sys.currentDate | System Field to get current date in YYYY-MM-DD. Timezone: GMT/UTC. |
| Action Context (System) | | sys.actionContext | System Field for action context. |

System fields are predefined. System fields cannot be assigned a default value because they leverage the SFDC product cache (or the current date and time) to generate their values.

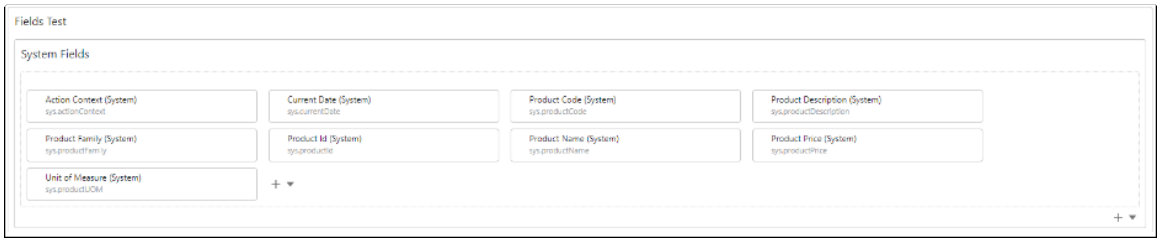
The following example shows how a user would call a system field in an On Configure/ Reconfigure enrichment:

```
let pC = {"input2":cfgRequest.sys.productCode.value};
```

System fields can be added directly to any layout. There are no issues with displaying them regardless of whether they contain predefined data.

In the layout editor:

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In the Configurator UI:

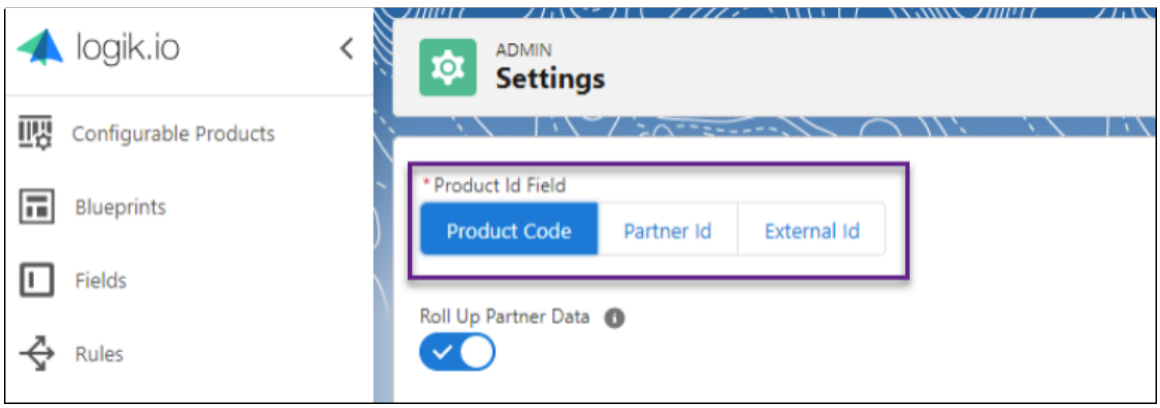



Unit of Measure is blank because in this example, it has not been defined in SFDC.

The mapping of each of these system fields to their respective SFDC object is as follows. The field API name is in parentheses.

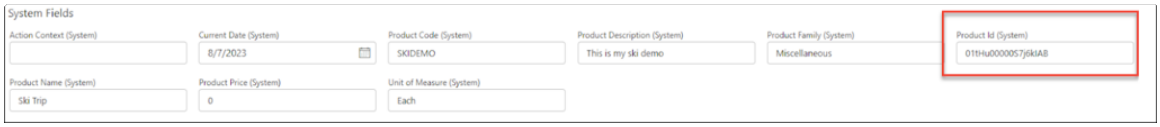
- sys.productUOM > Product: Quantity Unit Of Measure (QuantityUnitOfMeasure)
- sys.productName > Product: Product Name (Name)
- sys.productFamily > Product: Product Family (Family)
- sys.productDescription > Product: Product Description (Description)
- sys.productCode > Product: Product Code (ProductCode)
- sys.enableValidation: value defaults to true
- sys.currentDate: Simple time API call, returns date of UTC
- sys.actionContext > Quote Line: Action Context (LGK ActionContext c)
- sys.productPrice > Price Book Entry: List Price (UnitPrice)
- sys.productId: value depends on Admin Settings

  sys.productId changes to whatever is defined in your CPQ environment settings. For instance, if the Product Id field was set to Product Code, the resulting data would be Product Code, making it identical to the sys.productCode field.




If the Product Id field was instead set to Partner Id, the data would be pulled from the SFDC field Product2 Id (ID as the field API name):

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## Partner fields

| Name | Type | Variable Name ↑ | Description |
|---|---|---|---|
| Currency ISO Code (Partner) | Aa | partner.quote.currencyIsoCode | Currency ISO Code of the Quote used to price items. |
| Quote Id (Partner) | Aa | partner.quote.id | Id of the Quote for this configuration. |
| Line Id (Partner) | Aa | partner.quote.lineId | Unique identifier reference for the Configurable Product. |
| Pricebook Id (Partner) | Aa | partner.quote.pricebookId | Price book Id for the current Quote. |

Partner fields are fields that use a POST call to initialize a configuration via API. Partner fields leverage the partner's data set to generate field values.

The mapping of each of these partner fields to their respective SFDC object is as follows. The field API name is in parentheses.

- partner.quote.id Quote > Record ID (Id)
- partner.quote.lineId Quote Line > Record ID (Id)
- partner.quote.pricebookId Quote > Pricebook ID (SBQQPricebookIdc)
- partner.quote.currencyIsoCode Quote > CurrencyIsoCode

  partner.quote.currencyIsoCode defaults to USD if your organization does not have multi-currency enabled in their Salesforce Org. To enable multi-currency, follow the steps in this Salesforce article: Enable Multiple Currencies.

When using these fields, it's important to note that some of the data may not have any value (null) when the product is first configured. To make sure that there are no initialization errors, include null checks in any rules or scripts that utilize partner fields.

These fields cannot be directly added to a layout like system fields can. Instead, you can use CPQ fields to populate the data in partner fields via an initialization enrichment.

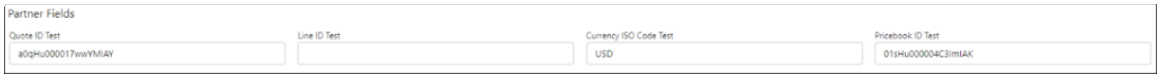
The following example initialization enrichment populates the values of the partner fields into the configurator:

```
let quoteId = cfgRequest.partner.quote.id.value;
let lineID = cfgRequest.partner.quote.lineId.value;
let currencyISO =
 cfgRequest.partner.quote.currencyIsoCode.value;
let priceBookID = cfgRequest.partner.quote.pricebookId.value;

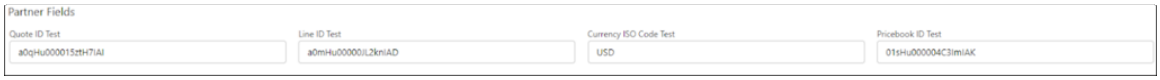
if (quoteId != null) {
 cfgRequest.quoteIDTest.set("value", quoteId);
}
if (lineID != null) {
 cfgRequest.lineIDTest.set("value", lineID);
}
if (currencyISO != null) {
 cfgRequest.currencyISOCodeTest.set("value", currencyISO);
}
if (priceBookID != null) {
 cfgRequest.pricebookIDTest.set("value", priceBookID);
}
return cfgRequest;
```

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Initial configuration:




Reconfiguration:




Line ID is now populated.

How you use partner and system fields is up to you. Some organizations find it helpful to display this information in the configurator to the end user, while others use it in the background in rules to drive pricing conditions.

**Related topics**

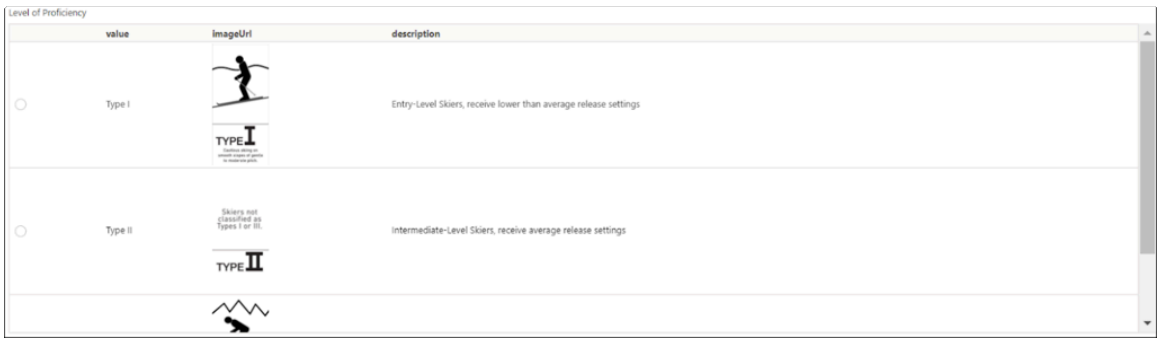
- Grid-style fields and field collections
- Configure fields

### Grid-style fields and field collections

Learn about the various types of grid-style fields: the picklist extension, the field grid, the indexed set, the associated picklist set, and the product picker. Learn how best to choose a field type for your data.

In CPQ, although many grid-style fields and field collections look similar to an end user, they have different behaviors and uses for admins. This article explains the basic capabilities of each and their intended use cases. It also provides the necessary resources for those who want to explore each option's setup at a deeper level.

## Picklist extension




A picklist extension is a field type that displays extended information. It may be used to show more option details or to show dynamic pricing options with the Picklist Extension Pricing enrichment. A picklist extension can include images and supports multi-select and single-select actions. It can send product information directly to the bill of materials (BOM).

A picklist extension uses exclusion rules and option filters to populate what end users see. Only one field is editable out of the grid (the selection).

For an overview of the picklist extension feature, see Picklist extensions.

For a deeper understanding of the back end and how to display picklist extensions, see Displaying a picklist extension on a layout.

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For an overview of the Picklist Extension Pricing enrichment feature, see The Picklist Extension Pricing enrichment.

For information about using picklist extensions in rules, see Picklists and picklist extensions in rules.

## Field grid

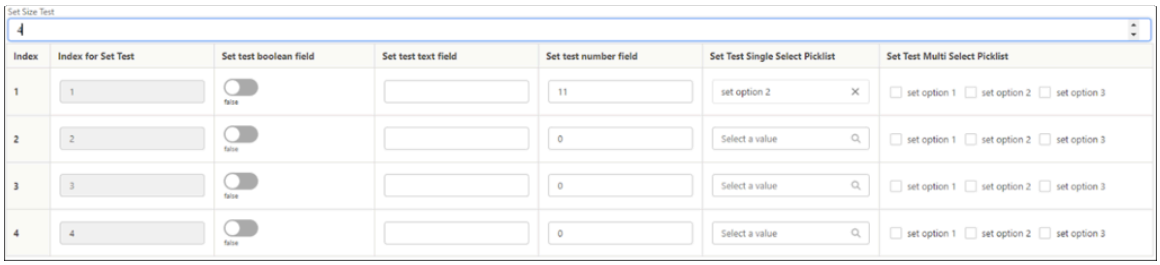



A field grid is a grid of independent fields in a format of rows and columns. It may be used to display similar and codependent fields in an easy-to-format pattern, when the number of fields to display is static, or when each field needs to be referenced outside of its own row and column.

Each field can be referenced and manipulated by any rule and must be independently defined. For example, a 3 x 3 row requires 9 fields.

For information about how to set up a field grid using the Matrix Loader, see Layouts: Field grid setup.

## Indexed set




An indexed set is a dynamic set of repeating identical fields. It can be used to display options for a component that can be changed per component, or to aggregate costs and quantities for simple product rules. It tends to require little setup and maintenance.

Each field can be cloned and edited separately depending on an outside number field. You only need to create the fields in each row, not one field per cell.

Each set field can only affect the fields in its row.

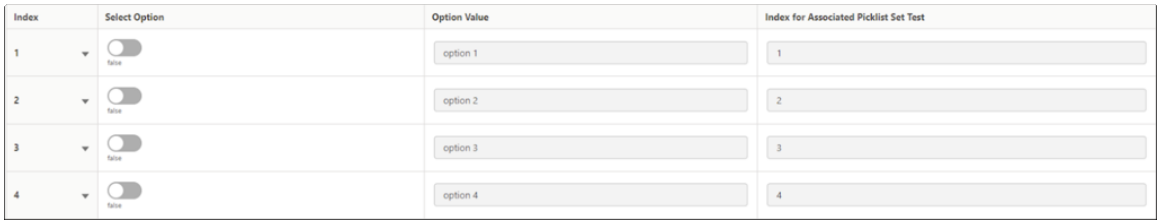
Each column can be aggregated into a field that can be referenced outside the set. It can be configured to display across tiers.

For more information about sets, set aggregates (collections of sets) and about how to use sets in layouts, see:

- Configure sets
- Creating set aggregates
- Using sets in layouts

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## Associated Picklist set




An Associated Picklist set is a dynamic set of repeating fields based on the options of a picklist. It may be used to aggregate costs and work hours for distinct services, to limit the options of a configurable component, or to expand and use more field options for a picklist than a picklist extension.

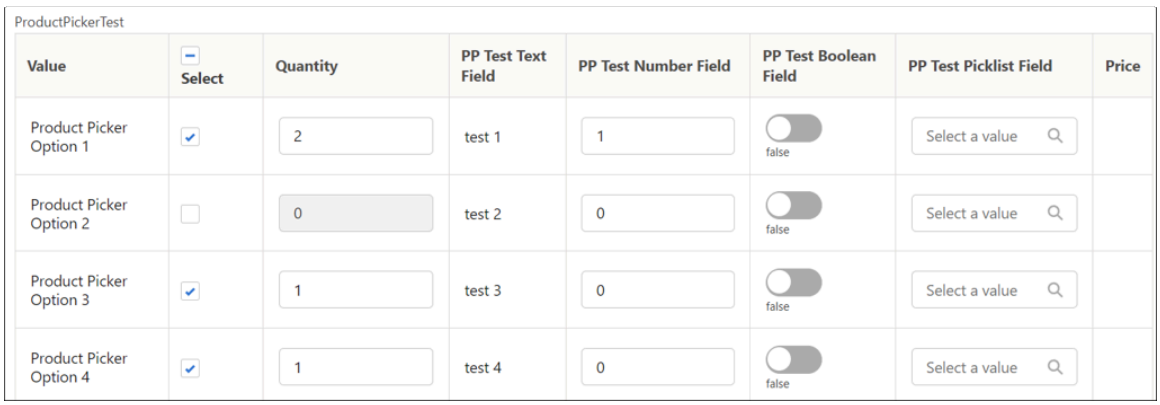
Each field can be cloned and edited separately depending on an outside picklist's selections. You only need to create the fields in each row, not one field per cell.

Each set field can only affect the fields in its row.

Each column can be aggregated into a field that can be referenced outside the set. It can be configured to display across tiers.

For more information, see Creating an associated picklist set.

## Product Picker




The product picker field type is a product-based table of distinct options and qualities similar to the Associated Picklist set, but with built-in product rules. It may be used when product options need further information from the end user before being added to the BOM.

Each option is defined like a picklist, but every cell contains an editable field. You only need to define the options and fields, as shown in the row and column headers.

Value, Select, and Quantity are automatically added, and will automatically send end-user selections to the BOM. Field behavior in a product picker is determined by product picker bulk actions.

This field can affect fields outside the product picker by means of rules.

For more information, see:

- Product pickers
- Product picker bulk actions

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**Related topics**

- CPQ fields, system fields, and partner fields
- Configure fields

## Field type display options

Field type display options

Users have many display options for the different field types. These are defined in the layout CSV in the Component Display Type column using the values in the parentheses for each type.

The admin uses the Component Display Type column to define how a field will display on a layout. The following types are available.

### Available display types

| Field type | Component display types |
|---|---|
| Text | ReadOnlyText<br>Text<br>TextArea<br>Date<br>LocationLookup |
| Boolean | Boolean<br>Radio<br>RadioButtons<br>Checkbox |
| Number | Number<br>NumberWithSubmit<br>Slider<br>ReadOnlyText<br>ReadOnlyCurrency<br>FormattedNumber |
| Picklist (single-select) | Picklist<br>ReadOnlyPicklist<br>ExtendedPicklist<br>ExtendedPicklistDisplayOnly<br>Radio |

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**Available display types (continued)**

| Field type | Component display types |
|---|---|
| | RadioButtons<br>VerticalRadio<br>SingleSelectPicklistGrid<br>VisualPicker |
| Picklist (multi-select) | MultiSelectPicklist<br>MultiSelectExtendedPicklist<br>MultiSelectExtendedPicklistDisplayOnly<br>MultiSelectPicklistGrid<br>MultiSelectVisualPicker<br>Checkbox<br>VerticalCheckbox |
| Product picker | ProductPickerGrid<br>VisualProductPicker |

## Text component display type

Text fields accept a maximum of 2000 entered characters. Administrators can specify minimum and maximum field lengths and a static default value. Text fields can have the following component display types.

Text: A single-line input. Examples demonstrate unpopulated and populated text fields because they are displayed on to the end user.

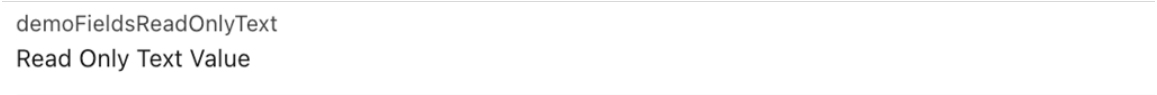



TextArea: A multi-line input field. The example shows a text area with force-set values populated.

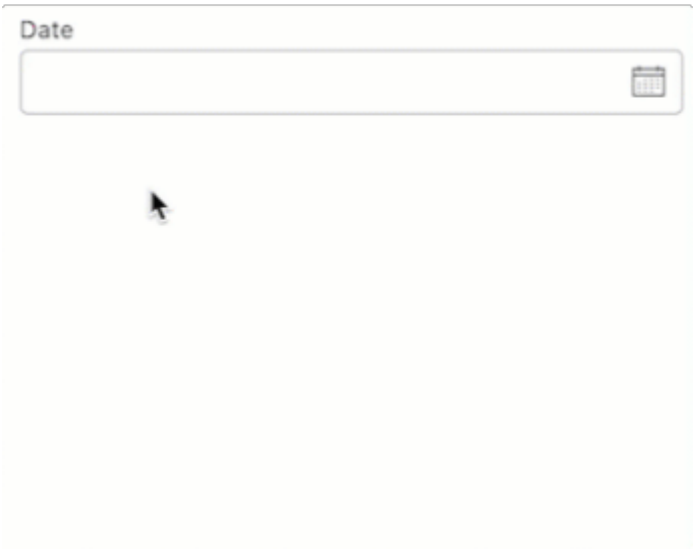



ReadOnlyText: A display-only option. The example shows a text area with a heading and the displayed field details.

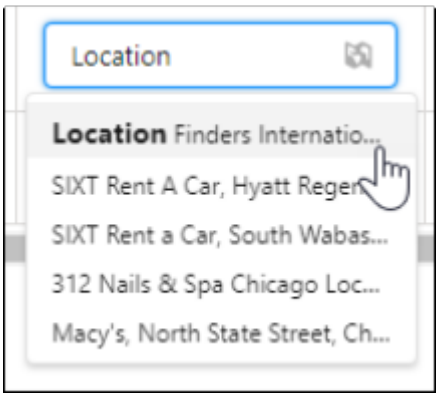
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Date: A single-line input and searchable calendar option. Users can enter a date or search by using the calendar icon.



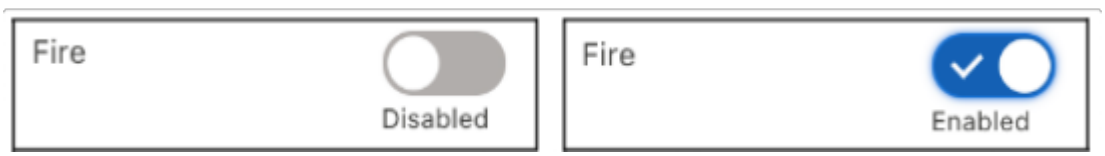

LocationLookup: uses the Google Places API to pull address data that can be used for unique location configuration and pricing.




## Boolean component display type

Boolean fields only accept two values: True and False. False is the default state. Administrators can specify labels for each state. Unless specified, the default label for True is Enabled, and the default label for False is Disabled.

Boolean: Displays as a switch.

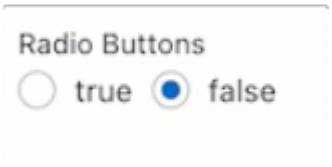



Radio: Displays as square radio buttons.

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RadioButtons: Displays as circular radio buttons.



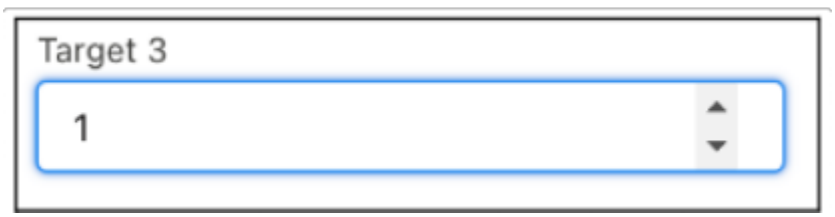

Checkbox: Displays either checked or unchecked.




## Number component display type

Numbers fields accept only numeric characters. Administrator must specify whether the field will be used as a number, as currency, or as a percentage. Optional settings include minimum, maximum, and default values. The unit label setting is not used in the application.

Number: Users can enter a number using the keyboard or modify it by using the up and down buttons.




NumberWithSubmit: Users enter the number by using the keyboard and must click the "Apply" button before their input is accepted.

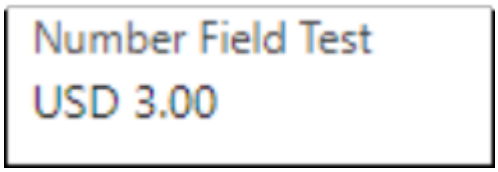



Slider: Users slide through range of available numbers. This field appears only if the field definition has a maximum value.

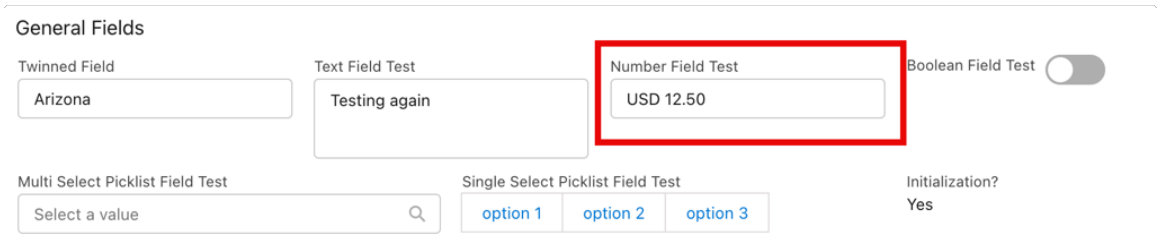



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ReadOnlyText and ReadOnlyCurrency: Display-only options, similar to ReadOnlyText for text fields. ReadOnlyCurrency is a display-only option with currency formatting.



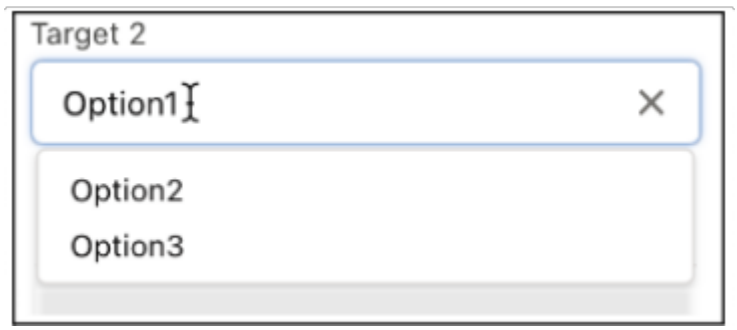

FormattedNumber: Users can enter a number by using the keyboard or modify it by using the up and down buttons. When the field loses focus, it displays in the format defined in the layout CSV.



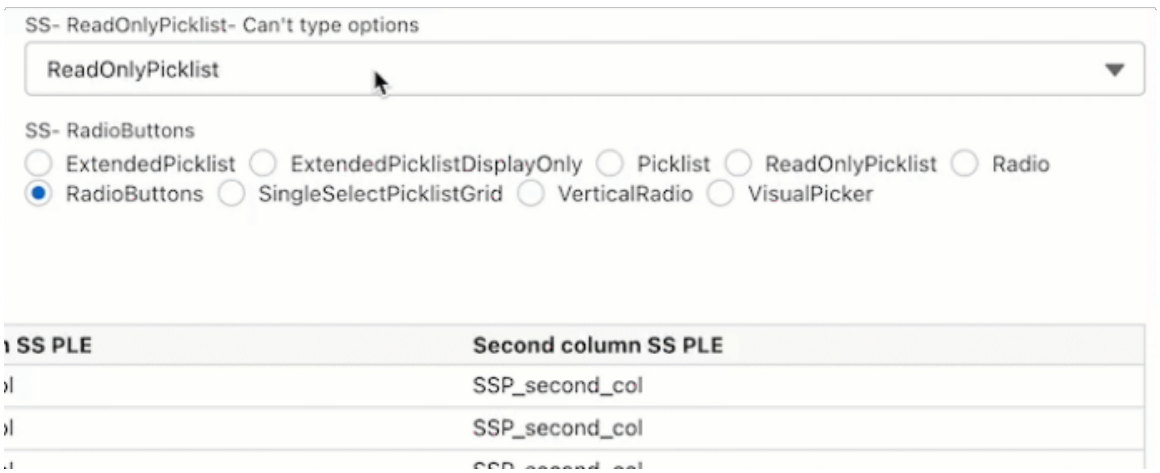

## Picklist component display type (single-select)

Picklists allow only specified options to be selected. Administrators must specify whether the field is single-select or multi-select. For single-select fields, administrators specify whether the values are evaluated as text fields or number fields. Administrators can also add field options, set the order, specify a default value, and add picklist extension data.

Picklist:

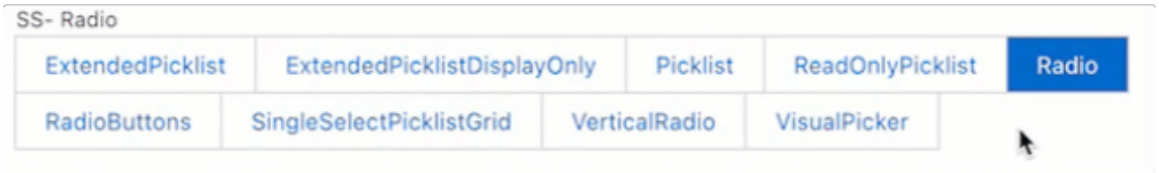



ReadOnlyPicklist: selection only: the user cannot type and filter options.

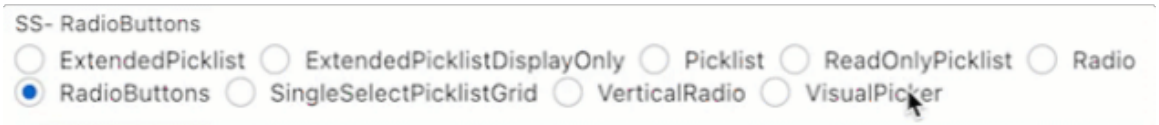



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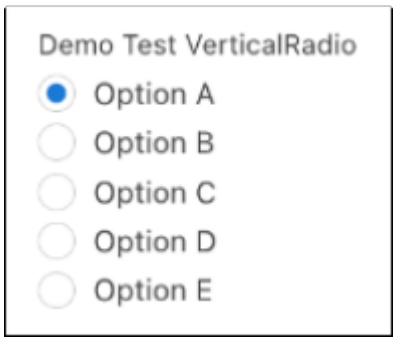
Radio: Displays all options in a square label display, making all options visible without the use of a menu.



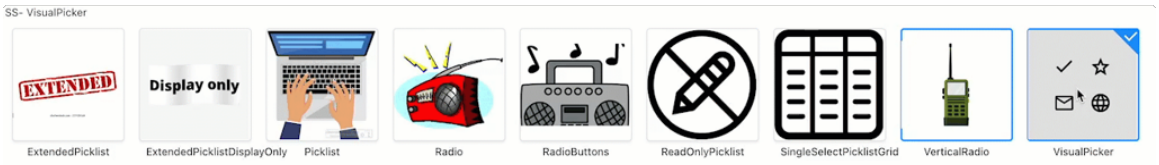

RadioButtons:




VerticalRadio: Options appear as vertical radio buttons.




Visual Picker: Displays the field's options using an associated image with a label below the image. Currently selected options are highlighted with a checkmark.



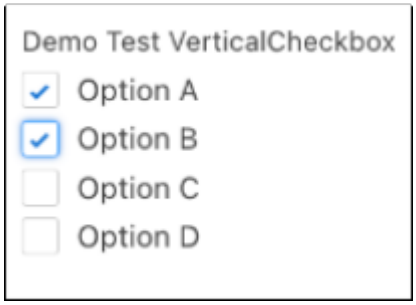

## Picklist component display type (multi-select)

Checkbox: Displays options in row format with checkbox selection. multi-select picklists only.



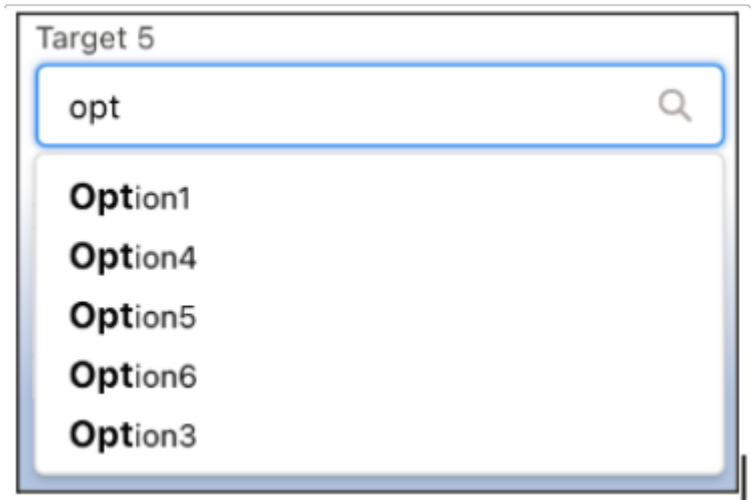

Vertical Checkbox: displays checkbox selection in vertical alignment. multi-select picklists only.

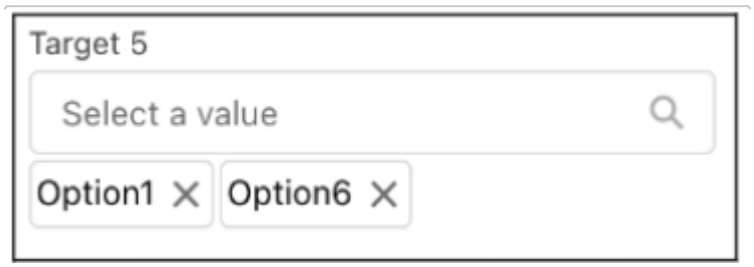
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ReadOnlyPicklist: (same as single-select)

MultiSelectPicklist:

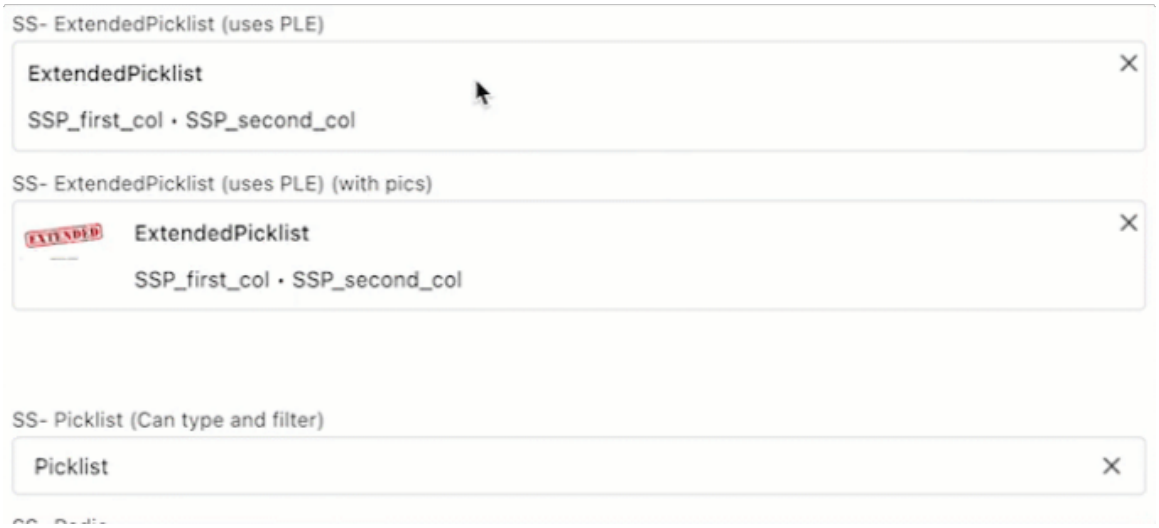


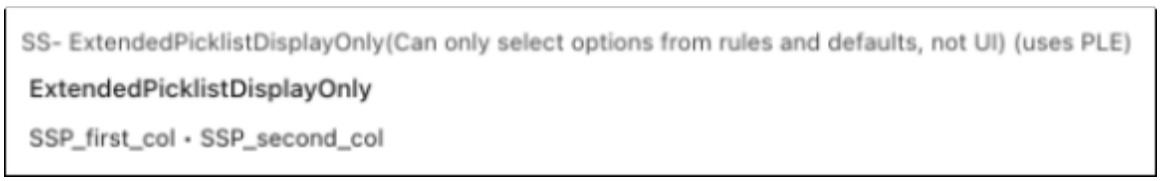

## Picklist extension (PLE)

ExtendedPicklist and MultiSelectExtendedPicklist: Includes additional details from the PLE and lets users choose from a menu. The example shows that this single-select extended picklist displays details from two columns from the associated PLE. Images can be added to field options.

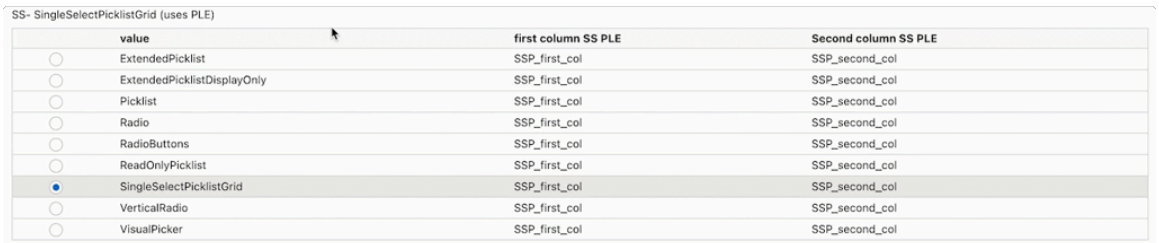
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ExtendedPicklistDisplayOnly, MultiSelectExtendedPicklistDisplayOnly: Includes additional details from the PLE and displays the selection. Options are determined by rule and default options. Not user editable.



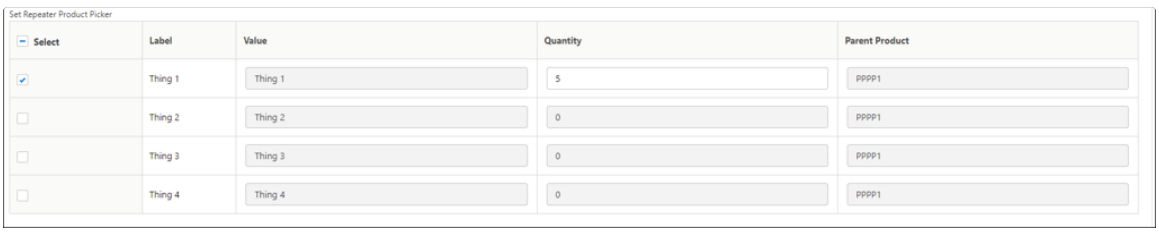

SingleSelectPicklistGrid, MultiSelectPicklistGrid, andSingleSelectPicklistGridCheckbox: Includes additional details from the PLE and displays field options in a grid. The Checkbox version lets the end user deselect their option.




## Product picker component display type

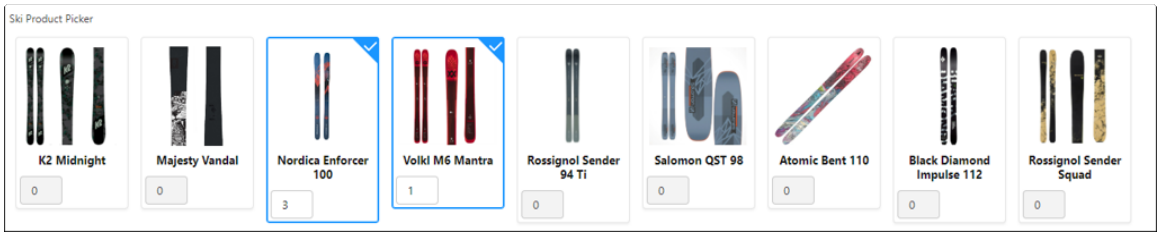
Product pickers are similar to a picklists with extended data. Product pickers can add products to a bill of materials and map additional data to product list fields, including extended data, without writing standard rules.

ProductPickerGrid: Shows the product picker and its subfields in a grid format, much like a picklist extension.




VisualProductPicker: Shows the product picker and its subfields as a Visual Picker.

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**Related topics**

Configure fields

### Blueprint, configurable product, and field UI

View a list of updates and changes made in April 2023.

Improvements in Admin usability and readability. No changes in functionality.

Revamped field, configurable product, and blueprint UIs.

Improved navigation. Breadcrumb links are used more extensively in the UI and dialogs.

Enhanced field association experience from the Blueprint page.

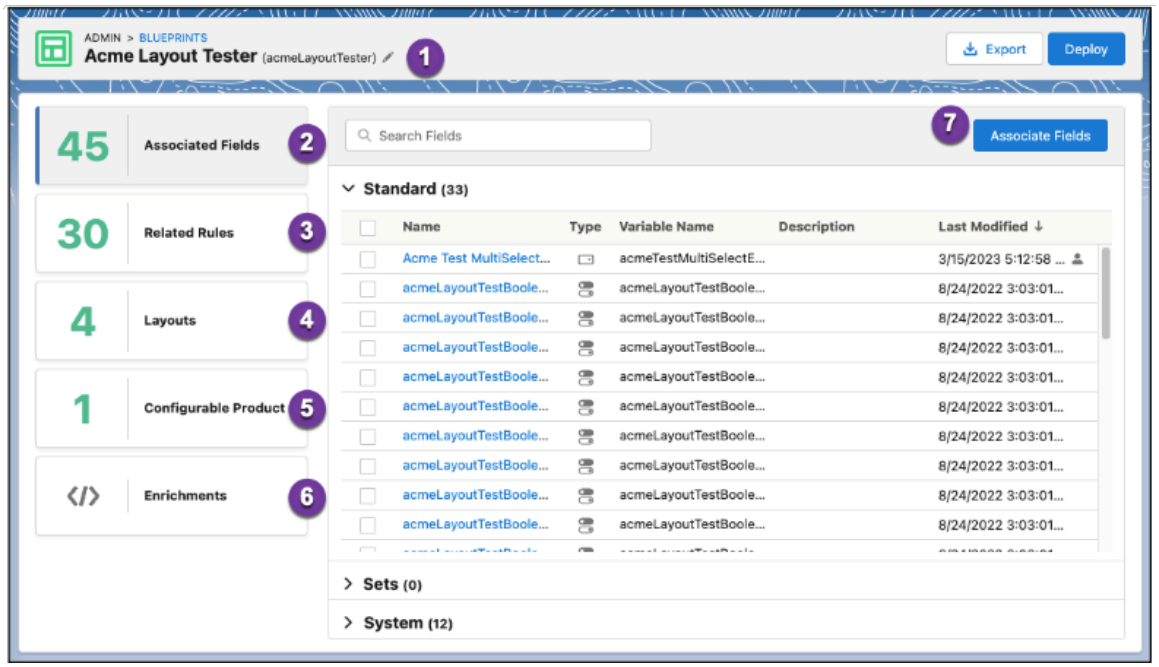
Field and set pages are consolidated into a single view.

Support for creating sets in the New Field dialog.

## Updated blueprint UI

The relationship between the CPQ items and the blueprint can now be easily accessed via the tiles in the left column and the number of associated items is visible at a glance.

Each tile displays the appropriate UI for its object on the right of the screen.




(1) Edit: The blueprint variable name is displayed in parentheses. The blueprint name and description can be edited by clicking the pencil icon.

(2) Associated Fields: Fields for blueprint use the updated field UI with grouping.

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(3) Related Rules: Rules that are related to the blueprint.

(4) Layouts: Layouts for this blueprint.

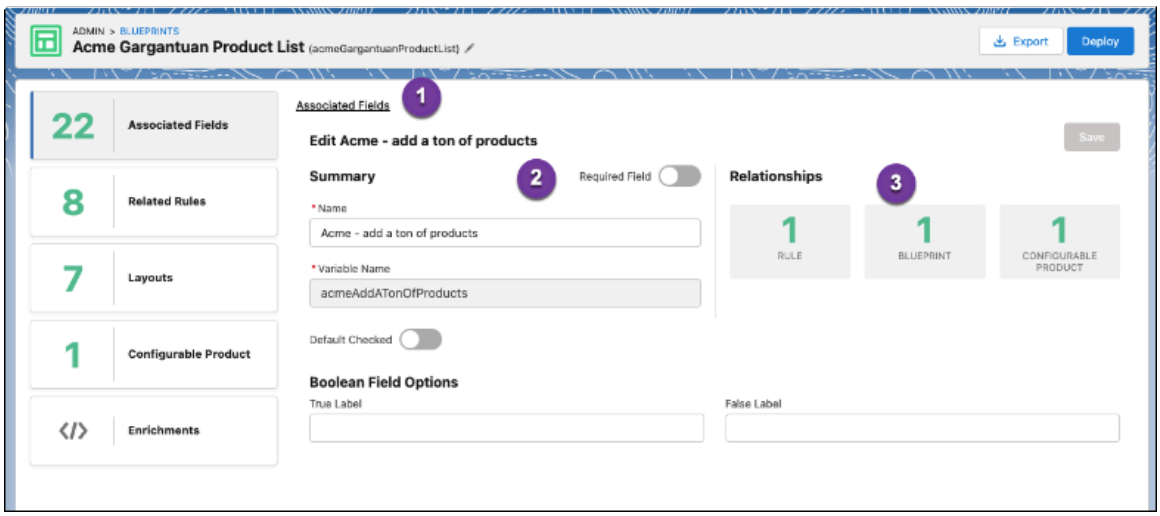
(5) Configurable Product: Configurable products that use this blueprint.

(6) Enrichments: The enrichment scripts for the blueprint.

(7) Associate Fields: Opens field association for the blueprint.

## Updated navigation

In the updated UI for blueprints and configurable products, the navigation and editing experience has changed. When clicking a field or a rule, an editing page slides into the page instead of a dialog appearing. Additionally, there are now breadcrumbs for navigation and context.




(1) Navigation breadcrumb: Breadcrumb links are placed on the header to help maintain context and provide navigation.

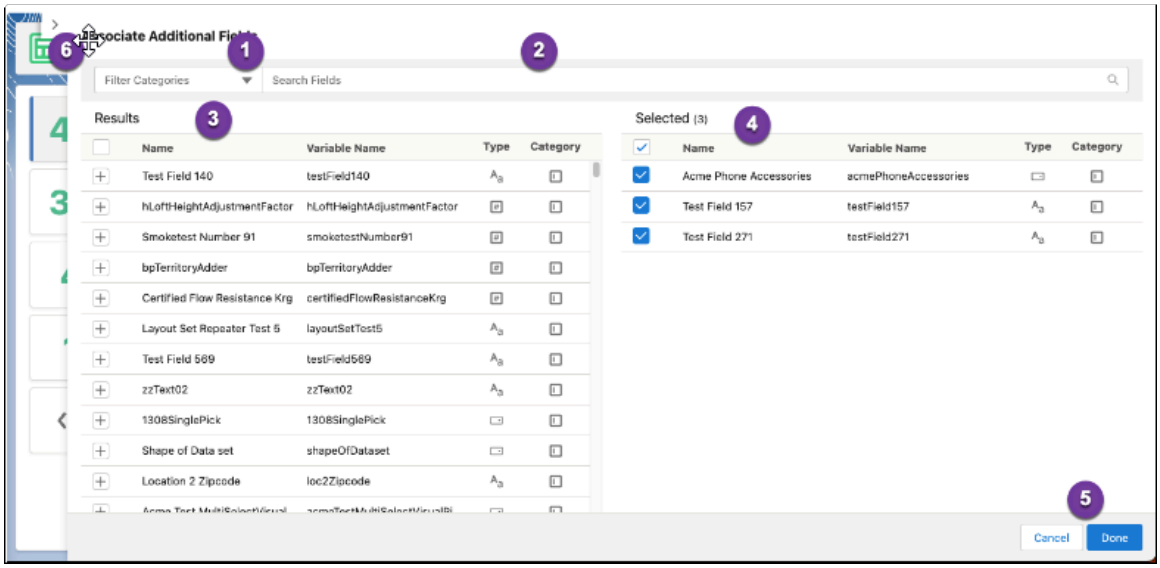
(2) Edit page: The editing page replaces the table view of items in context, instead of the dialog view used previously.

(3) Relationship links: Maintaining consistency with editing a field through the main fields tab, the page layout and relationship links are shown.

## Updated field association in blueprints

Field association to blueprints has also received a makeover. From the blueprint UI, with the Associated Fields tile selected, click the **Associate Fields** button to launch the new panel experience.

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(1) Filter Categories: Fields can be filtered to “Standard” or “Sets” using the drop-down menu. The filter applies to both the results list and the selected list.

(2) Search: Fields can be searched and filtered using the search bar.

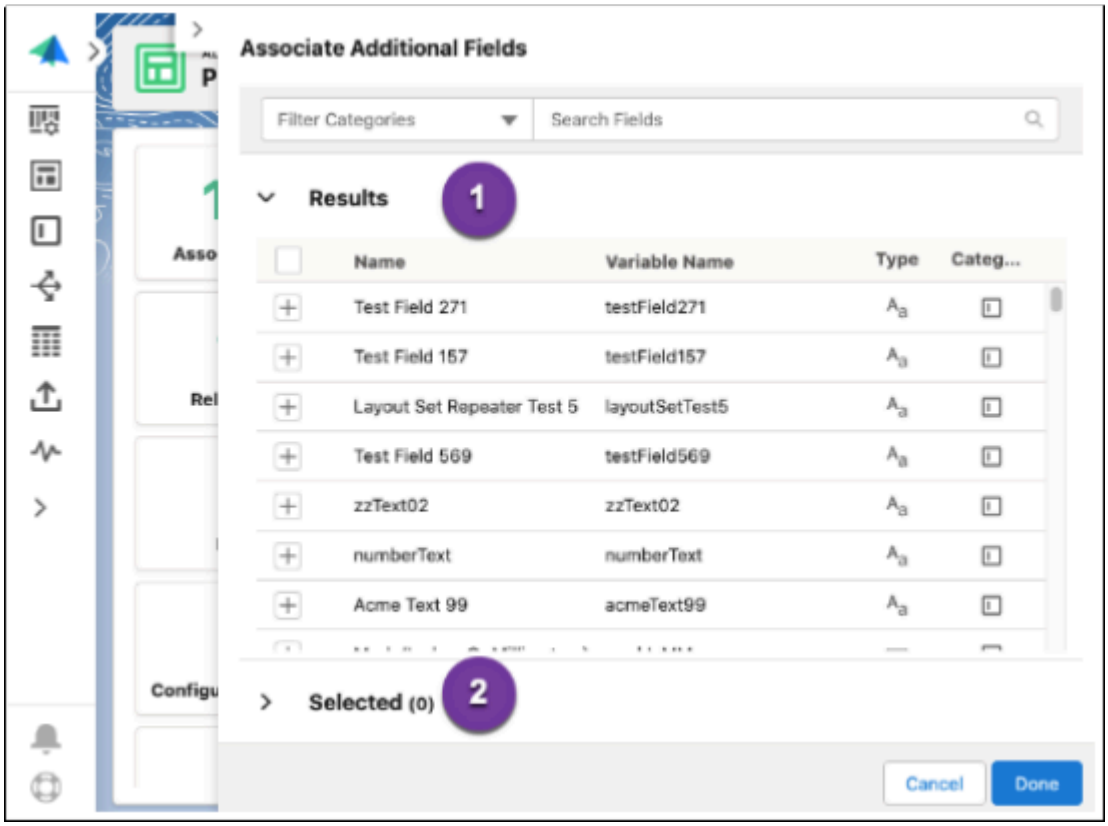
(3) Results: Field results appear on the left. Fields can be added by clicking the **+** icon. Selecting a field removes it from the results column and add it to the selected column.

(4) Selected: Selected fields and their details are displayed on the right. Click the check mark icon removes the field from the selected list.

(5) Actions: Two actions are available at the bottom of the panel, Cancel and Done. To save the changes and associate the fields to the blueprint, click Done. To close the panel without adding any fields, click Cancel. The panel can also be closed without adding fields by clicking the arrow at the top left of the panel (6).

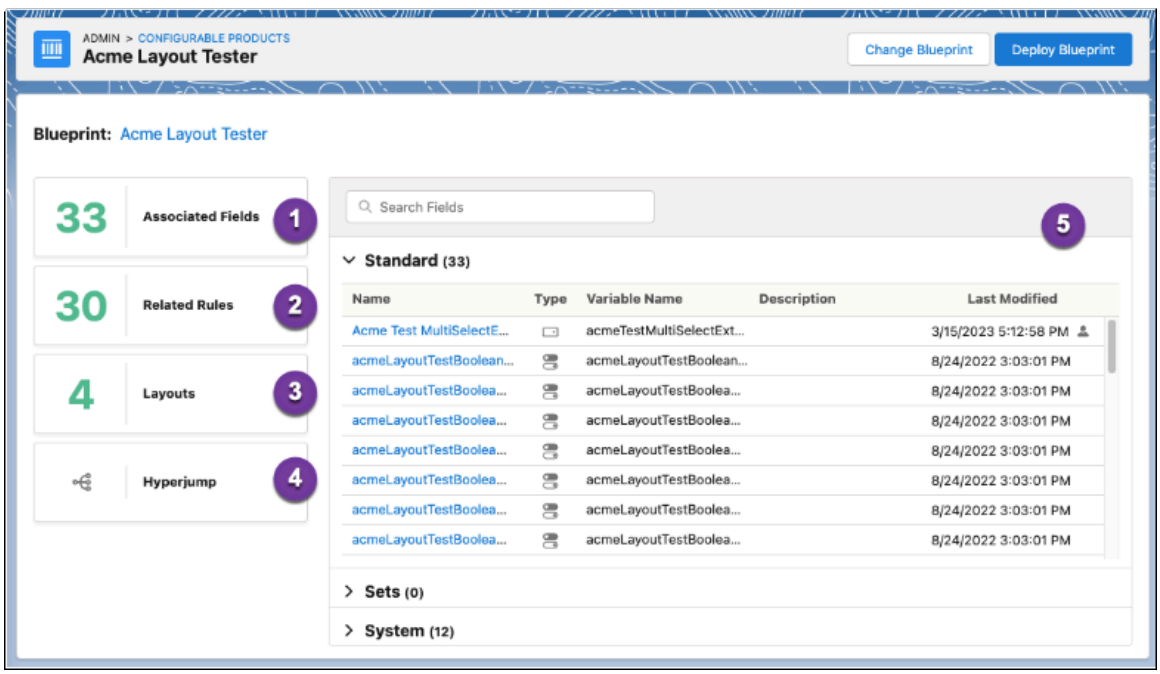
Depending on the size of the browser window, you may see a stacked view of the Results (1, below) and Selected (2) field lists. The functionality remains the same.

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## Updated configurable product UI

The configurable product UI has also received an update, to align with the blueprint UI and utilize the updated field UI.




Similar to the blueprint UI, tiles on the left control what is displayed on the right.

(1) Associated Fields: fields for configurable product.

(2) Related Rules: Rules that are related to the configurable product.

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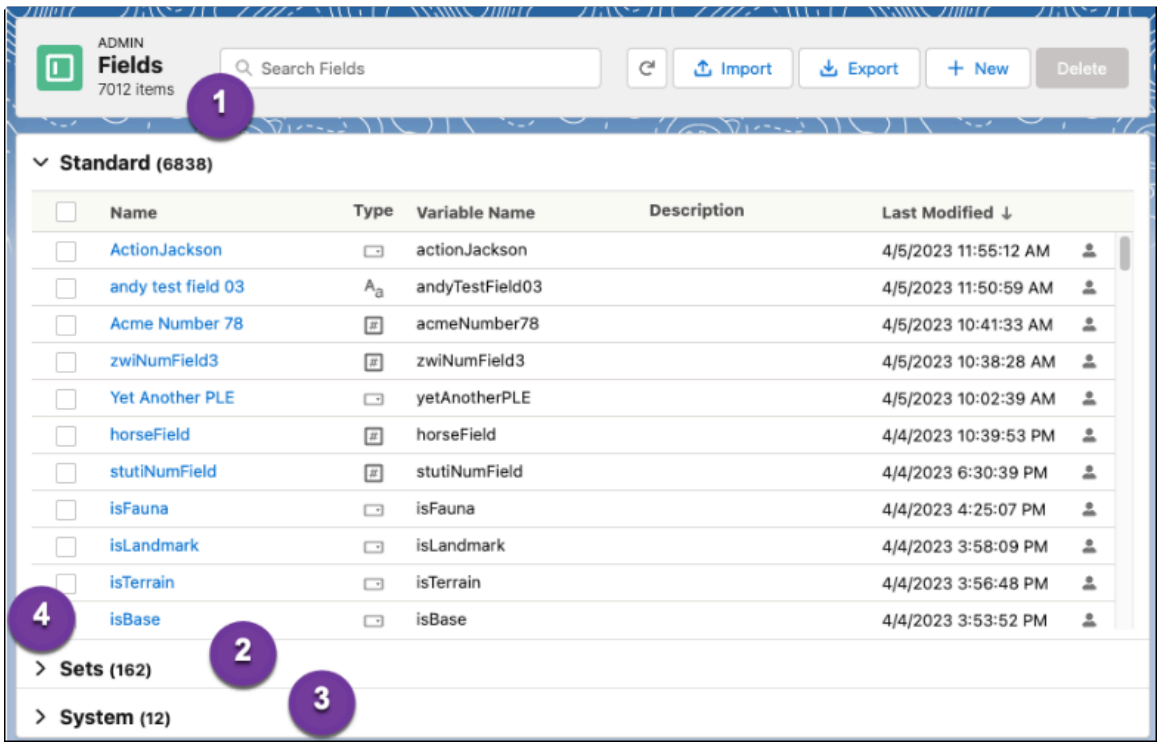
(3) Layouts: Layouts for this configurable product.

(4) Hyperjump: Launches Hyperjump for this configurable product.

5. UI Content: Displays content from whichever tile is currently selected.

## Updated field UI

The updated field UI provides a unified view of fields and sets and is also used in the update blueprint and configurable products UI.




Fields are now grouped into three types: Standard, Sets, and System. By default the “Standard” section is open.

(1) Standard section: Displays standard field types (Text, Number, Picklist, Boolean)

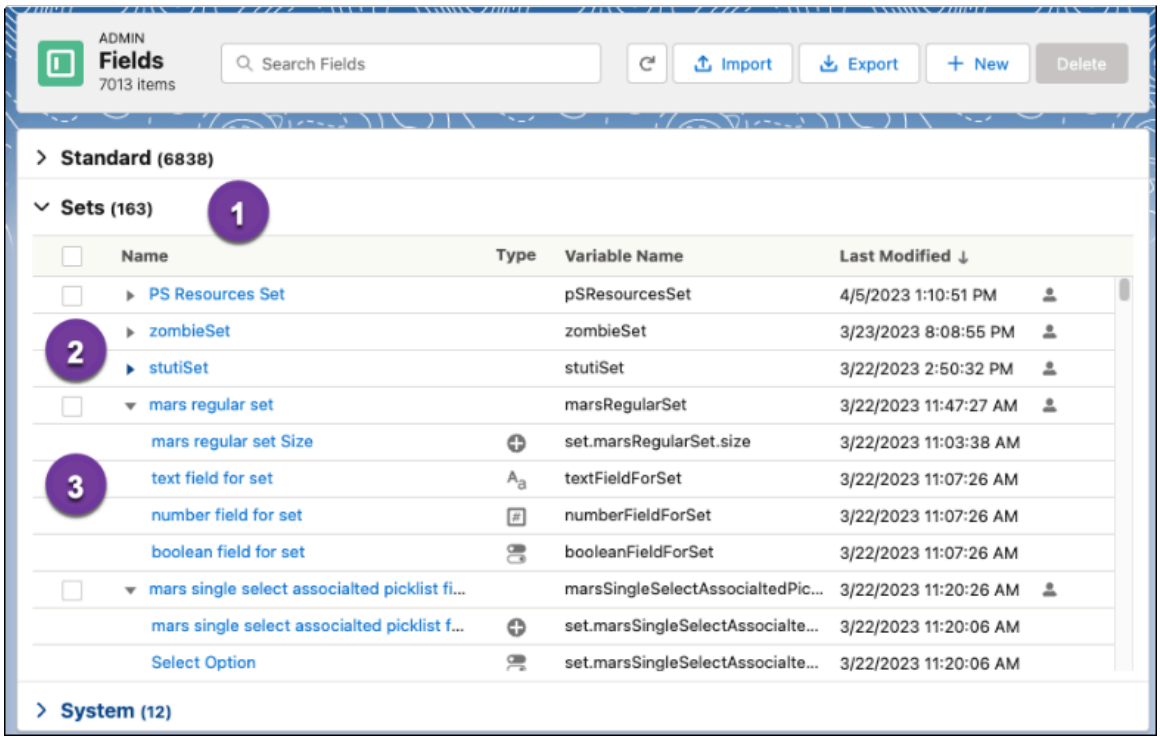
(2) Sets section: Displays all Sets (See more below)

(3) System section: Displays system fields.

(4) Open/Close section: Each section can be expanded using the arrow icon to the left of the grouping name. Only one section is open at a time.

With the inclusion of sets in the field UI, the display of sets has also been updated.

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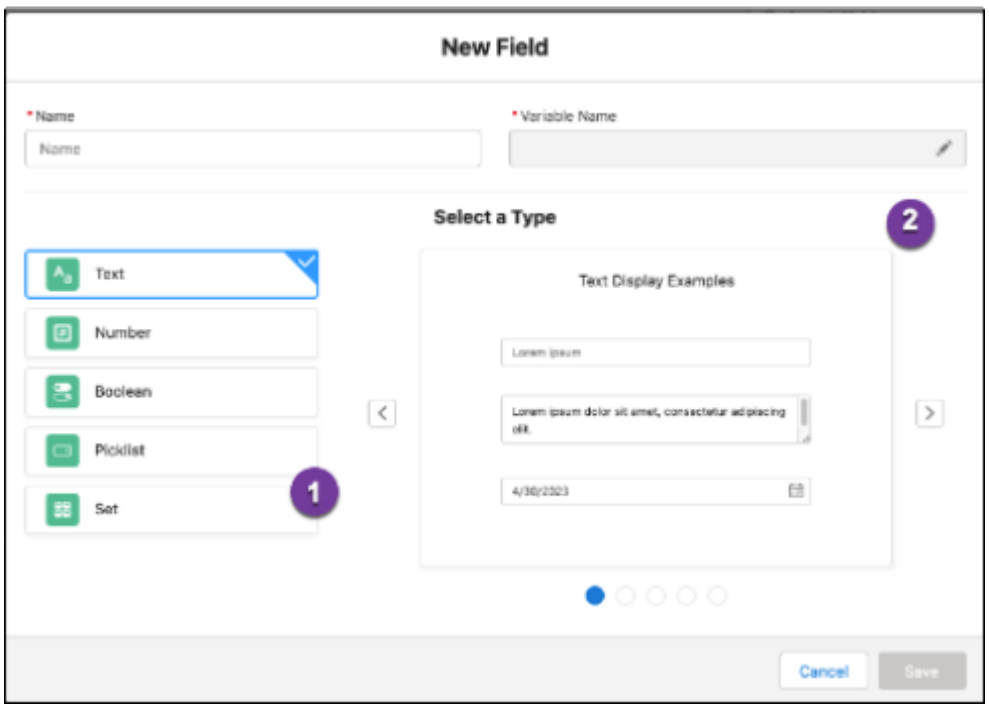



(1) Set grouping section: an expanded view of all sets.

(2) Individual sets can be expanded or collapsed in the table using the arrow icon on the left. By default, the view is expanded. Multiple sets can be expanded at once.

(3) When a set is expanded, the fields and details are also displayed.

The New Field window provides a unified way to create both standard field types and sets.




Field types can be selected by either picking the appropriate tile or by using the arrows to scroll through the display examples.

(1) Sets are available in addition to the four standard field types.

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(2) Each field type has a display example showing different ways that the field can appear on a layout. The example is not exhaustive.

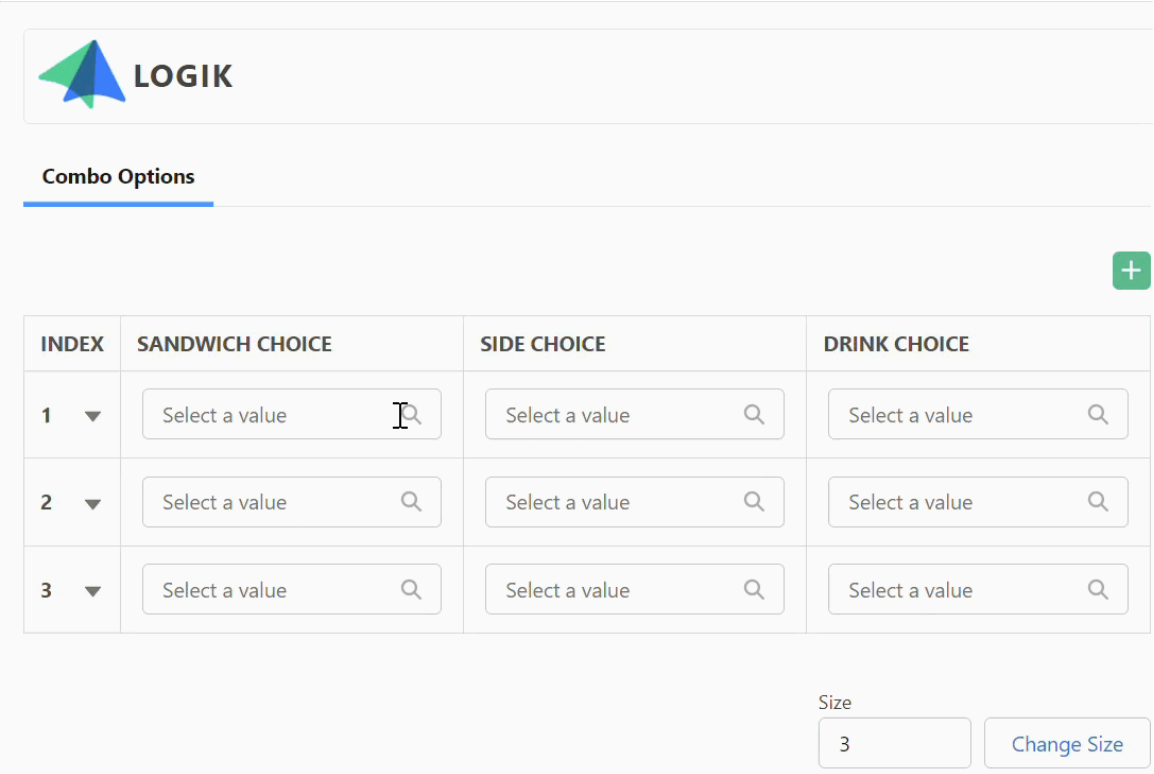
### Configure sets

Sets group related fields into repeatable collections, allowing administrators to streamline configurations and reduce redundancy. They enable dynamic, table-like data entry, support aggregates, and simplify managing repeated questionnaires or configurable options in CPQ.

Sets introduction

Sets allow the administrator to identify a number of fields in a group. Once associated with a set, the fields may then be replicated an indefinite number of times on the end-user UI in a matrix format. Sets reduce the number of fields and rules that must be defined for use cases that repeat fields and rules. The maximum number of set records (the number of times a group of fields can be repeated) is 2000.

In this set, three fields (Sandwich Choice, Side Choice, and Drink Choice) are defined in a set; the set is repeated three times:

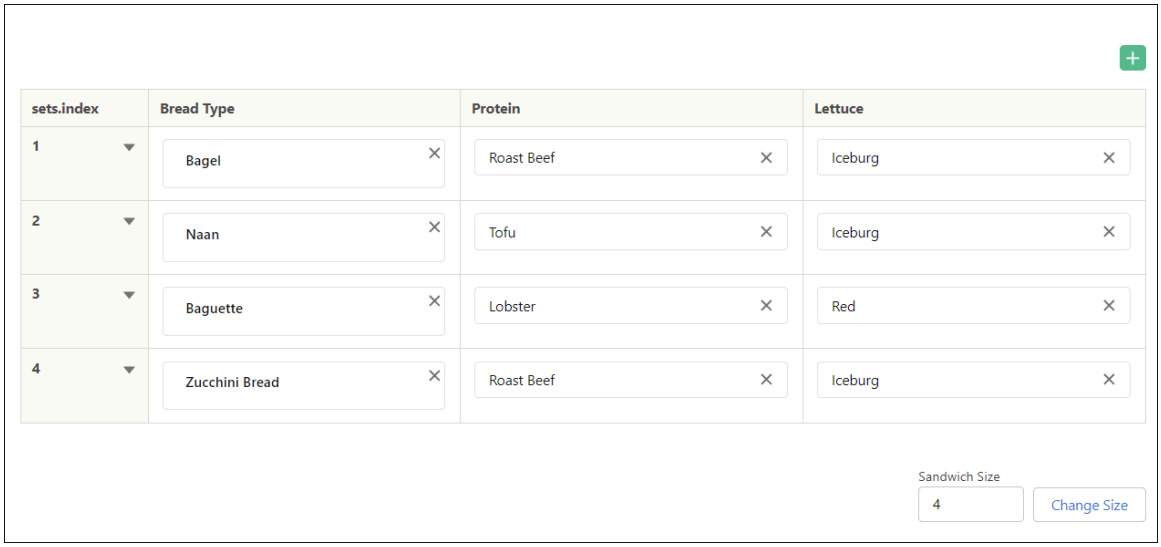



## Display types

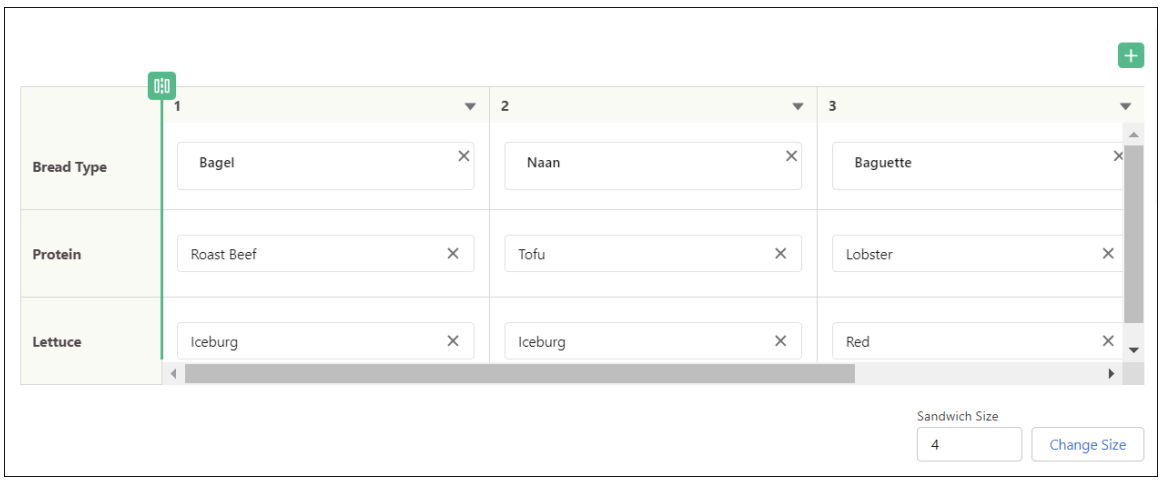
Sets can be displayed in several ways.

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- As table rows:

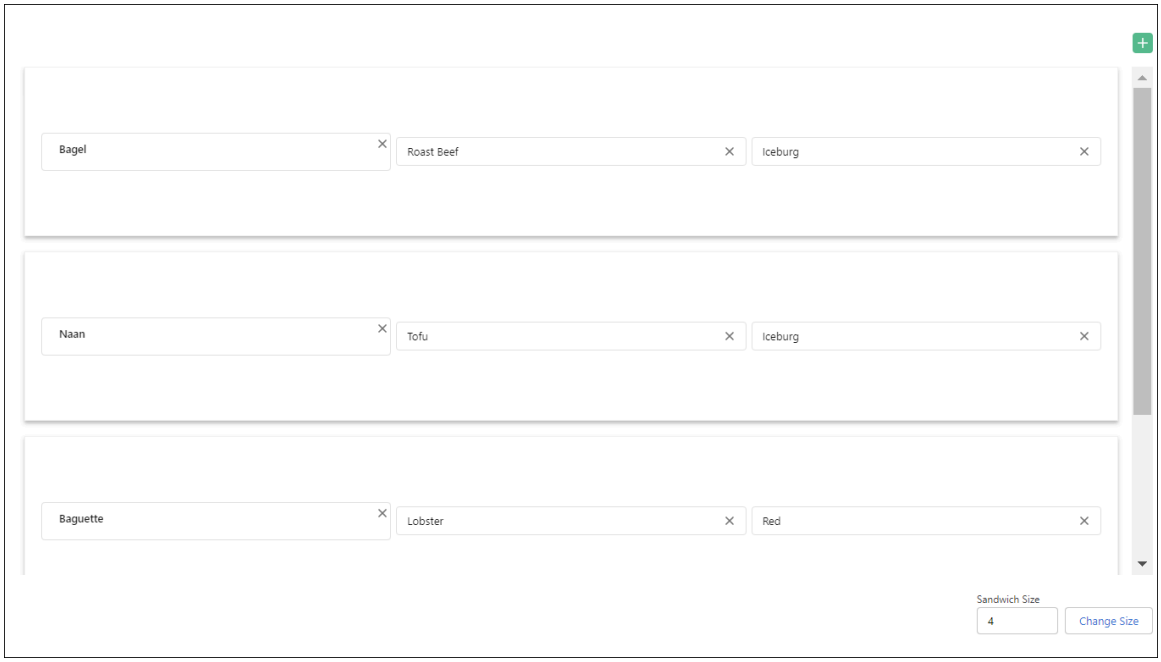



- As table columns:

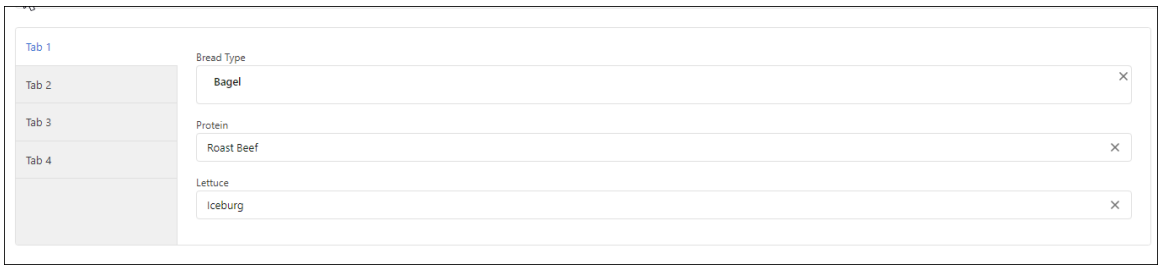



- As list rows:

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- As a set repeater:

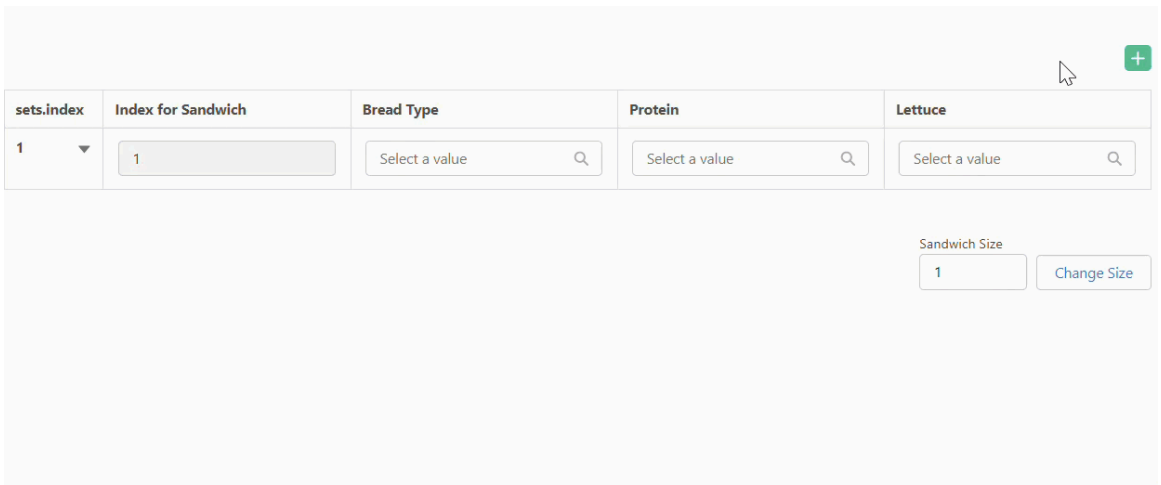



You can manage sets by using the Layout Wizard. For more information about sets and layouts, see Using sets in layouts.

## Adding and removing set rows

In the end-user UI, the user has four ways to increment or decrement set records:

- To add a record to the bottom of the set, click the green plus in the upper right corner.

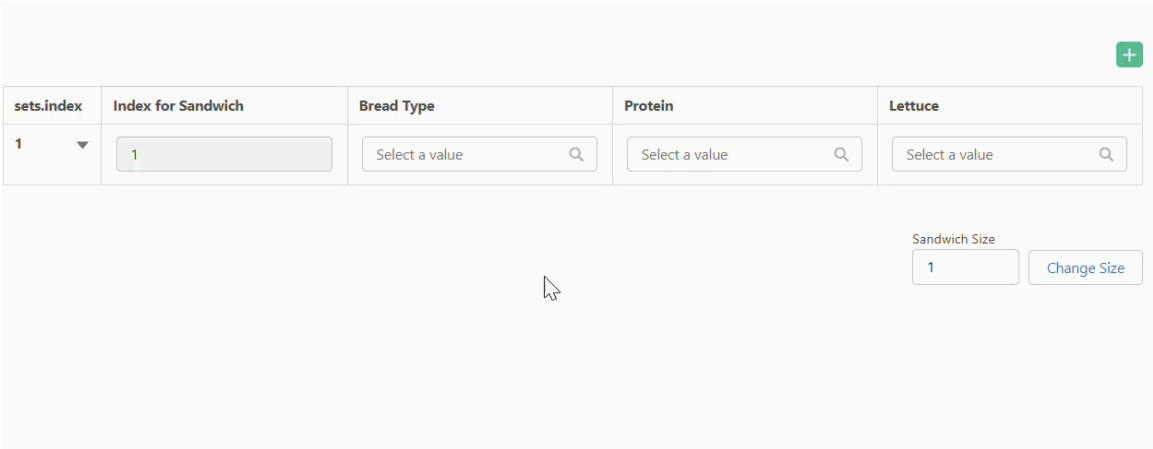



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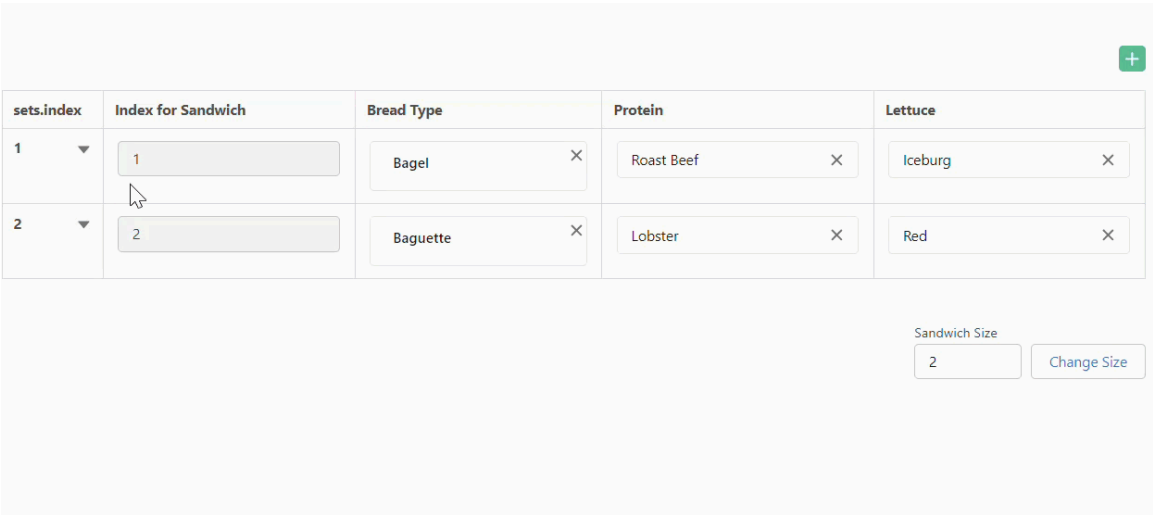
- To add or remove records from the bottom of the set, edit the Size field and click **Change Size**.




- To insert a record between two existing records, hold the cursor between them in the Index column.




- To add records relative to the current record or to delete a record, use the menu in the Index column.

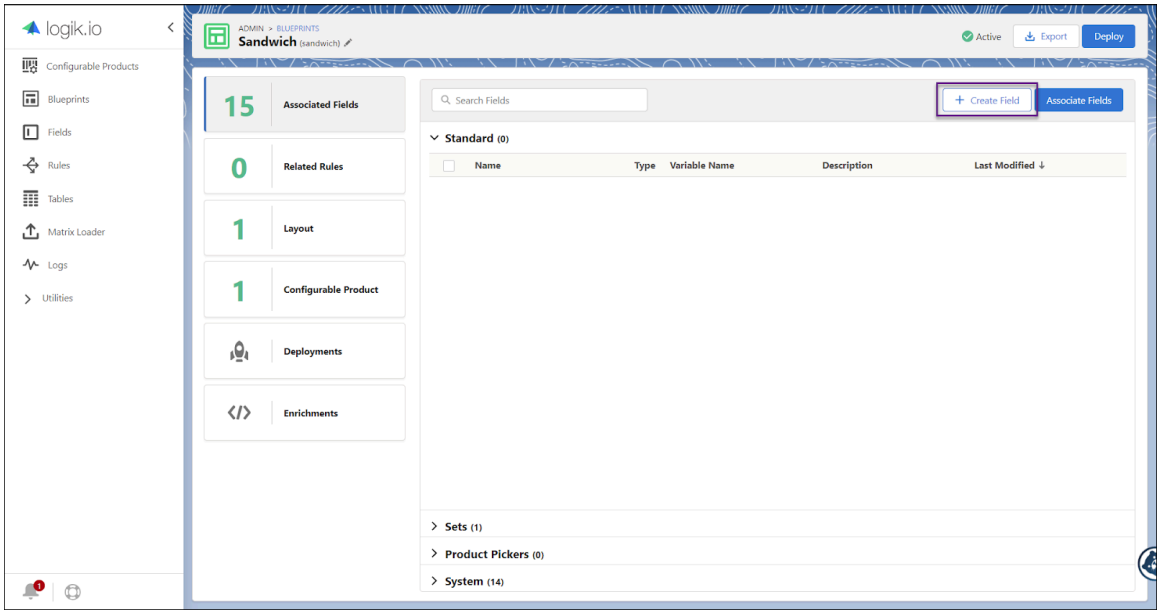


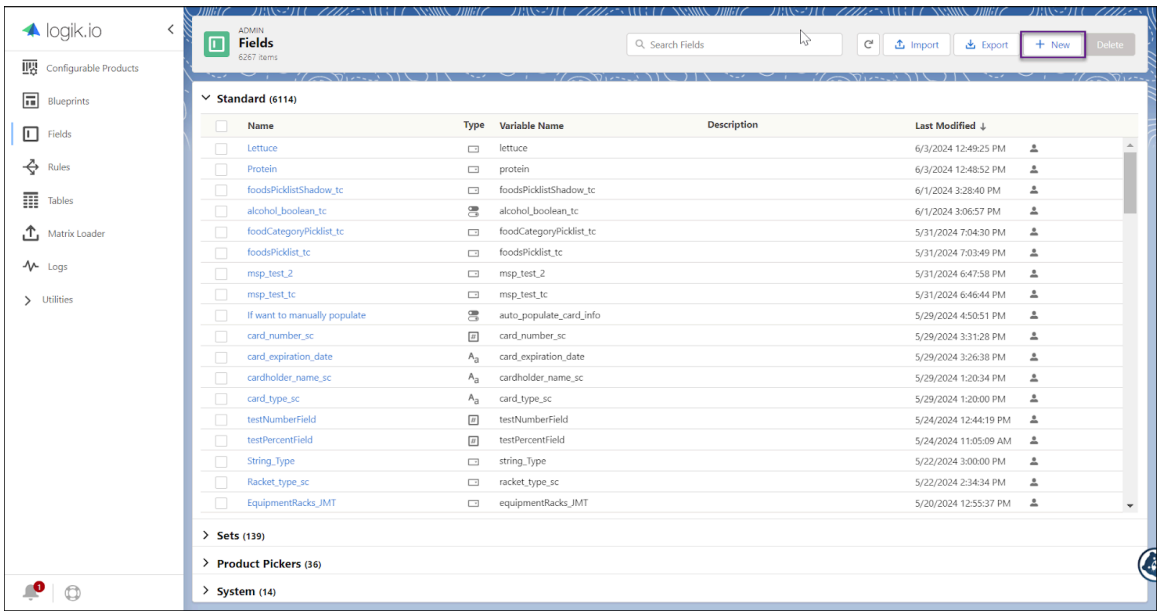

For more information about managing sets, see Using sets in layouts and How sets interact with the rest of a blueprint.

## Creating a set

Sets can be added in the same two areas you would create fields: the blueprint to which to add the set, and the fields administration tab.

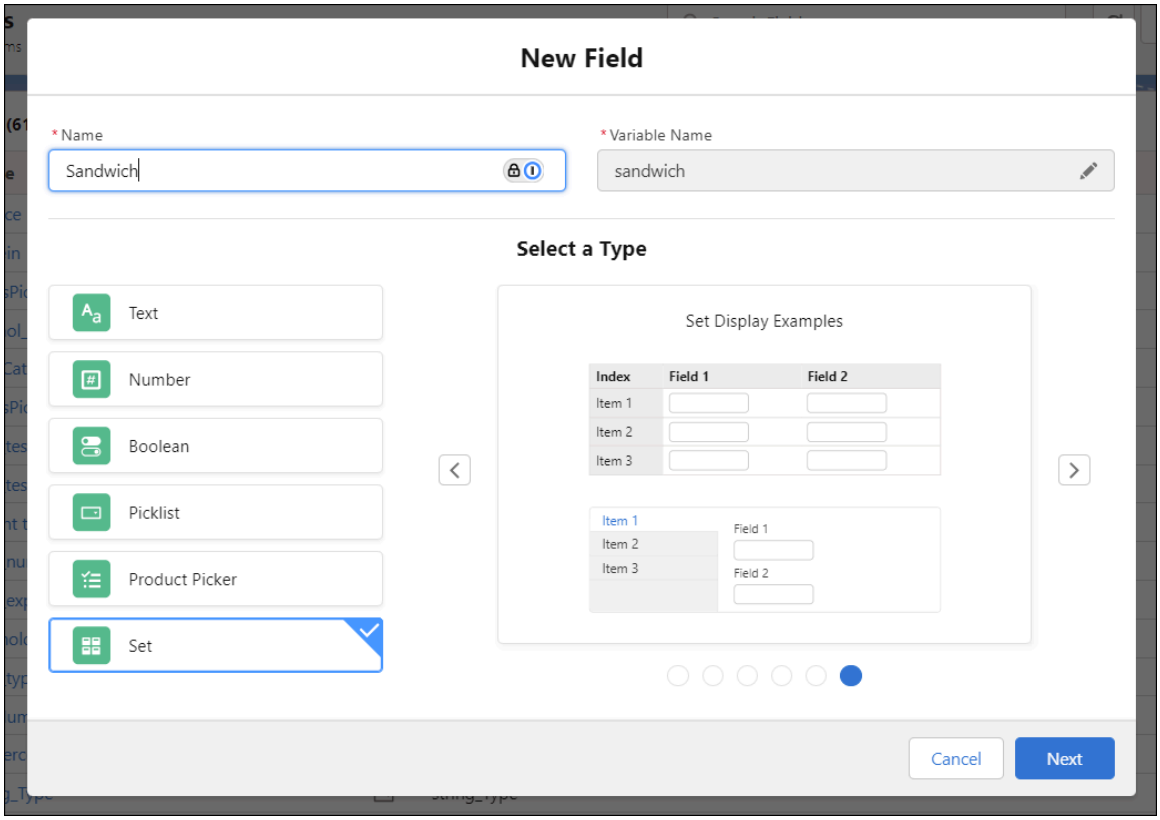
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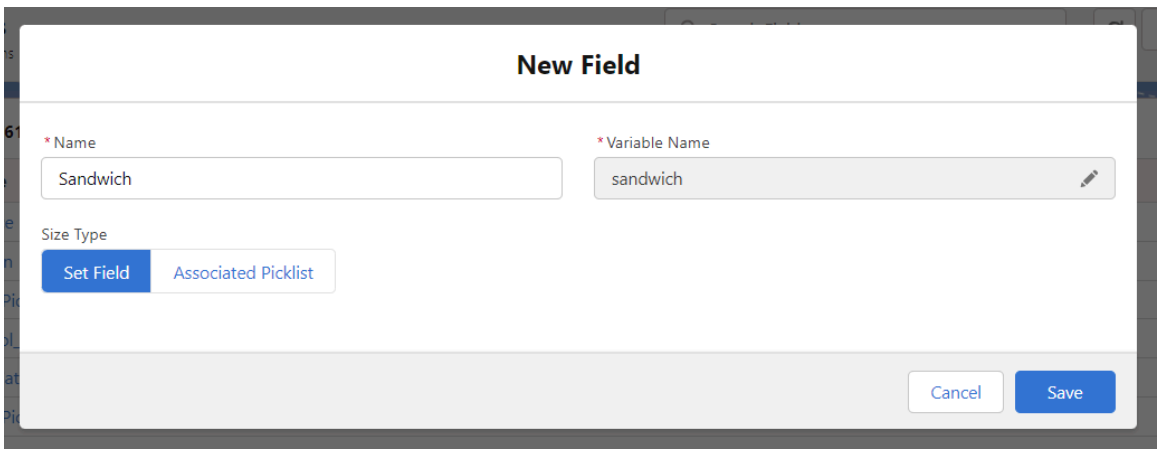




Select the set field type from among the list of options:

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Give your new set a name and choose from the size types.




The size type cannot be changed after the set is saved. Therefore, keep the following in mind:

- The set field determines the number of records that will be displayed in the set. This numeric field can be visible and edited by a user or set by determination action, as the case requires.
- The associated picklist leverages a picklist field to determine how many records to show in the set. When this option is selected, the admin must identify the field that will drive the set size. When the set type is Associated Picklist, CPQ creates two additional fields in the set:
  - Option Value: The value of each option in the set, represented as a read-only text field.
  - Select Option: Tracks whether each option of the picklist is selected.
  -

For more information, see Creating an associated picklist set.

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The next screen is the set screen, where the admin can add fields to the set, enforce distinct values, and create aggregates.

To add a field to the set, search for the name of the field to be added to the set, and then click **+**.

Any field in the set can have the "Distinct Values" option enabled. When this is true, each index of the set must have a unique value for the field. This setting only applies to non-empty fields.

When you create an aggregate for a field in the set, options include Average, Count, Maximum, Minimum, and Sum. For example, a sum aggregate on a number field called Quantity might store the sum of all Quantity field values in the set. Aggregates function as a field external to the set and can be used in global rules.

For more information on set aggregates, see Creating set aggregates.

When using sets in a configuration, it's important to understand the scope of fields in the set and what can and cannot be accomplished when creating rules. See How sets interact with the rest of a blueprint.

**Related topics**

Using sets in layouts

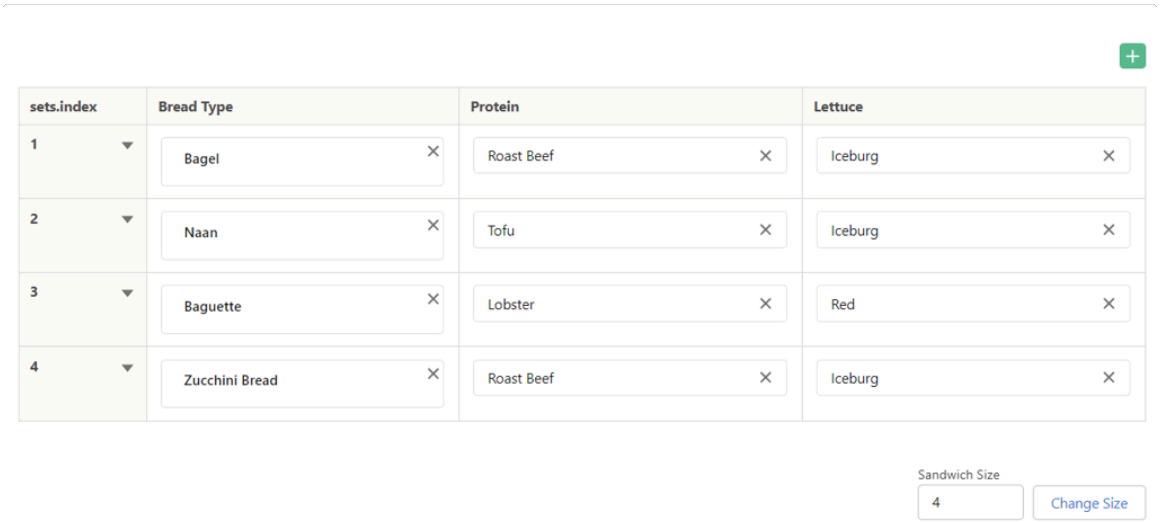
### Using sets in layouts

Learn about the various ways sets can be displayed and about their settings.

## Display types

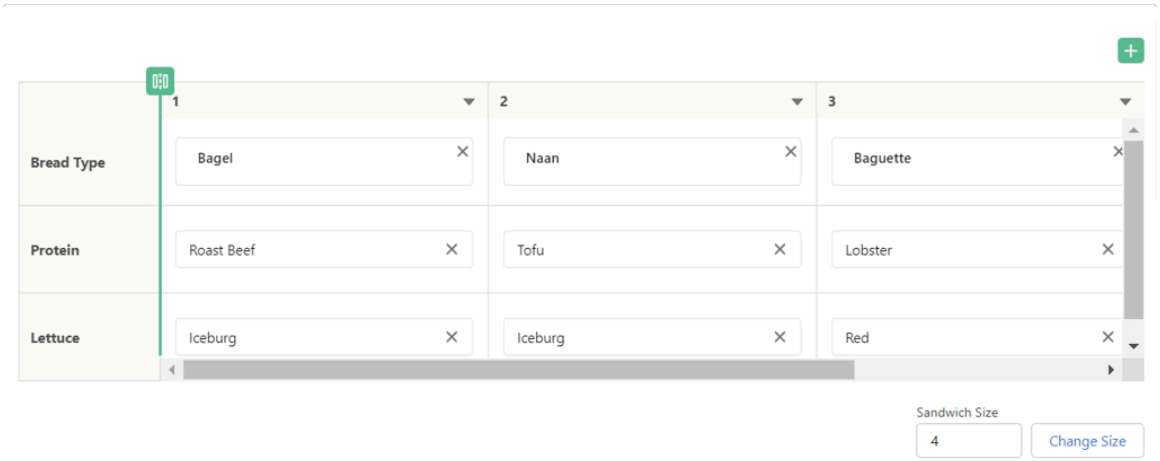
Sets can be displayed in several ways:

- As table rows where each index is displayed horizontally:

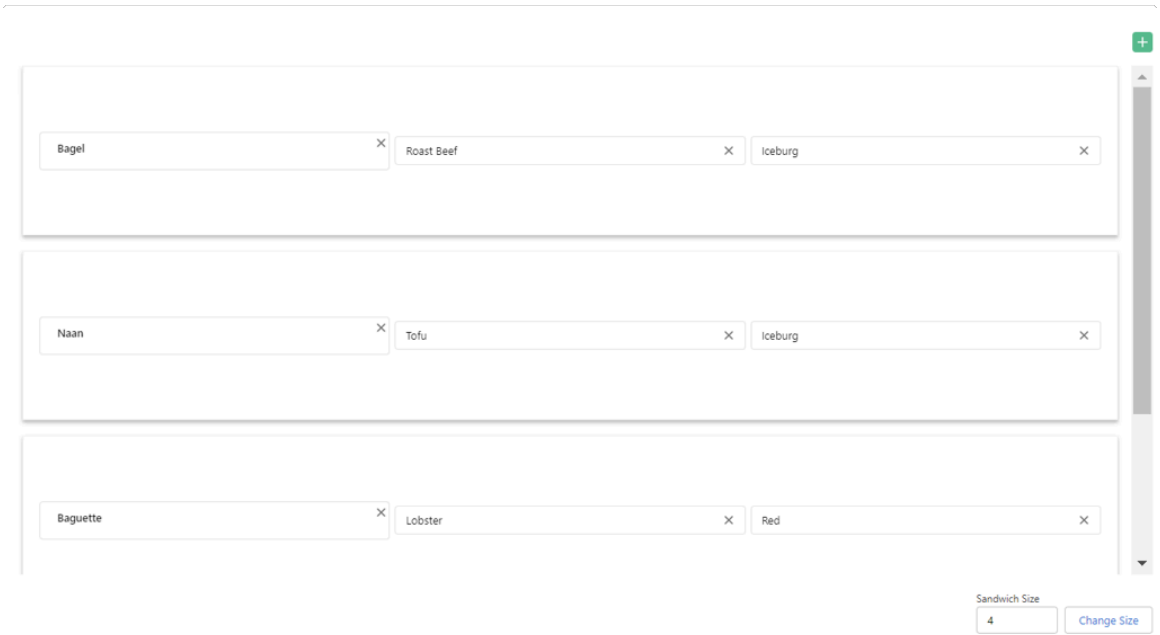



- As table columns where each index is displayed vertically:

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- As list rows:



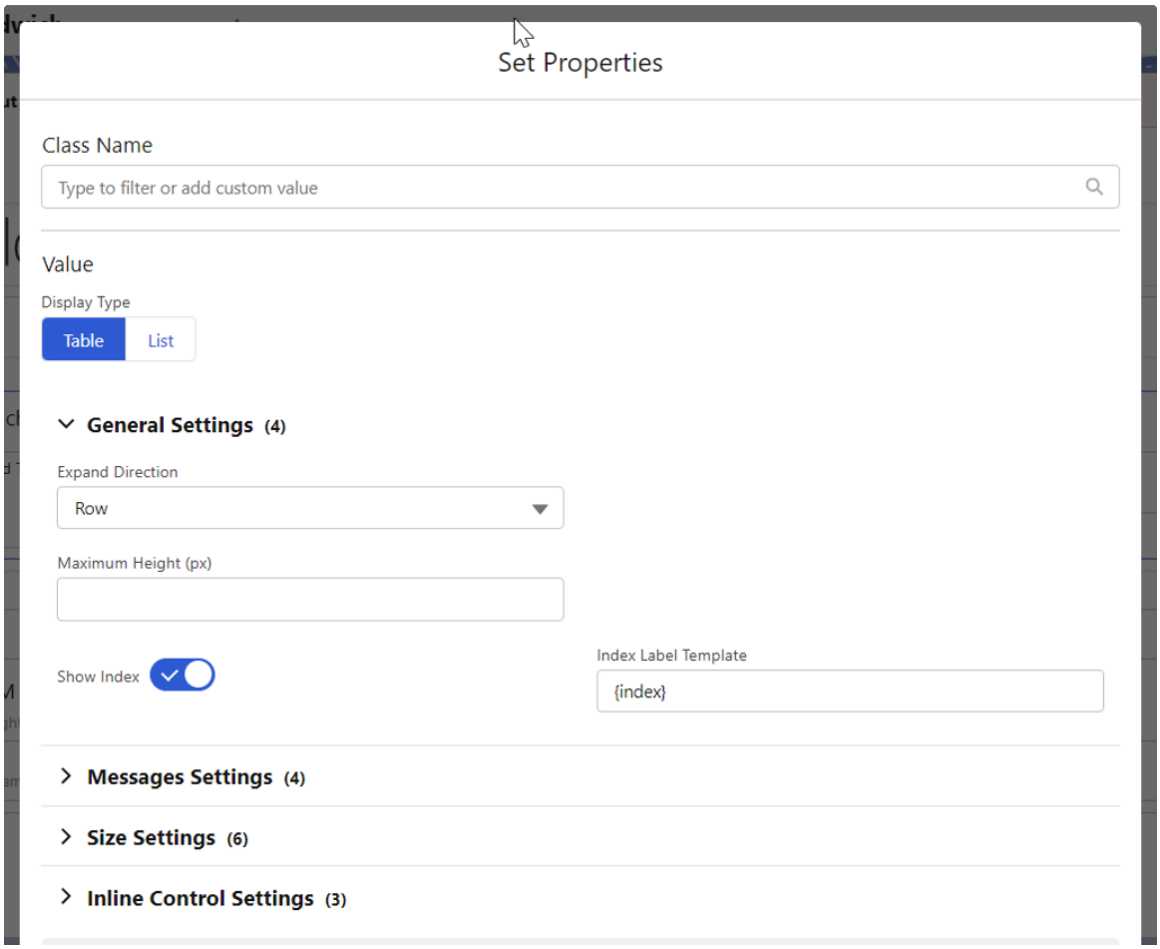

- As a set repeater where each index is tied to a tier:




Set repeaters are distinct in their administration. For more information about set repeaters, see Creating a Set Repeater.

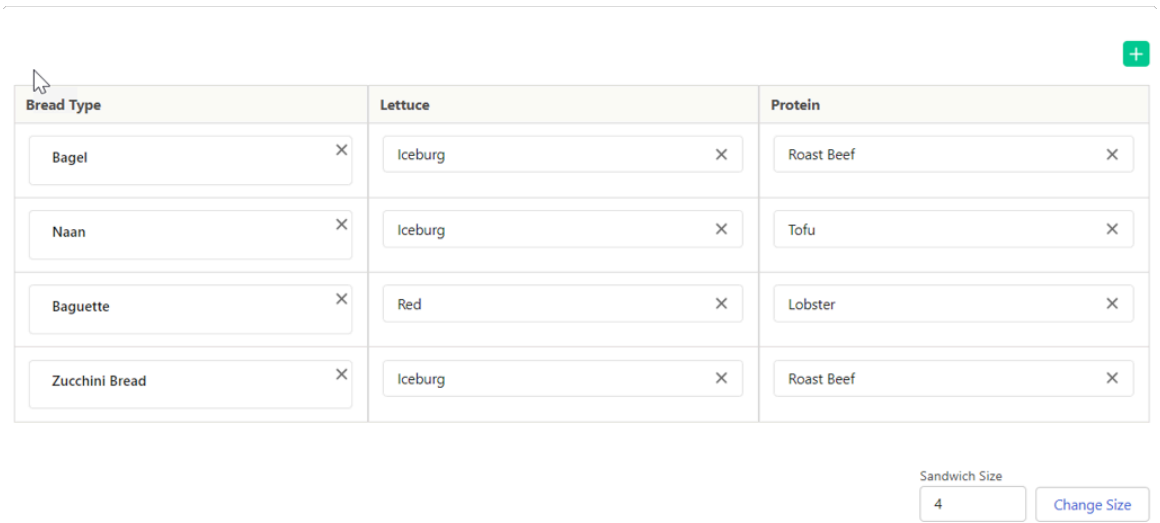
To manage the different display types, find the set in the Layout Wizard and select the gear icon. Here the admin has two options for Display Type: Table and List. Table is a basic grid, while List is a series of tiles.

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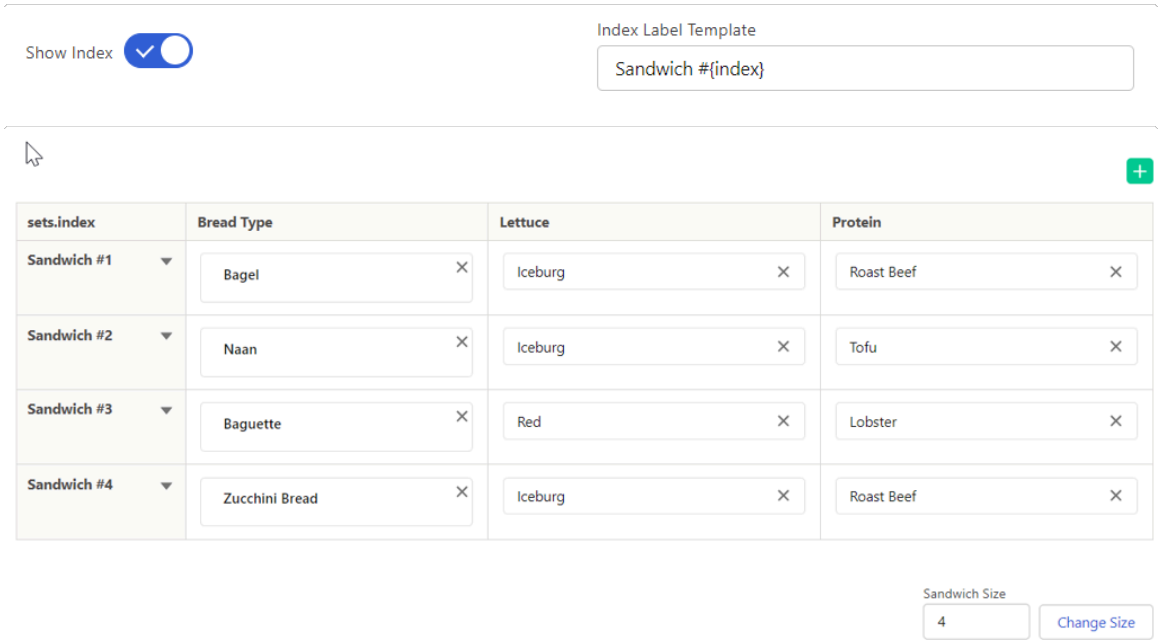

## General settings

- Expand Direction: Allows the user to specify how the set is formatted.
  - Rows: Each index is displayed as a row. As the set size increases, it will expand down the page.
  - Columns: Each index is displayed as a column As the set size increases, it will expand horizontally to the right.
- Maximum Height: The height of the set.
- Show Index (Table Display Type only): Whether the index is displayed in the set.

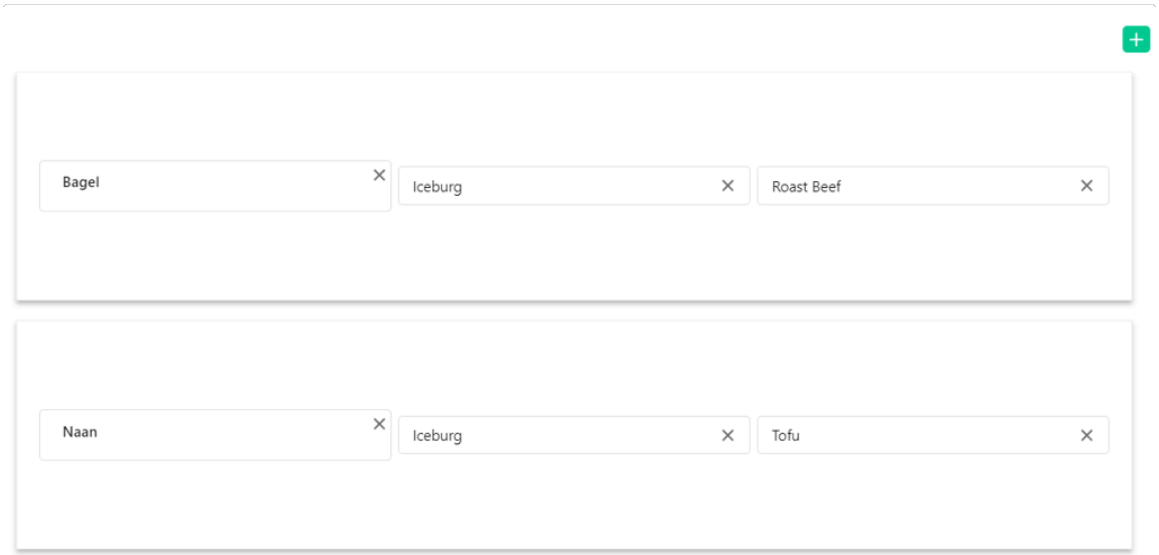



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- Index Label Template (Table Display Type Only): display a prefix or suffix string to the index numbers. Helps provide context of each index.

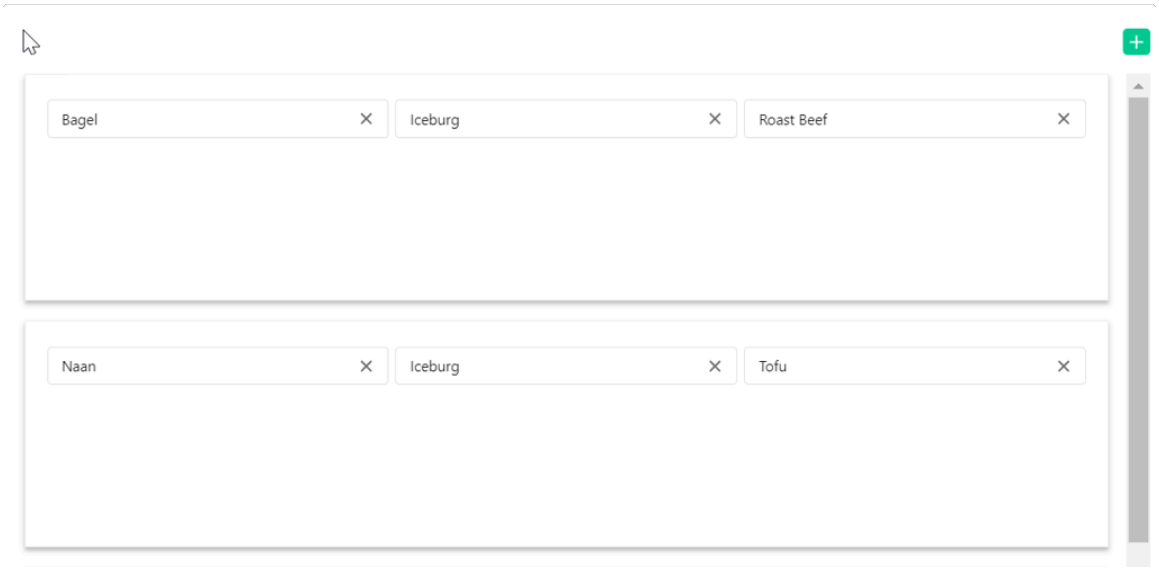



- Vertical Alignment (List Display Type Only): Control the alignment.
  - Middle



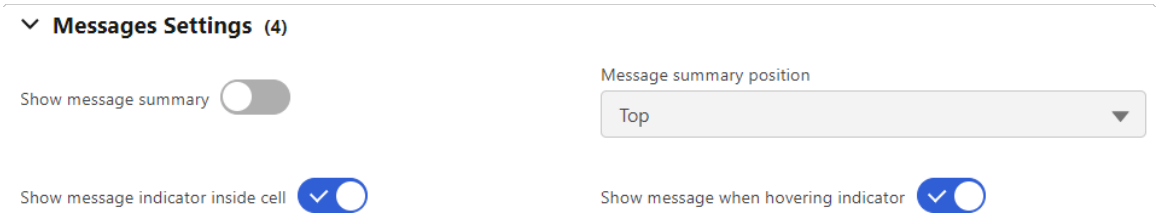

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- Top

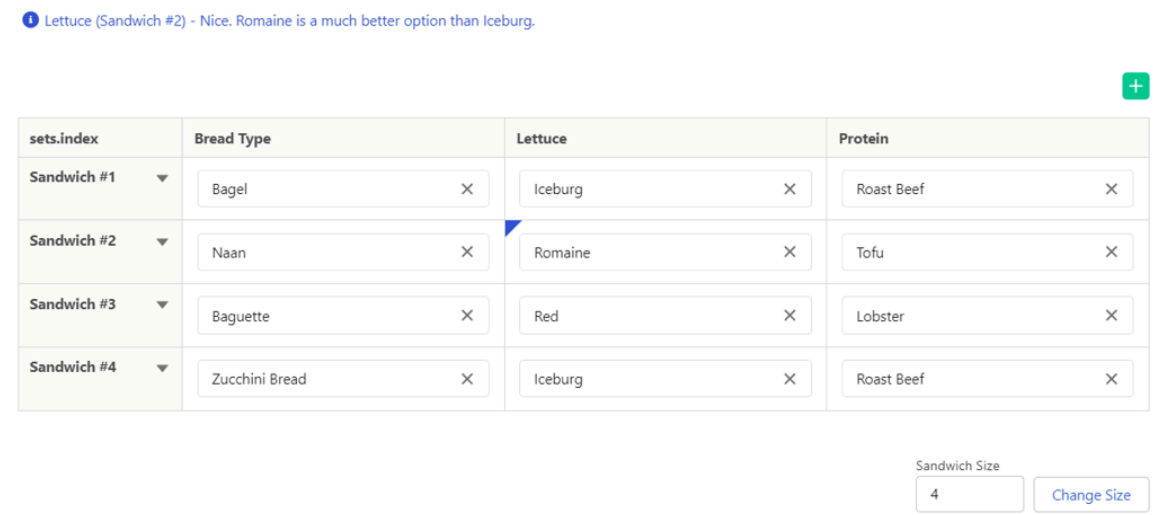



## Message settings

These options allow the admin to control how and where messages are displayed.

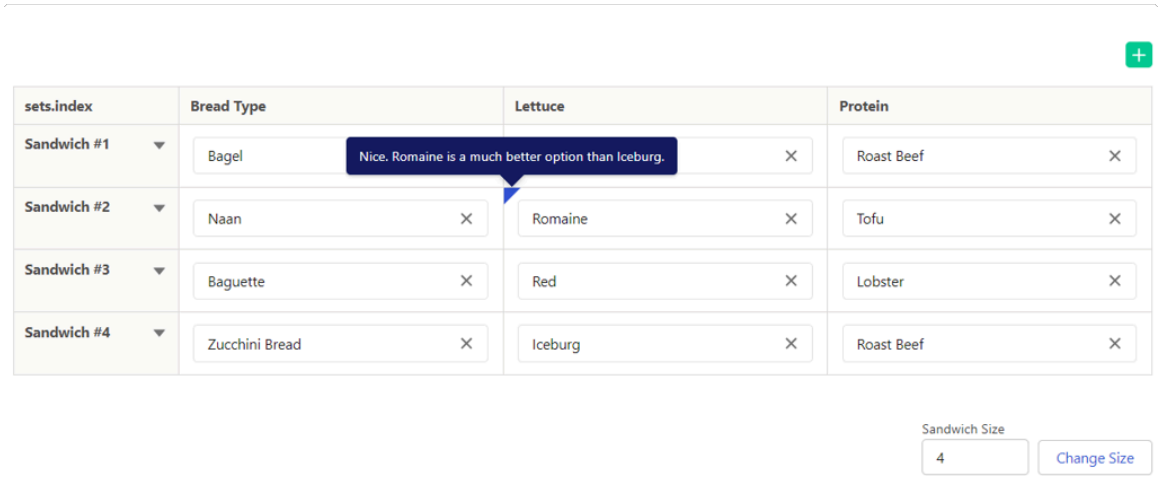



- Show message summary: summarizes all message actions and recommendation messages in one position. Toggling this to true will show the summary. Toggling to false, removes the summary.
- Message summary position: display the message summary above or below the set. The following image shows Show Message Summary = true and Message Summary Position = Top.



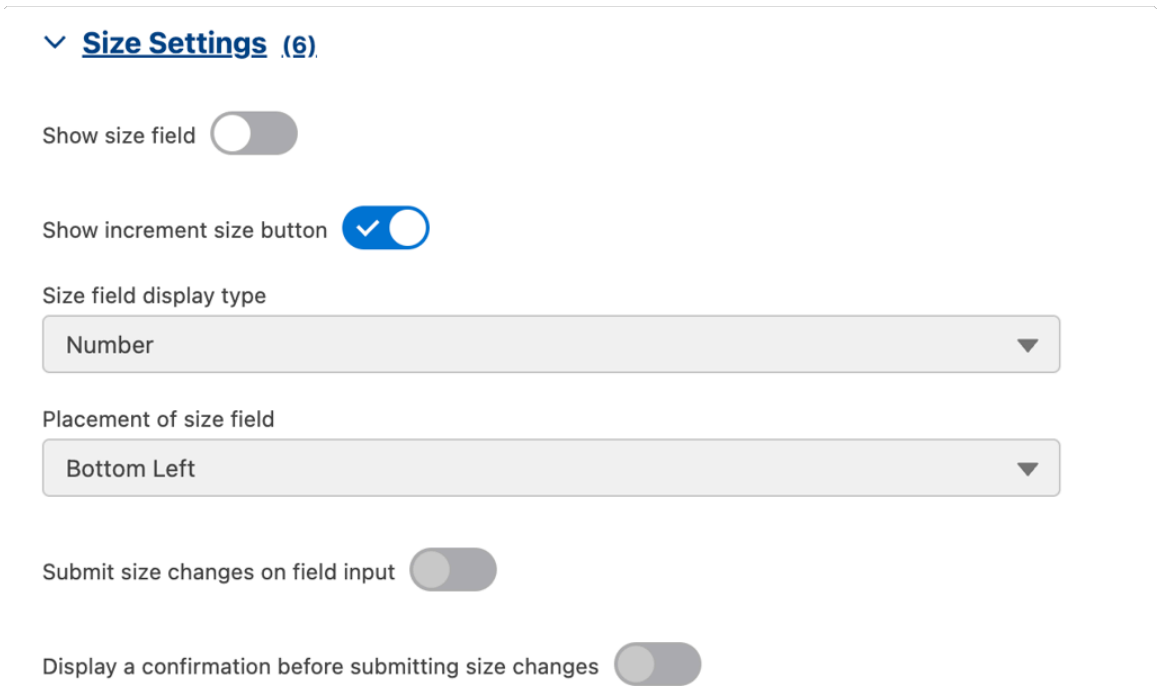

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- Show message indicator inside cell (table display type only): places a color-coded triangle in the cell that caused the message.
- Show message when hovering indicator (table display type only): displays messages when users hover over the color-coded triangle.



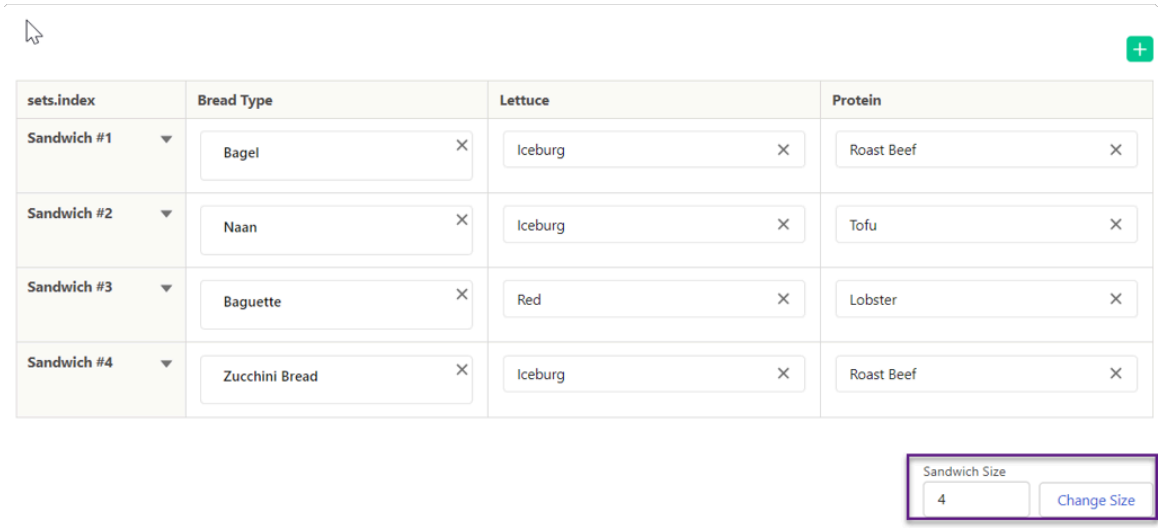

## Size settings

The size of the set refers to the number of indexes that will be displayed. This is applicable to sets with the size type of field, not for associate picklist sets. A size of 1 means that there is 1 index. A size of 10 means that there are 10 indexes.

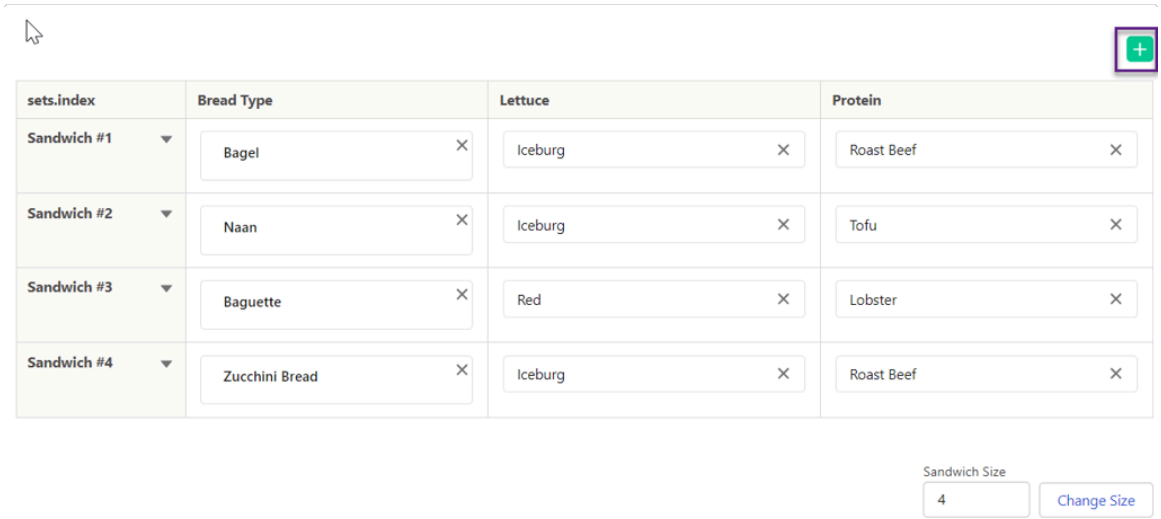



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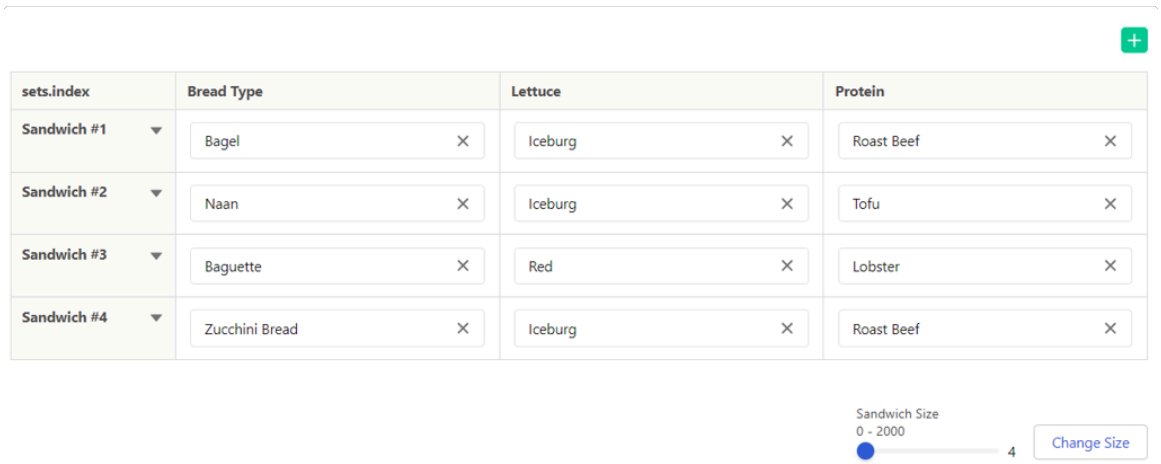
- Show size field: shows or hides the size field.




- Show Increment Size Button: control whether the green + icon is visible.




- Size Field Display Type: Pick between a number field or a slider field for user input.



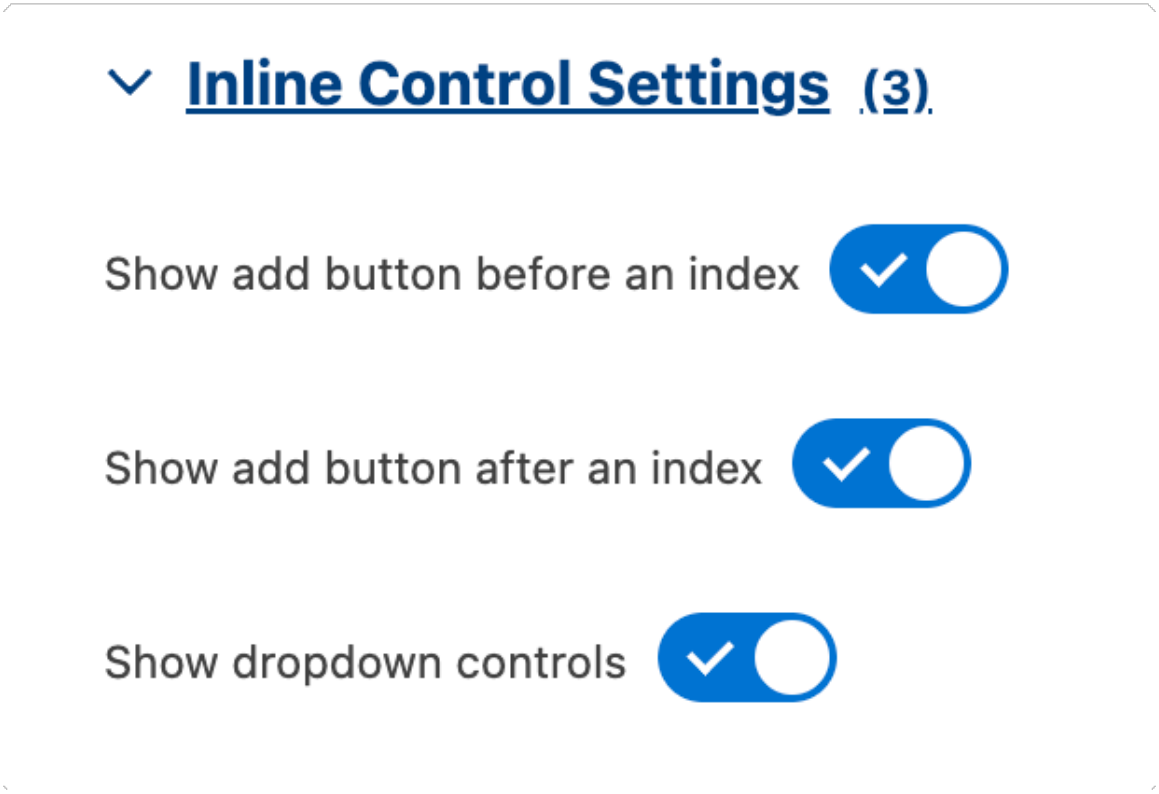

- Placement of Size Field: Control the location of the size field relative to the set itself.

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- Submit Size Changes on Field Input (Table Display Type Only): When true, the set adjusts according to any keystroke change in the size input field.
- Display a Confirmation Before Submitting Size Changes (Table Display Type Only): This property displays the confirmation button when set true. False hides the confirmation button.

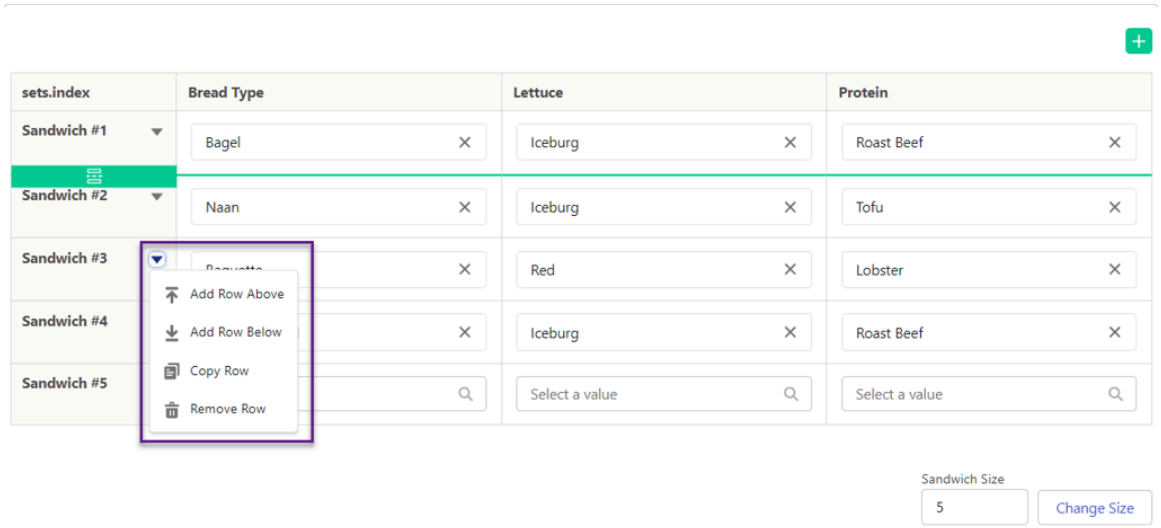
### Inline control settings

These settings refer to options in the index column menus.




- Show Add Button Before an Index: showAddBefore: show/hide the **Add Row Above** control.
- Show Add Button After an Index: showAddAfter: show/hide the **Add Row Below** control.
- Show Dropdown Controls: show or hide the inline size control menu.

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The dropdown controls setting refers to the caret icon on the index. It is not to be confused with the green bar for inserting indexes. Add Row Above and Add Row Below refer to the other controls here.

## Selection settings

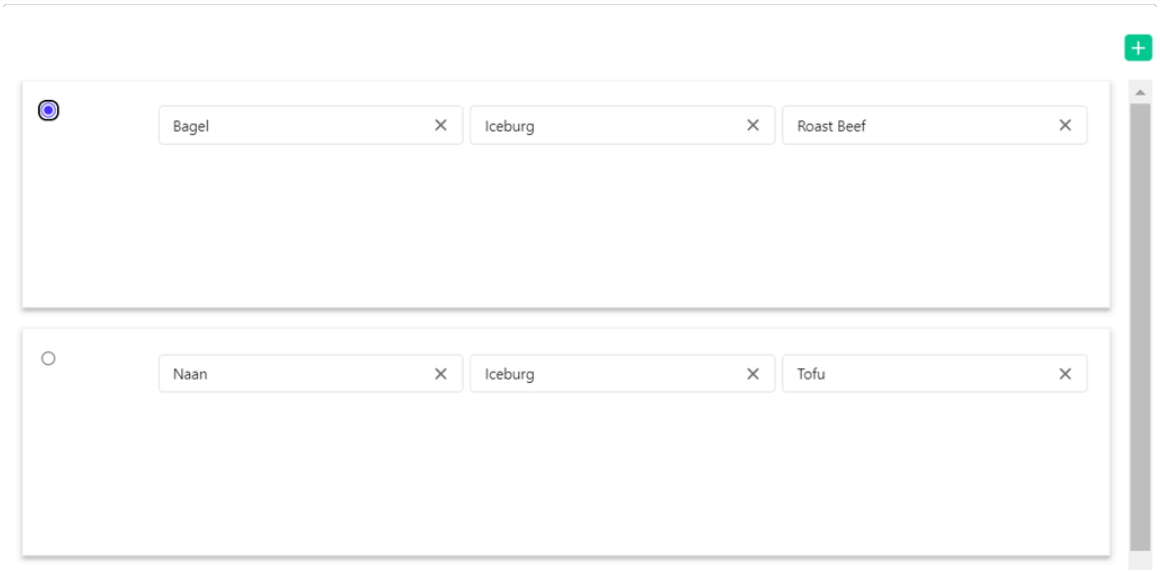
Selection settings apply only to the list display type. These controls affect how the user interacts with a set that is displayed as a list.



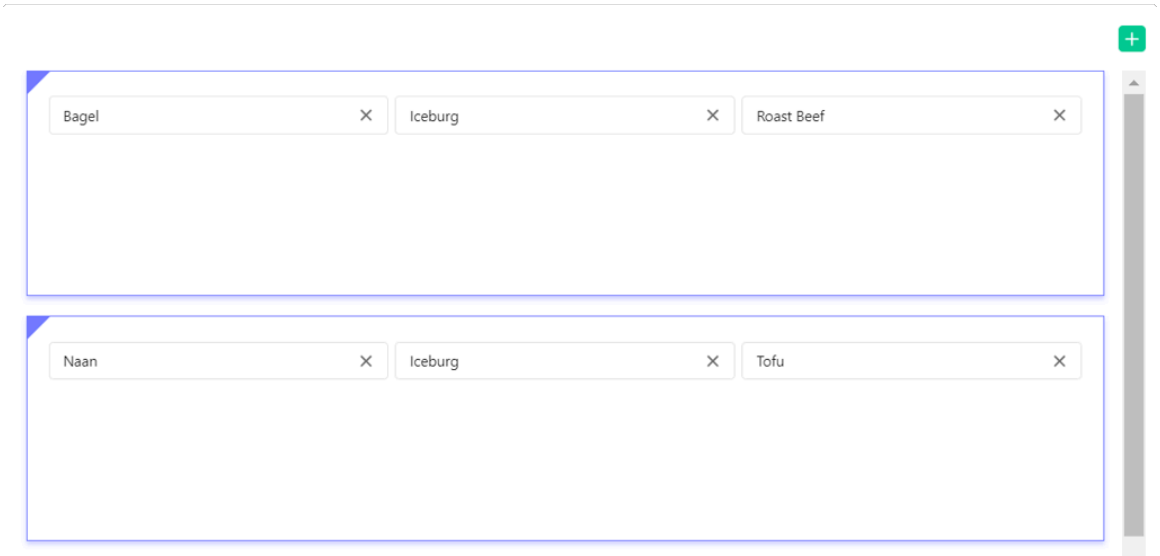

- Show Selector: toggles selectors on and off.
- Selection Type: choose between Single or Multiple. Single will appear as radio buttons and Multiple will appear as check boxes.

  Example of single selection where Show Selector is true:

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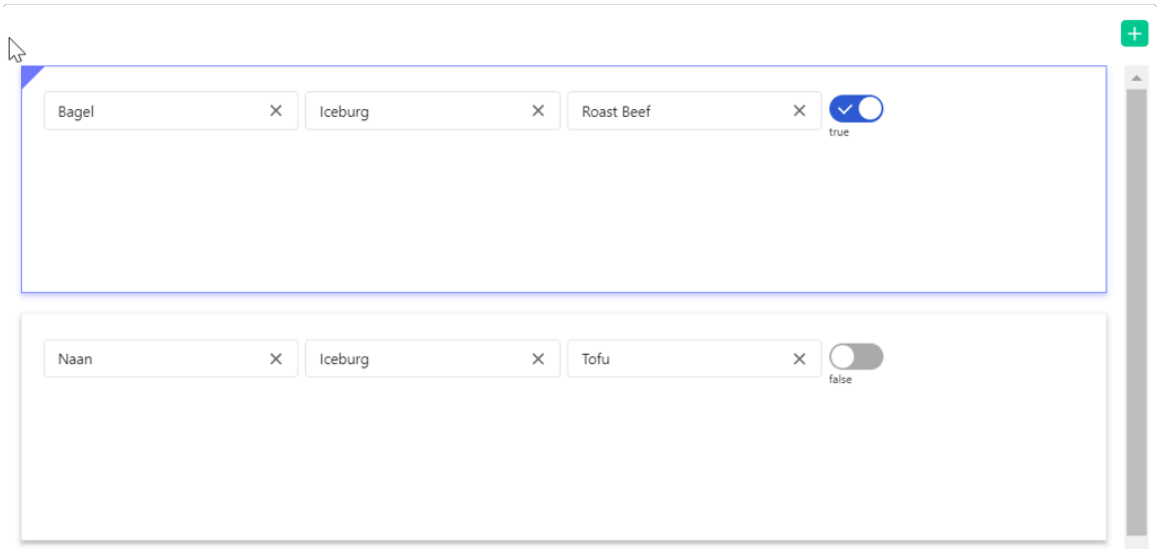



Example of multiple selection where Show Selector = false:




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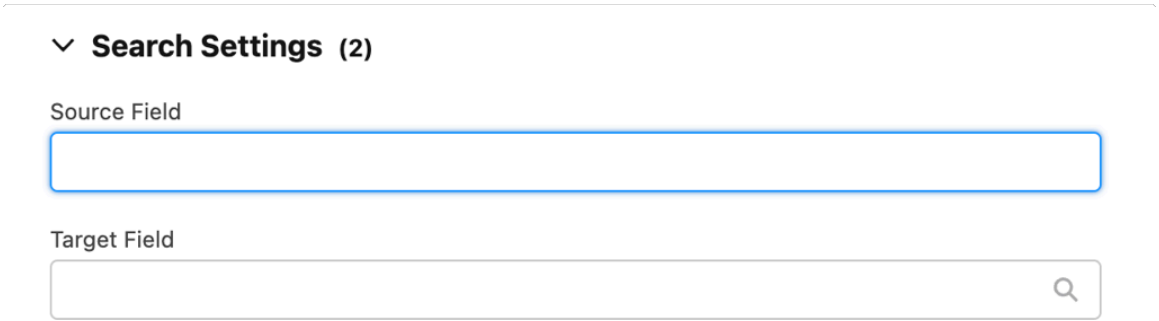
- Boolean field for selection: specify a field in the set that will be marked as true. This is required for the selection to work. If desired, the value can be displayed in the set itself:




**Note:** All of the set settings are editable in the value column of the layout CSV file. Admins are still able to update the JSON there and make changes. If this method is chosen, the entire list of properties does not need to be included, but be sure to keep the proper data structure intact.

## Search settings

Search settings apply only to the list display type.




## Search settings (List display type only)

- Source Field: The global field that, when the user changes, triggers the UI to search based on the value of the field.
- Target Field: The set subfield that has its value compared to the source field's value to determine whether it is a match.

## Displaying aggregates

Aggregates are a way to evaluate the data in a set. Set aggregates have five types and can aggregate on any field type. The types are:

- Average
- Count
- Max

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- Min
- Sum

For example, a sum aggregate on a number field will add all the instances of that subfield across all indexes. The admin can display that aggregate just as with any other field in the layout by specifying the field in the Layout Wizard.

The variable name for aggregates have the following syntax: `set.{set variable name}.{aggregate variable name}`

**Related topics**

How sets interact with the rest of a blueprint

Creating set aggregates

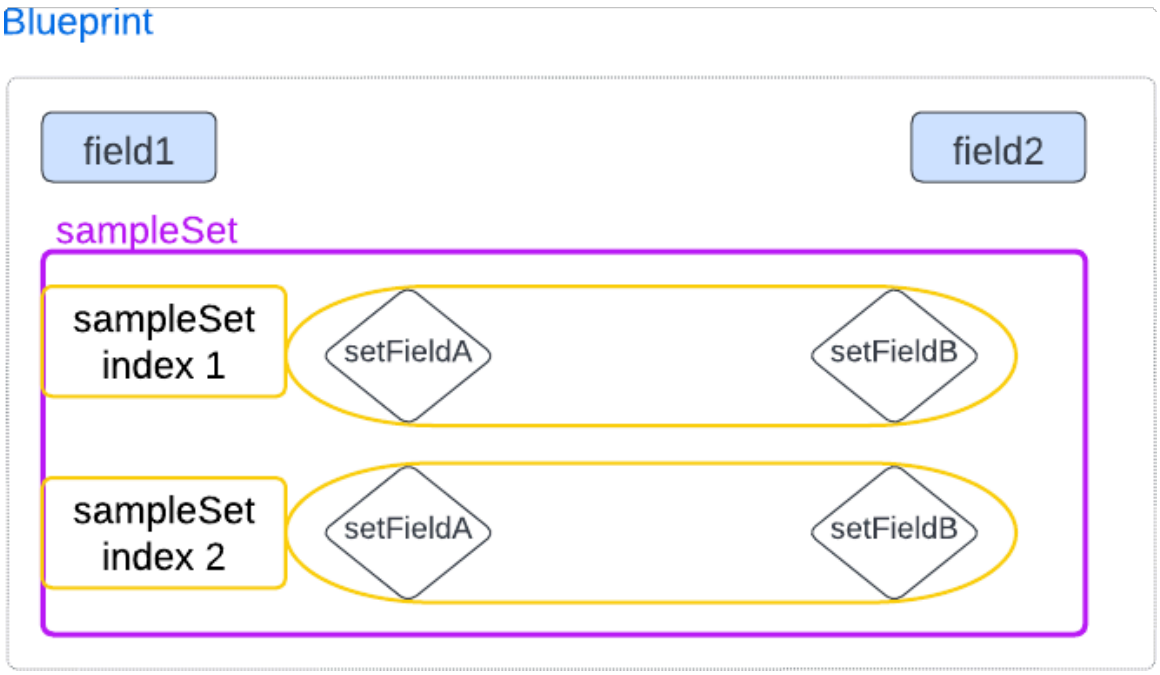
### How sets interact with the rest of a blueprint

The implications of sets when used in blueprints.

Suppose you have a blueprint with the following fields:

- field1
- field2
- setFieldA
- setFieldB

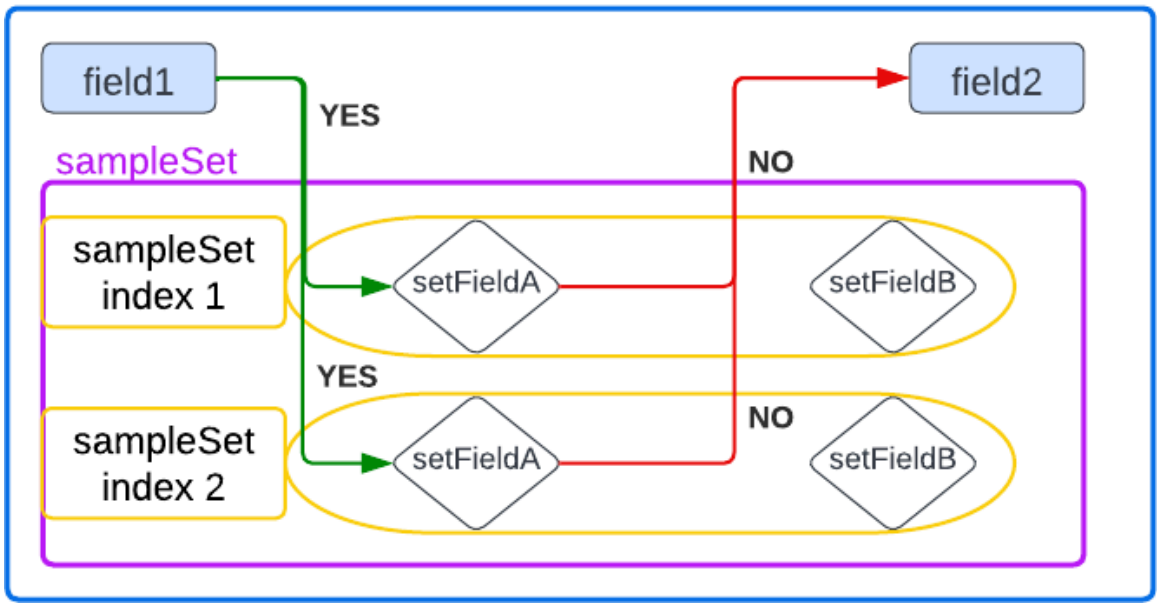
The setFieldA and setFieldB fields are part of a set named sampleSet. The field1 and field2 fields are not part of a set, but they are in the same blueprint as sampleSet. For our case, assume that sampleSet has a size of 2. That structure would look something like this:




Because a field can have a different value for each set index, a field in the set cannot influence a field outside the set (such as field2). However, fields outside the set (such as field1) can influence fields in the set. See the diagram:

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Blueprint




### Example: Ambiguous conditions

If in sampleSet index 1, setFieldA=Video and in sampleSet index 2, setFieldA=Audio, we cannot have the following rule:

- Condition: “if setFieldA==Video
- Action: set field2 to mp4

For index1, the condition is true, and the rule fires. For index2, the condition is false, and the rule does not fire. Because field2 is outside the set, it is not clear whether the rule should fire.

However, you can write rules for fields that affect other fields in the same set. These rules are independently applied to each index. Fields in indexes cannot influence fields in other indexes.

### Example: A valid rule

The following rule is valid:

- Condition: field1 == Mammals
- Action: Include the following field options on setFieldA: [“Lions”, “Tigers”, “Bears”]

The field options Lions, Tigers, and Bears are present for each index in sampleSet.

### Example: Independent indexes

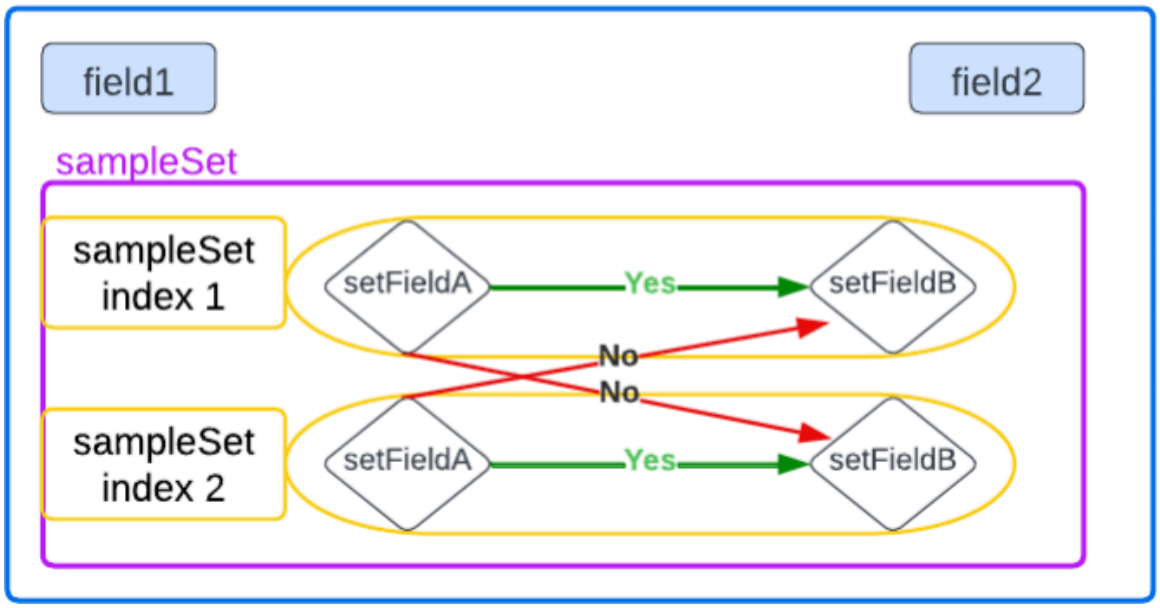
Suppose in sampleSet index 1, setFieldA=Video and in sampleSet index 2, setFieldA=Audio, and the following rule is set:

- Condition: If setFieldA == Video
- Action: setFieldB = true

For index1, the condtion is true, and the rule fires. For index2, the condition is false, and the rule does not fire. Therefore, setFieldB for index 1 is true, but the rule does not fire for the second index. Each index is independent of the other indexes.

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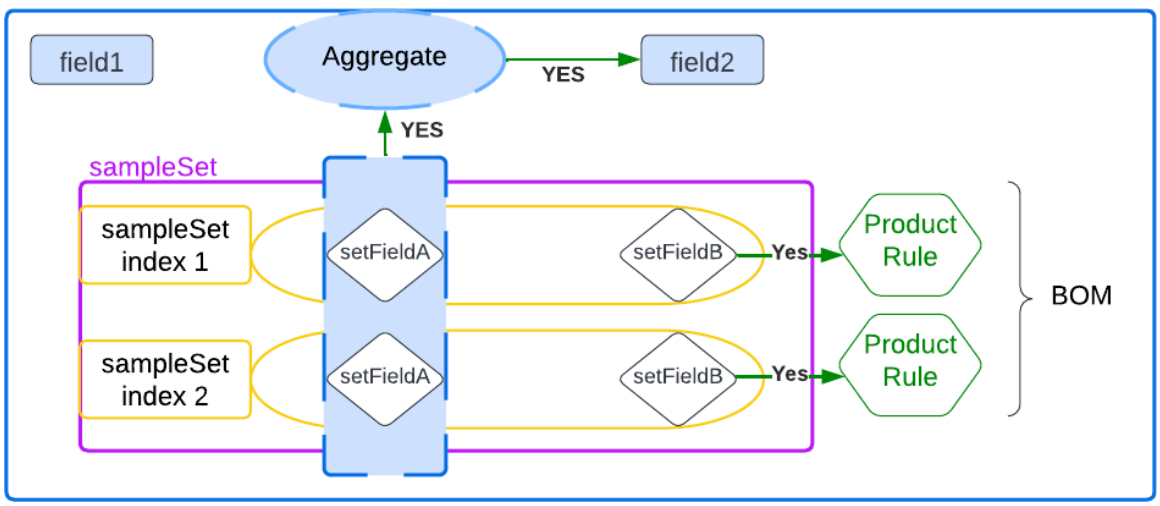
Blueprint




A set that is isolated from the rest of the blueprint is not very useful, but there are ways that the set can affect the blueprint outside of the set. First, if a Product rule is created using fields in the set, each Index in the set uses the Product rule to affect the BOM when the conditions are met. This is beneficial because you can write a single rule that each Index of the set follows differently, depending on the field values in that index.

If we want to have set fields affect fields outside the set, we have to use the set aggregates. There are five set aggregates: Sum, Average, Min, Max and Count. Each created aggregate will have a field variable name (with special formatting). This is because the aggregate fields operate like any other field outside the set, and they can influence other fields.

Blueprint




**Related topics**

Creating set aggregates

### Creating set aggregates

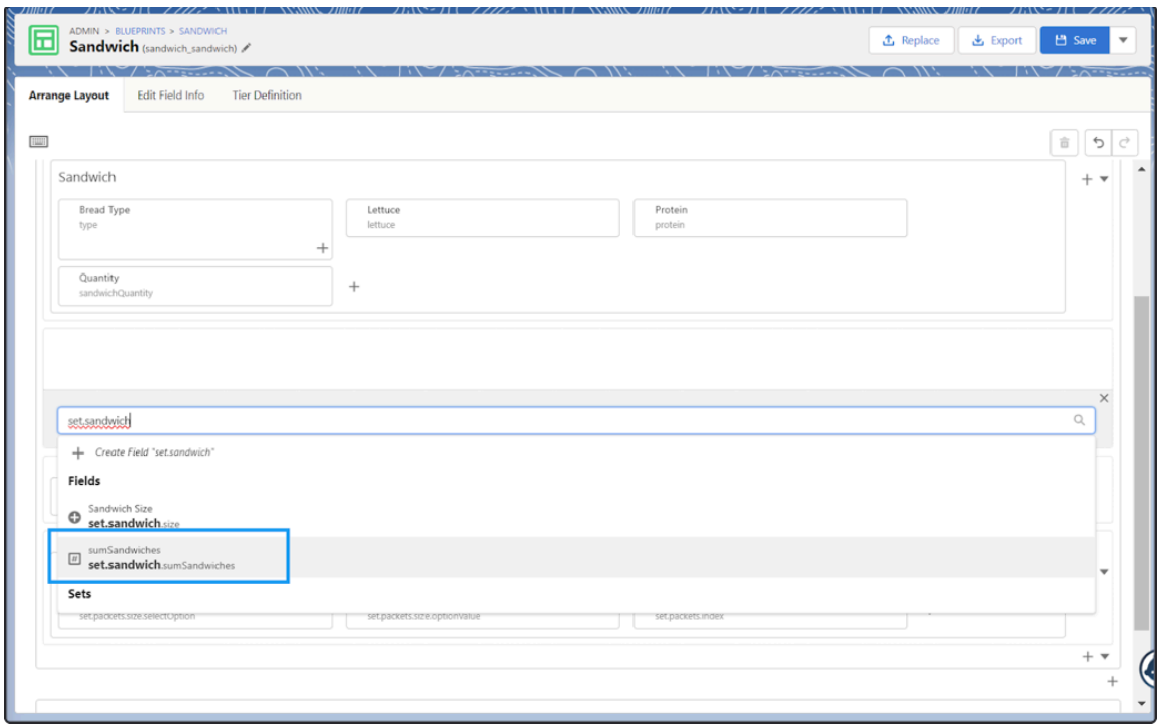
You can collect the average, count, maximum, minimum, and sum of the data in any field in a set by using a set aggregate.

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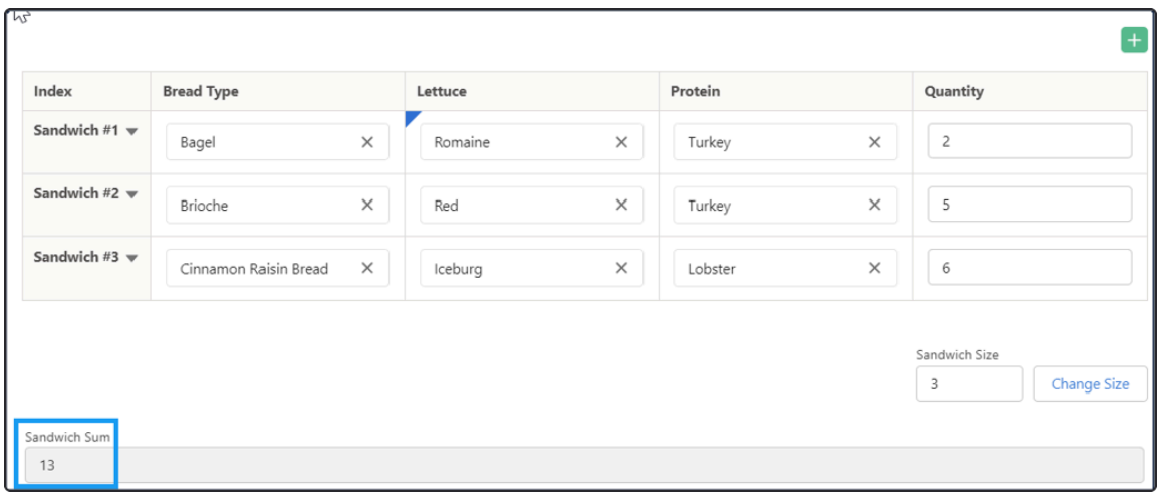
Set aggregates collect the data for each field in the set and output the result. Options include average, count, maximum, minimum, and sum. For example, a sum aggregate on a number field called Quantity will store the sum of all Quantity field values in the set. These aggregates function as a field outside of the set, can be used in global rules, and can be displayed anywhere in the layout.

To create an aggregate, open a set, scroll to the subfield that you want to aggregate, and click **Create New Aggregate**. You can then choose the aggregate type and give the new aggregate a name.

You can add the aggregate to the layout just like any other field, and deploy.




Below is the new sum aggregate during runtime:




**Note:** The Sandwich Sum aggregate represents the sum of the Quantity field. This is not to be confused with the Sandwich Size of 3, which is the number of rows in the set.

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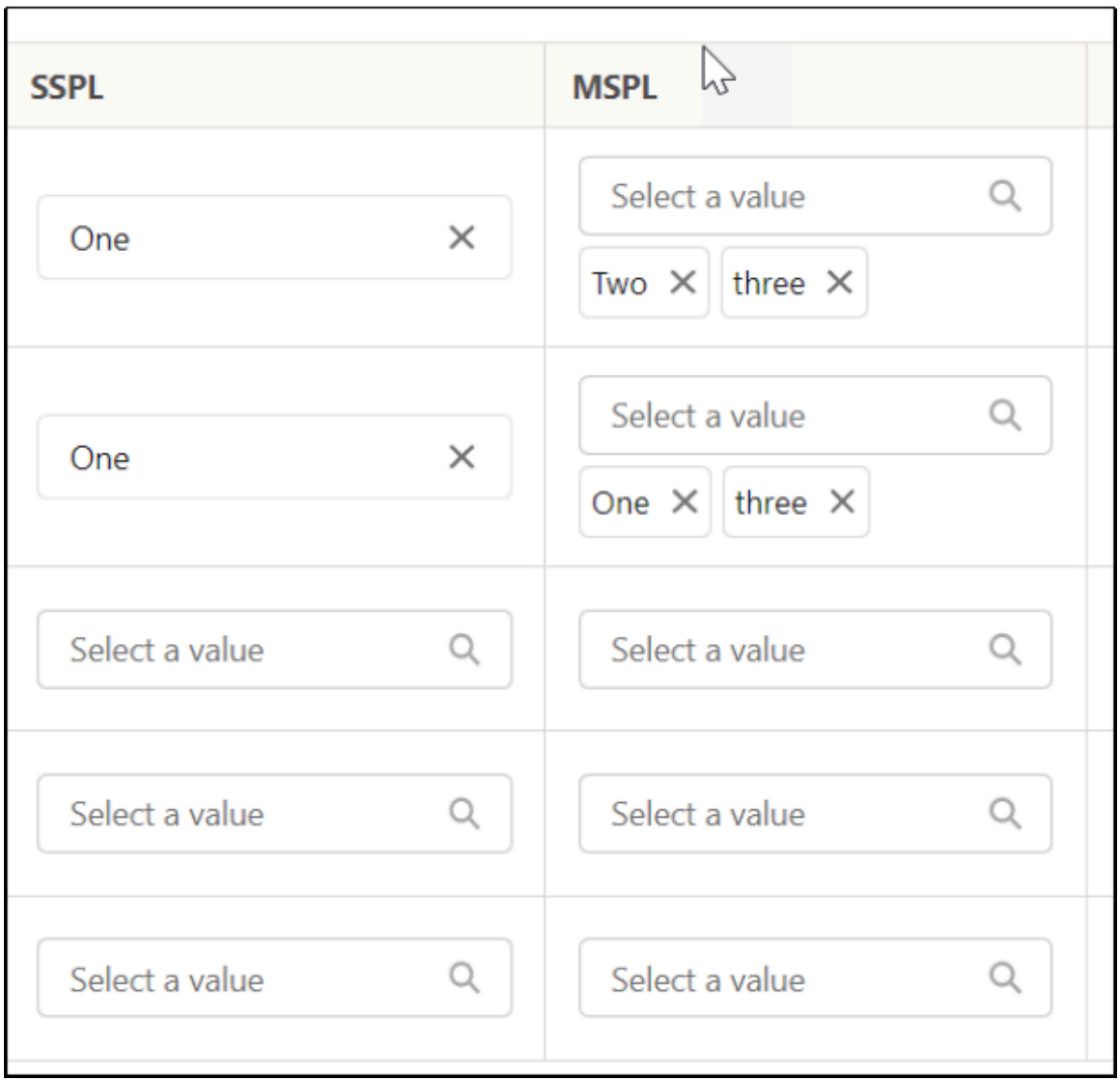
Although the five aggregate types seem straightforward, there are important details about how they function with Boolean fields, picklist fields, and fields that have blank values. The following sections clarify these particulars.

## The Count aggregate

This aggregate can cause the most confusion. Count can be defined as "count the number of times the field has defined values in the set." It tallies instances of the following types of values:

- Non-blank
- Non-zero
- Non-false

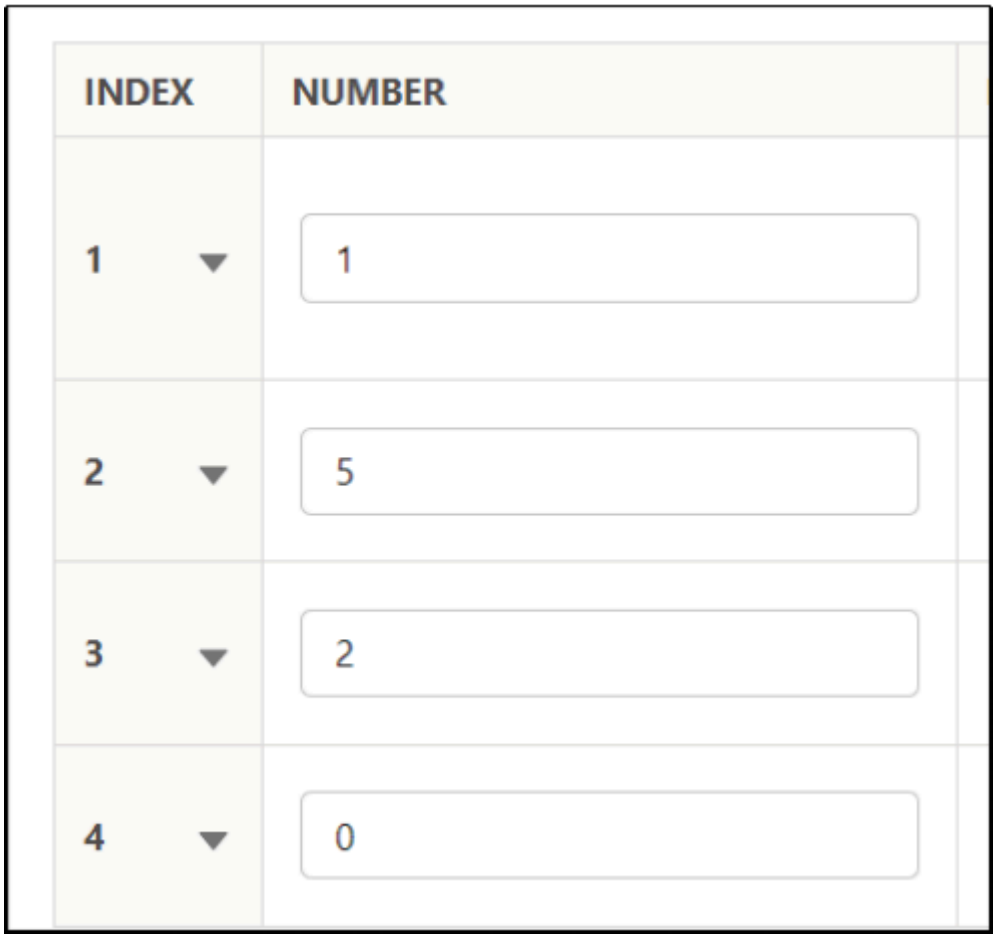
For both single-select and multi-select picklists, the count aggregate is based on how many indexes have a value selected. The Count aggregate for the following sample field would be 2, because indexes 1 and 2 have values. Indexes 3, 4, and 5 don't count because they are blank.




**Note:** For multi-select picklists, it does not matter how many values are selected—it counts as one.

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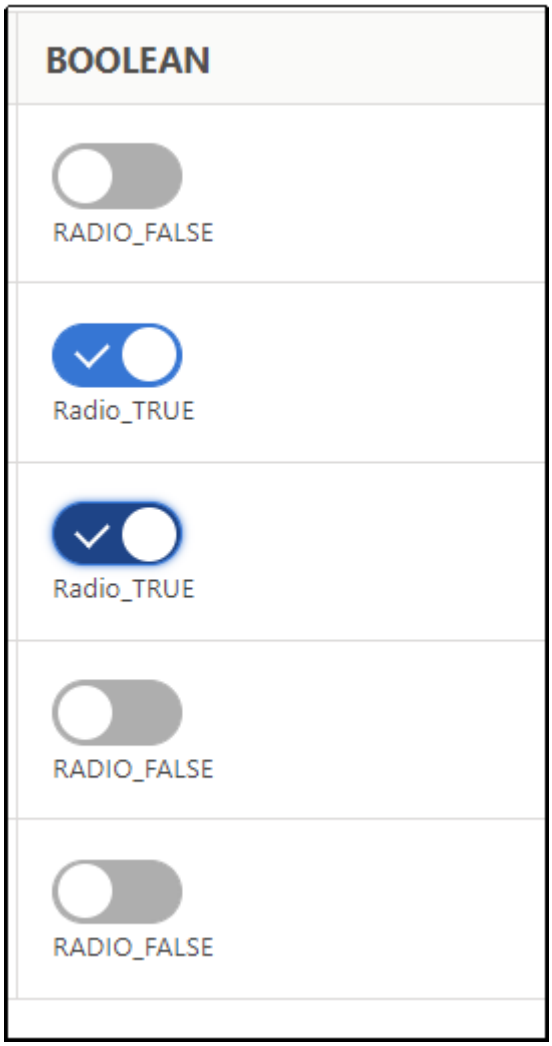
### Example: Number field




The count aggregate on this field would be 3 (from index 1, 2, and 3).

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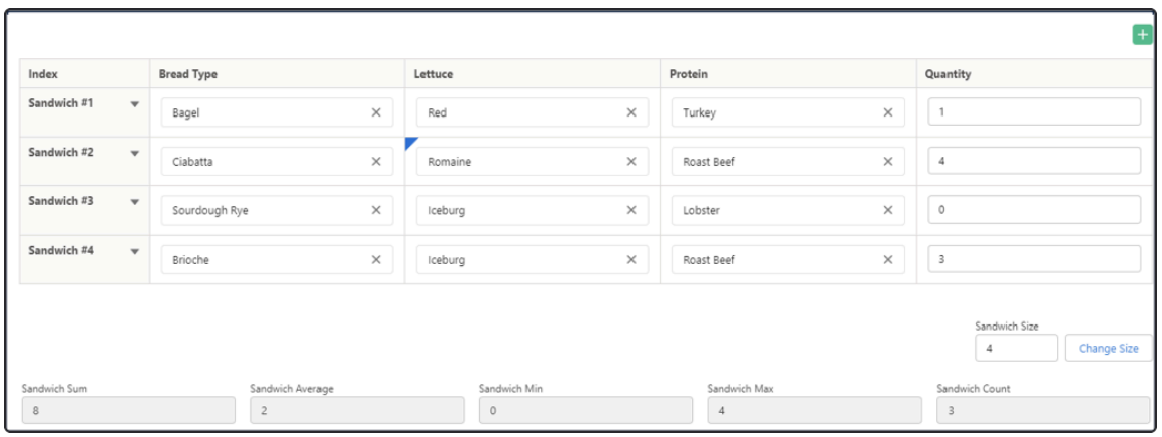
### Example: Boolean field




The count aggregate on this would be 2.

## The Average, Minimum, Maximum, and Sum aggregates

An average aggregate runs on all iterations of the number field in the set, including zero values. This is in contrast to count aggregates, which ignore zero number values.

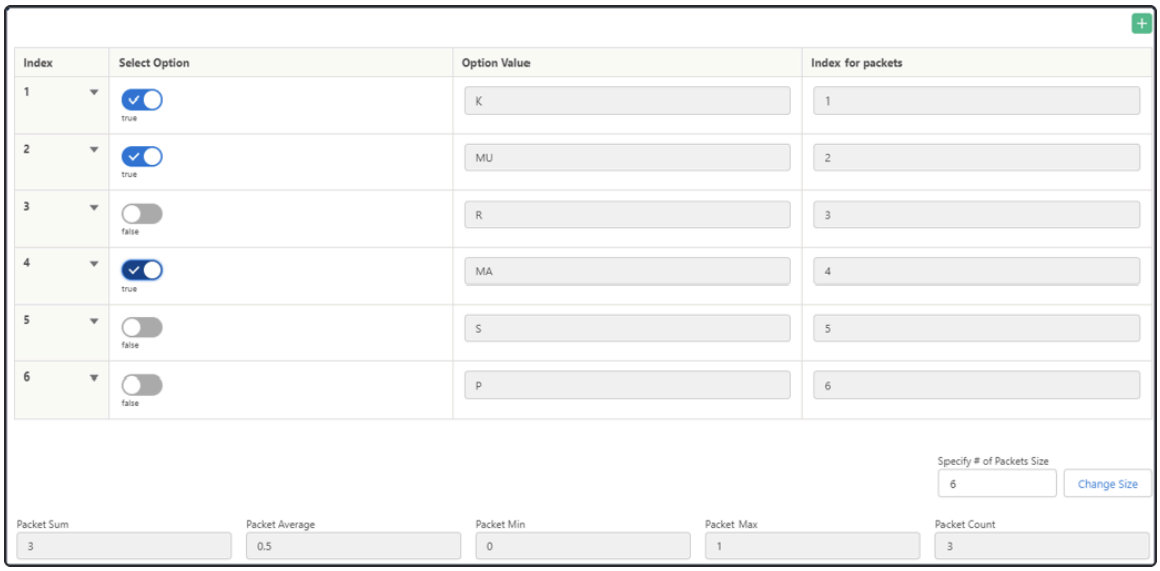



In this number field, indexes 1, 2, 3, and 4 add up to a quantity of 8. Since Index 3 with the 0 value is included, 4 is the divisor and the average is 8/4=2.

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This “including-zero” behavior is true for Sum aggregates, Minimum aggregates, and Maximum aggregates as well. In the example above, the minimum aggregate value is 0 since that is the smallest value.

An average aggregate on a Boolean field will usually be in decimal form. It lets the user know what percentage of the indexes are selected as true. In the following Boolean field, three of the six indexes' Select Option values are true, and the resulting aggregate is 0.5.




A sum aggregate will show the number of Boolean fields marked as true. In the example provided, the aggregate is 3.

A maximum aggregate will be 0 unless one of the Boolean fields is selected, in which case it will be 1.

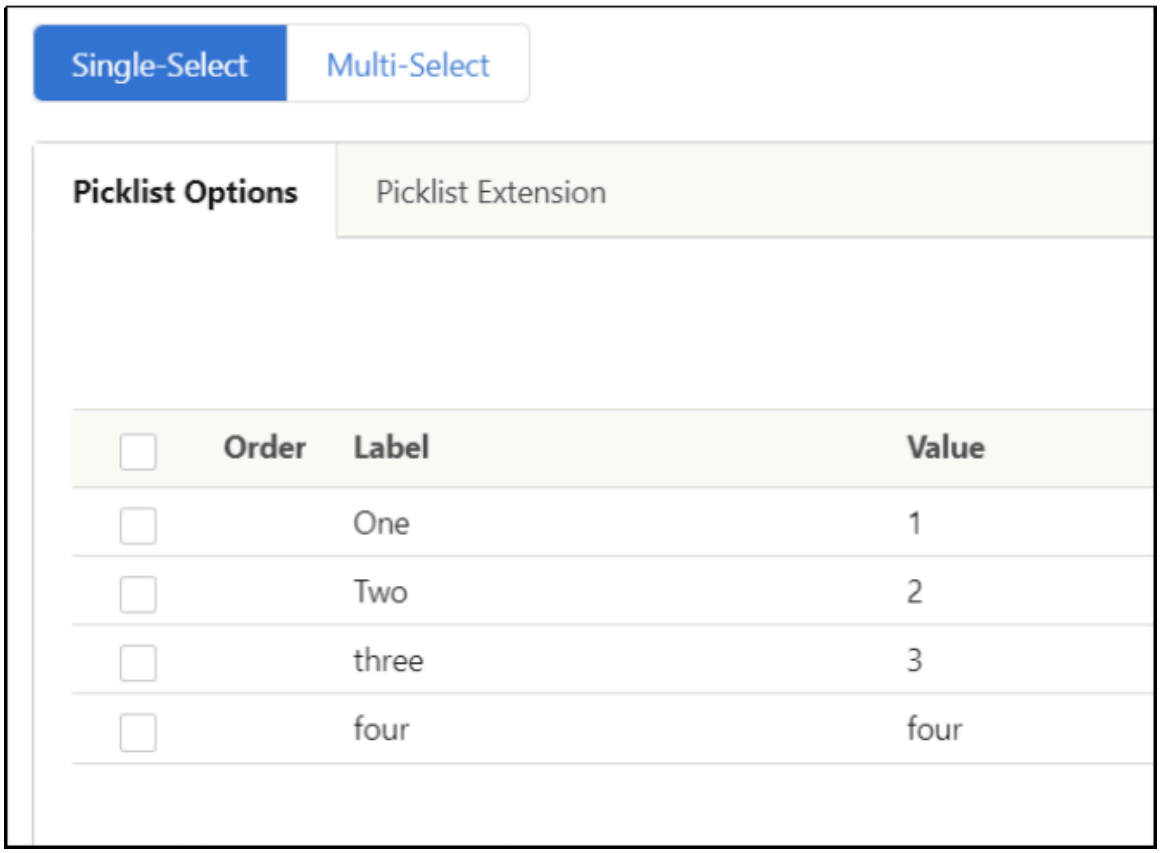
A minimum aggregate will be 0 unless all of the Boolean fields are selected, in which case it will be 1.

## Aggregates on picklist subfields

Four of the five aggregates (average, minimum, maximum and sum) work only on number values, not text. So if you add one of these aggregates on a set field that is a picklist, you will get an error once you deploy and select a text field option.

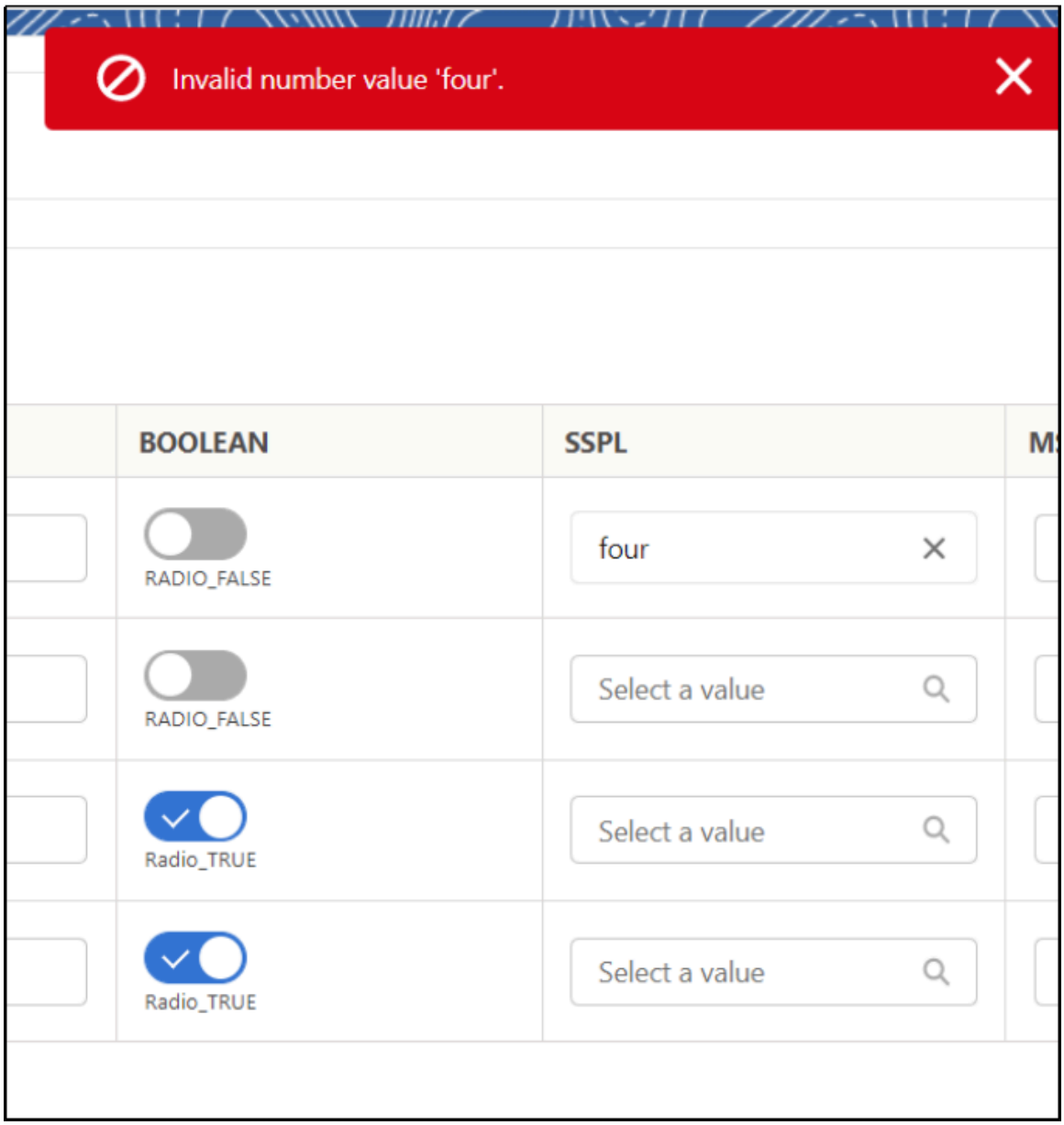
For example, suppose two fields were created. Both fields had the same field options, but one is a single-select picklist and one is a multi-select picklist. Here are the field options:

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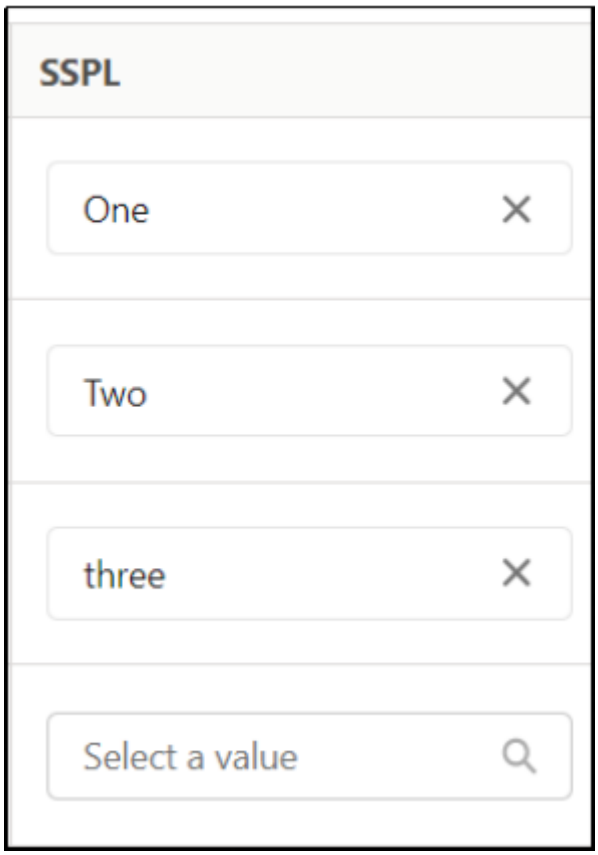

The fourth field option uses the word “four” instead of the number 4. As noted above, when deployed and “four” is selected, an error message occurs:

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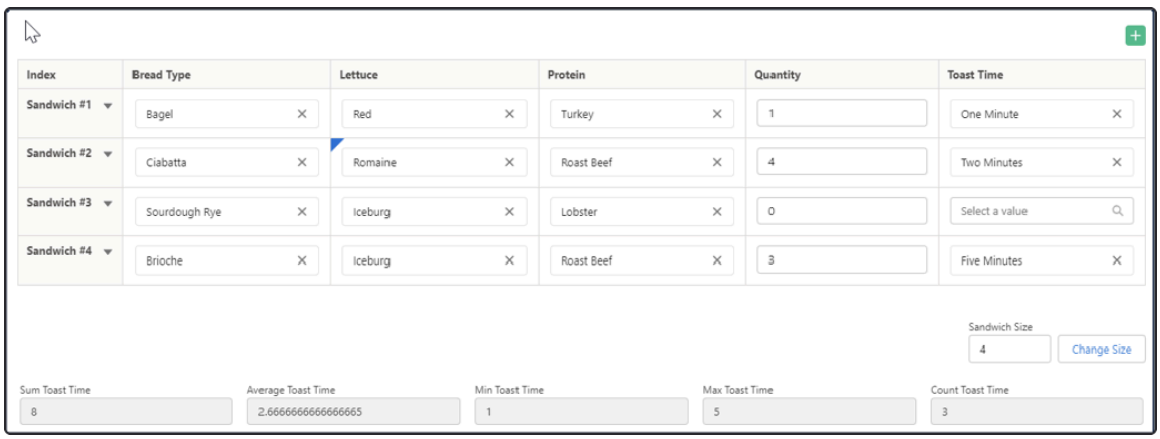



But if we select the numeric based options, the aggregates work.

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In the following single-select picklist field, there are four indexes. The picklist “Toast Time” has the option label displayed as text, but behind the scenes, the option value is numeric.



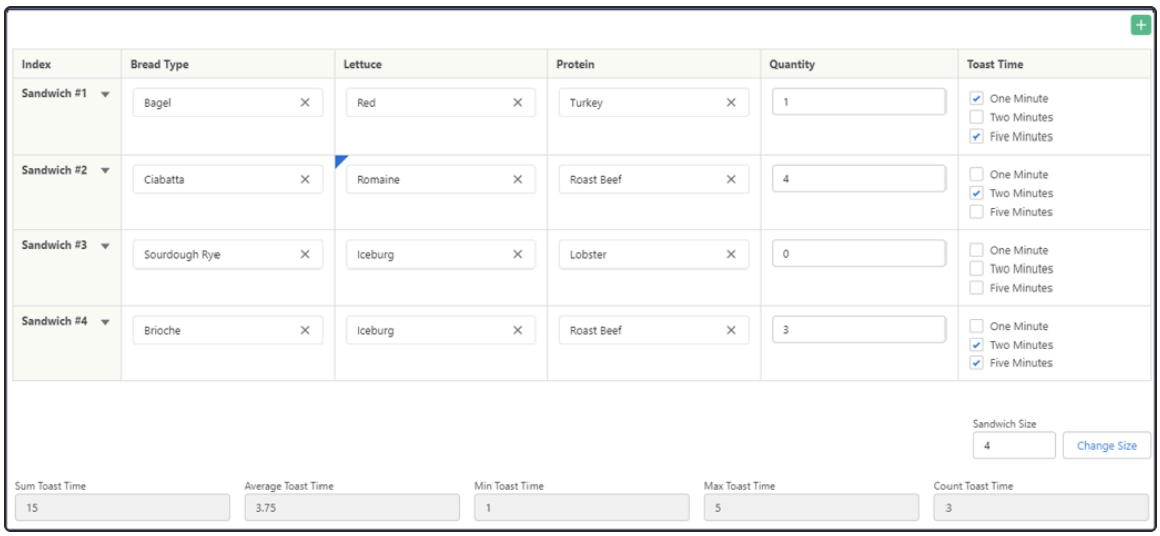

The four values selected are “One Minute” (1), ”Two Minutes” (2), blank, and “Five Minutes” (5). By applying each of the aggregates to the single-select picklist field, the result is:

- Sum: 8 = 1 + 2 + 0 + 5
- Maximum: 5 (the largest field option value selected)
- Minimum: 1 (The blank index does not apply to the minimum)
- Average: 2.66 = (1 + 2 + 5) / 3 (The blank index does not count toward the total and the divisor)
- Count: 3 (The blank value does not apply to a count aggregate)

Keep in mind that blank picklist values count towards the minimum, maximum, sum, and average aggregates.

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In the following picklist field, Toast Time has been converted into a multi-select picklist. The four indexes have the following option values: [1, 5], [2], [ ], and [2, 5].

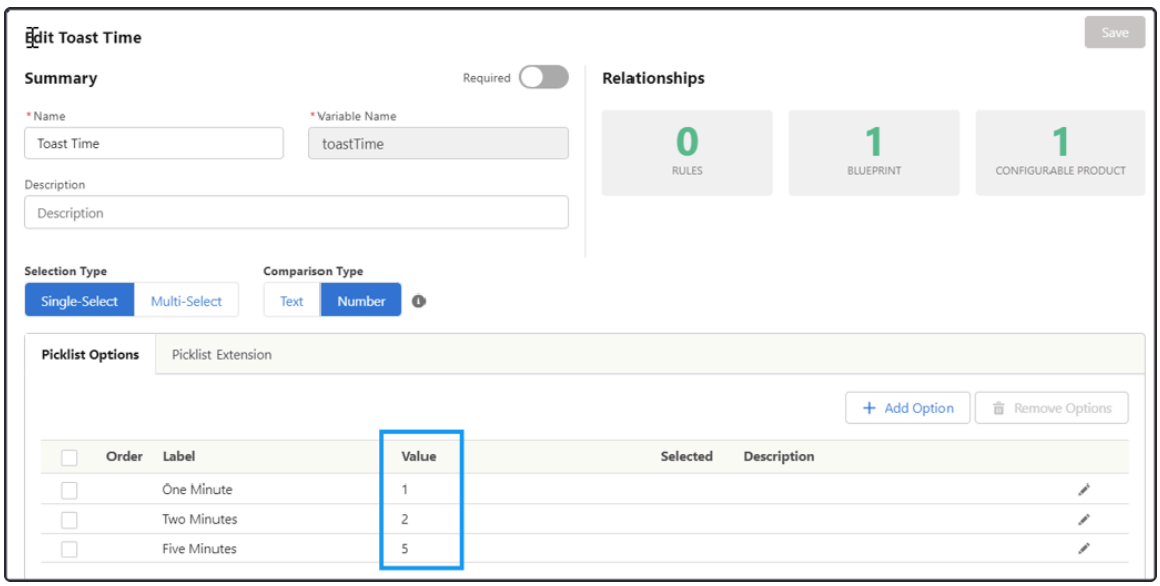



By applying each of the aggregates to the field, the results are:

- Sum: 15 = (1 + 5) + 2 + 0 + (2 + 5)
- Maximum: 5 (Still the largest value selected in the picklist. It is not the combined value in the index. To accomplish that, create a field and a rule in the set to add the multi-select picklist values together)
- Minimum: 0 (The blank row applies to the minimum)
- Average: 3.75 = [(1 + 5) + 2 + 0 + (2 + 5)] / 4 (The blank row counts towards the total and the divisor. The divisor is the number of indexes, not the number of picklist field options selected)
- Count: 3 (The blank value does not apply to a count aggregate)

Remember: The average, minimum, maximum and sum aggregates only work for picklist fields if the field option values are of number type. If the field option values are of text type, users will experience an error in runtime.

The following field is the field set up for the examples in this topic. Note that the Comparison Type is Number, and the values are numbers.




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**Related topics**

Using sets in layouts

### Using set indexes

Watch a video that demonstrates how to use set indexes to drive a product rule.

Sets automatically create a set index field (`set.{{setName}}.index`). Using this field, the indexes of Individual rows in a set can be used in rules or in calculations.

**Note:** Set indexes cannot be used for cross-index rules. For example, a row at index 1 cannot access or use values from a row at index 2.

The following video demonstrates set indexes and how to use them to drive a product rule.

Set indexes in CPQ

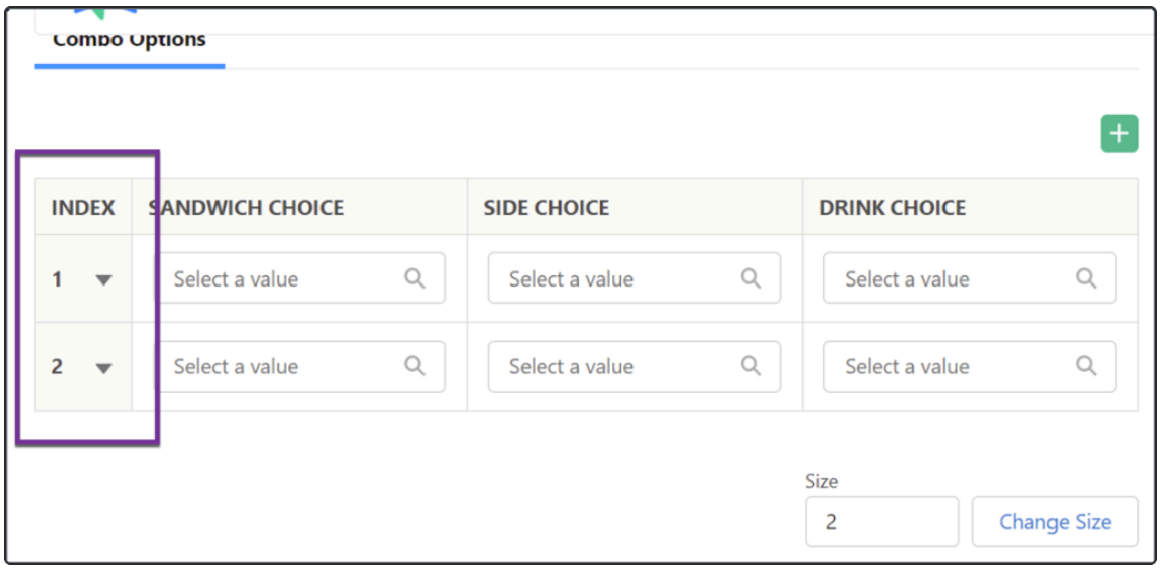
**Related topics**

Hiding the set grid and field grid indexes

### Hiding the set grid and field grid indexes

You can hide the index column in a set grid or a field grid.

By default, the index column is displayed in a set grid or a field grid. This index column can be hidden in two ways: by using the layout wizard or by modifying the layout CSV file.




## Hide the index by using the layout wizard

Navigate to the layout in question in the CPQ Admin. Then click the gear icon next to the set or field grid. Then select the General Settings expandable section. Set the Show Index toggle to false, save the layout, and deploy. The index will no longer be displayed.

**Note:** the Show Index setting is available for field grids as well.

## Hide the index by modifying the layout CSV file

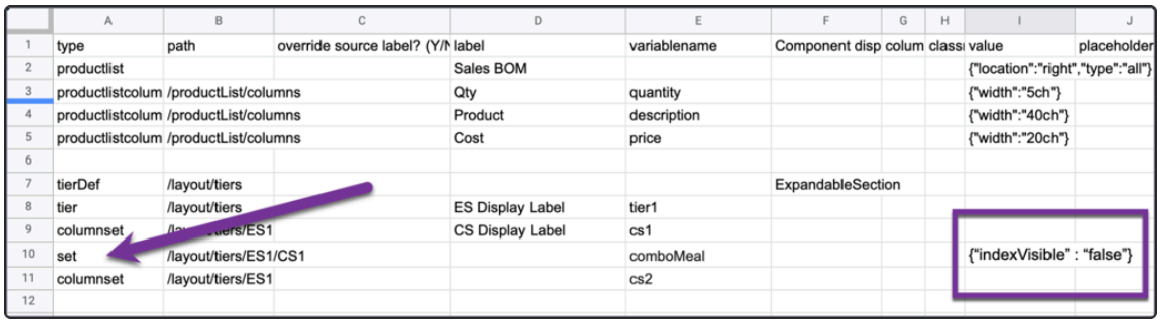
To hide the column, adjust your layout CSV to include the following instruction in the “Value”, for an appropriate row: `{“indexVisible” : “false”}`

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The examples below illustrate the CSV files for a field grid and for a set. In both cases, the Index is hidden on runtime:

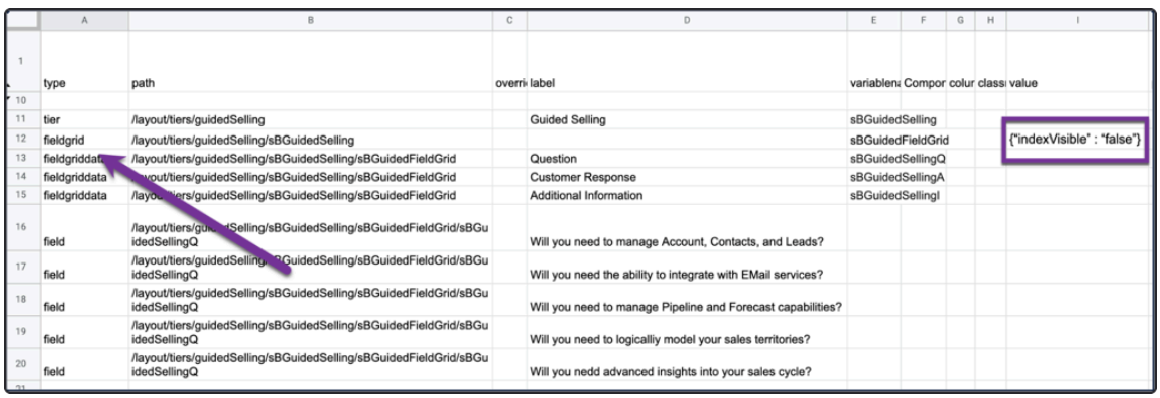



## Example: Field grid CSV file




Link to CSV example

## Example: Sets CSV file




Link to CSV example

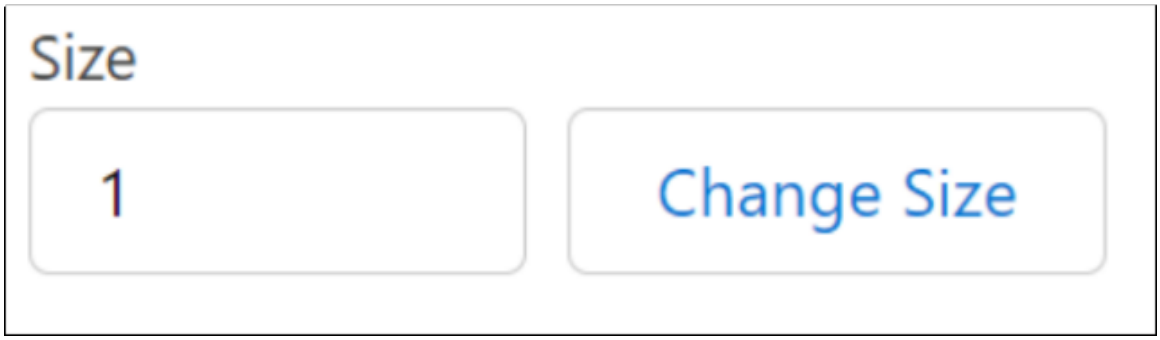
### Related topics

Modifying the Size and Change Size fields for a set

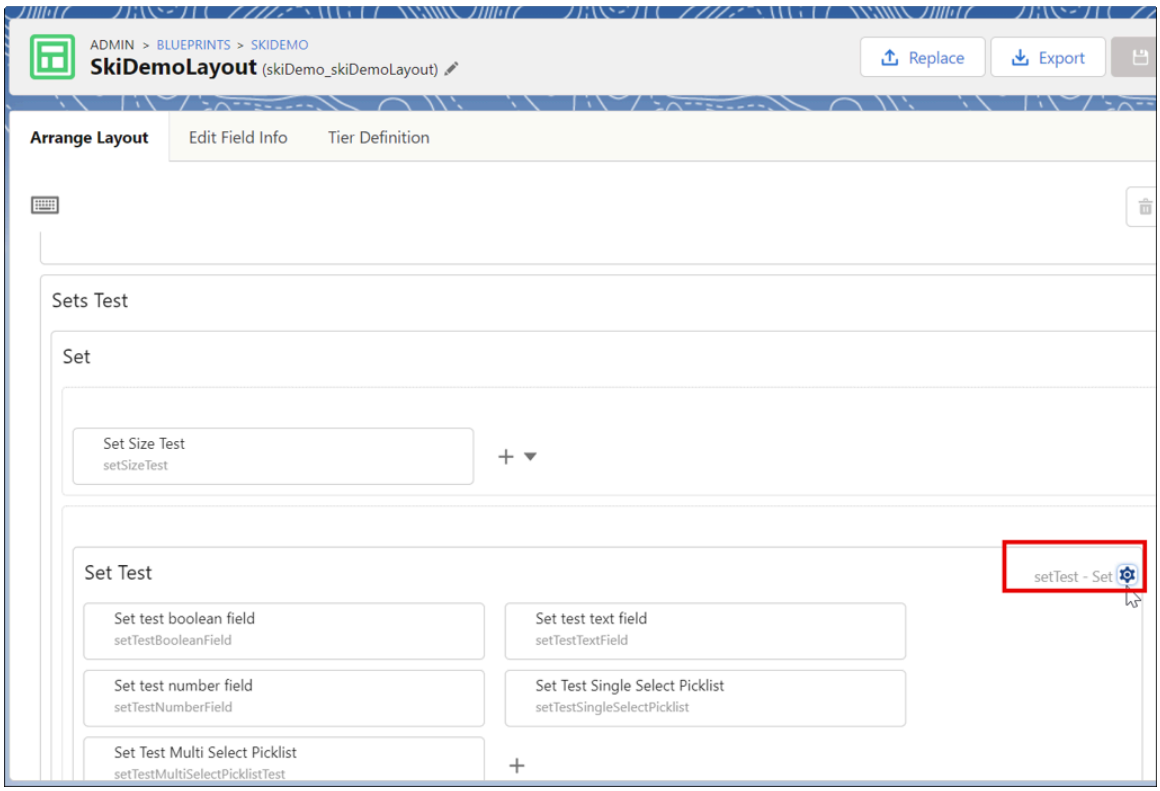
### Modifying the Size and Change Size fields for a set

You can change the appearance of the size fields for a set, or hide them altogether.

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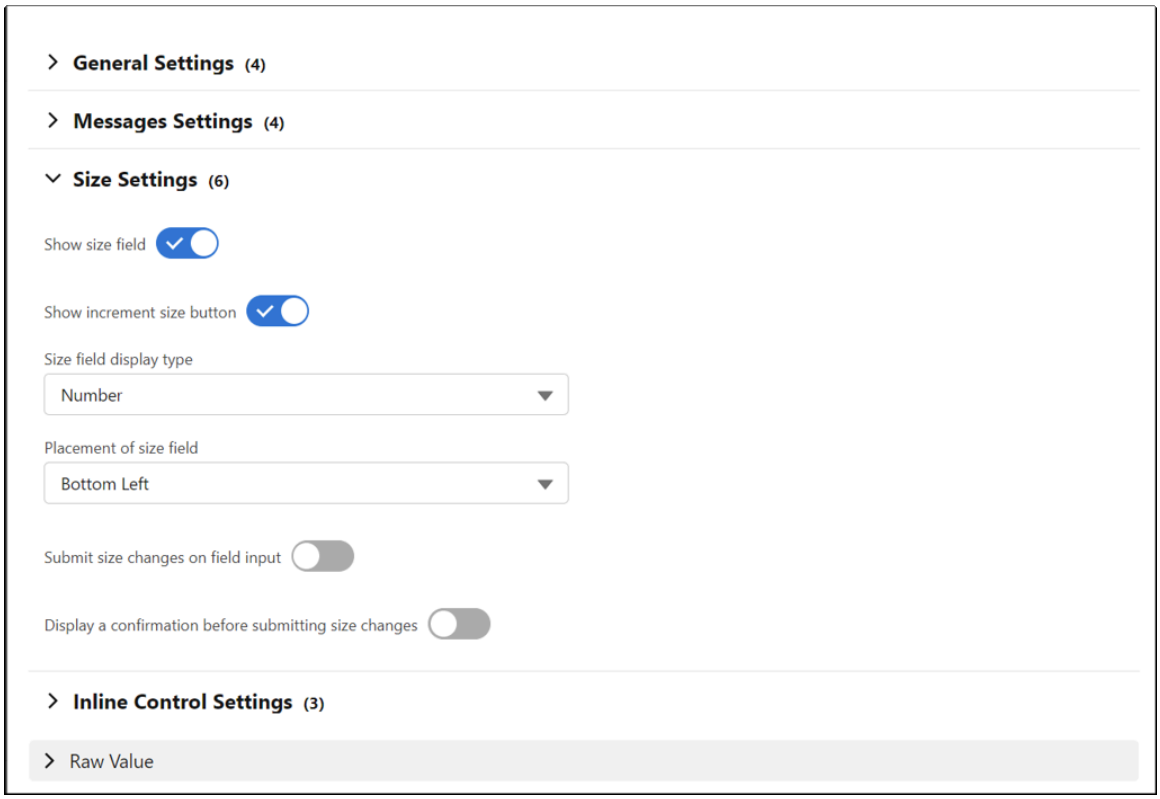



You can hide these fields by making an adjustment in the layout of the blueprint. In the layout editor, click the gear icon next to the set:




In the size settings, you can choose to show or hide the set size field, as well as the appearance, location, and behavior of the field:

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An admin can also hide the size field by modifying the Set type value column in the layout CSV file. Enter the following:

```
{ "sizeControl": { "visible": false } }
```

For more information about how to control the size and behavior of sets, see Using sets in layouts.

**Related topics**

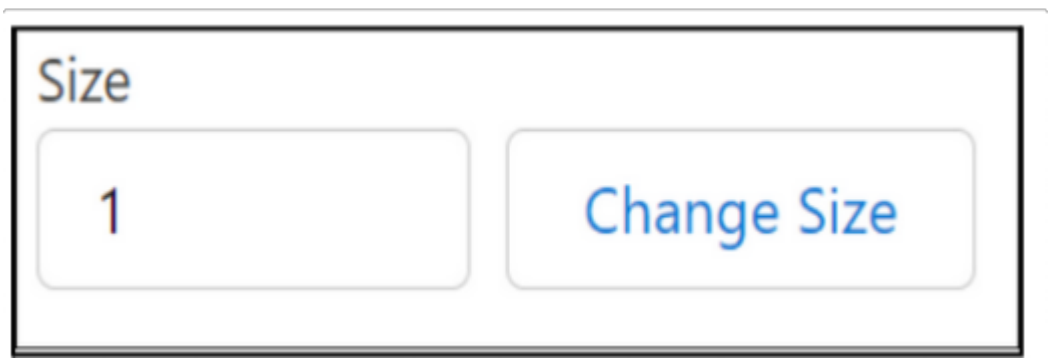
- Example: Use a custom field to dynamically control set size
- Configure sets

### Example: Use a custom field to dynamically control set size

This example demonstrates how to hide a standard field and replace it with a custom field.

## About this task

This article demonstrates how to hide the Size field (shown below) on a layout and replace it with a different field. A rule populates the value from the new field into the hidden field.




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### Before you begin

Role required: Admin

### Procedure

1. In the layout wizard, turn off the Show Size Field setting.




   Although the set size field still exists, it no longer appears in the layout. For more information about sets and layouts, see Using sets in layouts.

2. Create your replacement number field and add it to the layout.
   You can change the display type as desired. In the example below, we created a number field using a slider.




   The final task is to create a rule to take the value from the new field and enter it into the (hidden) Size field.

3. Create a rule, set your conditions, and create a Determination Action.
   In the rule action:
   - Define your original Set Size field as the field in which the value will be injected.
   - Select **Advanced**.
   - Click **Edit Advanced Function** and input a single line of code that returns the value of your new field.

   For example, assume that the new field has a value of numberOfHardDrives. As seen in the image below, our line of code would simply be:

```
return cfg.numberOfHardDrives;
```

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4. Deploy and test your updated blueprint.
   When you modify the values of the field that you created, the size of the Set should be updated accordingly.

### Configure picklist extensions

Learn how to create and configure picklist extensions (Picklist extensions) in CPQ. Add extended option details, apply filters, and map products and quantities to display enriched picklist data in layouts for more dynamic and efficient configurations.

### Before you begin

1. Create a single-select or multi-select picklist field for your picklist extension (example: dogBreed).
2. Create a single-select picklist field that you want to use to filter your picklist extension (example: dogBarking).

   **Tip:** For prerequisite steps 1 and 2, use Matrix Loader to upload the following two CSV files:

   dogBreed Fields CSV

   dogBreed FieldOptions CSV

3. Create an SFDC Product2 record, such as “Configured Canine”. Make a note of the ID (the format is a 15-20 character token, similar to 01t5f0000004GBwAAM) or Product Code, depending on your environment's ProductIdField setting. Define a standard pricebook price to the product record.

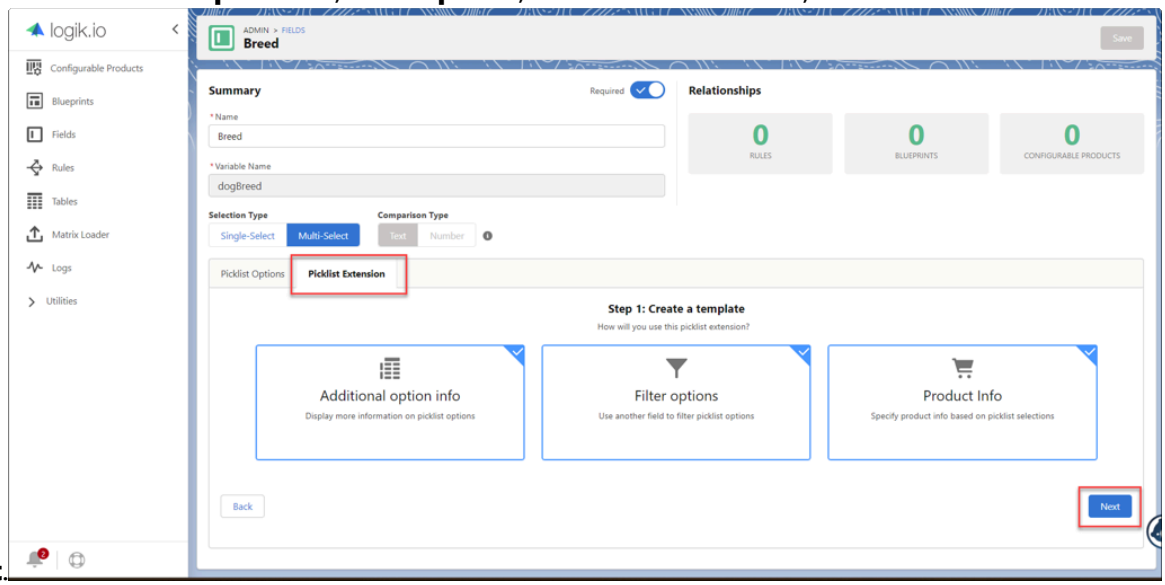
In steps 1 through 7 of the procedure, we set up the extension data. In the remaining steps, we map the data.

Role required: Admin

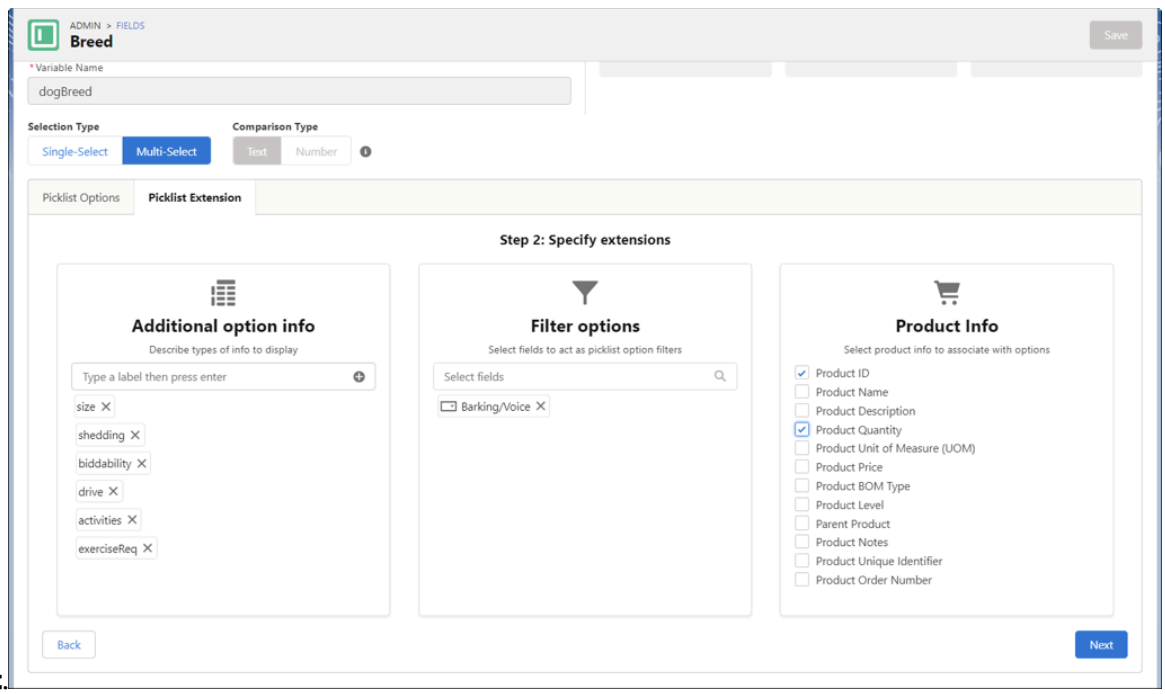
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## Procedure

1. In dogBreed picklist administration, click the Picklist Extension tab, and then click **Guided Setup**.
2. Click the **Additional option info**, **Filter options**, and **Product Info** tiles, and then click **Next**.

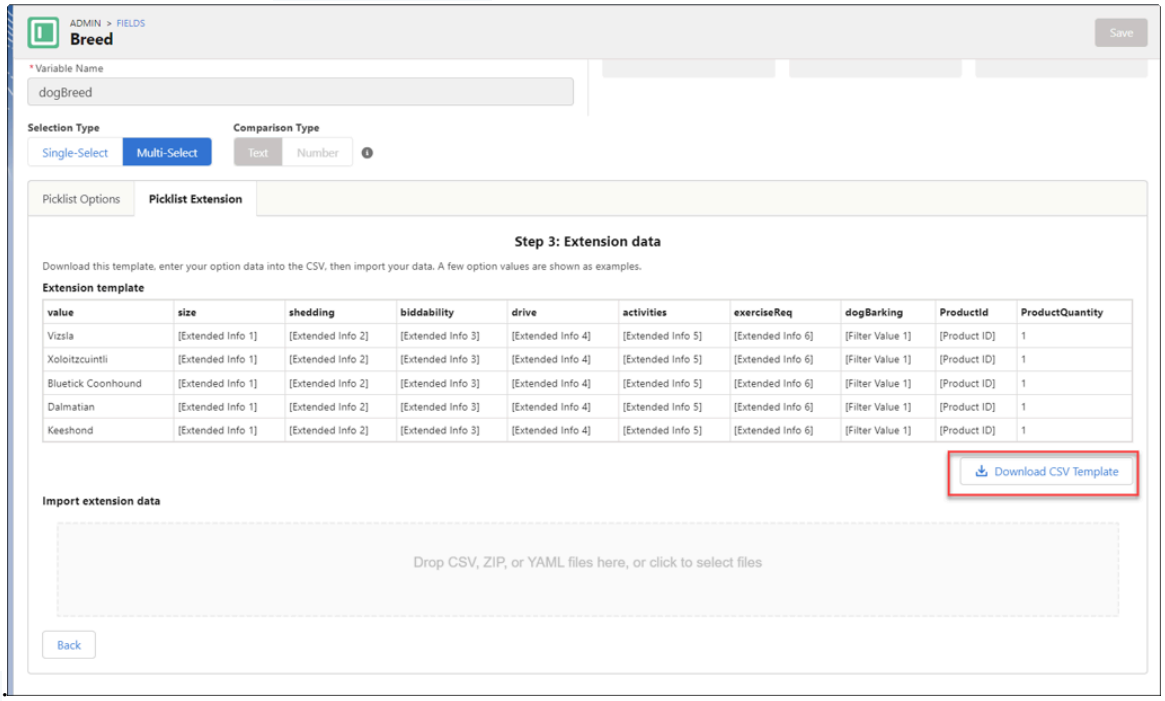



3. For each option in the picklist, enter labels for the extended information to show. Examples: size, shedding, exerciseReq, biddability, drive, activities.
4. Filter Options: choose the fields with which you will filter picklist extension. Example: Barking/Voice
5. Product Info: check **Product ID** and **Product Quantity**.
6. Click **Next**.




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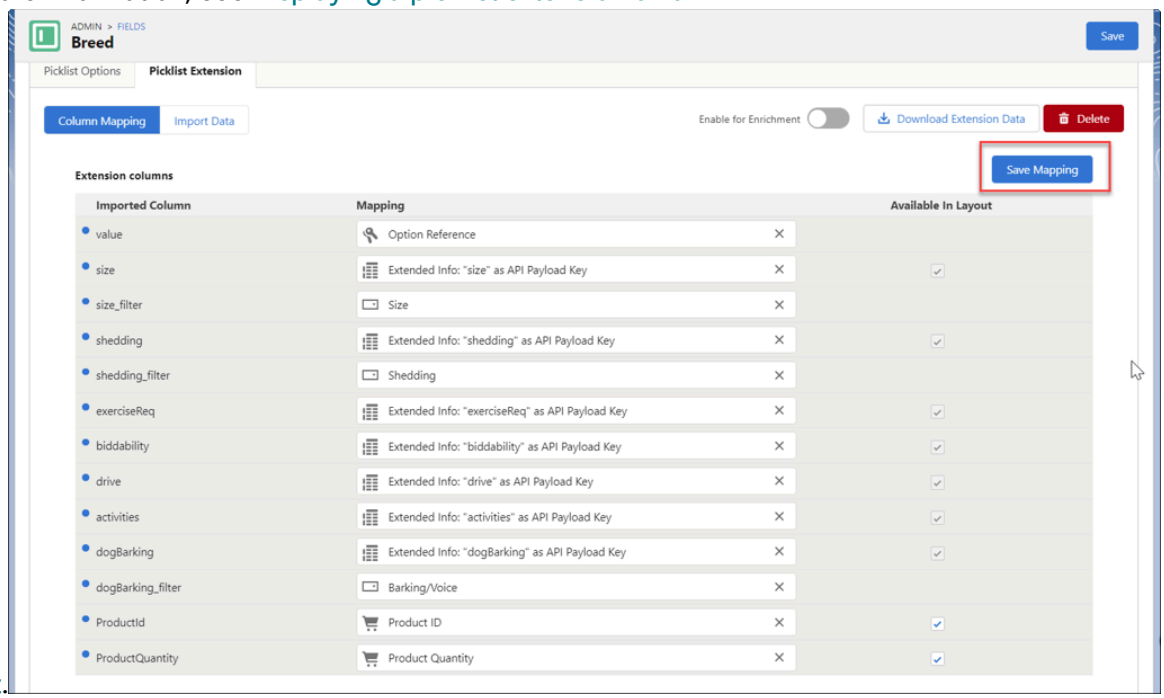
7. Review the format, and then click `Download CSV Template`.




8. Complete the CSV file on your local machine.
   (If you're implementing the dogBreed example: leverage the spreadsheet dogBreed picklist extension data; replace ProductId with token or Product Code from prerequisite step 3; and export to CSV format.)
9. In the picklist field you are editing, drag the CSV file to Import Extension Data, and then click **Import**.
10. Map the 'value' column to 'Option Reference'.
    This instructs the picklist extension to display defined values of the picklist in the leftmost column. The column that is mapped as the option reference must be named 'value'.
11. Map 'size' to 'Extended Info: "size" as API Payload Key'.
    The corresponding **Available In Layout** checkbox should be automatically checked.
12. Perform the same mapping for the 'shedding', 'exerciseReq', 'biddability', 'drive', 'activities', and 'dogBarking' fields.
    That is, for the 'shedding' imported column, map to 'Extended Info: "shedding" as API Payload Key', and so on.
13. Map 'size_filter' to the Size [dogSize] field.
    This will filter the picklist according to the user's selection in dogSize.
14. Map 'shedding_filter' to the Shedding [dogShedding] field.
15. Map 'dogBarking_filter' to the Barking/Voice [dogBarking] field.
16. Map 'ProductId' to the Product ID entry with the shopping cart icon, under 'Set product info'.
    This tells the app to reference the ProductId or Product Code in the picklist extension data to add the corresponding product to the Shopping Cart.
17. Map 'ProductQuantity' to the Product Quantity entry with the shopping cart icon, under 'Set product info'.
    This tells the app to set the quantity of the line item in the cart with this value from the picklist extension upload data.
18. Click **Save Mapping**, and then in the upper right corner, click **Save**.

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19. Add the picklist extension field to the layout via the Logik Admin UI or by CSV upload, and deploy.
    For more information, see Displaying a picklist extension on a layout.




**Related topics**

Displaying a picklist extension on a layout

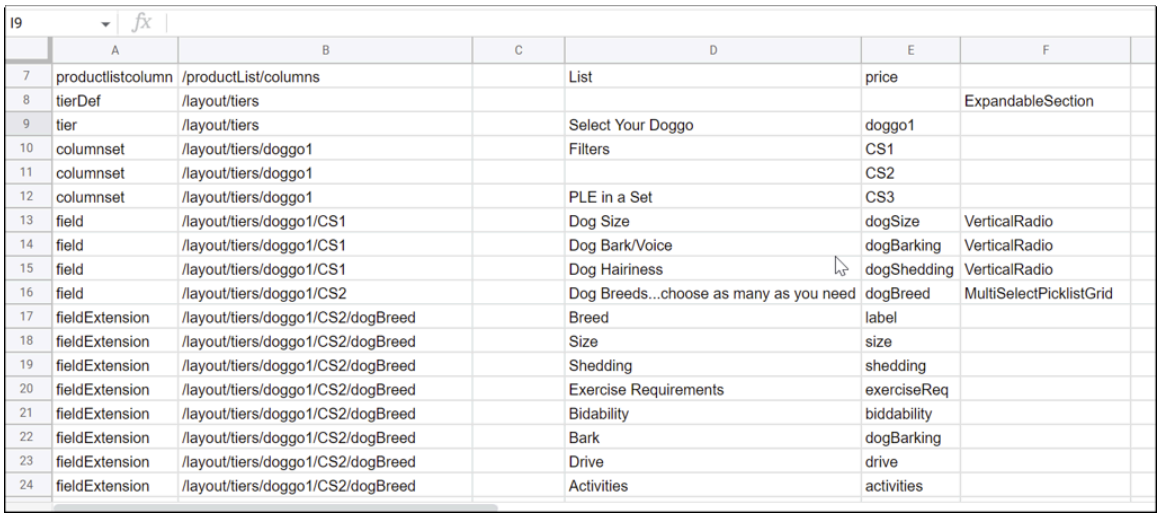
Picklists and picklist extensions in rules

### Adding a field with an extended picklist to the layout

Add an extended picklist field to a CPQ layout by placing it in a column set and defining each extension column in the layout CSV. Make sure that the picklist extension is marked “Available in layout” so its data appears correctly in the user interface.

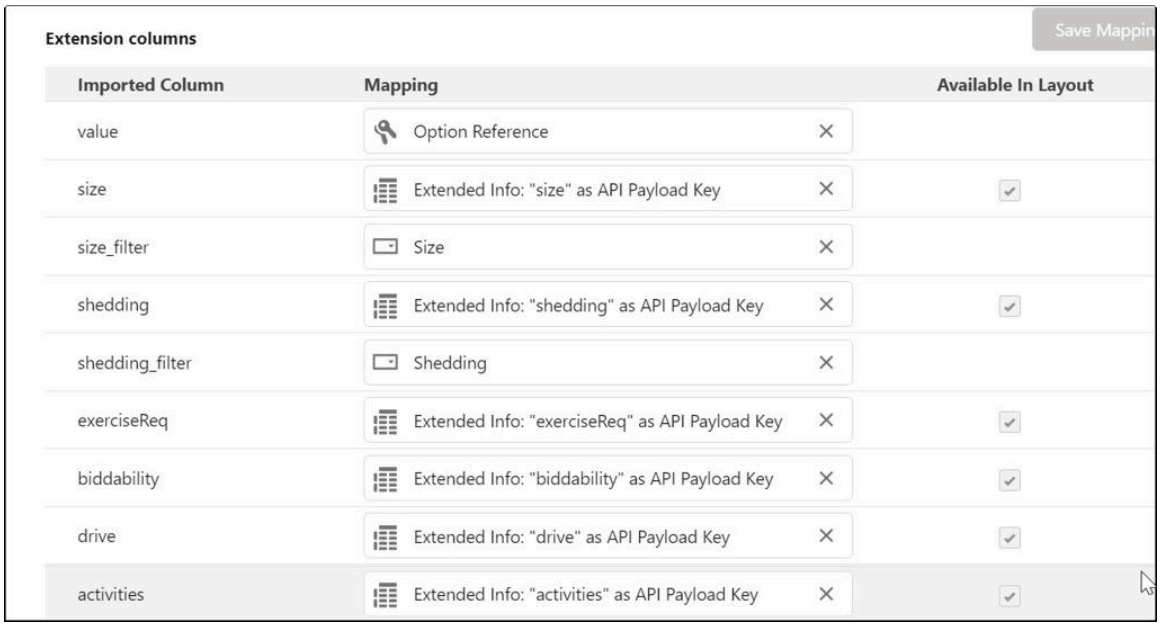
Adding a field with an extended picklist to the layout is similar to how a field is added to a layout. First the field has to be added to a Columnset in a Tier. After that, each column of the extended picklist must be added to the layout with the field added at the end of the path. In the following example, row 16 adds the field “dogBreed” to the layout. The path in rows 17- 24 all have “dogBreed” at the end of the path. They also have the value, fieldExtension, in the type column (column A).

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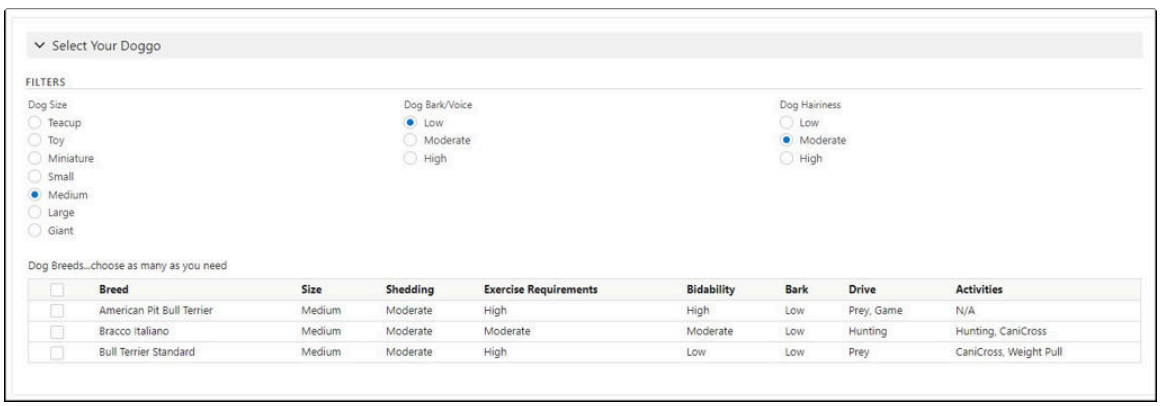


| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 7 | productlistcolumn | /productList/columns | | List | price | |
| 8 | tierDef | /layout/tiers | | | | ExpandableSection |
| 9 | tier | /layout/tiers | | Select Your Doggo | doggo1 | |
| 10 | columnset | /layout/tiers/doggo1 | | Filters | CS1 | |
| 11 | columnset | /layout/tiers/doggo1 | | | CS2 | |
| 12 | columnset | /layout/tiers/doggo1 | | PLE in a Set | CS3 | |
| 13 | field | /layout/tiers/doggo1/CS1 | | Dog Size | dogSize | VerticalRadio |
| 14 | field | /layout/tiers/doggo1/CS1 | | Dog Bark/Voice | dogBarking | VerticalRadio |
| 15 | field | /layout/tiers/doggo1/CS1 | | Dog Hairiness | dogShedding | VerticalRadio |
| 16 | field | /layout/tiers/doggo1/CS2 | | Dog Breeds...choose as many as you need | dogBreed | MultiSelectPicklistGrid |
| 17 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Breed | label | |
| 18 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Size | size | |
| 19 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Shedding | shedding | |
| 20 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Exercise Requirements | exerciseReq | |
| 21 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Bidability | biddability | |
| 22 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Bark | dogBarking | |
| 23 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Drive | drive | |
| 24 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Activities | activities | |

It is also important to make sure that any extension that will be added to the layout is selected on the picklist extension menu by checking the “Available in layout” box.




The setup above images would result in the following layout:




## Related topics

Displaying a picklist extension on a layout

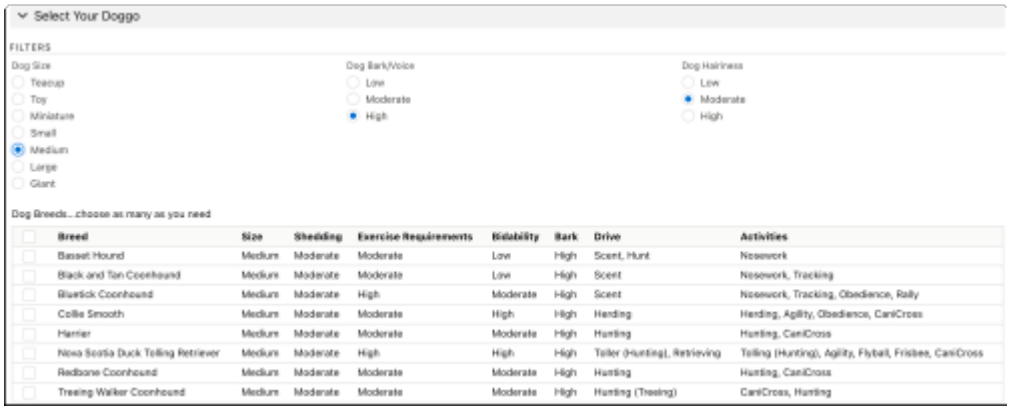
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### Displaying a picklist extension on a layout

Learn how to display a picklist extension (PLE) on a layout using either the CPQ Admin UI or a CSV upload. Configure foundational picklist fields, map extension columns, and design layouts that present rich, multi-column picklist data.

In this article, we show a simple picklist extension (PLE) as it appears to an end user and how to display it in the layout, either by adding it using the admin UI or by uploading a CSV file.

## End-user view



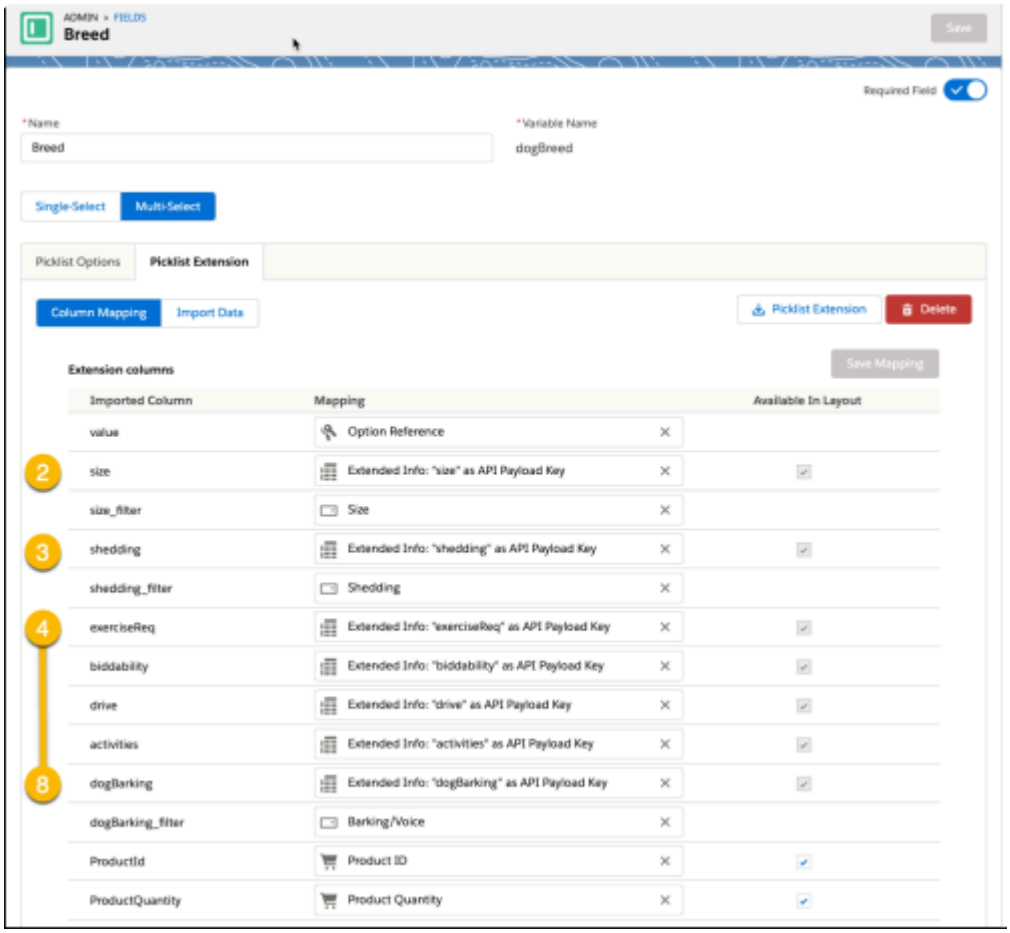

In this layout, we have the following structure:

- An ExpandableSection with the label "Select Your Doggo"
- A ColumnSet with the label "Filters"
- Three fields that act as filters for the PLE: Dog Size, Dog Bark/Voice, and Dog Hairiness
- A ColumnSet with no label (optional; administrators choice, but doesn't serve any purpose)
- The PLE framework. Label: "Dog Breeds...choose as many as you need". Displayed as a MultiSelect picklistGrid to match the multi-select type of the foundational picklist field (Breed [dogBreed]) that we're extending
- Eight columns in the PLE framework, consisting of (from left to right):
  - Breed: we're showing the label of the foundational multi-select picklist field, dogBreed
  - Size [size], referenced from the PLE data structure
  - Shedding [shedding], referenced from the PLE data structure
  - Exercise Requirements [exerciseReq], referenced from the PLE data structure
  - Biddability [biddability], referenced from the PLE data structure
  - Bark [dogBarking], referenced from the PLE data structure
  - Drive [drive], referenced from the PLE data structure
  - Activities [activities], referenced from the PLE data structure

## Picklist extension data structure

In the dogBreed multi-select picklist field, extension information is mapped as follows:

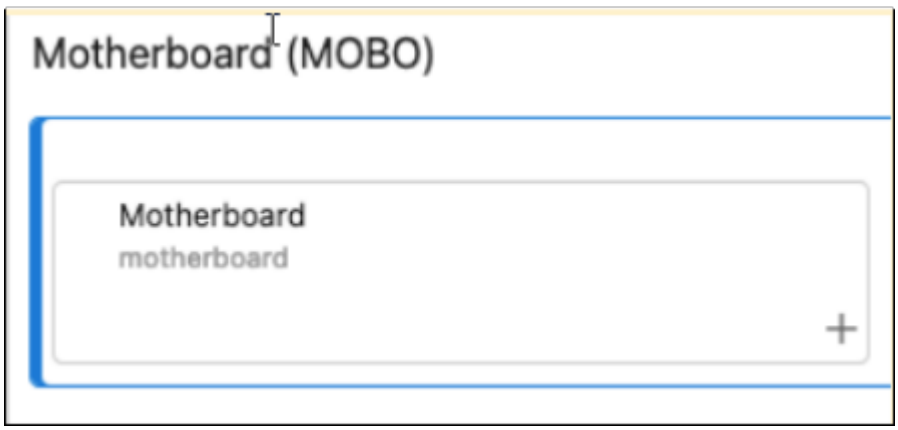
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Observe the extended info columns, marked with yellow circles. Later, in the CSV layout, we will map these as fieldExtensions to the foundational dogBreed picklist field. (See the picklist extension CSV layout section.)

## Adding a picklist extension to the layout using the CPQ Admin UI

CPQ supports the ability to easily add a picklist extension to the layout using the CPQ Admin UI. Navigate to the layout from the Blueprint and add the picklist extension field as you normally would any other field. We've added a picklist extension field, "Motherboard" to our layout.




You will see a "+" at the bottom-right of the newly added picklist extension field. Click it, and from here you can add columns that you defined on the picklist extension field itself. In the image below, we've added our columns for "value", "socketType", and "memoryCapacity".

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## Picklist extension CSV layout

The following is an image of the CSV layout. Ignore the gray-highlighted rows (1-8), as these have nothing to do with the picklist extension definition. Focus your attention on rows 9 through 17.

| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | type | path | override | label | variablename | Component disp | columnorder |
| 2 | tierDef | /layout/tiers | | | | ExpandableSection | |
| 3 | tier | /layout/tiers | | Select Your Doggo | doggo1 | | |
| 4 | columnset | /layout/tiers/doggo1 | | Filters | CS1 | | |
| 5 | columnset | /layout/tiers/doggo1 | | | CS2 | | |
| 6 | field | /layout/tiers/doggo1/CS1 | | Dog Size | dogSize | VerticalRadio | |
| 7 | field | /layout/tiers/doggo1/CS1 | | Dog Bark/Voice | dogBarking | VerticalRadio | |
| 8 | field | /layout/tiers/doggo1/CS1 | | Dog Hairiness | dogShedding | VerticalRadio | |
| 9 | field | /layout/tiers/doggo1/CS2 | | Dog Breeds...choose as many as you need | dogBreed | MultiSelectPicklistGrid | |
| 10 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Breed | label | | |
| 11 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Size | size | | |
| 12 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Shedding | shedding | | |
| 13 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Exercise Requirements | exerciseReq | | |
| 14 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Bidability | biddability | | |
| 15 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Bark | dogBarking | | |
| 16 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Drive | drive | | |
| 17 | fieldExtension | /layout/tiers/doggo1/CS2/dogBreed | | Activities | activities | | |

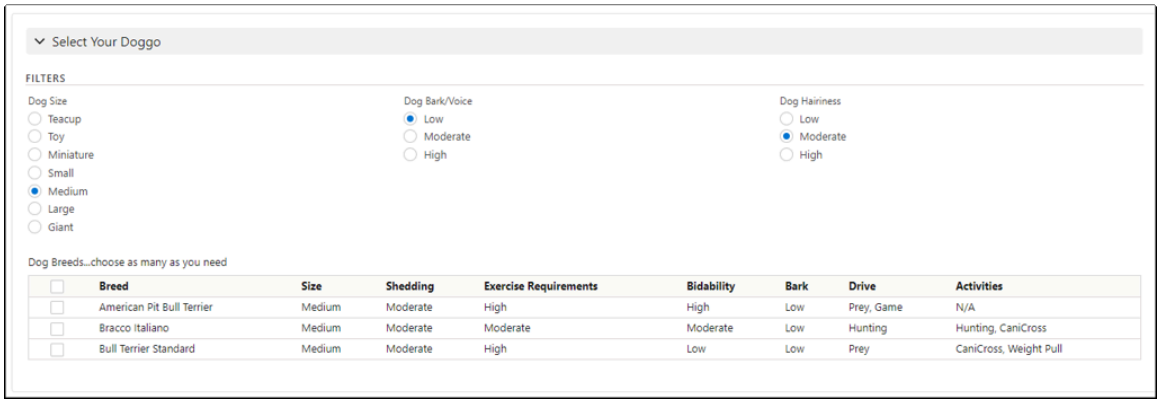
Row 9 (green highlighted): this is the picklist extension framework. In E9, we identify the variable name of the foundational picklist field [dogBreed]. As dogBreed is a multi-select picklist, we set the Component display type, F9, to 'MultiSelect picklistGrid', to match. (If our foundational picklist field was a single-select picklist, we would set the corresponding Component display type to 'SingleSelect picklistGrid'.)

In the rows highlighted yellow (rows 10 through 17), we reference the columns that are defined in the PLE data structure. Notes:

- The type in A10:A17 is 'fieldExtension', the child type to a field whose Component display type is [Multi|Single]Select picklistGrid (F9).
- The path in B10:B17, /layout/tiers/doggo1/CS2/dogBreed, references the parent foundational picklist field, dogBreed (E9).
- Row 10 instructs CPQ to show the labels ('label' in E10) of the foundational picklist options. This is optional, but highly recommended. The first fieldExtension row (A10), this is the left most column of the PLE displayed.
- The remaining fieldExtension rows lay out the remaining columns, from left to right, in the PLE display table.

The setup above would result in the following layout:

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For your reference, this is the sample CSV layout in spreadsheet format.

### Table-based picklists

A table-based picklist lets an administrator query and retrieve data from managed tables.

Table-based picklists allow administrators to retrieve configuration picklist field options from a managed table. This feature is particularly useful when:

- The number of options in the picklist is large. The buyside UI representation of the table-based picklist paginates options, and thus, improves the user's experience of page response.
- Several picklists make use of the same options. Picklist-specific query filters facilitate data reuse.

Managed Tables are not deployed. As a result, a picklist which references table data for its options will present the end-user with the data available in the table when it is queried, at runtime.

If the referenced managed table contains duplicate data, the application attempts to present the best picklist experience to the user at runtime. For example, consider the following three scenarios.

Scenario 1:

#### Two identical items

| Label | Value |
|---|---|
| Apple | apple |
| Banana | banana |
| Banana | banana |
| Chayote | chayote |

CPQ removes the second instance of Banana [banana], presenting the user with three picklist options.

Scenario 2:

#### Two items with the same label but different values

| Label | Value |
|---|---|
| Apple | apple |

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**Two items with the same label but different values (continued)**

| Label | Value |
|---|---|
| Banana | banana |
| Banana | banana2 |
| Chayote | chayote |

In this scenario, CPQ retrieves picklist options with four unique values. Unfortunately, two values, “banana” and “banana2” share the same label, “Banana”. The app cannot determine which value is best for label, “Banana”. Therefore, the user will be presented with a total of four options, two labeled “Banana”. Administrators must mind their managed tables data to avoid this poor end-user experience.

Scenario 3:

**Two items with different labels but identical values**

| Label | Value |
|---|---|
| Apple | apple |
| Banana | banana |
| Banana2 | banana |
| Chayote | chayote |

When duplicate values are returned from a managed table, CPQ displays the label associated with the first occurrence of the value. All other labels associated with that value are eliminated and are not displayed as picklist options to the end-user.

If the referenced table returns a row with no data contained in the label or value, the application will ignore the entry, and the record will not be presented to the end-user as a picklist option.

**Note:** Table-based picklists do not support picklist extensions.

**Related topics**

Picklists and picklist extensions in rules

### Picklists and picklist extensions in rules

Learn how to use picklist extensions (PLEs) effectively in rules. Understand how filtering, inclusion, and exclusion interact, and apply correct operators like equals and contains for single- and multi-select picklists to ensure accurate rule behavior in advanced configurations.

Picklist extensions (PLEs) are a powerful way for administrators to display as much information as possible about a product while making it easy for end users to select exactly what they want. However, simplicity at the front end can mask complexity at the back end. This article shows administrators how to correctly use PLEs in rules and advanced functions and explains some important caveats.

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**Note:**

- Try using Filter Options & Product Info first.
- Do not use inclusion rules for PLEs. PLE filtering works like inclusion rules, so in order to remove further options, the user should use exclusion rules.
- **Contains** and **Equals** act differently on multi-select picklists. `Array.includes()` and `==` also act differently.

For information about rules, including inclusion and exclusion rules, see Rules.

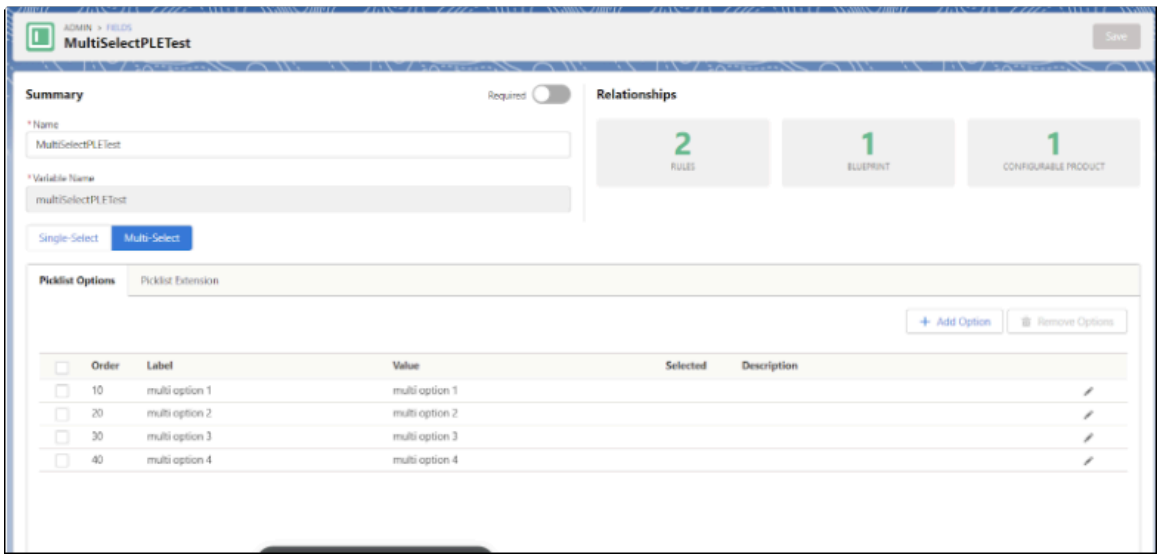
## Simple rules

It's best not to use rules with picklist extensions. PLEs are designed so that you can filter options and send data to the bill of materials without writing rules. Therefore, most reasons to use inclusion, exclusion, and product rules are not present in PLEs. Make sure your use case can't be completed with typical PLE features before you continue to build your rules.

If you are using selections in a PLE to drive actions, make sure to note the difference between the Equals and Contains operators.

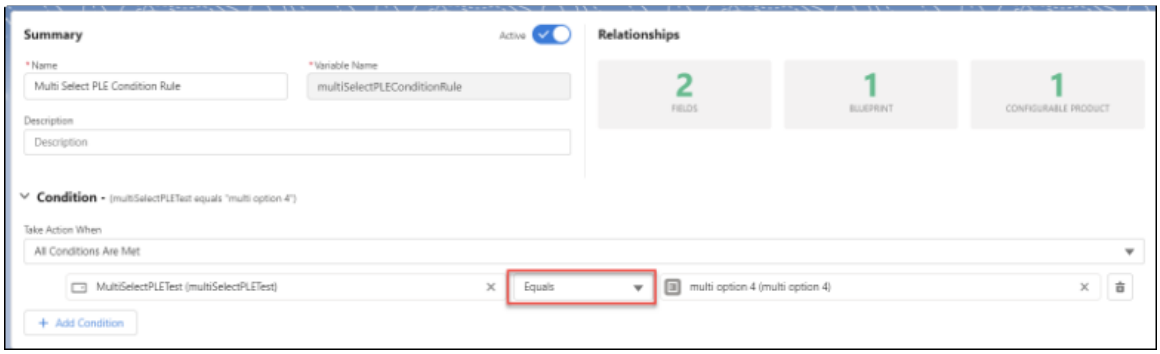
- Equals checks whether the selection in the PLE exactly matches the condition's value.
  - It can be used with both single-select and multi-select picklists, but it is recommended to be used with single-select PLEs since it is the closest to what users usually imagine the functionality would be.
  - If you are using a multi-select in the condition, if the user makes multiple selections, the condition will not be met if using equals.
- Contains checks whether the selection in the PLE includes the value described. This is the recommended operator for multi-select PLE fields.

For example: A user creates a multi-select picklist field with four options.




Suppose the condition of a rule (in this case, a determination action) is set to fire if the multi-select field equals multi option 4.

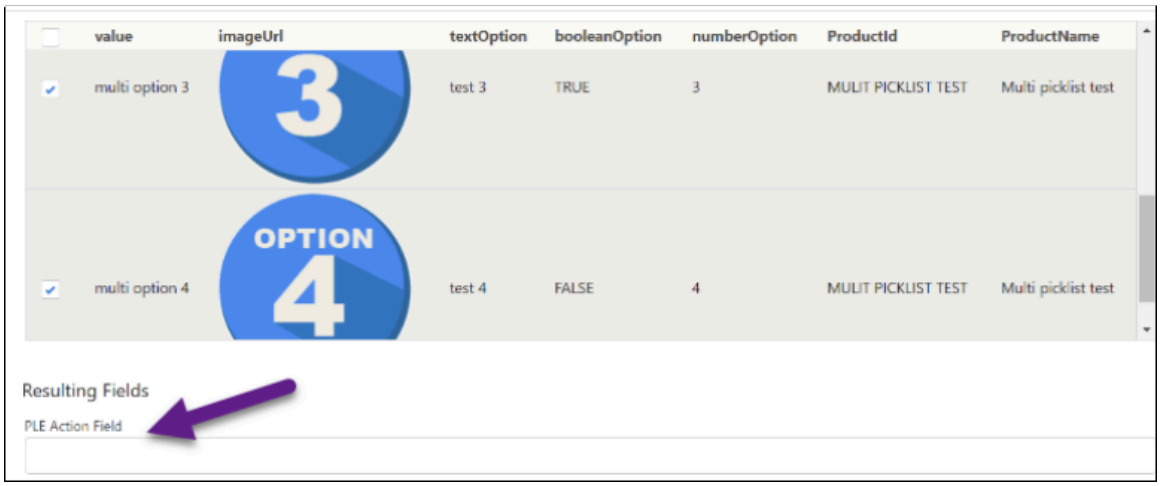
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If the end user selects only multi option 4, the rule fires:

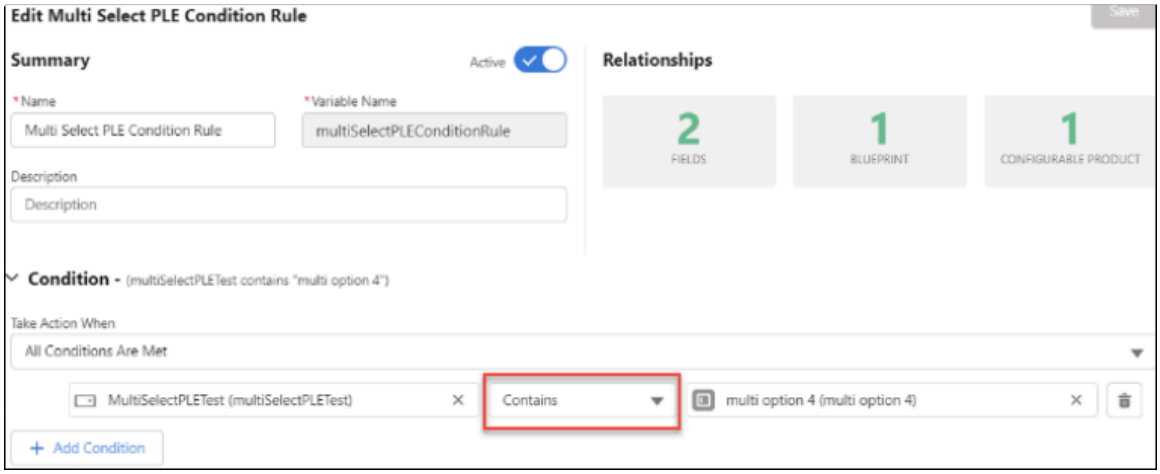


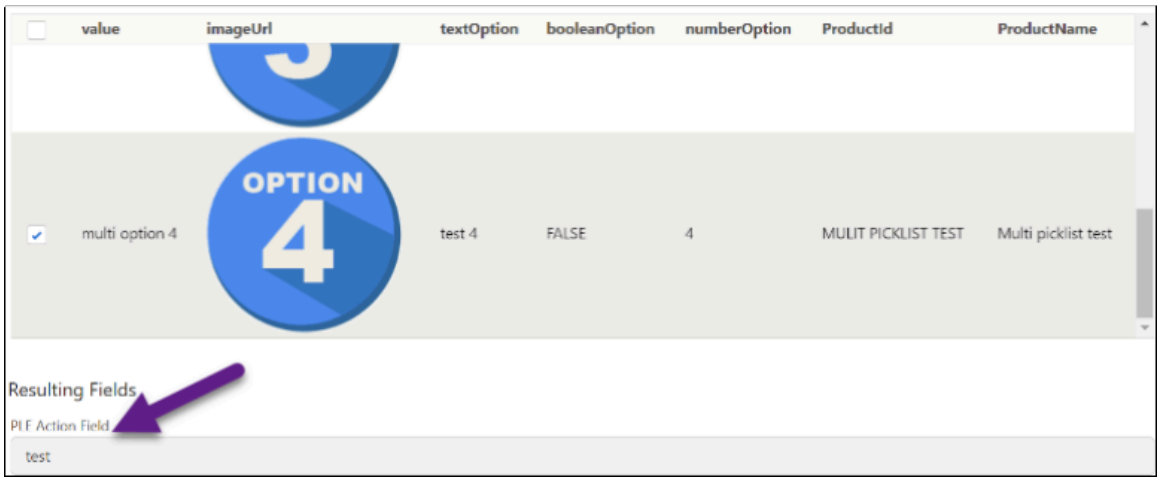

If the end user selects multi option 3 and multi option 4, the rule does not fire:

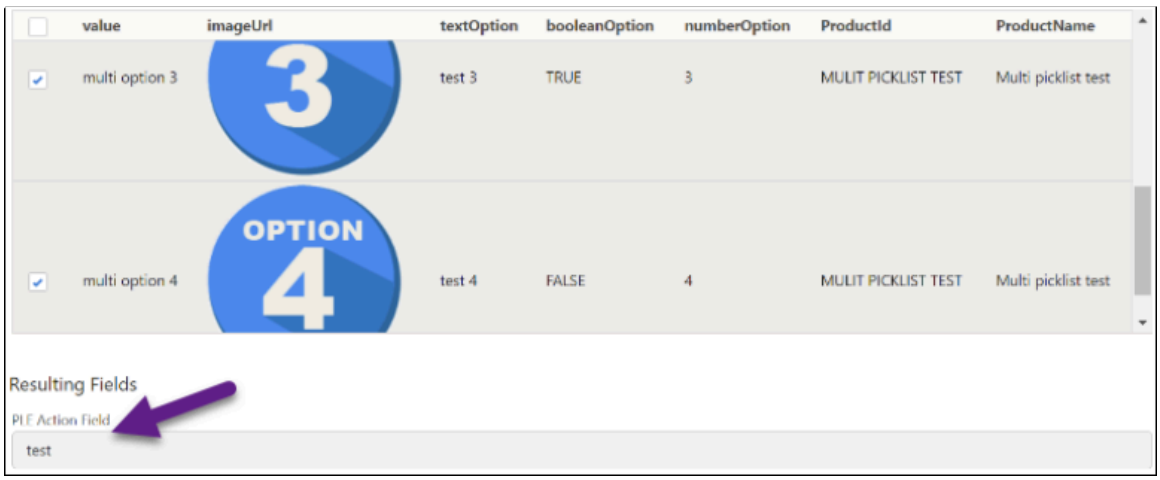



On the other hand, if the condition is set to fire if the multi-select field contains option 4, it fires in both instances.

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## How PLE filters interact with exclusion rules

Picklist extension filters act in the same way that simple inclusion rules work, except that when the defined filter fields are empty, no options are included instead of all options when a simple inclusion rule is not firing.

If you want to have a field that is not defined as a filter in the PLE and that limits options in your PLE field, you need to use a simple exclusion rule in order to further limit those field options, since using an inclusion rule would combine with the inherent inclusion contained in the PLE filter and leave all field options available.

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**Note:** Due to the nature of mapping the extended information via filter fields, using an inclusion rule to show more options for a PLE will show only the option value and no further data. Do not use inclusion rules that act on the options of a PLE.

## Advanced rules

When using picklists in advanced rules, it's important to know how these fields appear when referenced using the `cfg` object. For single-select picklists, the field has the text of the option, but for multi-select picklists, they will be in an array. This difference can often lead to discrepancies when building advanced functions.

Similar to the differences in simple conditions between Equals and Contains, while single-select picklists can be referenced in an "if" statement as:

```
1 if (cfg.field == "option") {
2 //code
3 }
```

Multi-select picklists should use the function "Array.includes()" to see if one of the options has been selected:

```
1 if (cfg.field.includes("option")) {
2 //code
3 }
```

This function acts on an array and will return true or false depending on whether the array includes the inputted value.

To determine the selections of a multi-select picklist in an advanced function, use the `.push()` function to add the option. Adding an option that is not defined in the picklist's fields results in an error.

For other manipulations with the multi-select picklist array in advanced functions, refer to the Help menu's Array functions. If there are conflicting inclusion and exclusion actions, exclusion actions have precedence.

## Additional reading

For an overview of the picklist extension feature, see Picklist extensions.

For a deeper understanding of the back end and how to display PLEs, see Displaying a picklist extension on a layout.

For an overview of the Picklist Extension Pricing enrichment feature, see The Picklist Extension Pricing enrichment.

### Creating an associated picklist set

Learn to use an associated picklist instead of a set field when you create a new set.

**Note:** Be sure to read about product pickers and their functionality before building associated picklists, as they may be better suited to your use case. See Product pickers.

The New Set dialog box includes an option for size type. **Set Field** is the default. If you select **Associated picklist**, a new field appears where you can select the picklist field that will be associated with the set.

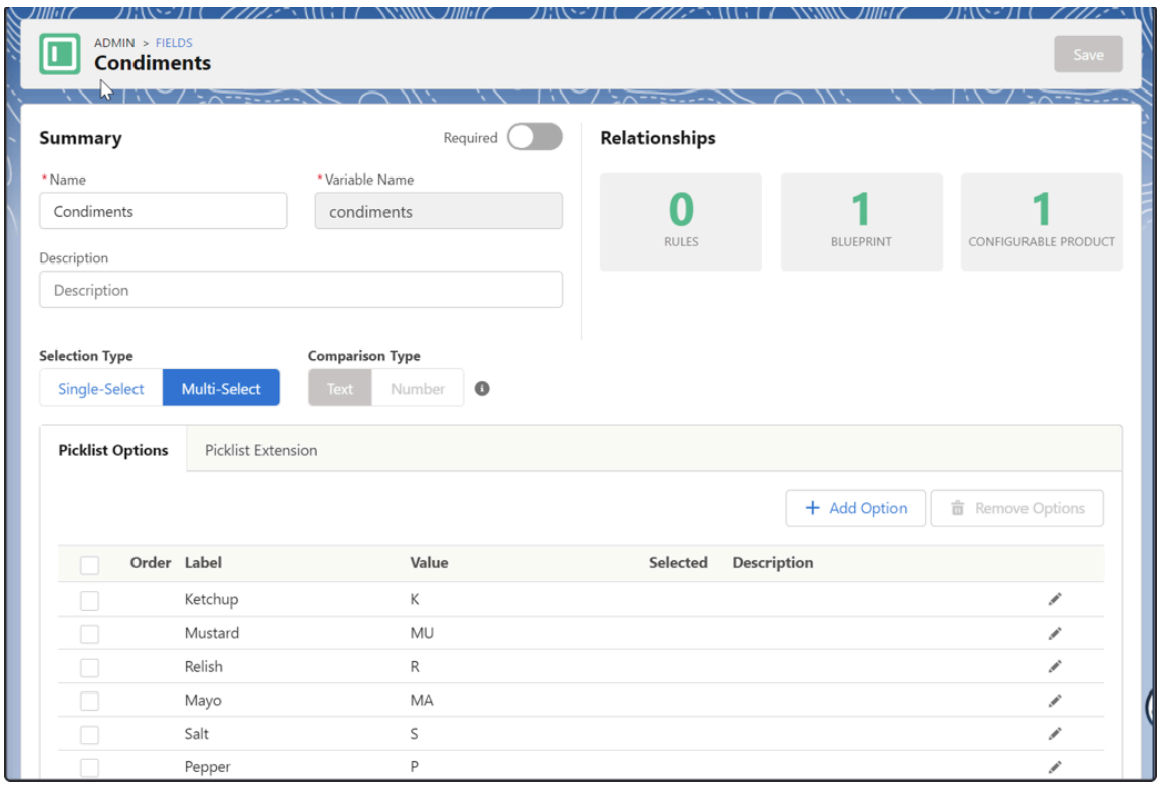
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This associated picklist must be a multi-select picklist field. This field determines the size of the set based on the number of field options in the picklist. If you edit the field to add or remove field options, the set size will adjust accordingly. This is the only way to adjust the size of the set associated with the picklist.

For example, a “Condiments” picklist could let users choose to include specific condiments, such as ketchup, mustard, or relish. A “Packets” associated picklist set could then let users specify the quantity of each item using set subfields.

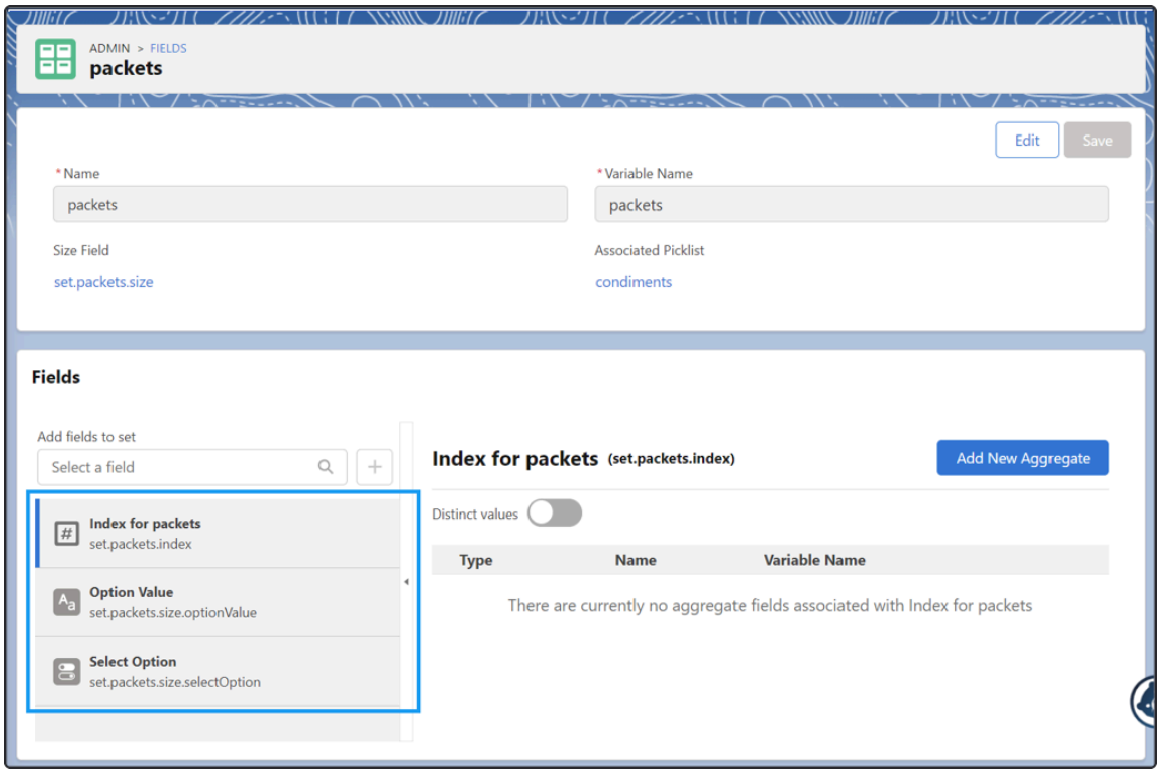
Unlike a regular set where a user can add as many rows as they want, each non-excluded field option of a picklist generates a row and index of the set. Inclusion and exclusion rules still work on the associated field, which can dynamically change the number of rows in the associated picklist set. The following is the sample picklist field we will use in this example. (Note that the labels and values differ.)



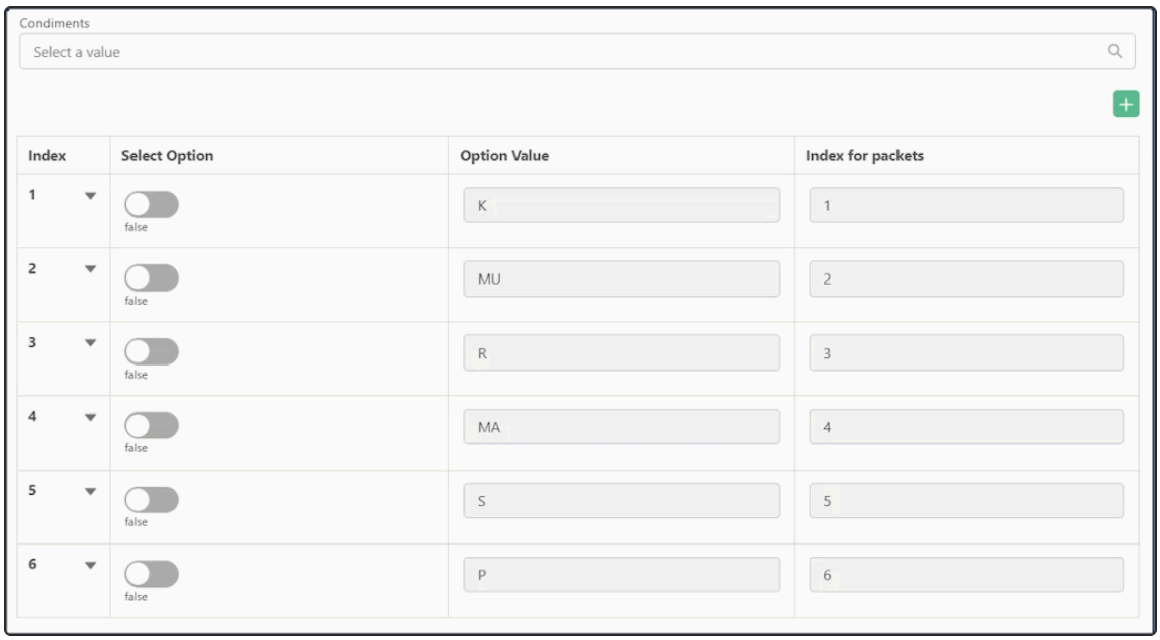

Once we select Condiments as the associated picklist, the normal set UI appears. Associated picklist sets automatically create three fields in the set:

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- Index: the row number of the set, starting at 1
- Option Value: the associate picklist's field option values
- Select Option: a Boolean field to indicate that the set index is selected



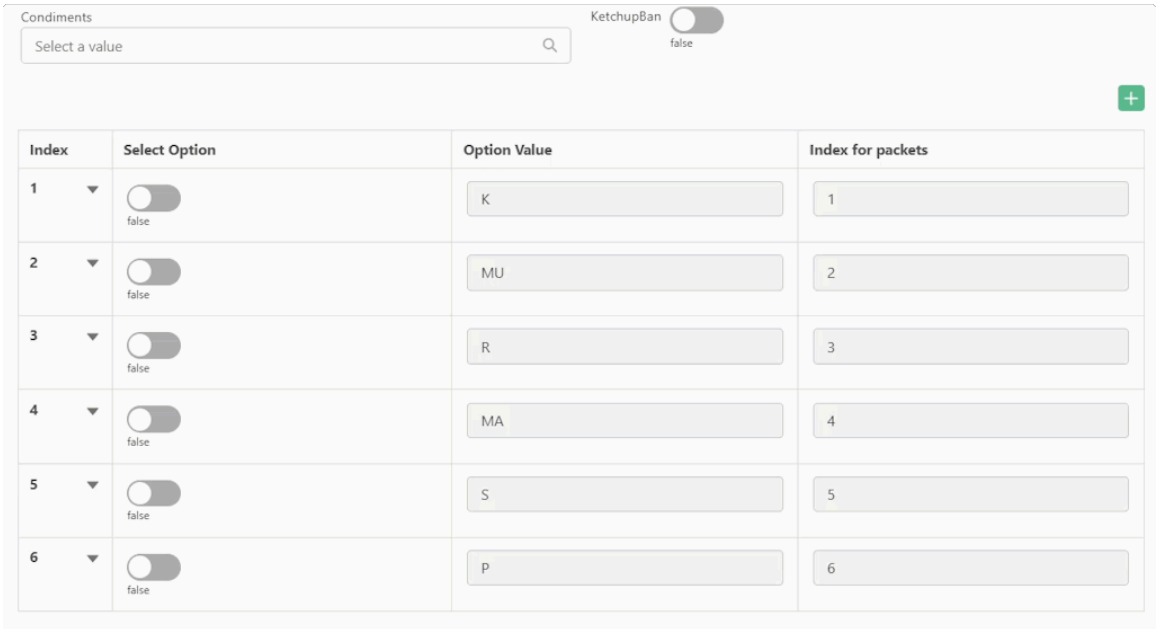

Like all other fields in the set, the option value, the select option, and the set itself need to be added to the layout. The following image shows the interaction between the Condiments associated picklist and the packets set:




Note that the option values in the set reflect the associate picklist's field option values. ("Ketchup" is reflected as "K", the field option value.) Also note that option values are read-only and cannot be edited.

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Associated picklist sets can still be acted upon with determination actions, inclusion actions, and exclusion actions. In the example below, a new field called KetchupBan removes Ketchup as a value from the Condiments picklist:




## Benefits of the associated picklist set

Depending on the configuration, there may be several reasons why an associated picklist set would be better than a regular set.

- Situations where each option value can only be used once
- Situations where select Option and Option Value fields that are used for index specific actions and other rules
- Associated picklist sets have a finite size, with as many indexes as the picklist has field options

Note that picklist extension fields can also be used as the associated picklist. Furthermore, the associated picklist can live elsewhere on the page layout or in the background—it does not need to be near the set it controls.

## Example: A complex rule

The customer has 100 different fees that could be applied to the configuration. To determine the value of these fees, each fee is calculated using a complex formula. Each fee is only be applied once. The formula is the same for all fees. The customer does the following in CPQ:

- Creates a multi-select picklist field called Fees with 100 field options (one for each fee)
- Creates an associated picklist set and selects Fees as the associated picklist
- Creates inclusion rules for the Fees field
  - This would create an inclusion rule for each fee based on the condition of that fee.
  - This would also create an inclusion rule that included none of the fees as a default. This way, the Fees are added, as inclusion rules are additive.
- Creates a rule for calculating the fee

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This is where the associated picklist set is really beneficial. The customer only has to write 1 rule, and it is applied to each row of the set. If the customer did not use the set, they would have had to replicate this script multiple times in multiple rules throughout the configuration. This can lead to errors downstream when the complex calculation changes.

## Example: Picklist extension with varying quantities for product rules

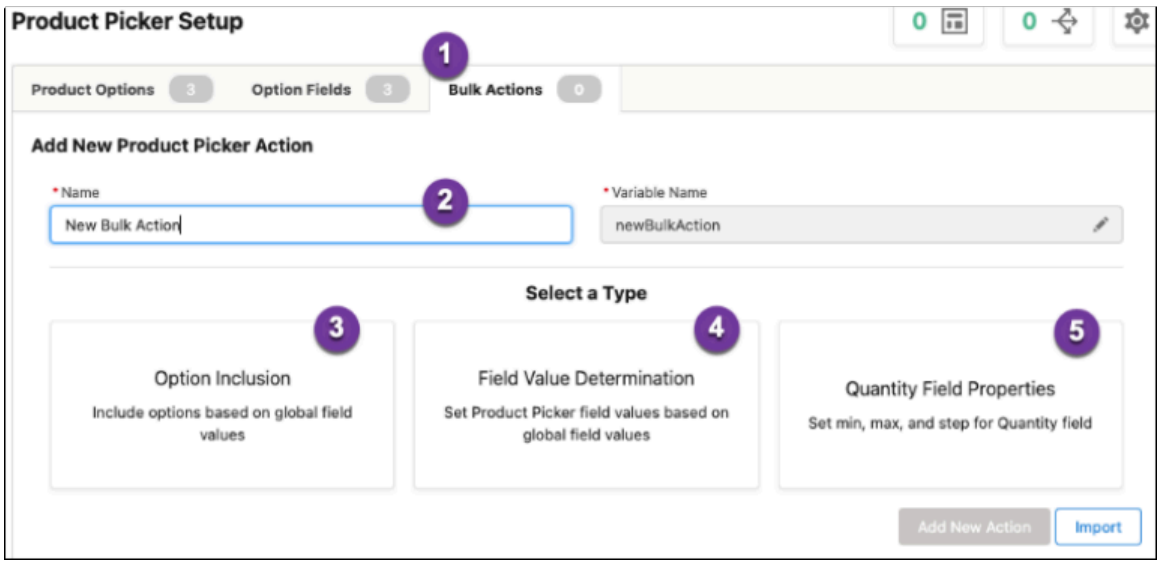
Another customer has effectively used the picklist extension to filter field options and provide columns of extra information. However, they cannot use the picklist extension to add products to the bill of materials because they want to give the end user the ability to specify the quantities as each field option is added to the BOM.

They put the picklist extension grid on a single tab tier, and then they put the set, which shows all the field options selected on the first Tab Tier, on the second tab tier. Using the associated picklist set, the end user can customize for each customer the quantity added to the BOM.

### Product picker bulk actions

Learn how to use bulk actions to automate product picker behavior without writing rules. Configure option inclusion, field determination, and quantity limits through table-based logic to control what products appear, how values are set, and when conditions apply—all directly in the product picker interface.

Bulk actions are a simple yet powerful way to manage product pickers. Bulk actions can function as table:based rules to control and modify product pickers without needing to write traditional, global rules. Like global rules, bulk actions consist of conditions and targets. All the bulk actions together control the behavior of the product picker.




- (1) Bulk actions tab: displays all associated bulk actions of the product picker
- (2) Name, Variable Name: name and variable to set for the bulk action

There are three basic types of bulk actions:

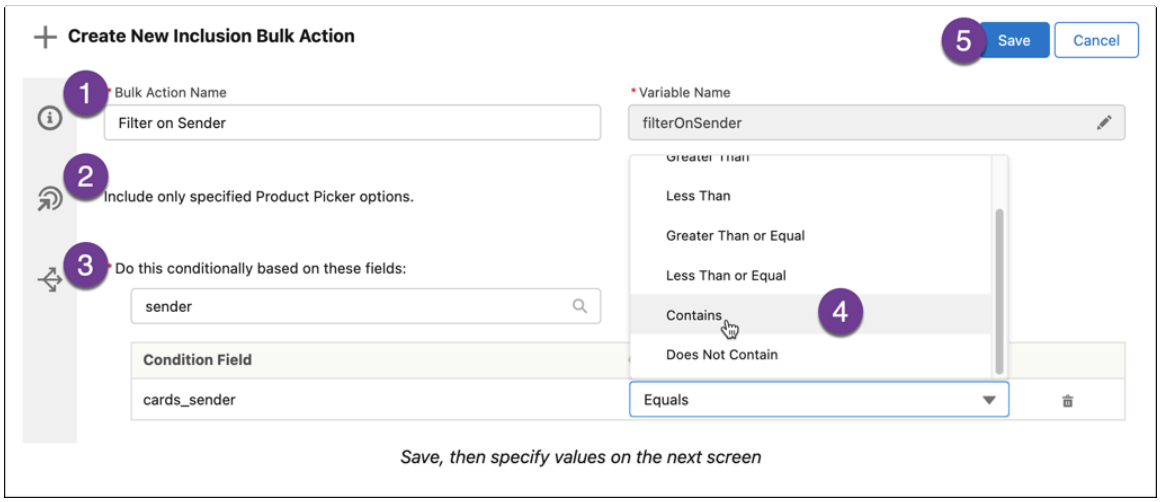
- (3) Option Inclusion: What options are displayed to the user
- (4) Field Determination: What values should be set for product picker child fields
- (5) Quantity Field Properties: Quantity limits of options

For an example use case, view the following video: Product Picker bulk actions2

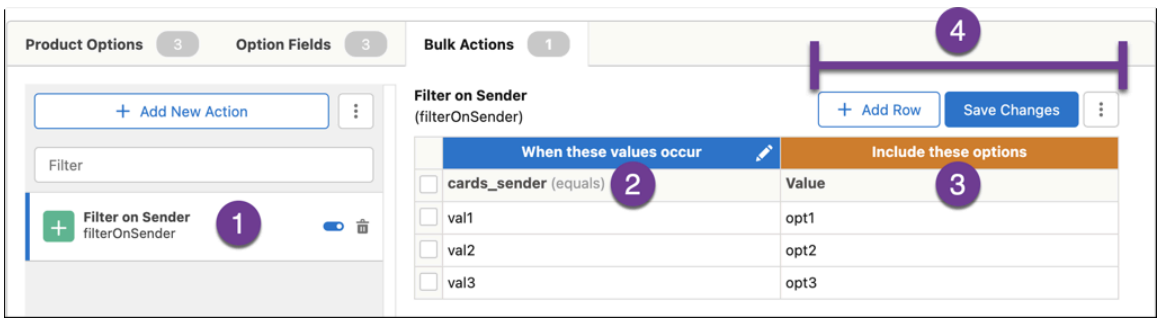
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## Bulk actions: Inclusion

Option Inclusion bulk actions can automatically include (and exclude) product options in a product picker based on the value of global fields. If no action is in place to include options, all are included by default.




- (1) Bulk Action Name: The name of your Option Inclusion bulk action. Variable Name will be automatically populated, but you can customize it by clicking the pencil icon.
- (2) Info: What this Option Inclusion bulk action will do
- (3) Select Condition fields: Global fields to use for the comparison. Additional fields can be selected, but at least one is required
- (4) Select Comparator for this Condition field: The comparison that should be made against the field's value. Comparison Options depend on the field type. For example, a Boolean field type would use either 'Equals' or 'Does Not Equal'. A picklist field type, such as cards_sender, offers a large number of comparison options.
- (5) Save: When finished, move to the next step to add the data for the bulk action




The bulk action data drives the outcome of the Option Inclusion.

- (1) Current bulk action: In the list of defined bulk actions, the selected bulk action's data is displayed in pane to the right
- (2) When these values occur: One column for each field selected as a condition in the prior step. The corresponding comparator is noted in parenthesis.
- (3) Include these options: product picker Option value to include if the conditions on that row are met
- (4) Add Row and Save Changes: Add a new blank row to input new data; save changes to the data

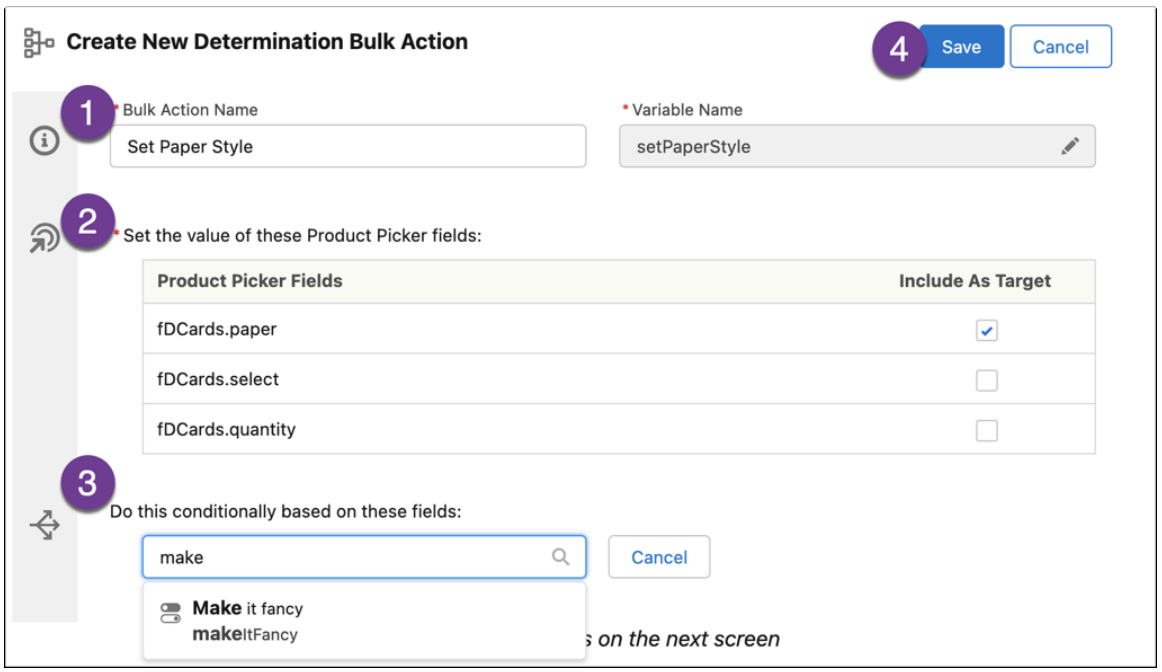
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Additional actions:

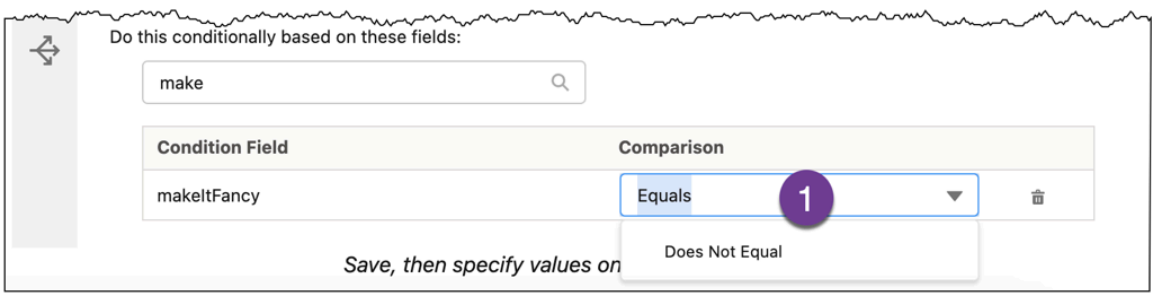
- Import Data: Import a CSV file
- Export Data: Export the data as a CSV file
- Delete Rows: Delete the selected rows

## Bulk actions: Field determination

Field determination bulk actions are an easy way to set and default values into product picker subfields.



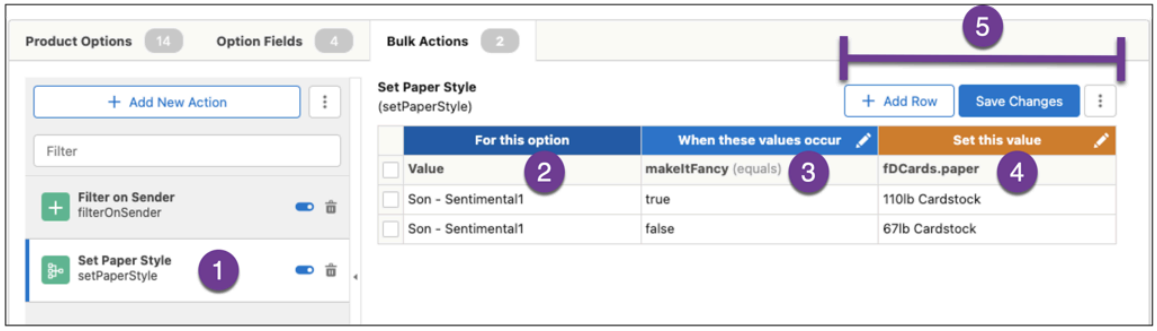

- (1) Bulk Action Name: The name of your Option Inclusion bulk action. Variable Name will be automatically populated, but you can customize it by clicking the pencil icon.
- (2) Select the target subfields: Review what this action will do, and select the target fields this action will set
- (3) [Optional] Select the condition fields: The global fields to use for the comparison
-




Select Comparators: For each condition field, select the comparator with which you will determine the condition. Comparison options will depend on the field type.

Save: When finished, move to the next step to add the data for the bulk action.

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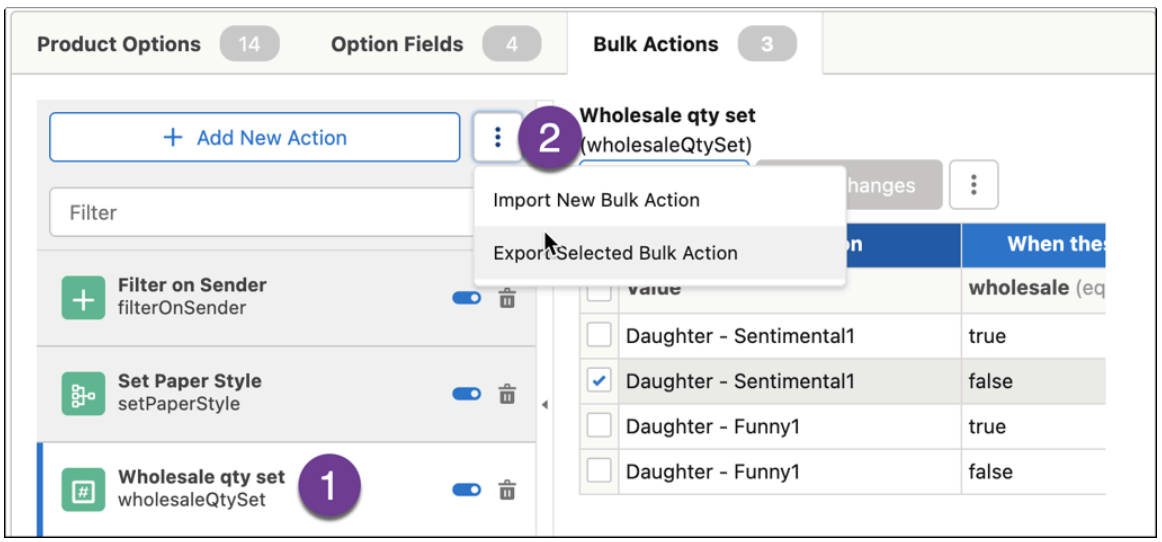

The bulk action data drives the outcome of the Field Determination.

- (1) Current bulk action: In the list of defined bulk actions, the selected bulk action's data is displayed in pane to the right
- (2) For this option: the product picker option for which this Field Determination applies
- (3) When these values occur:- one column for each field selected as a condition in the prior step. The corresponding comparator is noted in parenthesis.
  - If no condition fields and comparators were selected in the condition setup step, this column heading will read "Always" and you will not be able to add data to this column.
  - To change the conditions on this bulk action, click the pencil icon in the column heading.
- (4) Set this value: the value that this rule will apply to the product picker subfield when the condition is true
- (5) Add Row and Save Changes: Add a new blank row to input new data; save changes to the data

Additional actions:

- Import Data: Import a CSV file
- Export Data: Export the data as a CSV file
- Delete Rows: Delete the selected rows

## Import and export bulk actions and bulk action data




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Individual bulk actions can be exported from a product picker as a ZIP file. The export will include both the rule definition and the data itself as a CSV file. To export a bulk action, select the action, and then click **Export**.

The data for a bulk action can also be exported in the data pane. The data can be modified and imported in the same location. To export the data from the data pane, select the action, and in the menu, click **Import Data**. Then, select the CSV file that contains the data.

## Forcing data override

By default, bulk actions that set the values of product pickers will not override a value that was set by the end user. To change this setting so that bulk actions will change user-edited values, submit a support case to request "set the bulk actions Override User Edited Values behavior to True." This setting acts across the environment.

To submit a support case, use the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

### Related topics

Product picker aggregates

### Product picker aggregates

Aggregates help calculate and summarize data in products. Learn how to use aggregates in a product picker.

Product pickers let users select products from a list. Aggregates help calculate and summarize data (like sums, counts, or averages) from the selected products.

**Note:** Before you read this article, we recommend that you understand the product picker field type and how to create a product picker. See Product pickers.

Product picker aggregates allow data collection and calculation for specific fields in a product picker. This helps analyze data directly from the product picker options.

Suppose you have a product picker containing various measurable products, and you need to identify which product has the least volume in demand. By applying a "Min" aggregate on the volume field, the smallest value is automatically determined, streamlining the decision process without needing a rule.

## Available aggregate functions

| Aggregate Type | Behavior |
|---|---|
| Sum | Sum of the base field values for each selected option, if they can be coerced to a number<br><br>Does not multiply by the option quantity |
| Count | Count of options selected in a product picker |
| Min | Minimum of the base field values of the selected options, if they can be coerced to a number |
| Max | Maximum of the base field values of the selected options, if they can be coerced to a number |

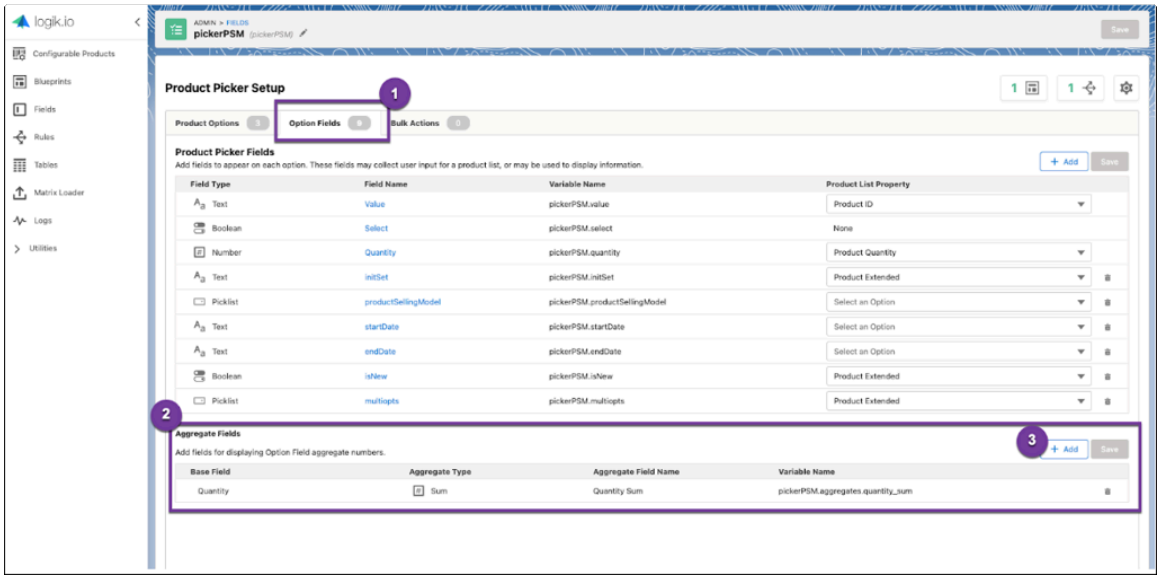
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| Aggregate Type | Behavior |
| --- | --- |
| Average | Average of the base field values of the selected options, if they can be coerced to a number |

Aggregates can be configured through the UI configuration or by using admin APIs.

## Configuring aggregates through the UI

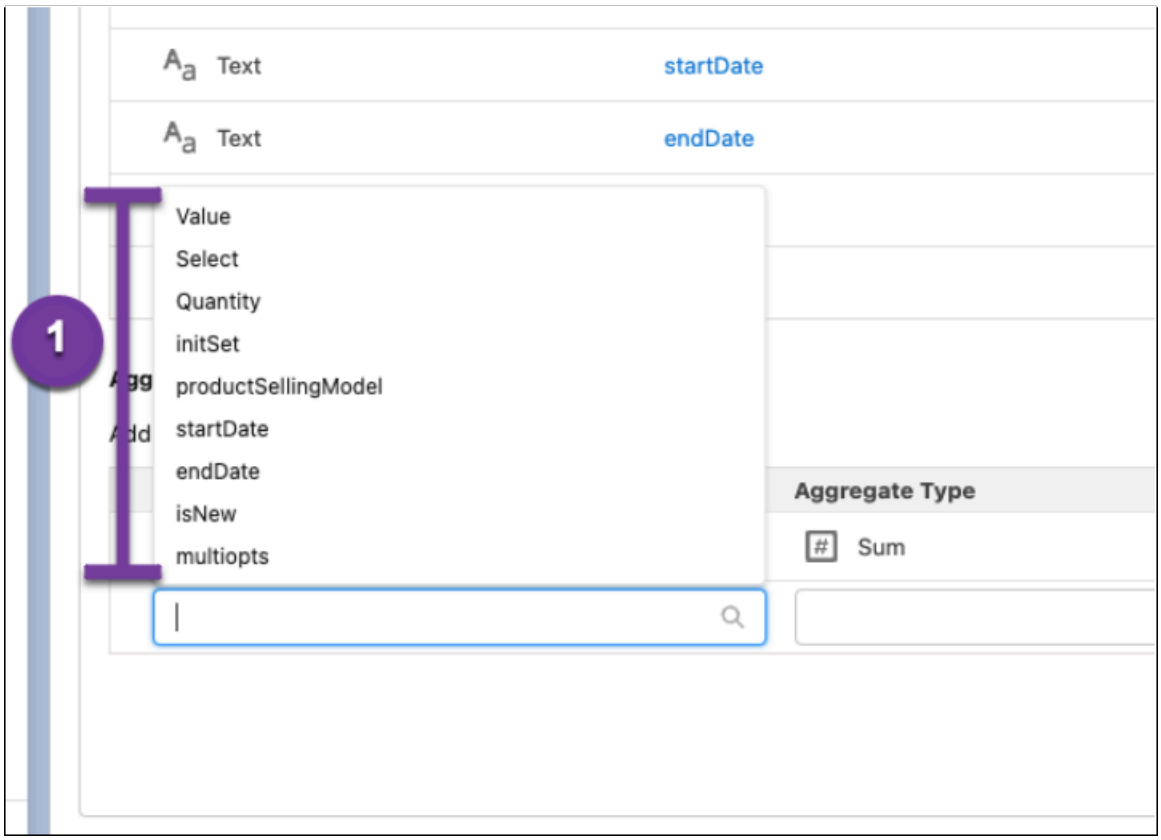
To configure an aggregate through the UI, go to any product picker, and then on its definition page, click **Option Fields**. Then, in the Aggregate Fields section, click **+ Add.**



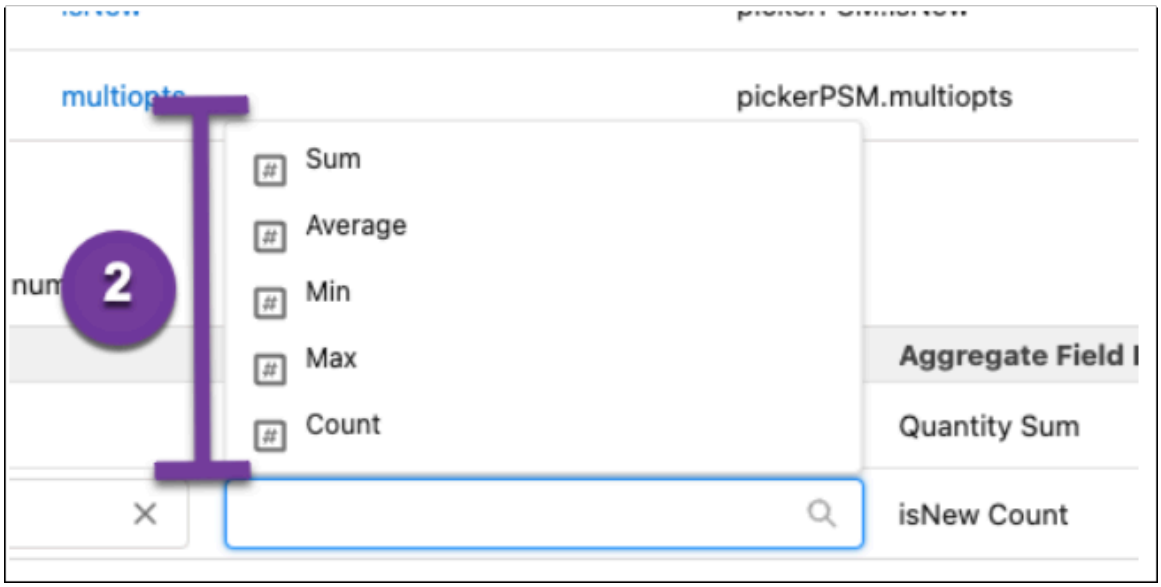

When you create a new aggregate, provide the following details:

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- Base Field: A list of available subfields of the product picker is displayed here. Select the sub-field to create a new aggregate.




- Aggregate Type: Select the aggregate type whose behavior fits your use case: Sum, Average, Min, Max, or Count.




- Aggregate Field Name: After defining the aggregate, its value is stored in a separate field to facilitate data display. This field is typically located beneath the product picker. The field's name clearly indicates that it represents an aggregate, ensuring easy interpretation. This is auto-generated by the system.

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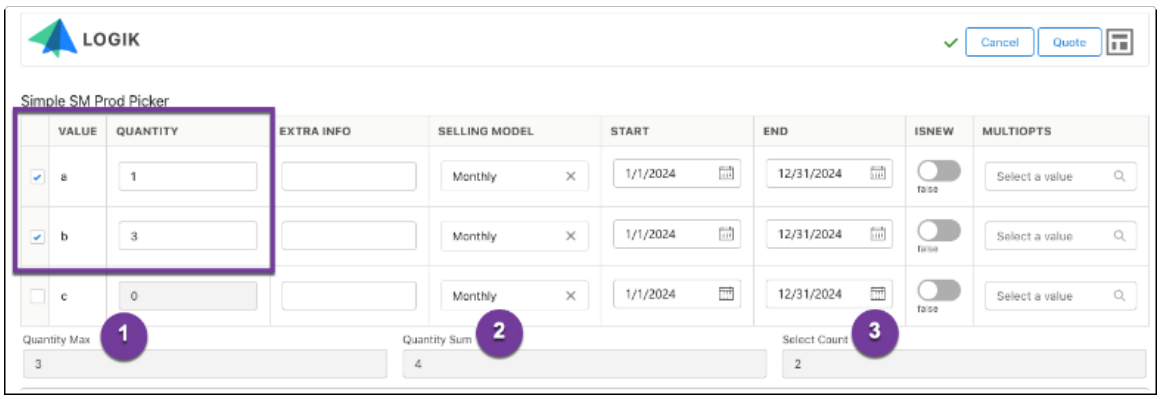
- Variable Name: This is the variable name of the aggregate field name that is created. The variable name is usually used to reference the product picker aggregates in scripting. This is auto-generated by the system.
- Delete: Use this icon only if you want to delete the added aggregate or if you want to remove any existing aggregates.

## Configuring aggregates through the admin APIs

For steps to create and configure an aggregate using API calls, see Adding a product picker aggregate using APIs.

## Viewing a product picker aggregate

Aggregate fields can be added to the layout and will automatically be calculated on the change of a field. Just as we can search a normal field by its display name or variable name and add it to the layout, we can do the same with the product picker aggregate. We search the aggregate field name or variable name of the newly created field, define the position in the layout by adding it under the product picker field for ease of display, and save the layout. To read more about the layout editor, see Layout editor.




The product picker field “Simple SM Prod Picker“ has many subfields. On the Subfield “Quantity“, we have added three aggregates: Max, Sum, and Count.

## Products with different quantities

Suppose product A has a quantity of 1, and product B has a quantity of 3.

- Applying Max aggregate on quantity gives the value of aggregate field name “Quantity Max” as 3, as product a has the maximum quantity among the selected products.
- Applying Sum aggregate on quantity gives the value of aggregate field name “Quantity Sum” as 4, as product a quantity + product b quantity has value 4.
- Applying Count aggregate on quantity gives the value of aggregate field name “Select Count” as 2, as there are only 2 selected products among the list.

### Adding a product picker aggregate using APIs

Follow these steps to add a product picker aggregate using API calls.

**Before you begin**
Role required: Admin

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## Procedure

1. Using Postman or another API tool, set the authorization mode to "Bearer token", and provide the token of the environment where you want to create the aggregate.

   In the product picker aggregates area, two endpoints are available in the admin APIs:

| | | |
|---|---|---|
| Get Product Picker Aggregates | GET | /api/admin/v1/productPickers/productPickerName/aggregateFields |
| Create a Product Picker Aggregate Field | POST | /api/admin/v1/productPickers/productPickerName/aggregateFields |

   The GET endpoint gets the list of all the aggregates that are already available on a product picker. The parameter is the variable name of the product picker field that is passed in the URL in Postman.

   The POST endpoint creates a new aggregate on the product picker. The parameters are the variable name of the product picker field and the request body or payload that gives the details of the aggregates to create.

   Examples of product picker endpoints:

   - **Get Product Picker Aggregates (GET)**
     **https:// {tenant}.{sector}.logic.io/api/admin/v1/productPickers/productPickerName/aggregateFields**
     **https://mark-pg.demo01.logik.io/api/admin/v1/productPickers/equipmentRacks_PP_mad/aggregateFields**
   - **Create a Product Picker Aggregate Field (POST)**
     **https:// {tenant}.{sector}.logic.io/api/admin/v1/productPickers/productPickerName/aggregateFields**
     **https://mark-pg.demo01.logik.io/api/admin/v1/productPickers/equipmentRacks_PP_mad/aggregateFields**

2. Set the following URL as the URL of the Postman API call.
   (This is the URL from the image just above.)

   ```
   https://<tenant>.<sector>.logik.io/api/Admin/v1/productPickers/<productPickerName>/aggregateFields
   ```

   Replace the URL with the parameters that apply to your environment, including the sector name and the variable name of the product picker from the UI.

3. Send the call.
   This returns a list of aggregates already applied in the UI. You can copy any of the responses for a particular aggregate entry to set the request body for the post method in the next step meant to create a new aggregate. If there are no preconfigured aggregates, you can take the sample request code directly from the API documentation.

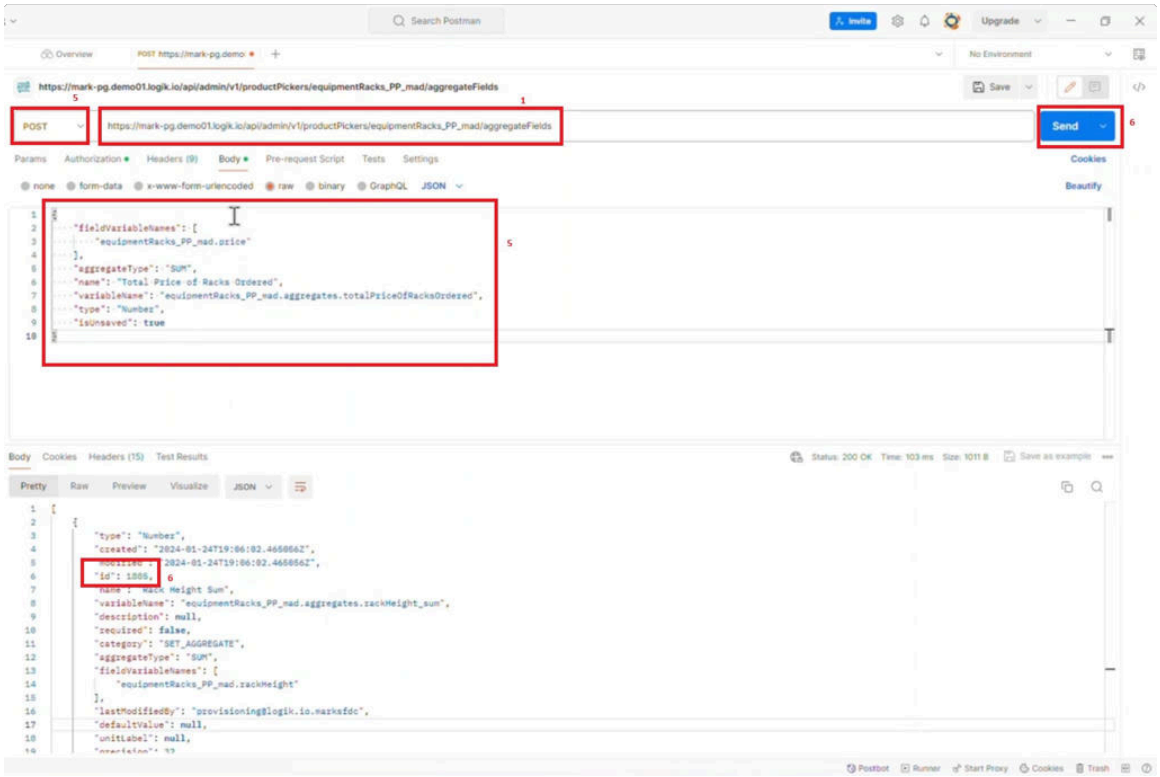
4. Change GET to POST, copy the body of the request from the previous steps, and replace the body with the new aggregate details, including the field variable name and the aggregate type. You can add only one field per API call.

5. Send the call.
   The response includes an aggregate ID that indicates that the aggregate is successfully created.

## Result

In the UI, refresh the page to see the added aggregate.

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**Related topics**

Product picker aggregates

Product pickers

### Set up layouts

Layouts in CPQ define the structure and appearance of the configuration interface. They organize fields into pages, tabs, and sections, shaping how users interact with configurations and view shopping cart details.

A layout record defines the buyside user interface for a configuration experience. It consists of fields and the organizational structures—pages, tabs, sections, column sets, and headings—that govern how fields will be represented on the screen. It also describes how the shopping cart should be displayed, by default.

When a blueprint has more than one layout defined, the user can step through them. Use the alternate layout ( ) button in the upper-right corner of the buyside UI.

CPQ layouts are defined in spreadsheets and uploaded via matrix loader. Refer to CSV layout upload for detailed instructions.

## Layout element hierarchy

A layout is organized using a hierarchical structure of organizational elements, each playing a specific role:

**Pages**

Top-level organizational boundaries within a layout. Pages divide content into major sections.

**Tabs and Vertical Tabs**

Secondary organization within pages. Users can navigate between tabs to access different groups of fields.

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**Tiers (Sections)**

Container elements within pages and tabs. Tiers organize fields into logical groups and can be configured as collapsible sections, expandable containers, or simple headings.

**Column Sets**

Arrange fields horizontally within a tier. Support two modes: **Responsive** (fields wrap on resize; default) and **Defined Columns** (fixed number of columns, table-based structure). See Defined column set reference for detailed configuration and when to use each mode.

**Fields and Buttons**

Individual data input elements and action buttons placed within columnsets. Fields can display or collect data; buttons trigger events or actions.

## Column set modes: Responsive vs. Defined

| Responsive (Default) | Defined Columns |
|---|---|
| Fields wrap automatically when space is limited | Fixed column structure; content does not wrap |
| No setup required; add fields freely | Requires specifying number of columns (1–5) and width/ alignment per column |
| Recommended for standard forms | Recommended for e-commerce, product pickers, structured grids |
| Mobile-friendly; adapts to smaller screens | Less responsive on mobile; content may be cut off on narrow screens |

For full configuration details, see Defined column set reference.

**Related topics**

Layout Wizard

### Layout Wizard

Watch a video about how to generate a layout.

Use the Layout Wizard to quickly build a layout for a blueprint with a visual representation of how configuration experience will display to the end user.

**Note:** The Layout Wizard works only to generate layouts. Edits or additions to an existing layout must still be made by downloading and editing the layout CSV file and uploading the updated file.

## Prerequisites

Have a blueprint created with desired fields associated to it.

## How it works

View a walkthrough of the CPQ Layout Wizard.

Layout Wizard Walkthrough

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**Related topics**

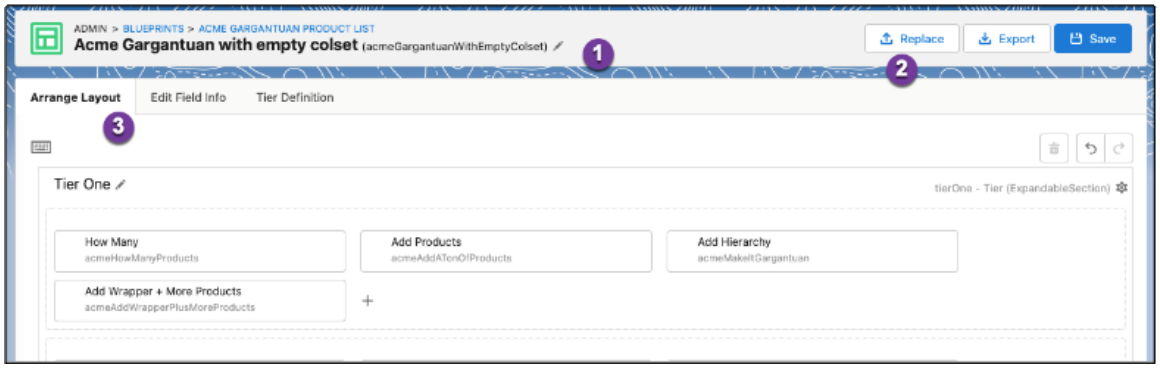
Set up layouts

CSV layout upload

### Layout editor

Learn how to use the layout editor to modify a layout without leaving CPQ.

The layout editor enables an admin to edit an layout without leaving CPQ.

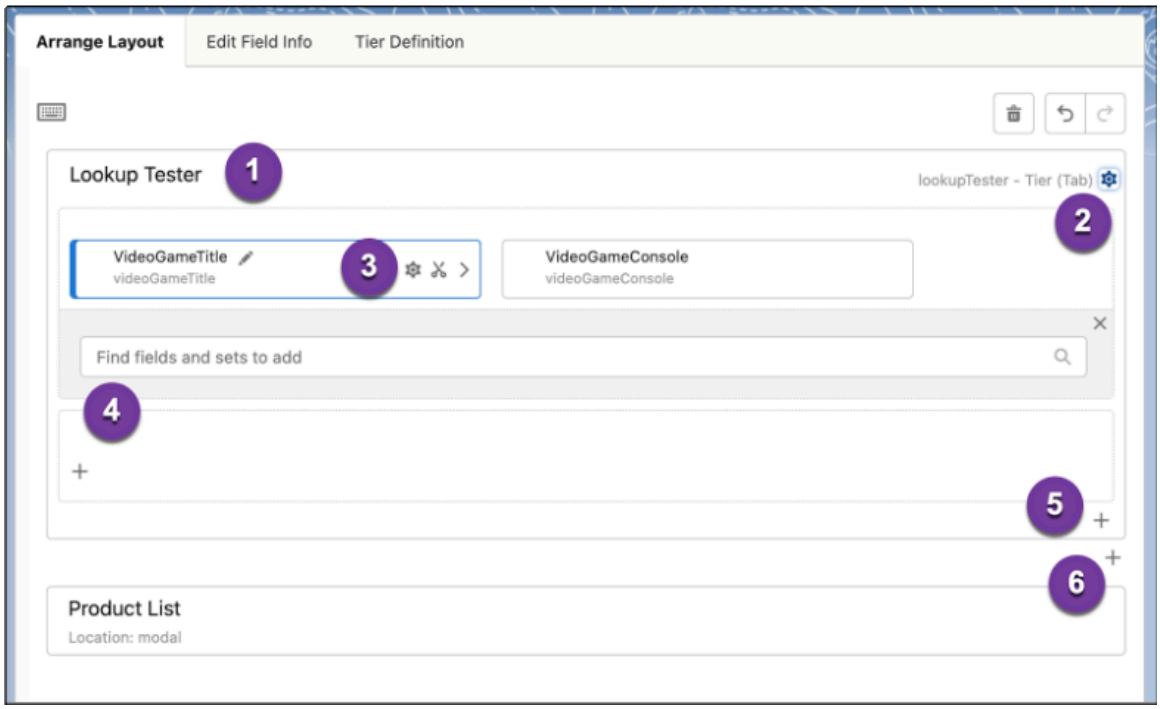



1. The layout variable name appears in parenthesis in the header. The layout name and description can be edited by clicking the pencil icon.
2. Three actions are available: **Replace**, **Export**, and **Save**.
   - **Replace**: Launches the file picker to select a CSV file to replace the current layout.
   - **Export**: Exports and downloads a CSV file of the current layout
   - **Save**: Save changes to the layout. This button will be disabled if no changes have been made to the layout.
3. The layout editor provides three tabs for editing different aspects of the layout: Arrange Layout, Edit Field Info, and tier definition.

## The Arrange Layout tab

The Arrange Layout tab provides a similar experience to the Layout Wizard. It lets you adjust various depths but does not allow for a change in the overall tier format.

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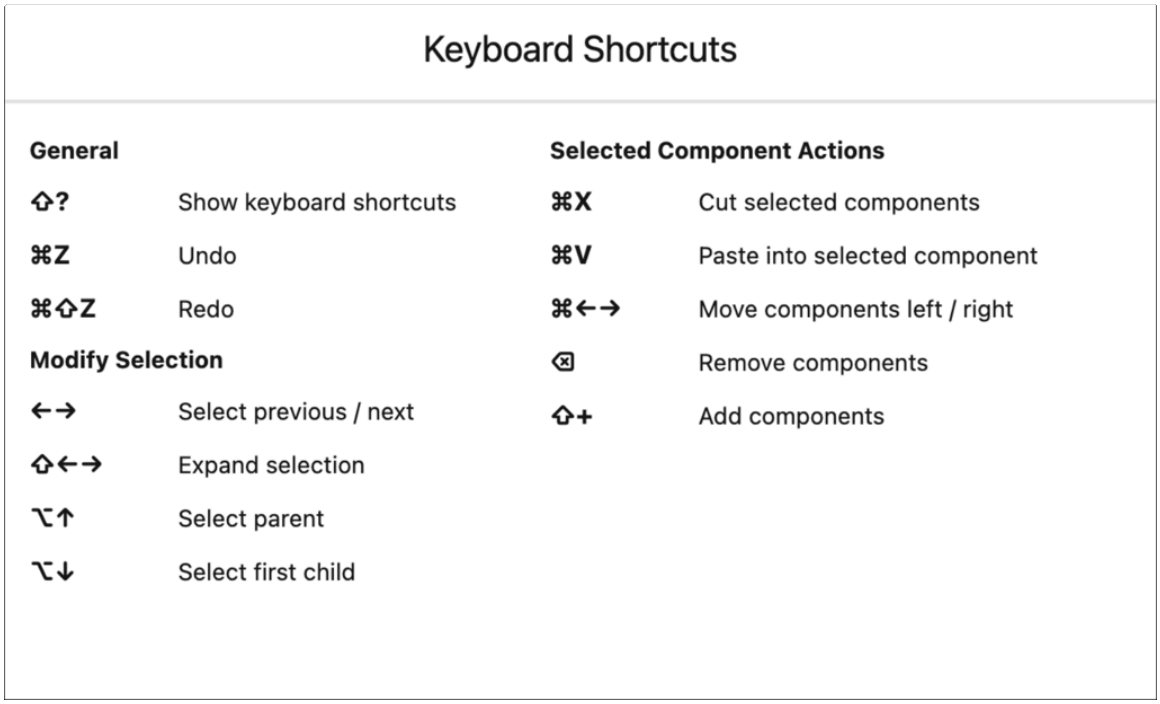

1. Tier labels can be edited inline by clicking the pencil icon that appears on hover.
2. Extended properties of the element can be edited by clicking the gear icon, which will launch a window to update the values.
3. The field label can be edited by clicking the pencil icon, and extended properties of the field can be edited by clicking the gear icon. Fields can also be edited in the Edit Field Info tab.
4. Clicking the plus icon in a column set lets you search for fields to add to the column set.
5. Additional column sets can be added to the layout by clicking the plus icon in the tier you want to add to.
6. Tiers can be added to the layout by clicking the plus icon outside of the existing tiers.

**Tip:** Several keyboard shortcuts are available to rearrange these visual elements. For example, tiers and column sets can be moved vertically by pressing Cmd/Ctrl + ↑ or ↓, and fields can be moved horizontally by pressing Cmd/Ctrl + ← or →. While in the Arrange Layout tab, you can view the keyboard shortcuts by pressing Shift + ? or by clicking the keyboard icon at the top of the page.

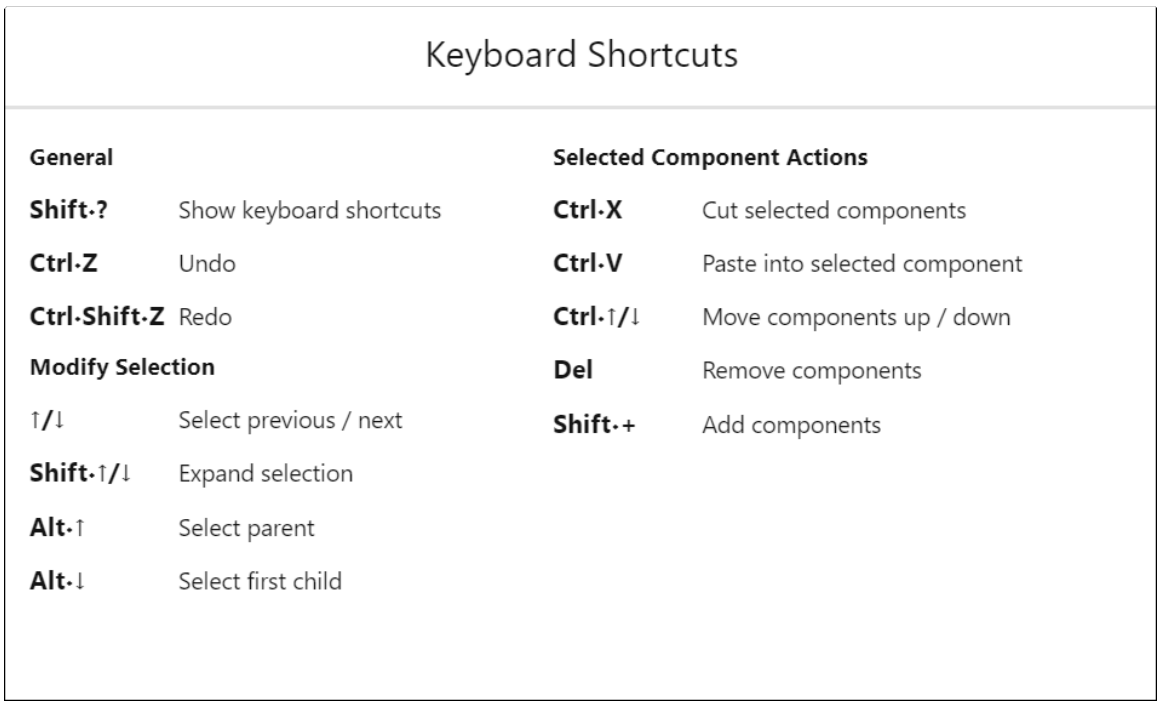
## Keyboard shortcuts

Mac:

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PC:




## Missing fields

If a layout contains fields that are no longer available appear slightly grayed out, with a dashed border.

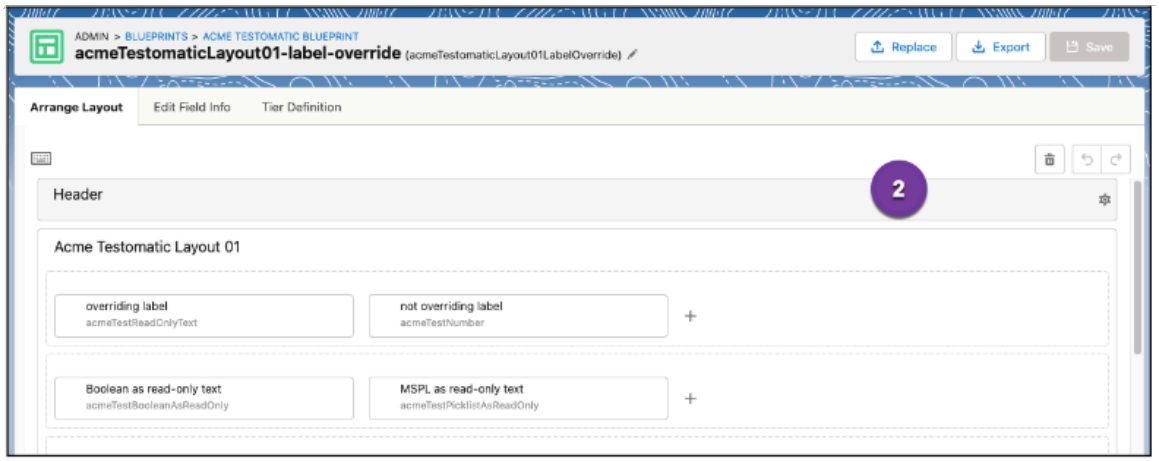
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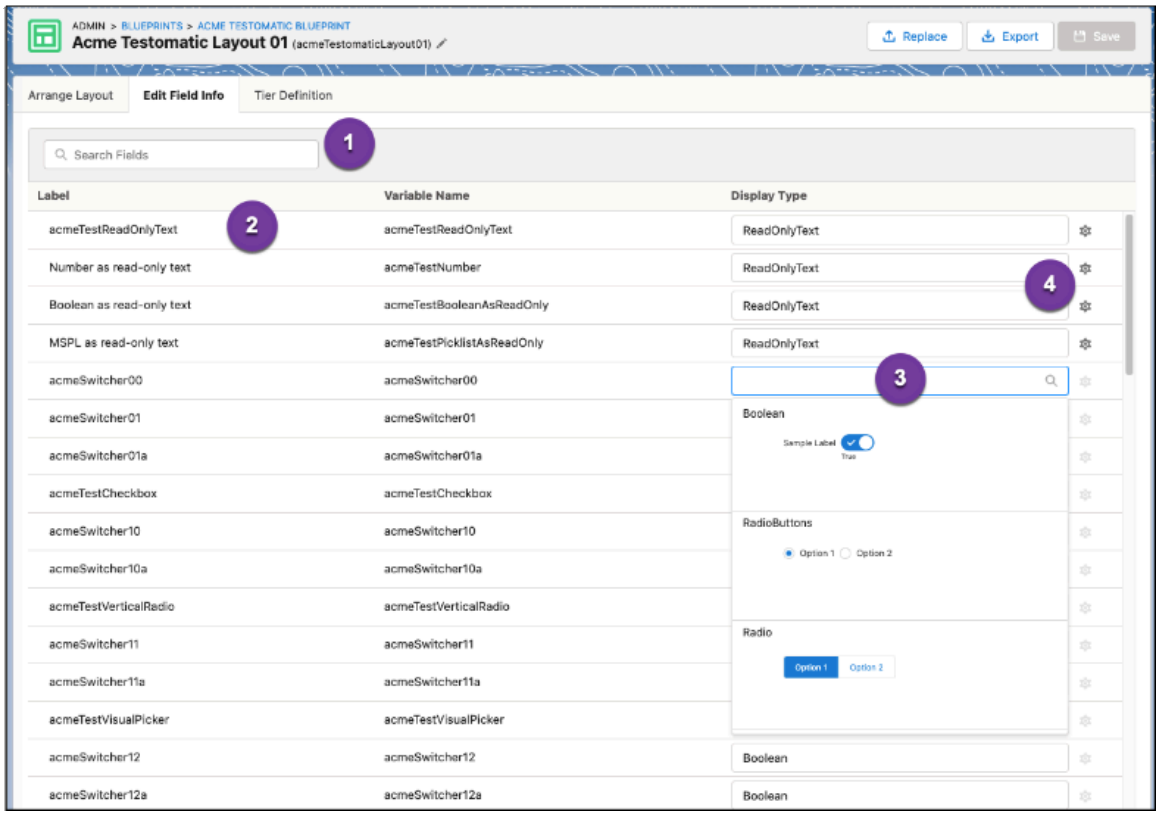

## Partially supported elements

Layout elements that are only partially supported appear with a darker gray background. Some properties can still be edited by clicking the gear icon.

Field information such as label, display type, and extended properties can be edited in the layout editor.

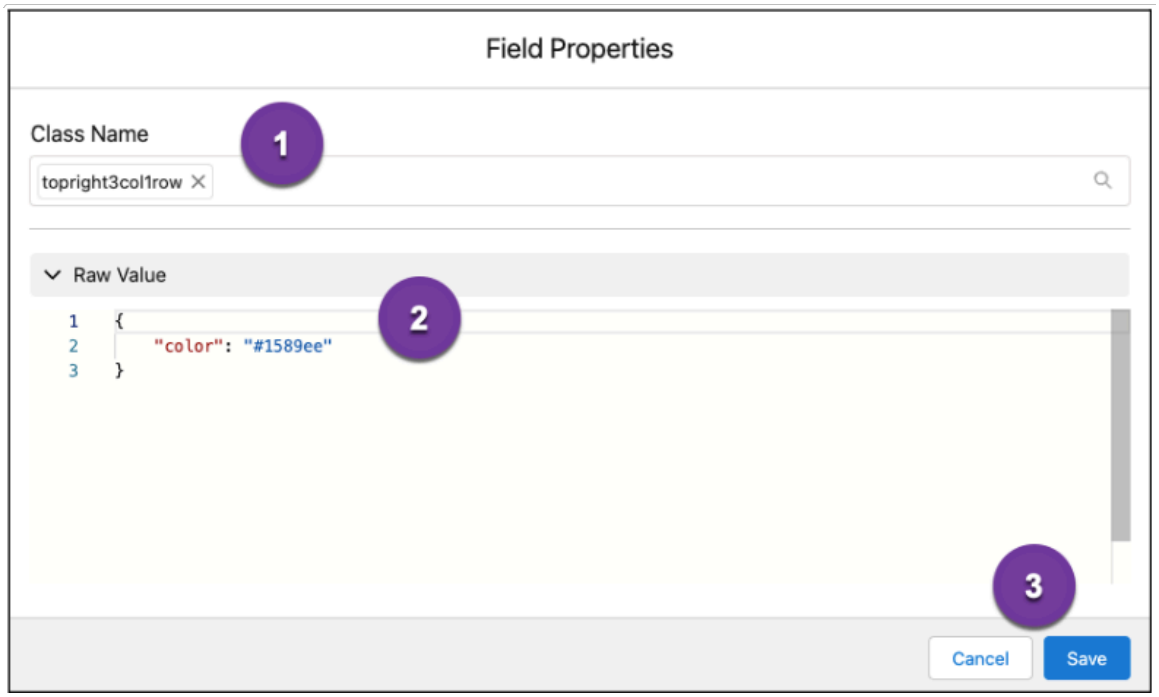



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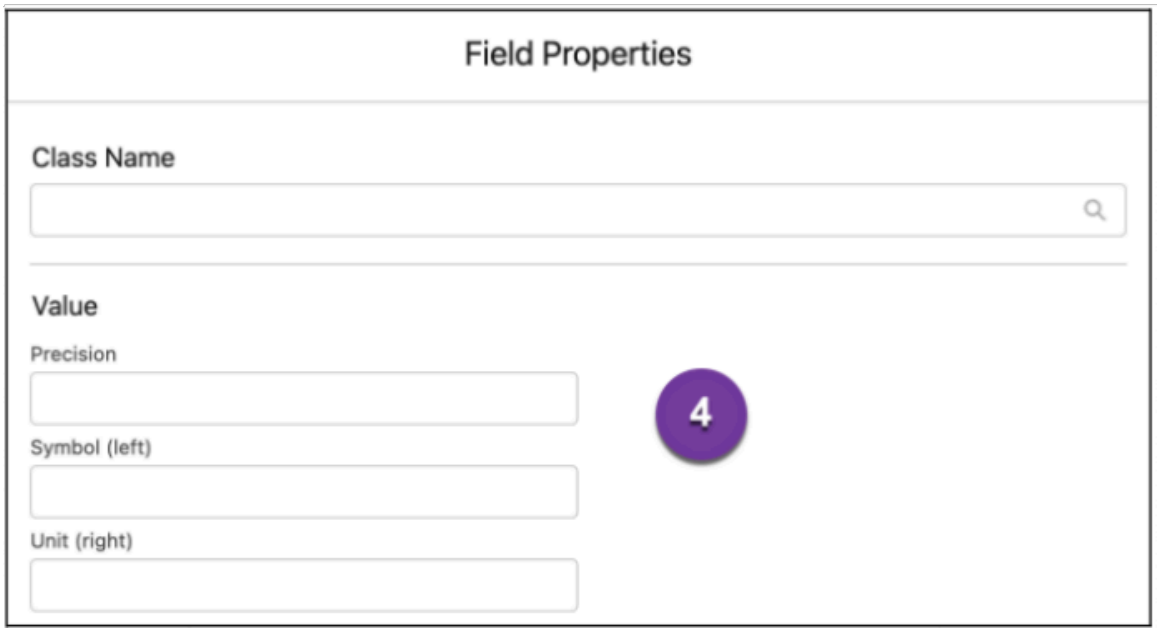

1. Search and filter fields associated with the layout.
2. The field label can be edited inline by clicking the label to edit.
3. The field display type can be updated from a list of available options for the field type by clicking the display type value for the field you are updating.
4. Extended properties of the field can be edited by clicking the gear icon and making the edits in a dialog box.

## Edit extended field properties




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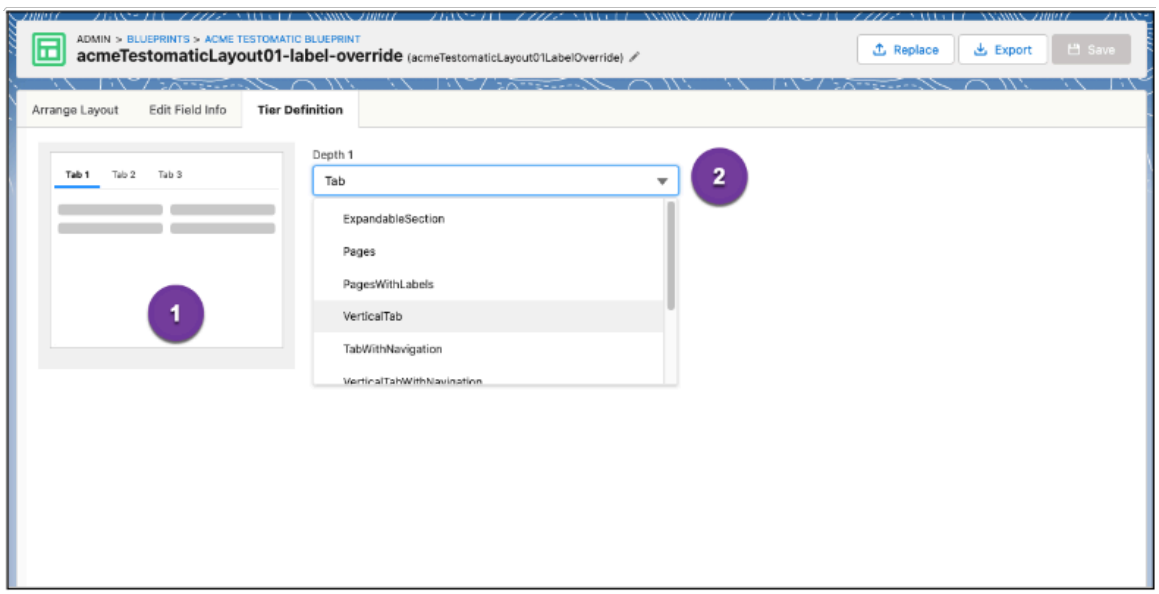
1. Class Name: Classes can be added to fields and searched for in the search bar. Classes appear as a pill once added. Classes that control the width and height of the field or align the field to a grid layout have built-in support.
2. Raw Value: The value can also be edited directly, in the format of key:value pairs. This corresponds to the value column in the layout.csv file.
3. Cancel and Save




4. Number fields also have three values: **Precision**, **Symbol**, and **Unit**.
   - **Precision**: Controls the decimal precision of the number field
   - **Symbol**: Displays to the left of the number field
   - **Unit**: Displays to the right of the number field

## Tier definition

The overall structure of the layout tiers can be updated in the tier definition tab. This is similar to selecting the initial tier definition when using the Layout Wizard.



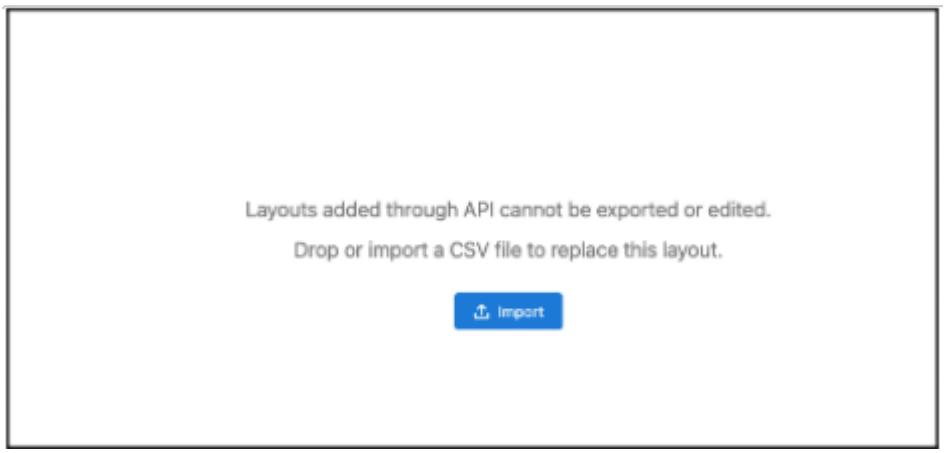

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1. Tier definition preview: Shows a simplified preview of the currently selected tier definition
2. Tier definition menu: Provides a list of available tier definitions to select from

When you have made all the changes to the layout, don't forget to save it, using the Save button in the header.

## Additional considerations

Layouts that were uploaded by using API calls cannot be edited in the layout editor. A message will appear that lets you import a CSV file to replace the layout.




Modifications that cannot be made by using the layout editor can be made by exporting, adjusting, and importing layout CSV files.

The order of rows is not maintained as the layout editor parses the values.

### Layout: a deeper dive

Learn advanced layout concepts in CPQ, including tiers, column sets, and product list layouts. Understand how to structure pages, tabs, and sections in CSV files to create dynamic, responsive configuration interfaces with organized and intuitive user experiences.

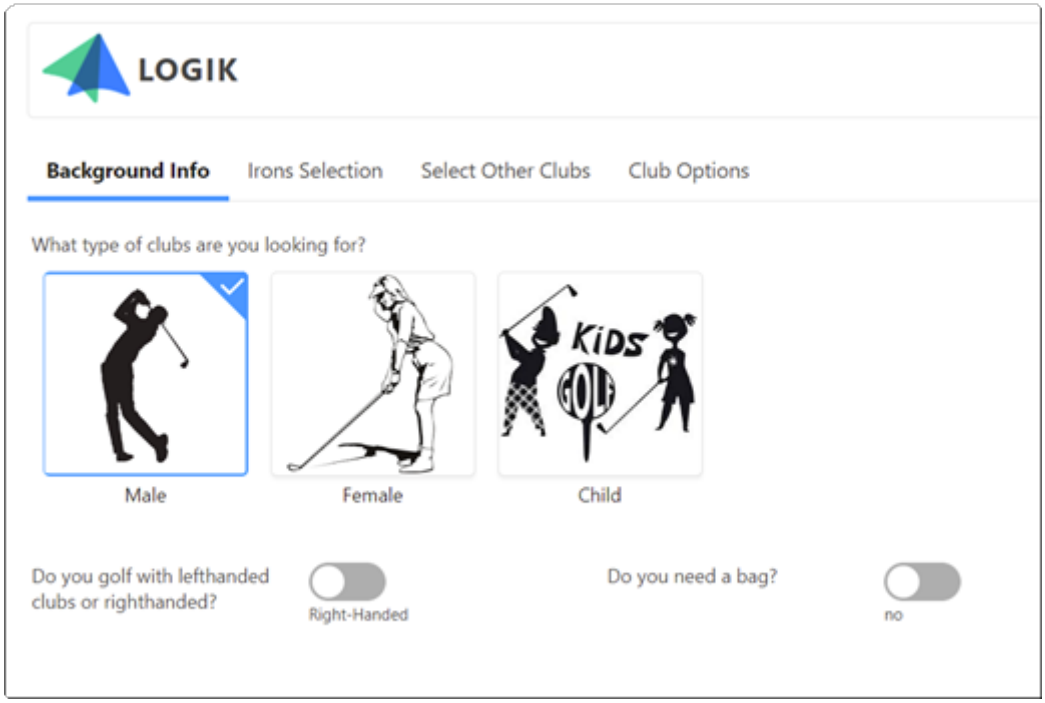
## Tiers and tierDef

Tiers define the sections of the page.

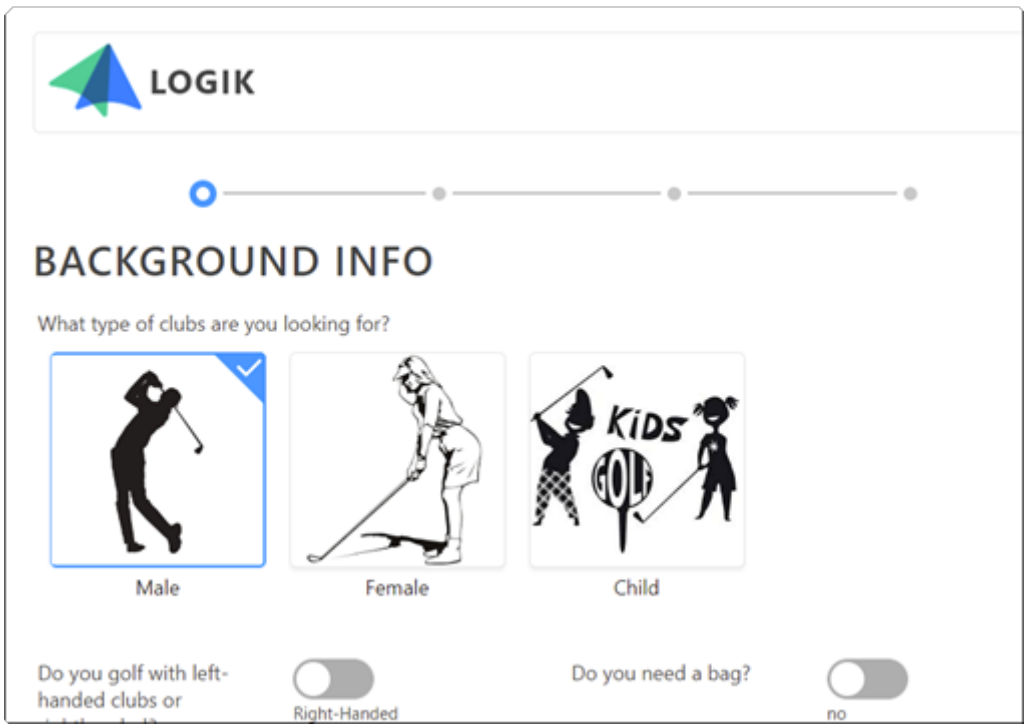
Each tier and subtier needs a tierDef that defines the component display type (column F). Each tier has the following options: Tab, ExpandableSection, Pages, Accordion, AccordionWithNavigation, and VerticalTab. Each of the examples below shows the same configuration with different tier structures.

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- Tabs:




- ExpandableSection (this makes the layout more vertical)
- Pages:



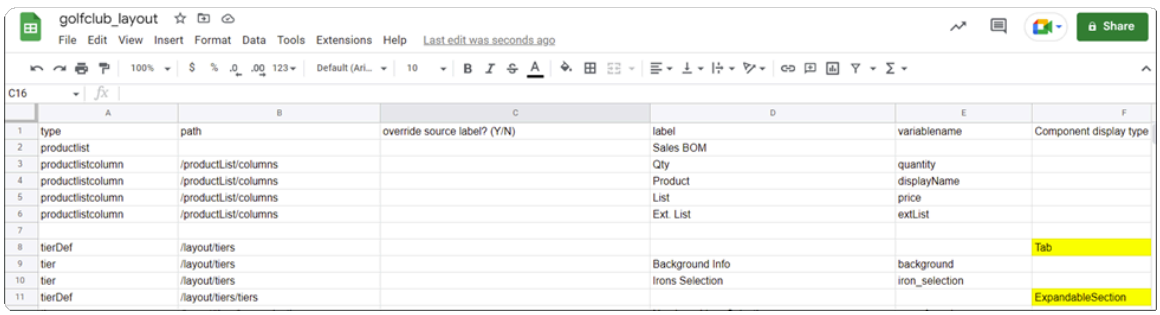

You also can have subtiers inside tiers.

Tab tier with an ExpandableSection subtier:

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A screenshot of the CSV file used to create this two-tiered layout is shown below. The highlighted cells show how the different tiers are flagged. Because rows 9 and 10 have the same path as the top row tierDef in row 8, the cells are displayed in a tab layout.



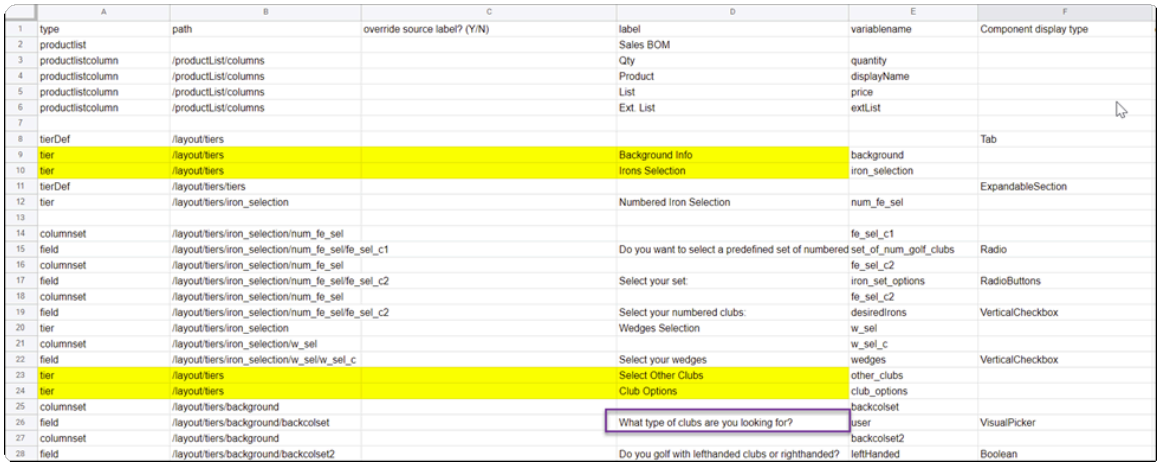

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | type | path | override source label? (Y/N) | label | variablename | Component display type |
| 2 | productlist | | | Sales BOM | | |
| 3 | productlistcolumn | /productList/columns | | Qty | quantity | |
| 4 | productlistcolumn | /productList/columns | | Product | displayName | |
| 5 | productlistcolumn | /productList/columns | | List | price | |
| 6 | productlistcolumn | /productList/columns | | Ext. List | extList | |
| 7 | | | | | | |
| 8 | tierDef | /layout/tiers | | | | Tab |
| 9 | tier | /layout/tiers | | Background Info | background | |
| 10 | tier | /layout/tiers | | Irons Selection | iron_selection | |
| 11 | tierDef | /layout/tiers/tiers | | | | ExpandableSection |

Do not define label or variablename at the tierDef level (row 8 in the image). They are applied at the tier level (rows 9 and 10).

## Label column

For both fields and tiers, the text entered in the label column is the text that appears on screen in the layout. The label for the yellow rows appears as the label for each tab. The label column is also used for fields.

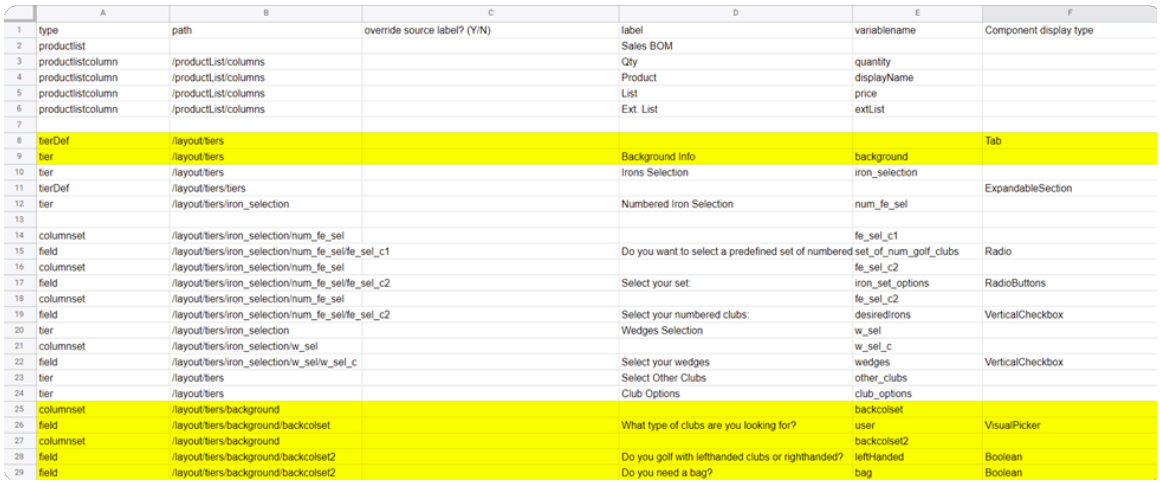
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| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | type | path | override source label? (Y/N) | label | variablename | Component display type |
| 2 | productlist | | | Sales BOM | | |
| 3 | productlistcolumn | /productList/columns | | Qty | quantity | |
| 4 | productlistcolumn | /productList/columns | | Product | displayName | |
| 5 | productlistcolumn | /productList/columns | | List | price | |
| 6 | productlistcolumn | /productList/columns | | Ext. List | extList | |
| 7 | | | | | | |
| 8 | tierDef | /layout/tiers | | | | Tab |
| 9 | tier | /layout/tiers | | Background Info | background | |
| 10 | tier | /layout/tiers | | Irons Selection | iron_selection | |
| 11 | tierDef | /layout/tiers/tiers | | | | ExpandableSection |
| 12 | tier | /layout/tiers/iron_selection | | Numbered Iron Selection | num_fe_sel | |
| 13 | | | | | | |
| 14 | columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c1 | |
| 15 | field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c1 | | Do you want to select a predefined set of numbered | set_of_num_golf_clubs | Radio |
| 16 | columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c2 | |
| 17 | field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c2 | | Select your set: | iron_set_options | RadioButtons |
| 18 | columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c2 | |
| 19 | field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c2 | | Select your numbered clubs: | desiredIrons | VerticalCheckbox |
| 20 | tier | /layout/tiers/iron_selection | | Wedges Selection | w_sel | |
| 21 | columnset | /layout/tiers/iron_selection/w_sel | | | w_sel_c | |
| 22 | field | /layout/tiers/iron_selection/w_sel/w_sel_c | | Select your wedges | wedges | VerticalCheckbox |
| 23 | tier | /layout/tiers | | Select Other Clubs | other_clubs | |
| 24 | tier | /layout/tiers | | Club Options | club_options | |
| 25 | columnset | /layout/tiers/background | | | backcolset | |
| 26 | field | /layout/tiers/background/backcolset | | What type of clubs are you looking for? | user | VisualPicker |
| 27 | columnset | /layout/tiers/background | | | backcolset2 | |
| 28 | field | /layout/tiers/background/backcolset2 | | Do you golf with lefthanded clubs or righthanded? | leftHanded | Boolean |

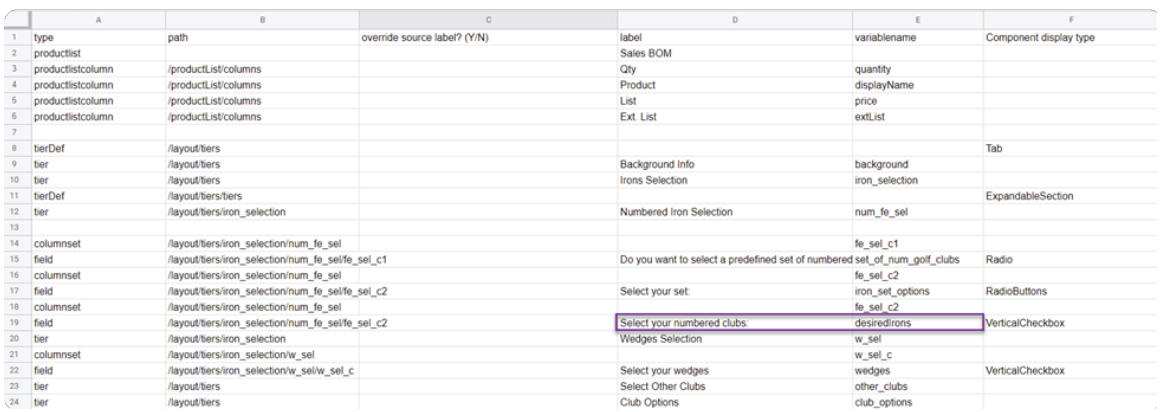
## variablename

Variables are used to define the path and call specific fields created in CPQ. In row 9 of the following image, the variablename *`background`* is defined in column E. In rows 25-29, *`background`* is added to the path (column B). This lets CPQ know that those go in the *`background`* tier.



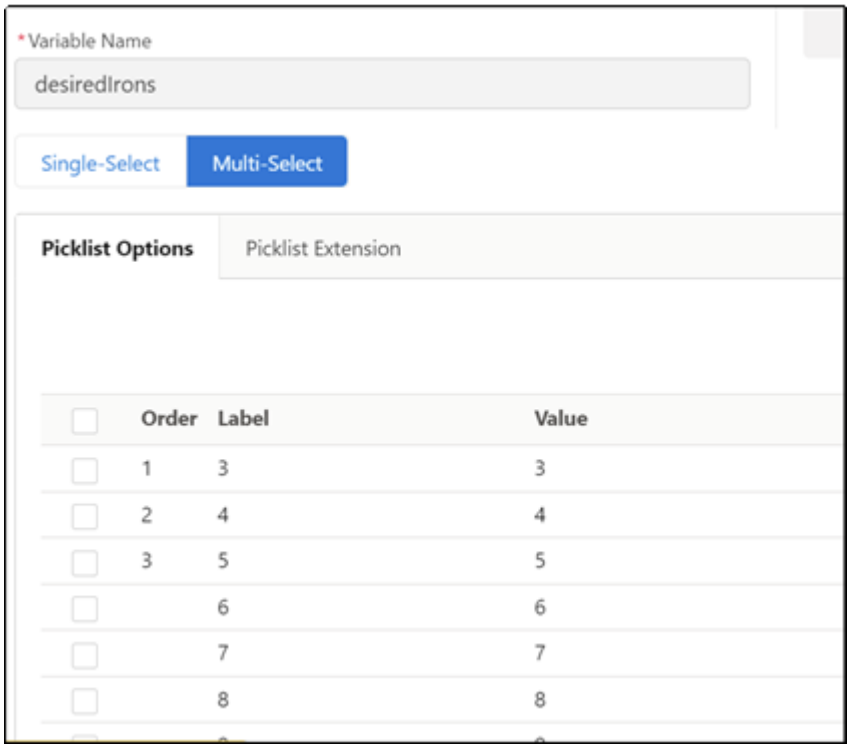
| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | type | path | override source label? (Y/N) | label | variablename | Component display type |
| 2 | productlist | | | Sales BOM | | |
| 3 | productlistcolumn | /productList/columns | | Qty | quantity | |
| 4 | productlistcolumn | /productList/columns | | Product | displayName | |
| 5 | productlistcolumn | /productList/columns | | List | price | |
| 6 | productlistcolumn | /productList/columns | | Ext. List | extList | |
| 7 | | | | | | |
| 8 | tierDef | /layout/tiers | | | | Tab |
| 9 | tier | /layout/tiers | | Background Info | background | |
| 10 | tier | /layout/tiers | | Irons Selection | iron_selection | |
| 11 | tierDef | /layout/tiers/tiers | | | | ExpandableSection |
| 12 | tier | /layout/tiers/iron_selection | | Numbered Iron Selection | num_fe_sel | |
| 13 | | | | | | |
| 14 | columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c1 | |
| 15 | field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c1 | | Do you want to select a predefined set of numbered | set_of_num_golf_clubs | Radio |
| 16 | columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c2 | |
| 17 | field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c2 | | Select your set: | iron_set_options | RadioButtons |
| 18 | columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c2 | |
| 19 | field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c2 | | Select your numbered clubs: | desiredIrons | VerticalCheckbox |
| 20 | tier | /layout/tiers/iron_selection | | Wedges Selection | w_sel | |
| 21 | columnset | /layout/tiers/iron_selection/w_sel | | | w_sel_c | |
| 22 | field | /layout/tiers/iron_selection/w_sel/w_sel_c | | Select your wedges | wedges | VerticalCheckbox |
| 23 | tier | /layout/tiers | | Select Other Clubs | other_clubs | |
| 24 | tier | /layout/tiers | | Club Options | club_options | |
| 25 | columnset | /layout/tiers/background | | | backcolset | |
| 26 | field | /layout/tiers/background/backcolset | | What type of clubs are you looking for? | user | VisualPicker |
| 27 | columnset | /layout/tiers/background | | | backcolset2 | |
| 28 | field | /layout/tiers/background/backcolset2 | | Do you golf with lefthanded clubs or righthanded? | leftHanded | Boolean |
| 29 | field | /layout/tiers/background/backcolset2 | | Do you need a bag? | bag | Boolean |

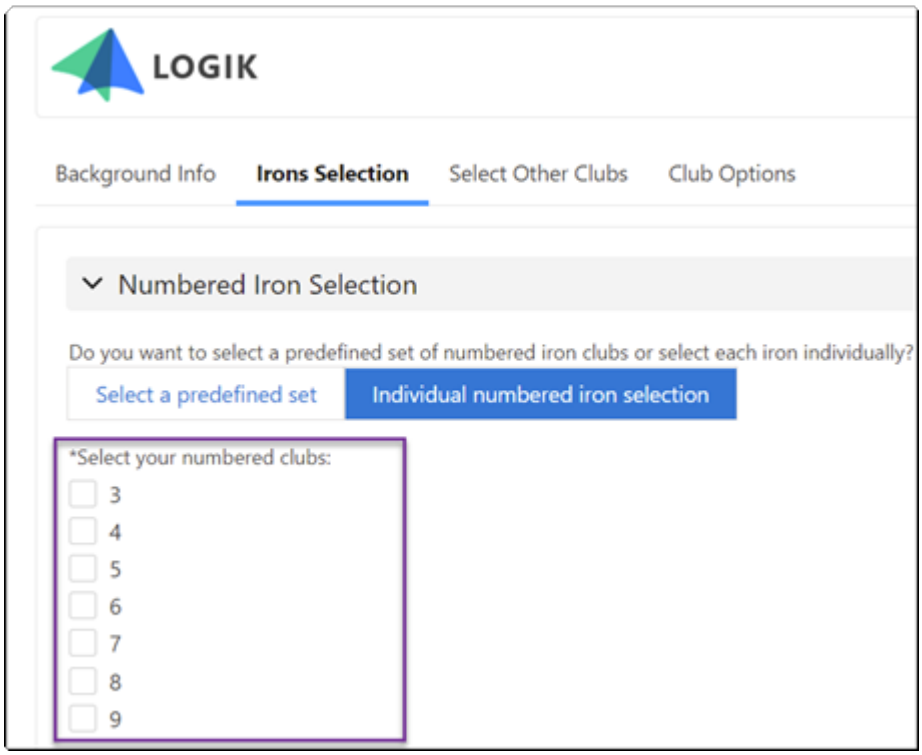
Variables pertaining to layout must be different than variables defined in CPQ for fields or rules. This is because variables defined in CPQ are also used in the layout CSV. The variables names assigned to a field in CPQ UI are used to add the field to the layout. The following images show the CSV file referencing a field variable (variablename=*`desiredIrons`*) that was created in CPQ resulting in the field appearing in the layout.



| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | type | path | override source label? (Y/N) | label | variablename | Component display type |
| 2 | productlist | | | Sales BOM | | |
| 3 | productlistcolumn | /productList/columns | | Qty | quantity | |
| 4 | productlistcolumn | /productList/columns | | Product | displayName | |
| 5 | productlistcolumn | /productList/columns | | List | price | |
| 6 | productlistcolumn | /productList/columns | | Ext. List | extList | |
| 7 | | | | | | |
| 8 | tierDef | /layout/tiers | | | | Tab |
| 9 | tier | /layout/tiers | | Background Info | background | |
| 10 | tier | /layout/tiers | | Irons Selection | iron_selection | |
| 11 | tierDef | /layout/tiers/tiers | | | | ExpandableSection |
| 12 | tier | /layout/tiers/iron_selection | | Numbered Iron Selection | num_fe_sel | |
| 13 | | | | | | |
| 14 | columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c1 | |
| 15 | field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c1 | | Do you want to select a predefined set of numbered | set_of_num_golf_clubs | Radio |
| 16 | columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c2 | |
| 17 | field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c2 | | Select your set: | iron_set_options | RadioButtons |
| 18 | columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c2 | |
| 19 | field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c2 | | Select your numbered clubs: | desiredIrons | VerticalCheckbox |
| 20 | tier | /layout/tiers/iron_selection | | Wedges Selection | w_sel | |
| 21 | columnset | /layout/tiers/iron_selection/w_sel | | | w_sel_c | |
| 22 | field | /layout/tiers/iron_selection/w_sel/w_sel_c | | Select your wedges | wedges | VerticalCheckbox |
| 23 | tier | /layout/tiers | | Select Other Clubs | other_clubs | |
| 24 | tier | /layout/tiers | | Club Options | club_options | |

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## Column set types

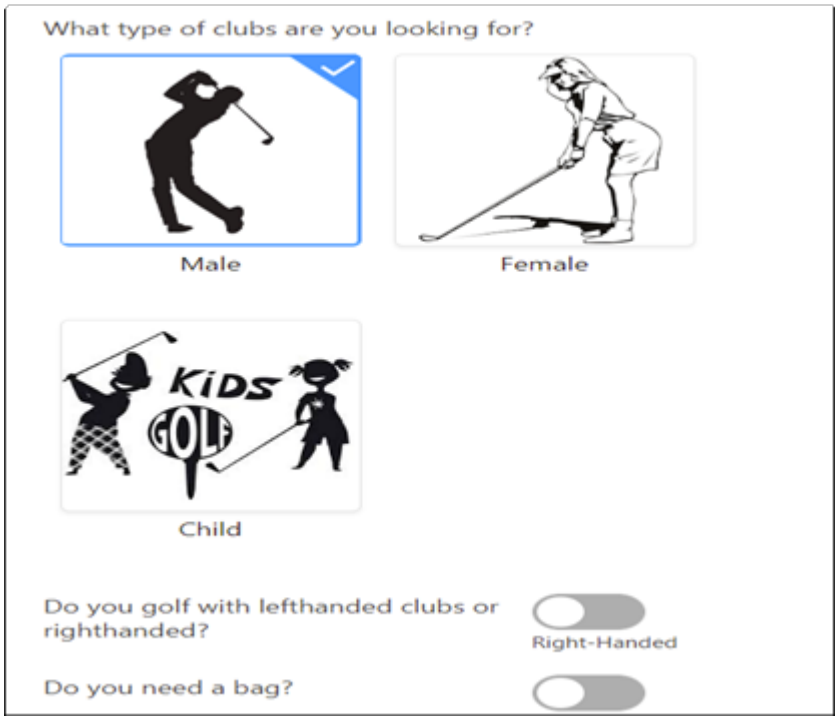
Column sets help define the vertical positioning of objects in a tier. The layout is responsive to the width of the browser (which can change), so CPQ uses column sets to help the Admin identify an intentional row breakpoint.

If the user is using a smaller window where the whole column set does not fit on one row, columns will continue onto the next row. The end of the column set always triggers a new row.

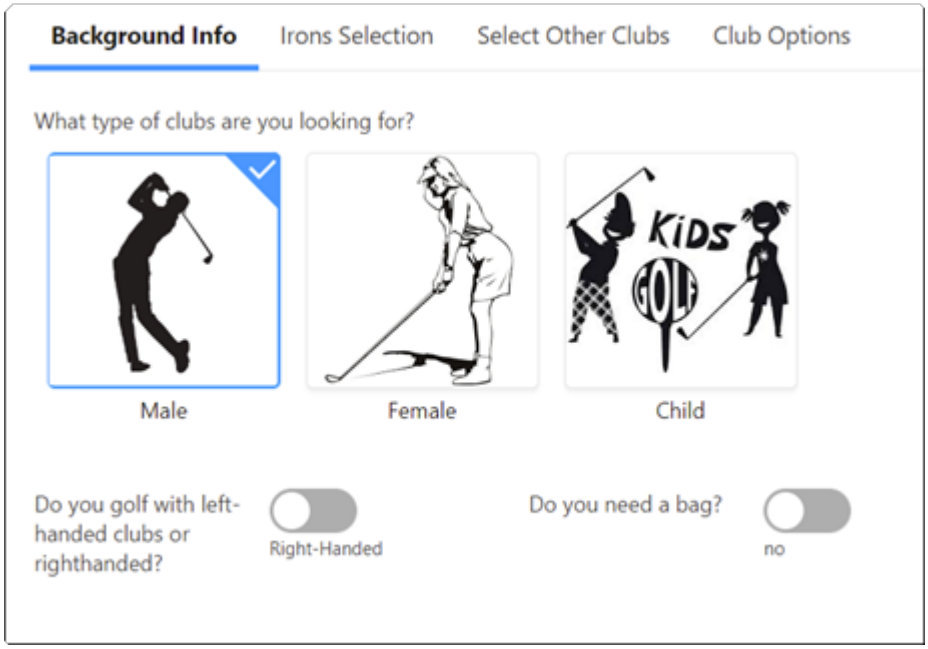
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In the following images, the *user* field is part of 1 column set, while the fields *leftHanded* and *bag* are part of a second column set. If the browser window becomes too small for all three pictures (picklist options for *user*), the column set continues on the next row. Even though there is room for the *leftHanded* field next to the third image, it is on a new row.

| type | path | override source label? (Y/N) | label | variablename | Component display type |
|---|---|---|---|---|---|
| productlist | | | Sales BOM | | |
| productlistcolumn | /productList/columns | | Qty | quantity | |
| productlistcolumn | /productList/columns | | Product | displayName | |
| productlistcolumn | /productList/columns | | List | price | |
| productlistcolumn | /productList/columns | | Ext. List | extList | |
| | | | | | |
| tierDef | /layout/tiers | | | | Tab |
| tier | /layout/tiers | | Background Info | background | |
| tier | /layout/tiers | | Irons Selection | iron_selection | |
| tierDef | /layout/tiers/tiers | | | | ExpandableSection |
| tier | /layout/tiers/iron_selection | | Numbered Iron Selection | num_fe_sel | |
| | | | | | |
| columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c1 | |
| field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c1 | | Do you want to select a predefined set of numbered | set_of_num_golf_clubs | Radio |
| columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c2 | |
| field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c2 | | Select your set: | iron_set_options | RadioButtons |
| columnset | /layout/tiers/iron_selection/num_fe_sel | | | fe_sel_c2 | |
| field | /layout/tiers/iron_selection/num_fe_sel/fe_sel_c2 | | Select your numbered clubs: | desiredIrons | VerticalCheckbox |
| tier | /layout/tiers/iron_selection | | Wedges Selection | w_sel | |
| columnset | /layout/tiers/iron_selection/w_sel | | | w_sel_c | |
| field | /layout/tiers/iron_selection/w_sel/w_sel_c | | Select your wedges | wedges | VerticalCheckbox |
| tier | /layout/tiers | | Select Other Clubs | other_clubs | |
| tier | /layout/tiers | | Club Options | club_options | |
| columnset | /layout/tiers/background | | | backcolset | |
| field | /layout/tiers/background/backcolset | | What type of clubs are you looking for? | user | VisualPicker |
| columnset | /layout/tiers/background | | | backcolset2 | |
| field | /layout/tiers/background/backcolset2 | | Do you golf with lefthanded clubs or righthanded? | leftHanded | Boolean |
| field | /layout/tiers/background/backcolset2 | | Do you need a bag? | bag | Boolean |

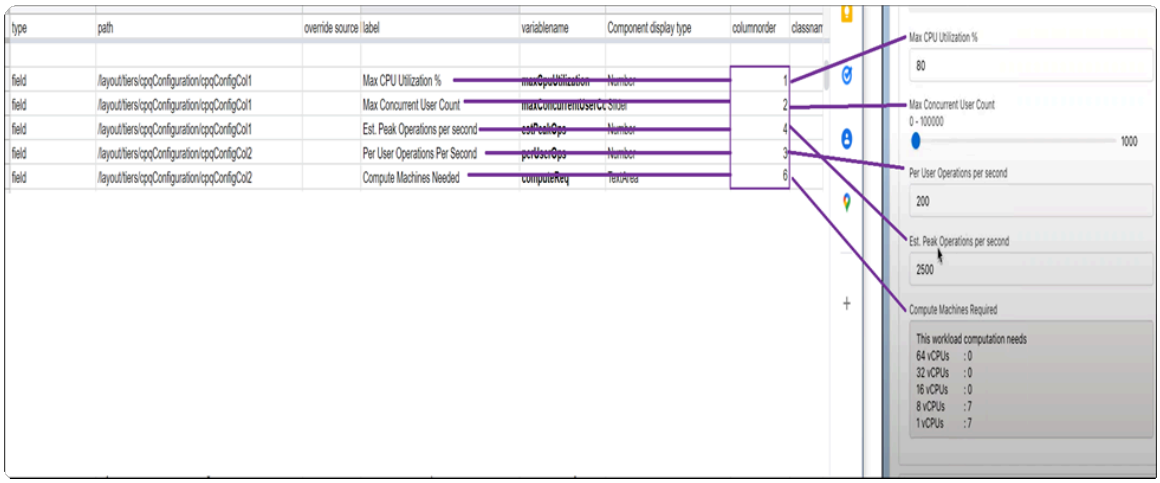



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## Column order

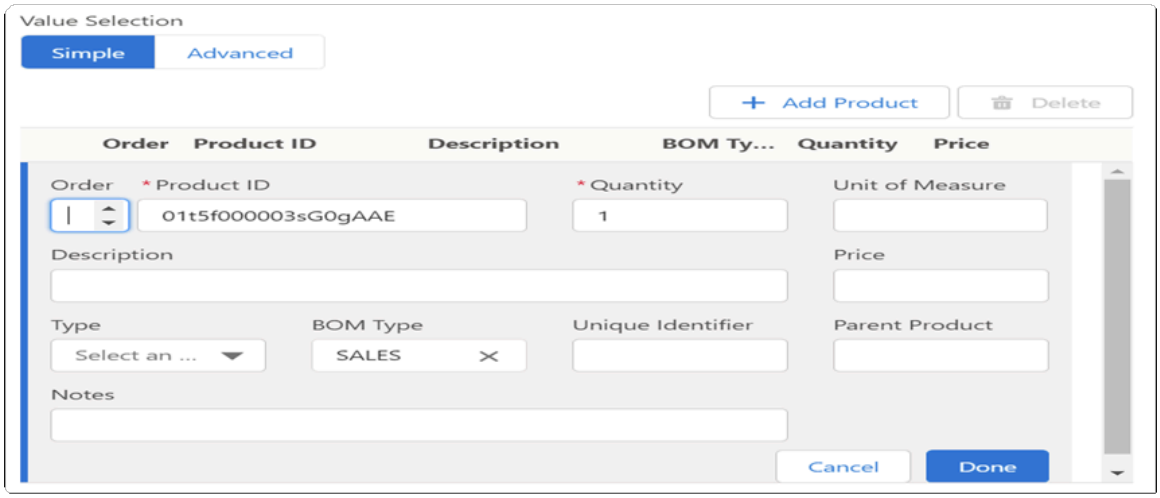
The *columnorder* column in the CSV file changes the order of the columns in the same column set. Fields do not have to be added to the CSV in order, as seen in the following image.




## Product list layouts

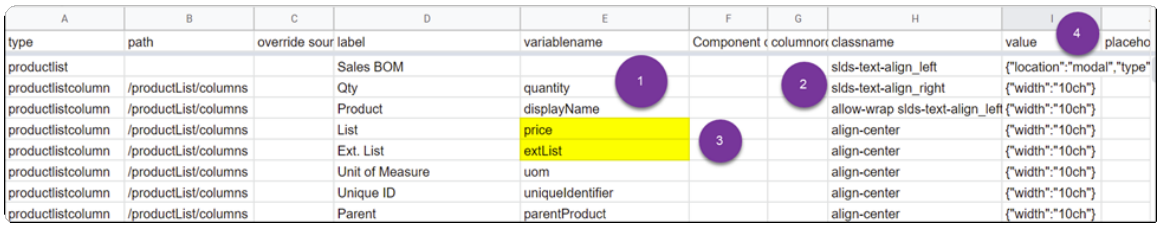
The product list is how the shopping cart feature of configurations are customized. To add items to the product list, a new product rule is created. When the user selects **Simple**, the following fields are available:

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If the user wants the field to be displayed in the layout, they would add a column to the layout CSV for the field. (The user would use the values in the *ProductList.<param>* column of the linked table as the variable name. See note 1 for the following image.)

The following is a screen shot of the product list section of the layout CSV.



| type | path | override sour | label | variablename | Component ( | columnor( | classname | value | placeho |
|---|---|---|---|---|---|---|---|---|---|
| productlist | | | Sales BOM | | | | slds-text-align_left | {"location":"modal","type" | |
| productlistcolumn | /productList/columns | | Qty | quantity | | | slds-text-align_right | {"width":"10ch"} | |
| productlistcolumn | /productList/columns | | Product | displayName | | | allow-wrap slds-text-align_left | {"width":"10ch"} | |
| productlistcolumn | /productList/columns | | List | price | | | align-center | {"width":"10ch"} | |
| productlistcolumn | /productList/columns | | Ext. List | extList | | | align-center | {"width":"10ch"} | |
| productlistcolumn | /productList/columns | | Unit of Measure | uom | | | align-center | {"width":"10ch"} | |
| productlistcolumn | /productList/columns | | Unique ID | uniqueIdentifier | | | align-center | {"width":"10ch"} | |
| productlistcolumn | /productList/columns | | Parent | parentProduct | | | align-center | {"width":"10ch"} | |

A few things to note:

1. The variables in this column match the values in the productList.<param> column {hauss-extList and List are missing}. This tells CPQ to add the user inputs to the table.
2. To adjust the alignment of the text in the individual columns add the class *slds-text-align_left*, *slds-text-align_right*, or *slds-text-align_center*. To add multiple class names, separate them with a space.
3. *price*, *list*, and *extList* always align right so the numbers align nicely.
4. To save space on the screen, select *modal* for *location*.

## Tier components

Use these tier component property names in the component column of a CSV layout.

### Tier components

| Component | Property name | Description |
|---|---|---|
| Basic container | *BasicContainer* | Tier container with no decoration or navigation |
| Expandable sections | *ExpandableSection* | Display tiers in expandable sections with gray bar as section header |

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**Tier components (continued)**

| Component | Property name | Description |
|---|---|---|
| | | Value setting for initial state: `defaultState: delay \| collapsed`<br><br>To lazy-load the tier, use "delay", which will open the section after other sections have begun rendering |
| Accordion | *Accordion* | Similar to expandable sections, but only one is expanded |
| Accordion with navigation | *AccordionWithNavigation* | Similar to expandable sections, but only one is expanded, and next/previous buttons are included |
| Tabs | *Tab* | Display tiers in a horizontal tab group |
| Vertical tabs | *VerticalTab* | Display tiers in a vertical tab group (tabs are on the left) |
| Pages | *Pages* | Display tiers as pages with a progress nav bar at the top (tier names are displayed on hover) |
| Pages with labels | *PagesWithLabels* | Display tiers as pages with a progress nav bar at the top, including labels that truncate as needed (no hover display) |

### Layout elements and hierarchy

Layouts use a hierarchical structure of organizational elements: pages, tabs, tiers (sections), column sets, and fields. Understanding how these elements nest and interact helps you design layouts.

## Layout hierarchy overview

The layout element hierarchy from top to bottom is: Layout (root) → Pages (top-level sections) → Tabs or Tiers (organization within pages) → Column Sets (horizontal arrangement) → Fields and Buttons (data/actions)

Not all levels are required. For example, a simple layout may have only a page, a tier, a columnset, and fields. More complex layouts use multiple pages, tabs, and nested tiers to organize content.

## Element definitions

**Page**

The top-level organizational boundary within a layout. A page is a distinct view or section of the configuration interface. Users navigate between pages using page tabs or buttons. Each page can contain multiple tabs and tiers.

**Tab and Vertical Tab**

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Secondary organization within a page. Tabs are displayed as a horizontal or vertical tab bar, allowing users to switch between different groups of content without leaving the page. Each tab can contain tiers and column sets.

**Tier (Section)**

A container element that groups related fields and components. Tiers can be configured with different representation types (for example, simple section, accordion, expandable container) to control how content is displayed and interacted with. Tiers can be nested within other tiers to create multi-level hierarchies.

**Column Set**

Arranges fields, buttons, and images horizontally within a tier. Column sets support two modes: Responsive (fields wrap automatically; default) and Defined Columns (fixed column structure, table-based layout). Multiple column sets in the same tier are stacked vertically. See Defined column set reference for details on both modes.

**Field**

An individual data input or display element placed within a column set. Fields can be text inputs, dropdowns, radio buttons, checkboxes, or read-only text. Each field is associated with a configuration attribute or variable.

**Button**

An action element placed within a column set. Buttons trigger events or navigate users to other views (for example, a reconfigure button, a link to product picker, a validate button).

**Heading**

A text label or section title placed within a layout to organize and label content. Headings do not contain fields or interactive elements.

## Nesting rules and constraints

The following rules govern how layout elements can be nested:

- Layout contains one or more Pages.
- Page contains one or more Tabs/Vertical Tabs or Tiers.
- Tab contains one or more Tiers.
- Tier can contain:
  - One or more Column Sets (most common), or
  - Nested Tiers, or
  - A Line Item Grid (Quote Experience only; must be the only element in the tier)
- Column Set contains one or more Fields, Buttons, or Headings.
- Multiple Column Sets in the same Tier are arranged vertically (stacked).

**Important:** A Line Item Grid (Quote Experience layouts only) must be the only element in its tier and cannot coexist with column sets or other elements in the same tier.

## Example layout structures

Simple Layout (No Pages or Tabs):

- Layout → Tier (Heading) → Column Set → Fields
- Use case: Basic configuration form with a single section.

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Multi-Section Layout (Multiple Tiers):

- Layout → Tier 1 (General Info) → Column Set → Fields ↓ Tier 2 (Advanced Options) → Column Set → Fields ↓ Tier 3 (Summary) → Column Set → Fields
- Use case: Configuration with distinct logical groups (General, Advanced, Summary).

Tabbed Layout (Horizontal Organization):

- Layout → Tab: "Basic" → Tier → Column Set → Fields ↓ Tab: "Advanced" → Tier → Column Set → Fields
- Use case: Configuration with many options; tabs reduce cognitive load.

Complex Layout (Nested Tiers + Defined Columns):

- Layout → Page: "Config" → Tier (Accordion) → Tier (nested) → Defined Column Set (3 columns) → Fields ↓ Page: "Summary" → Tier → Responsive Column Set → Fields
- Use case: Multi-step configuration with product picker (defined columns) and summary view.

## Choosing between responsive and defined column sets

Most layouts use responsive column sets, which are the default. Choose defined columns when:

- You need a fixed, table-based structure (for example, product grid, comparison table).
- You want to control column widths and alignment explicitly.
- You are designing an e-commerce or product picker interface.

Use responsive column sets when:

- You want the layout to adapt to various screen sizes (especially mobile).
- You are building standard forms or data entry interfaces.
- You want minimal configuration effort.

For a detailed comparison, see Defined column set reference.

## Layout design tips

- Organize logically: Group related fields into tiers with meaningful labels.
- Use tabs for many options: If a single tier contains too many fields, consider splitting them into tabs.
- Test responsive behavior: Resize your browser and test on mobile to ensure layouts are usable on small screens.
- Consistent alignment: Use consistent column structures within a tier to maintain visual coherence.
- Avoid deep nesting: While nesting tiers is allowed, avoid nesting more than 2–3 levels deep, as it can become confusing.

**Related topics**

Set up layouts

Defined column set reference

Quote transaction layouts

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### Defined column set reference

Defined column sets organize fields in a fixed, table-based structure with explicit column configuration, used for structured layouts such as product pickers and e-commerce product grids.

## Defined Column Properties

**Number of Columns**

Integer value between 1 and 5 (inclusive). Specifies how many columns the columnset will have.

**Column Width**

`auto`

Width is calculated automatically based on content and available space.

`pixel`

Exact width specified in pixels (e.g., `100px`, `200px`). Provides precise control but may overflow on small screens.

`percentage`

Width as a percentage of available container width (e.g., `25%`, `50%`). Scales with screen size.

**Column Alignment**

Controls horizontal and vertical alignment of content within the column. Nine alignment options combine horizontal (left, center, right) and vertical (top, middle, bottom) positioning:

- top-left, top-center, top-right
- middle-left, center (middle-center), middle-right
- bottom-left, bottom-center, bottom-right

Default alignment is top-left.

**Column Flow**

**Stacked**

Fields within the column appear one below the other in a vertical stack.

**Inline wrap**

Fields within the column appear on the same horizontal line and wrap to the next line if space is insufficient.

## YAML Reference

Defined column sets are configured in the layout YAML using the `columnSetType: defined` property.

```
columnSets:
  - variableName: productPickerColumns
    columnSetType: defined
    columns:
      - width: 100px
        alignment: center
        flow: stacked
      - width: 50%
```

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```
        alignment: top-left
        flow: stacked
      - width: auto
        alignment: middle-center
        flow: stacked
    elements:
      - type: field
        variableName: txn.line.product.image
        columnOrder: 1
      - type: field
        variableName: txn.line.product.name
        columnOrder: 2
      - type: field
        variableName: txn.line.product.description
        columnOrder: 2
      - type: field
        variableName: txn.line.product.price
        columnOrder: 2
      - type: field
        variableName: txn.line.quantity
        columnOrder: 3
```

**Key properties:**

- `columnSetType: defined` — Activates defined column mode (omit or set to `responsive` for default behavior).
- `columns` — Array of column objects, each with `width`, `alignment`, and `flow`.
- `columnOrder` — Integer (1, 2, 3...) assigned to each field to place it in the correct column.
- `elements` — Array of fields and buttons; `columnOrder` determines which column each element occupies.

## Field Migration on Column Removal

If you reduce the number of columns after fields have been added, fields in the removed column(s) automatically migrate to the nearest previous column. For example:

- If you have 3 columns with fields distributed across them, and you change to 2 columns, all fields previously in Column 3 move to Column 2.
- If you remove Column 2 (middle column), fields in Column 2 move to Column 1, and fields in Column 3 move to Column 2.

**No data is lost.** All fields and their configurations are preserved during column reduction.

## Warnings and Limitations

### Mixed Width Units Warning

Do not mix percentage and pixel widths in the same columnset. When detected, a warning appears: "Columns with mixed percentage and pixel units. Manual column alignment is expected." While the layout will function, runtime behavior may not match expectations. Use consistent width units (all auto, all pixel, or all percentage) across all columns.

### Loss of Responsiveness

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Defined columns sacrifice mobile responsiveness for structural control. Content will not wrap or reflow when the window is resized or on narrow mobile screens. Content may be cut off or require horizontal scrolling.

**Maximum Column Count**

The maximum number of columns is 5. If you need more columns, consider using multiple columnsets or switching to responsive mode.

**Accessibility Considerations**

Test defined column layouts with keyboard navigation and screen readers, as fixed column structures may impact navigation order. Ensure alignment and flow settings do not obscure content or create confusing reading order.

## Best Practices

- **Use for structured data:** Defined columns work best for layouts with fixed, predictable content (e.g., product grids, comparison tables).
- **Test on mobile:** Since responsiveness is lost, always test defined column layouts on mobile devices to ensure content is not cut off.
- **Consistent width units:** Avoid mixing percentage and pixel widths. Choose one approach per columnset.
- **Consider responsive first:** Default to responsive columnsets unless you have a specific need for fixed column structure.
- **Label columns clearly:** Use meaningful field labels and section headers so users understand column organization.

**Related topics**

Layout elements and hierarchy

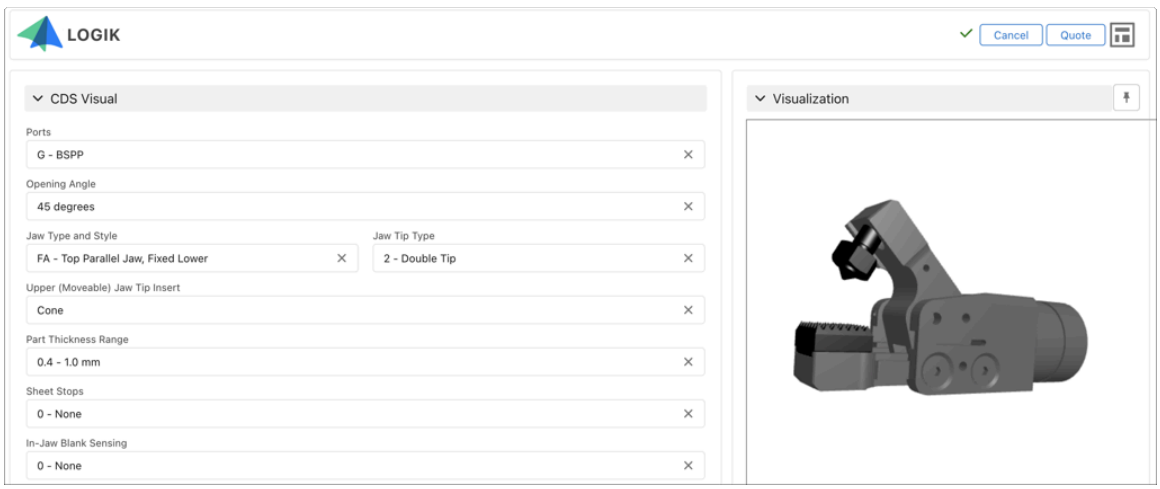
Configure defined column sets in layouts

Set up layouts

### The sidebar

Use the sidebar element to display persistent information, such as visualizations, product details, or alternate shopping carts, across tiers in a configuration. Define its position and content in the layout CSV file.

In a layout, the sidebar element can be used to show persistent information to the end user across multiple tiers.




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**Note:** This feature is not available in the CPQ layout editor. You must create the sidebar element in the layout CSV and then import the CSV file.

## Setup

When setting up the sidebar, define the sidebar element as a child of the entire layout. The following table lists the cells to fill in, with an example of the sidebar section of the CSV file.

- Type: sidebar
- Path: /layout/sidebar
- Value: `{"location":"right"}` or `{"location":"left"}`

**Sidebar element**

| type | path | label | variablename | component display type | value |
|---|---|---|---|---|---|
| sidebar | /layout/sidebar | | | | `{"location":"right"}` |
| tierdef | /layout/sidebar/tiers | | | BasicContainer | |
| tier | /layout/sidebar/tiers | Tier | tier | | |

The *`location`* property determines whether the sidebar appears to the user on the left or right of the screen. The sidebar appears in this position during configuration and, unlike the shopping cart, cannot be placed at the bottom of the configurator or moved during configuration.

The child of the sidebar can only be a *`tierdef`* object. If you add a *`tier`* or a *`columnset`* element as a child, the layout is invalid. After a tierdef is defined in the CSV, you can then add the necessary tiers, columnsets, and fields as children as in any other tier.

Only one sidebar can exist in a layout. If you add another, both are combined into the same tier upon deployment.

## Control the sidebar pin

Add the *`pinned`* property to the sidebar value to control whether the pin button appears to the end user and whether the sidebar is pinned or unpinned by default. Set this property in the `value` cell of the sidebar element in the layout CSV file.

**Values for the pinned property**

| Value | Description |
|---|---|
| `{"pinned":"PINNED"}` | Hides the pin button and renders the sidebar as pinned. |
| `{"pinned":"UNPINNED"}` | Hides the pin button and renders the sidebar as unpinned. |
| `{"pinned":"DEFAULT"}` | Shows the pin button and renders the sidebar as pinned. The sidebar also uses this behavior when you omit the *`pinned`* property. |

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## Set the sidebar width

Add width properties to the sidebar value to define how wide the sidebar component appears to the end user. Specify each width value in pixels (`px`) or viewport width (`vw`) units, and set the properties in the `value` cell of the sidebar element in the layout CSV file.

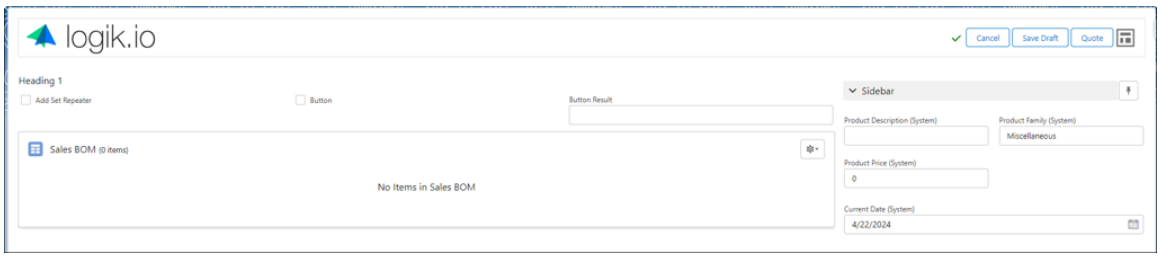
### Properties for the sidebar width

| Property | Description |
|---|---|
| *`width`* | Sets the default width of the sidebar component. For example, `{"width":"400px"}`. |
| *`minWidth`* | Sets the minimum width of the sidebar component. For example, `{"minWidth":"300px"}`. |
| *`maxWidth`* | Sets the maximum width of the sidebar component. For example, `{"maxWidth":"600px"}`. |

## Use case: 3D visualizer

The sidebar can host 3D visualization tools used during configuration. Any changes to fields tied to the visualization are visible to end users regardless of the tier they are on. For more information, see Integrating CPQ with visualization tools.

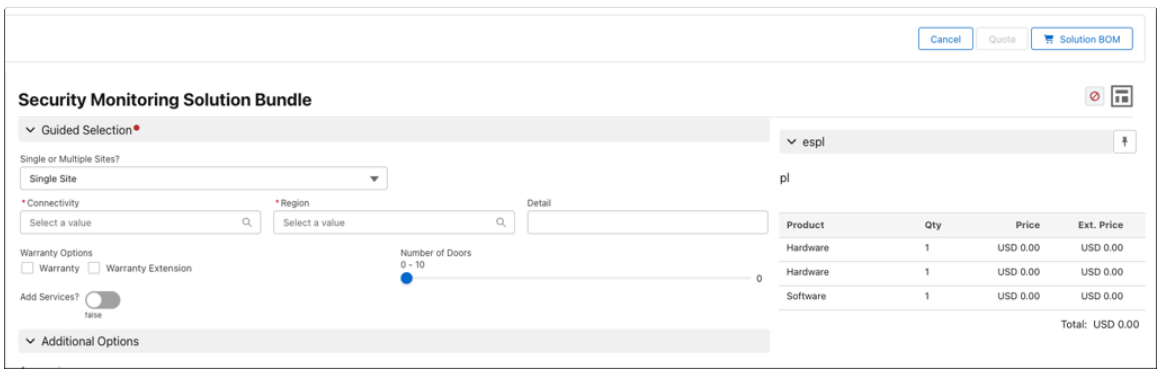
## Use case: product information




The sidebar can display product or quote information — including system or partner fields — throughout the configuration process.

Example CSV file

## Use case: shopping cart




To show a product list other than the shopping cart to the end user, you can host it in the sidebar. Use this option to list a separate manufacturing BOM type while showing only sales BOM types in the shopping cart.

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Example CSV

### Layouts: Field grid setup

A field grid collects multiple fields in a single layout, but unlike a set, it can reference other rows.

A field grid presents numerous fields in a matrixed layout. These are helpful when you need to request the same set of information a predetermined number of times. Field grids allow users to create a table of repeated values. In a field grid, rows can reference other rows, while in a set a user cannot write rules between indexes.

Field grids can expand in columnar or row direction (that is, horizontally or vertically).

Define all fields that are intended to be displayed in the field grid. Matrix Loader is a good tool for this. Associate the fields with the blueprint in which they will be used.

## Field grid layout setup

To add a field grid to the layout, a column set is not needed because the field grid creates the rows and columns. Instead, the following row types are needed:

- *`fieldgrid`*: this type tells the layout that a field grid will be used in the layout
- *`fieldgriddata`*: this type is used for each column of the field grid
- *`field`*: this type is needed for each cell in the field grid (not each row)

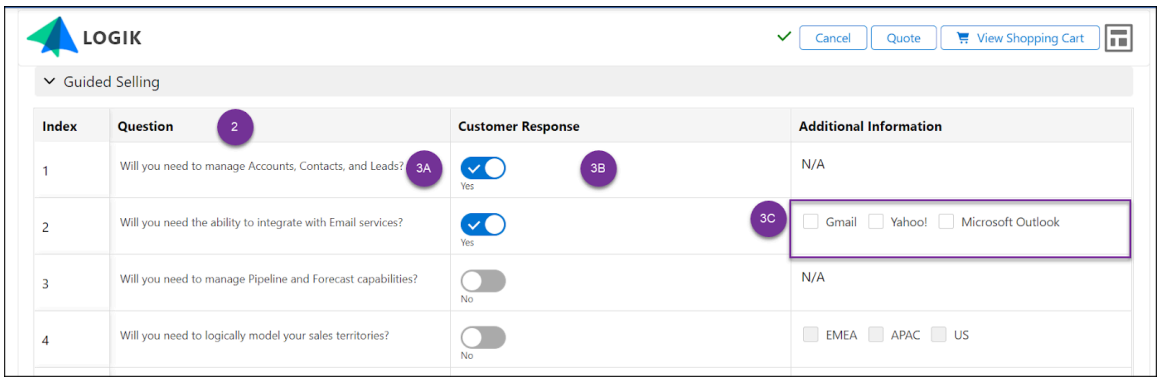
The first three images show the CSV file. The last image shows the corresponding user layout. The numbers above align with the numbers in the images below. (Because number 3 is shown several times, a letter is added for clarity.) Individual cells in the field grid cannot have both a label and an input field. Note that by 3C, both a label and input field are added to the layout CSV file. However, only the input field goes in the layout.

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | type | path | override source label? (Y/N) | label | variablename |
| 10 | | | | | |
| 11 | tier | /layout/tiers/guidedSelling | | Guided Selling | sBGuidedSelling |
| 12 | fieldgrid | /layout/tiers/guidedSelling/sBGuidedSelling | | | sBGuidedFieldGrid |
| 13 | fieldgriddata | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid | | Question | sBGuidedSellingQ |
| 14 | fieldgriddata | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid | | Customer Response | sBGuidedSellingA |
| 15 | fieldgriddata | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid | | Additional Information | sBGuidedSellingI |
| 16 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingQ | | Will you need to manage Accounts, Contacts, and Leads? | sBGuidedQ1 |
| 17 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingQ | | Will you need the ability to integrate with Email services? | sBGuidedQ2 |
| 18 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingQ | | Will you need to manage Pipeline and Forecast capabilities? | sBGuidedQ3 |
| 19 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingQ | | Will you need to logically model your sales territories? | sBGuidedQ4 |
| 20 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingQ | | Will you need advanced insights into your sales cycle? | sBGuidedQ42 |

| | | | | | |
|---|---|---|---|---|---|
| 29 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA1 |
| 30 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA2 |
| 31 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA3 |
| 32 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA4 |
| 33 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA42 |
| 34 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA5 |
| 35 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA6 |
| 36 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA0 |
| 37 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA7 |
| 38 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA8 |
| 39 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingA | | | sBGuidedA9 |
| 40 | | | | | |

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| | type | path | override | label | variablename |
|---|---|---|---|---|---|
| 41 | | | | | |
| 42 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | | | sBGuidedI1 |
| 43 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | 3C | What Email platforms? | sBGuidedI2 |
| 44 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | | | sBGuidedI3 |
| 45 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | | | sBGuidedI4 |
| 46 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | | | sBGuidedI42 |
| 47 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | | | sBGuidedI5 |
| 48 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | | | sBGuidedI6 |
| 49 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | | | sBGuidedI0 |
| 50 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | | | sBGuidedI7 |
| 51 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | | | sBGuidedI8 |
| 52 | field | /layout/tiers/guidedSelling/sBGuidedSelling/sBGuidedFieldGrid/sBGuidedSellingI | | | sBGuidedI9 |




fieldGrid Sample Layout JSON

## Field grid UI controls

Various aspects of the field grid UI can be controlled by updating the value field in the layout CSV file:

- Gridline visibility
- Dynamic column headers
- Field grid field width

## Fieldgrid elements

The following values can be added to the value column of fieldgrid elements:

- *`indexPre`*: String value to be displayed in the index column before the index number. optional
- *`indexPost`*: String value to be displayed in the index column after the index number. optional
- *`indexVisible`*: true | false, whether to display the index number and column in the field grid layout. Optional, default: true
- *`maximumHeight`*: Maximum height to set in CSS px. I.e. "180px". optional
- *`gridlines`*: all | horizontal | vertical | none, control how grid lines are displayed between cells. Optional, default is all.

## Fieldgriddata elements

The following values can be added to the value column of fieldgriddata elements:

- *`fieldIndex`*: name of field to use for header value. Optional. If included, the label for the fieldgriddata element should be blank.
- *`width`*: width of the fields. Optional. If included, examples of valid value are *`auto`*, *`300`* (px are assumed here), *`300px`*, *`20vw`*, and *`calc(100% - 100px)`*.

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Field grids default to 100% width. If even one width value is specified for a contained fieldgriddata component, the field grid's width changes to *auto* so that a specified width can be applied.

Example field grid dynamic headers and grid lines CSV file

Example field grid width CSV file

### CSV layout upload

Learn how to create and upload a CSV file that contains a layout specification.

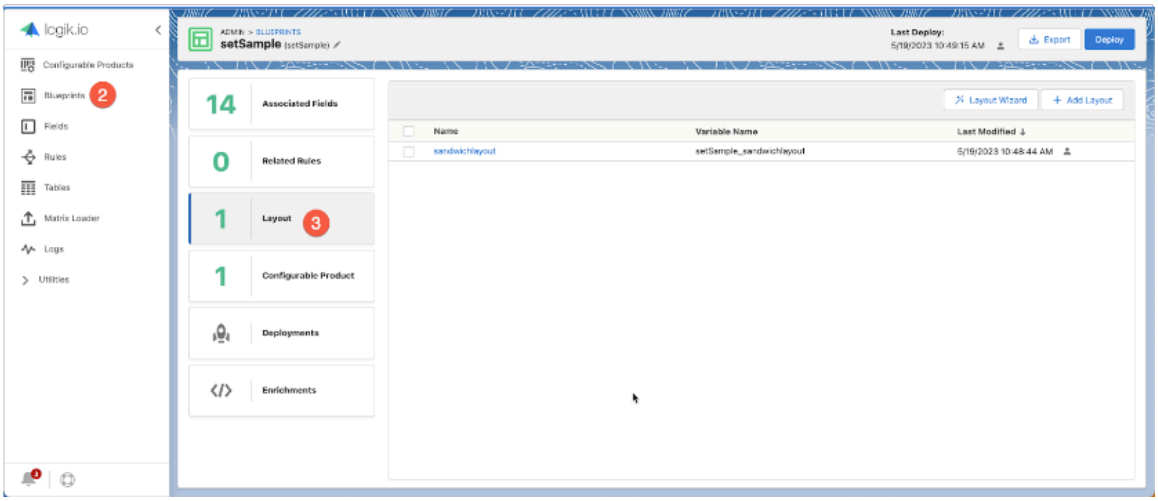
Layouts are defined in a blueprint. When more than one layout is defined for a blueprint, end users rotate through them using the alternate layout button in the upper-right corner of the buyside UI.

Layouts are defined via CSV file that contains all instructions for the layout. For ease of administration, we recommend that admins build their layout in a spreadsheet (Google Sheets, Microsoft Excel, or similar) and export to CSV format.

## Creating and editing a layout

Access a layout from its corresponding blueprint administration page.

1. In the CPQ Admin navigation pane, click **Blueprints** (2).
2. Click the Layouts tab (3).
3. Click the name of the blueprint you want to access.



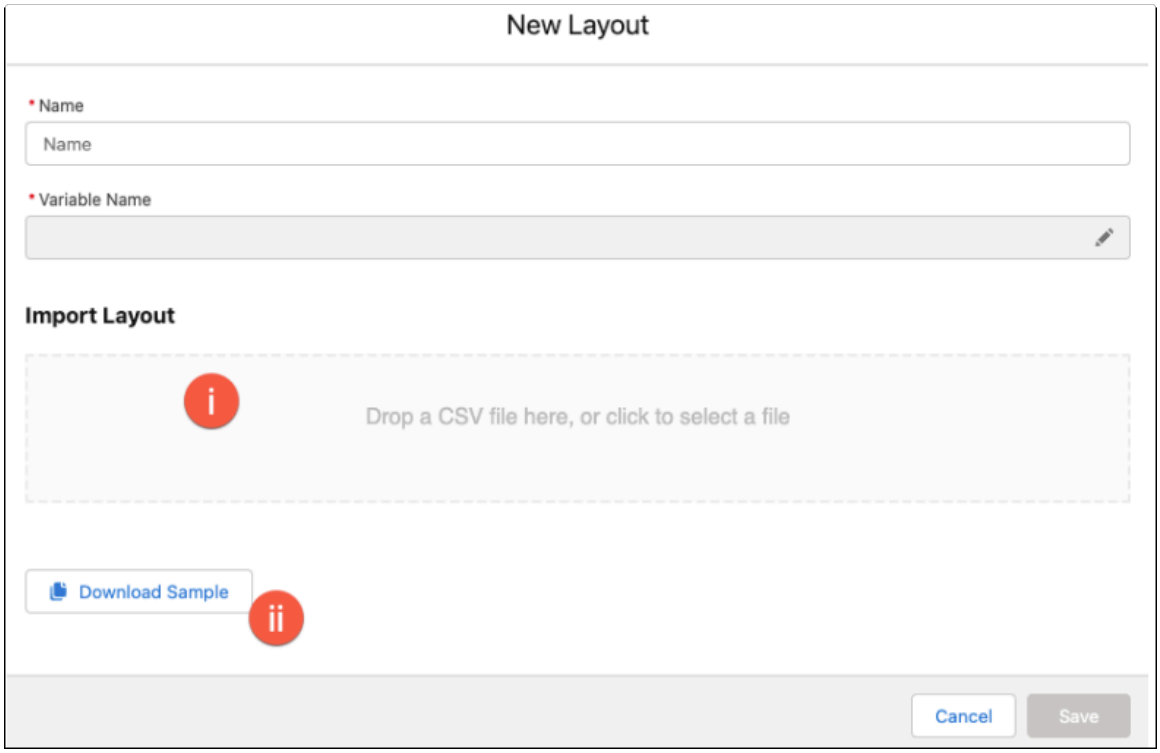

To start a new layout, click **Create Layout**. To edit an existing layout, click the name of a layout in the list.

You can also edit a layout in the Layout Wizard. After you redeploy your blueprint, the new UI changes appear on the buyside.

When you begin a new layout, the New Layout window opens. You can import a CSV file by dropping it in the box or click to select it from your computer. (i) You can also download a sample layout file for your reference. (ii)

Sample layout file

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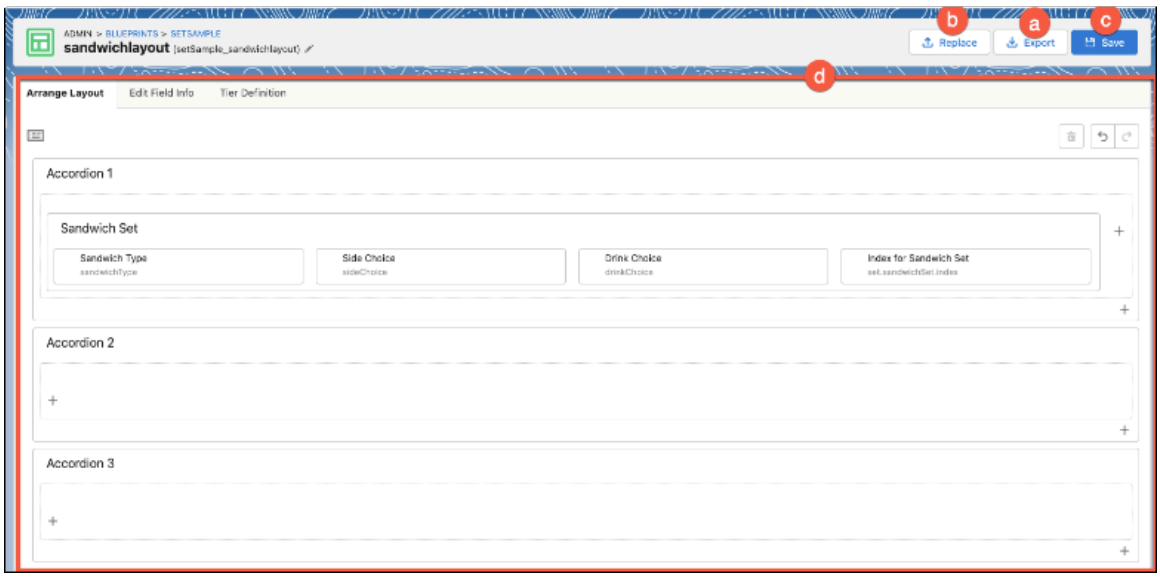



When you edit an existing layout:

Click **Export** to download the current layout file. (a)

Import a layout CSV file by clicking **Replace** (b).

Click **Save** (c) to replace the current layout with the edited layout. If CSV file upload fails, all errors found in the file will be shown to the administrator in an error dialog.




## Using layout CSV file upload

For a thorough introduction to the layout CSV format, view the following 26-minute video:

Layout CSV Overview

For an example of how a layout CSV is used, view the following 4-minute video:

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HiTech Layout Overview

Download the corresponding HiTech Layout CSV file:

HiTech layout CSV file

## Layout CSV format

Column headings are lower case.

The type column defines the layout components. The following table shows valid values for this column.

**Valid values for the type column**

| Type value | Description |
|---|---|
| tierDef | Properties: Pages, PagesWithLabels, PagesWithNavigation, ExpandableSection, Tab, TabWithNavigation, VerticalTab, VerticalTabWithNavigation, Accordion, AccordionWithNavigation |
| tier | |
| columnset | |
| image | |
| productlist | |
| productlistcolumn | |
| field | |

The path column value format gives a visual cue to the placement of the element override source label, and is not currently used by the application. Leave it empty.

`label` defines the label to display to the end-user in the UI for tiers and fields.

`variablename` defines a unique identifier for a tier or field.

- For tiers, administrator should define distinct values.
- For fields, populate the field variable name.

The component display type column defines how a field should be displayed. The following types are available.

**Component display types**

| Field type | Component display types |
|---|---|
| Text | ReadOnlyText<br>Text<br>TextArea<br>Date |

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**Component display types (continued)**

| Field type | Component display types |
|---|---|
| Boolean | Boolean<br>Radio<br>RadioButtons |
| Number | Number<br>Slider<br>NumberWithSubmit<br>ReadOnlyText<br>ReadOnlyCurrency<br>FormattedNumber |
| Picklist (single-select) | Extended picklist<br>Extended picklistDisplayOnly<br>Picklist<br>ReadOnly picklist<br>Radio<br>RadioButtons<br>SingleSelect picklistGrid<br>VerticalRadio<br>VisualPicker |
| Picklist (multi-select) | MultiSelectExtended picklist<br>MultiSelectExtended picklistDisplayOnly<br>MultiSelect picklist<br>MultiSelect picklistGrid<br>MultiSelectVisualPicker<br>Checkbox<br>VerticalCheckbox |

`columnorder` is relevant for components in a column set. Used to provide the sort order of the Fields based on screen resolution in the responsive UI.

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`classname` is used to reference predefined classes available in CPQ. For example, when placing an image, a class can define the flow of fields around that image. Add these class names to the layout CSV file in the className column. As max-height and grid controls interact with the width of the browser, we recommend you experiment with each class distinctly, exploring how the class responds to a variety of browser sizes.

### Effects classes

| Effect | Applies to | Supported classes | Notes and examples |
|---|---|---|---|
| Grid | Fields, Images | topleft1col1row, topleft1col2row ... topleft1col6row | topleft1col1row { grid-column: 1/2; }<br><br>topleft1col2row { grid-column: 1/2; grid-row: 1/3; }<br><br>topleft1col3row { grid-column: 1/2; grid-row: 1/4; }<br><br>topleft1col4row { grid-column: 1/2; grid-row: 1/5; }<br><br>topleft1col5row { grid-column: 1/2; grid-row: 1/6; }<br><br>topleft1col6row { grid-column: 1/2; grid-row: 1/6; } |
| | | topleft2col1row, topleft2col2row ... topleft2col6row | topleft2col1row { grid-column: 1/3; }<br><br>topleft2col2row { grid-column: 1/3; grid-row: 1/3; }<br><br>topleft2col3row { grid-column: 1/3; grid-row: 1/4; }<br><br>topleft2col4row { grid-column: 1/3; grid-row: 1/5; }<br><br>topleft2col5row { grid-column: 1/3; grid-row: 1/6; }<br><br>topleft2col6row { grid-column: 1/3; grid-row: 1/6; } |

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### Effects classes (continued)

| Effect | Applies to | Supported classes | Notes and examples |
|---|---|---|---|
| | | topleft3col1row, topleft3col2row ... topleft3col6row | topleft3col1row { grid-column: 1/4; }<br><br>topleft3col2row { grid-column: 1/4; grid-row: 1/3; }<br><br>topleft3col3row { grid-column: 1/4; grid-row: 1/4; }<br><br>topleft3col4row { grid-column: 1/4; grid-row: 1/5; }<br><br>topleft3col5row { grid-column: 1/4; grid-row: 1/6; }<br><br>topleft3col6row { grid-column: 1/4; grid-row: 1/6; } |
| | | topright1col1row, topright1col2row ... topright1col6row | topright1col1row { grid-column: -2/-1; }<br><br>topright1col2row { grid-column: -2/-1; grid-row: 1/3; }<br><br>topright1col3row { grid-column: -2/-1; grid-row: 1/4; }<br><br>topright1col4row { grid-column: -2/-1; grid-row: 1/5; }<br><br>topright1col5row { grid-column: -2/-1; grid-row: 1/6; }<br><br>topright1col6row { grid-column: -2/-1; grid-row: 1/6; } |
| Height | Fields | mh5, mh10, mh15 ... mh40 | Maximum height from 5 rem to 40 rem, in increments of 5 |
| Width | Fields | w5, w10, w15 ... w40 | Maximum width from 5 rem to 40 rem, in increments of 5 |

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**Effects classes (continued)**

| Effect | Applies to | Supported classes | Notes and examples |
|---|---|---|---|
| Grid column width | Fields | lc-15m-15max, lc-15m-20max, lc-15m-25max, lc-15m-30max | These classes set the width of the columns in the layout grid.<br>• lc: layout column<br>• 15m: width of 15 rem<br>• 15max: maximum width of 15 rem |
| Display vertically, align center | Picklist Fields | vertical-layout, align-center | Default: horizontal (when layout is vertical, default is left) |
| Hide field label, hide field option label | Display components: Extended picklist, MultiSelectExtended picklist | hide-field-label, hide-field-option-label | |

The value column contains a JSON string to represent properties for element (Field or productlistcolumn) referenced on that row.

`placeholder` allows the Admin to define placeholder text that will display in a text field until the end-user inputs a value.

## Components with images

For picklist display components that include images, when options are disabled, the image is faded. Admins can override this behavior and force the image to look normal by applying the `override-disabled` class to the classname field in the layout.

**Note:** An earlier means of defining and editing layouts using JSON is available. When leveraging JSON, the files must be loaded into the application via REST API. Once a layout has been edited via JSON, CSV manipulation is no longer available. If a layout has been edited via JSON, the Current Layout button is disabled.

### Related topics

Layout Wizard

Layout editor

Configure the Matrix Loader

### The art of design: show-stopping layout ideas

Discover how thoughtful layout design can transform complex configurations into clear, intuitive, and visually engaging user experiences. Learn best-practice patterns, spacing strategies, and industry-inspired structures to create polished, high-impact layouts for your product configurations.

Designing visually appealing layouts for your configurations can significantly enhance the overall experience for users who interact with your data. Implementing consistent formatting, using white space strategically, and thoughtfully considering other design elements can transform your layout into a well-structured and engaging resource. As your data continues to play a crucial role

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in decision-making, the importance of presenting it in an intuitive and appealing manner cannot be underestimated.

Here are some real world examples (with their associated CSV files) of the layouts we've used in our most popular demo videos and builds- inspired by our customers. If you haven't already, familiarize yourself with the basics of layout, with the use of the Layout Wizard and the Layout editor, and take a deeper look at tiers and tier definitions.

### Manufacturing- Industrial Generator Layout

Industrial Generator Demo: Configure Complex Products Based on Customer Needs

Download the Layout CSV file

### Technology- High Tech Configuration Layout

High Tech Configuration Demo

Download the Layout CSV file

### Headless- B2B e-commerce w/3D Visualization

CPQ for eCommerce

Download the Layout CSV file

#### Product lists in layouts

Define and customize product lists in CPQ layouts to display data from bills of materials (BOMs) and product details. Configure list placement, columns, and display settings in the layout CSV file or the layout editor to present clear, structured product and pricing information to end users.

In CPQ, layout definition is accomplished via CSV file. Product lists are components that can show products and related information in the bill of materials (BOM). There are 2 types of columns in the layout to control the product list component: *`productlist`* and *`productlistcolumns`*. Multiple product lists can be included in a layout to display products of different BOM types.

### Defining a product list

In the layout CSV file, define your product list row with the following column guidelines:

- Type (column A in the layout CSV file) for the product list is defined as *`productlist`*
- Path (column B in the layout CSV file) is not required for the product list. When left blank, this places the product list in the standard position. To place the product list in a tier, specify the path relative to the tier. For example, `/layout/tiers/myTier/myProductList`

A product list has many properties that can be controlled by setting the value field in JSON format.

Example:

```
{
  "location": "right",
  "type": "sales",
  "totalLocation": "bottom",
  "hierarchyColumn": "displayName",
  "displayZeroPriceAs": "On Request",
```

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```
  "displayNullPriceAs": ""
}
```

### Available options

- `location` indicates where you want the product list component to display in the layout. The value can be *`right`* (default), *`left`*, *`bottom`*, or *`modal`*.
- `type` determines which products are included in this product list, based on the *`bomType`* field in the product. Values can be *`sales`*, *`manufacturing`*, or any custom type specified in the products by the admin. Multiple BOM types can be included. For example, `type: sales, customBOMTypeA, customBOMTypeB`, `type: all`
- `totalLocation` determines where the cart total is shown. Valid values are *`bottom`*, *`top`*, *`both`*, and *`none`*.
- `hierarchyColumn` determines which column shows an expand arrow or collapse arrow when a product has child products.
- `displayZeroPriceAs` and `displayNullPriceAs` determine how to display zero and null prices in the product list. The display value can be any string, such as "On Request". If 0 (zero) is provided, a zero price is shown with locale and symbol or code (for example, USD 0.00). Blank is the default, and will be the behavior if not specified.

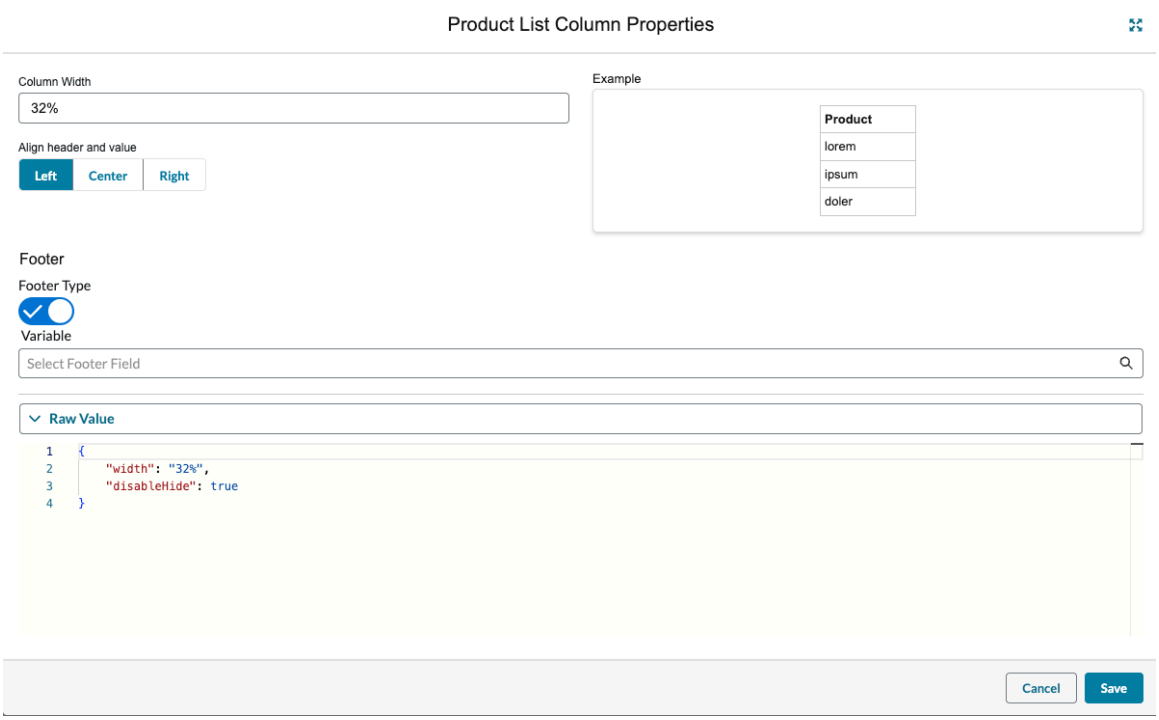
### Product list columns

Product list columns are children of the product list and define what columns of data are displayed, with the data coming from the products that are displayed in the BOM. For each column of product data you want to display, create a product list column.

In the layout CSV file, define your product list column rows with the following column guidelines:

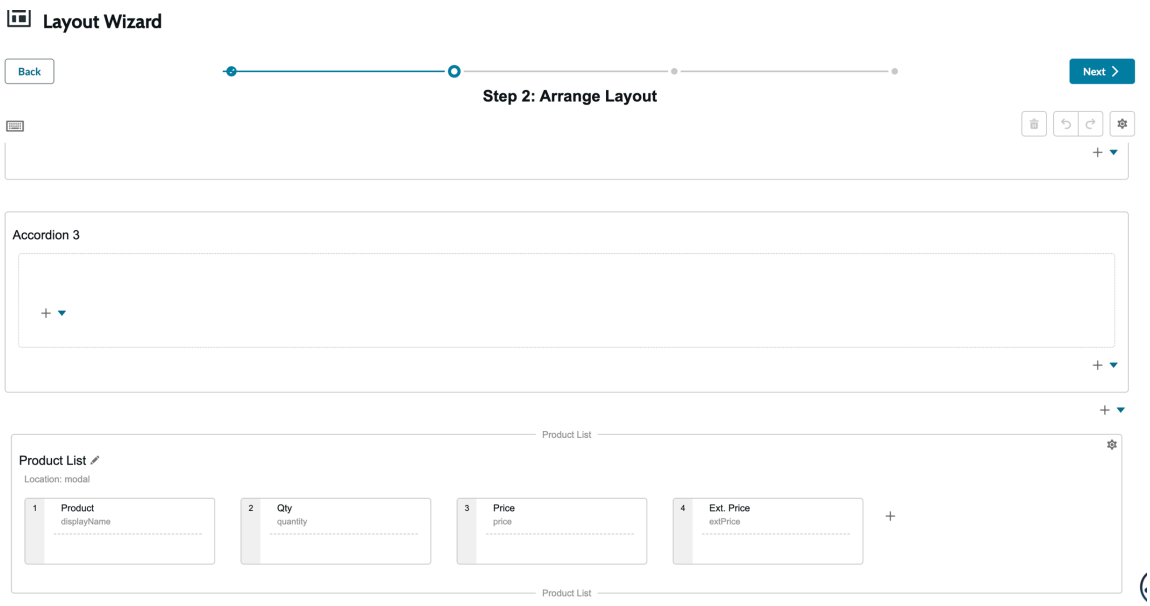
- *`type`* (column A in the layout CSV file) for the product list column rows are defined as *`productlistcolumn`*.
- *`path`* (column B in the layout CSV file) for product list columns are defined relative to the product list. For example, /productList/columns.
- *`variablename`* (column E in the layout CSV file) determines what data to display based on the matching field from the product. Extended product list values can be displayed by putting `extended.columnName` in the *`variablename`* column. For example, `extended.taxExempt` displays the value of `ProductList.extended.taxExempt`.
- *`classname`* (column H in the layout CSV file) can be set to `allow-wrap` to allow content in that column in the layout to wrap. *`value`* (column I in the layout CSV file) defines the visual styling of the column in the layout.
  - The *`value`* column can specify a width. For example: `{"width":"10%"}`.
  - If specifying a width, using a percentage is recommended for a modal or bottom-docked product list.
  - The use of fixed units such as *`px`* (pixels) is recommended for left-docked or right-docked product lists, since the width of the product list is fixed. Using *`ch`* is not recommended.

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## Layout editor

The product list and its properties can be edited by using the layout editor in the CPQ UI. The product list layout element is at the bottom of the page:

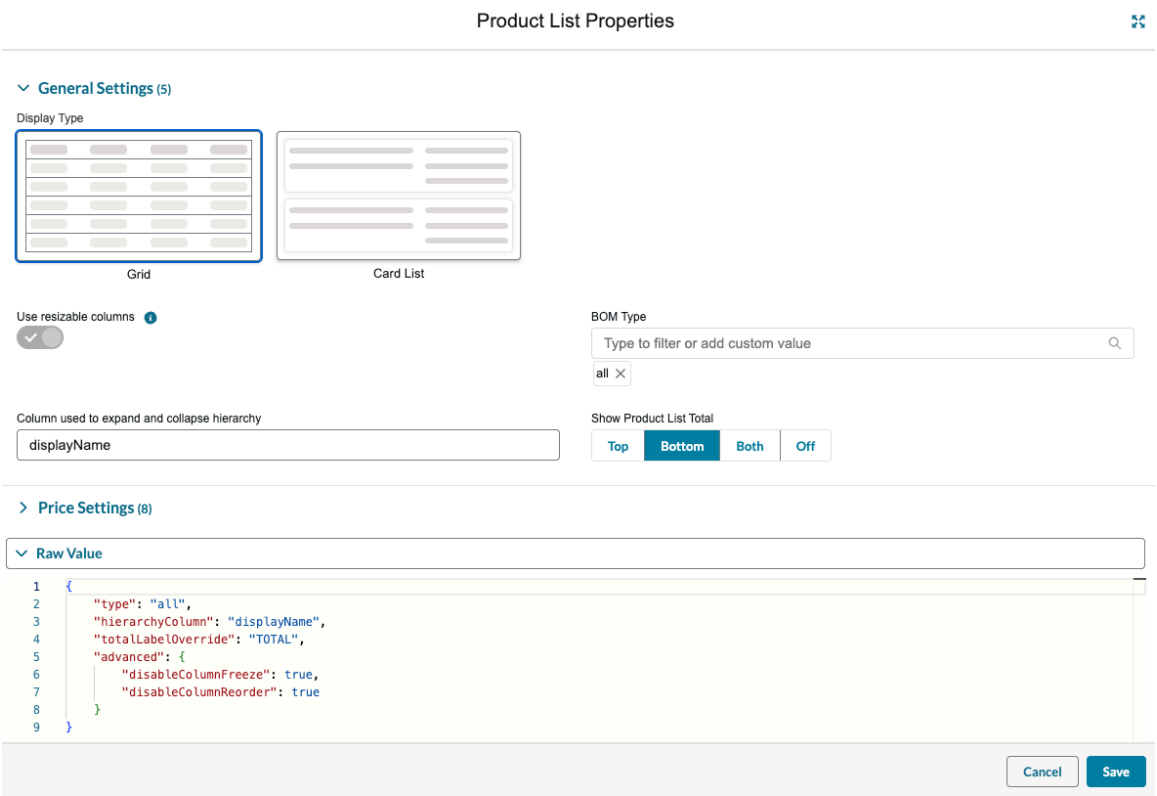



You can edit **Product List** element by selecting the gear that appears in the top right of the product list layout element. The product list has a settings screen that contains all the properties referenced earlier.

For advanced BOM, enable **Use resizable columns** option to allow re-sizable columns. Control column management features in the product list using these properties:

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- `disableColumnFreeze`: Disable column freeze option
- `disableColumnReorder`: Disable column reorder option on product list or an individual column
- `disableHide`: Disable column hide option for an individual column




For more information, see Displaying multiple product lists in layouts.

### Number field properties in layouts

Control how number fields behave and display in CPQ layouts using the step and precision properties. Define valid input intervals, enforce decimal formatting, and ensure consistent numeric entry for use cases like quantities and currency values.

When you define the input parameters of a number field in the layout editor, you can set either the step property or the precision property.

These properties can conflict and should not be combined.

## The step property

The step property restricts entered values to multiples of the step (or zero if undefined). The step must be a whole positive integer. The UI truncates (not rounds) an entered value if it contains decimal places beyond that of the step value. A common use case for the step property is to limit inputs to whole numbers.

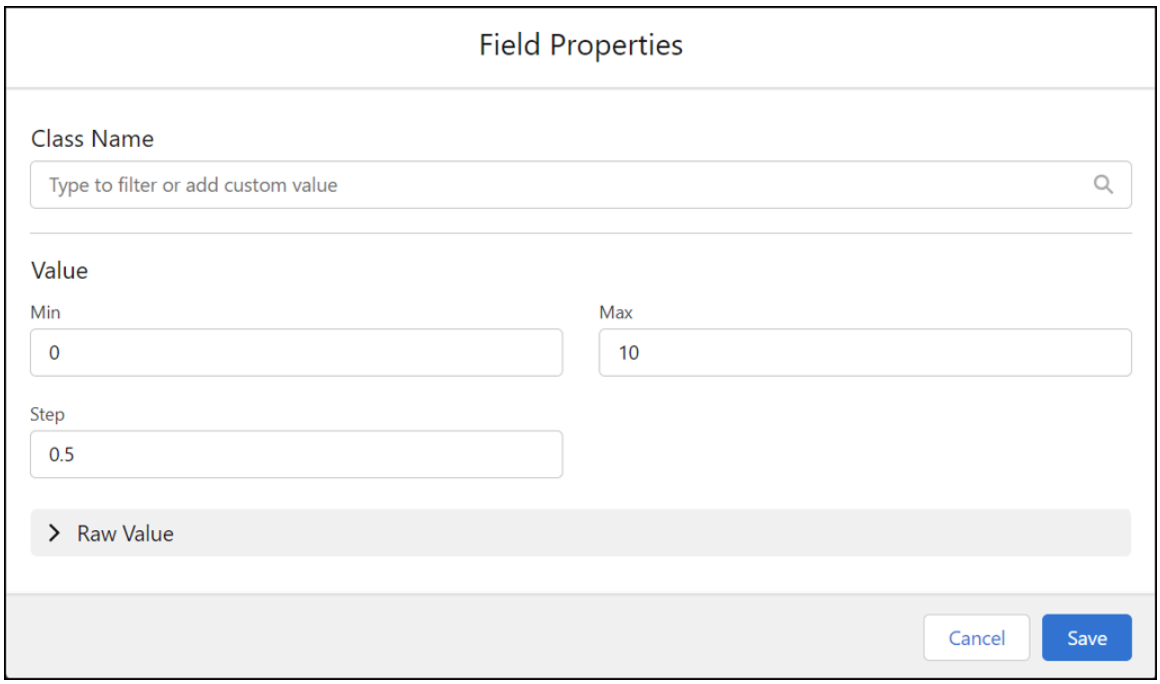
If the number entered is not a multiple of the step, the setting is not logged immediately, in case the user is entering a value slowly. The value will be reverted to its original value when the user clicks out of the field.

If the number entered is a multiple of the step, an input is logged after a 1-second delay.

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Using a rule to set a value that is not a multiple of the step is not recommended. If the user clicks the up or down arrow in the input, the value is changed according to the step value. This may result in an invalid user-entered value.

The following Field Properties dialog illustrates one use of the step property.



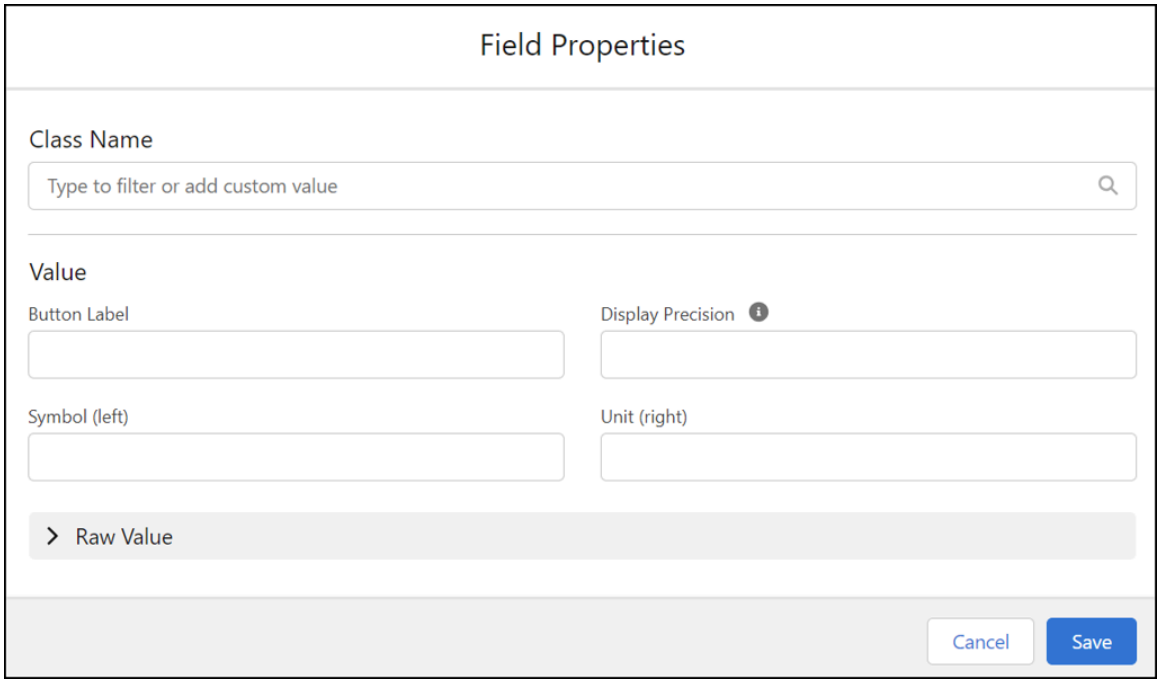

## The precision property

The precision property displays the number of decimal places provided, regardless of what is entered. When defined, the field will round (not truncate) if decimals are entered beyond the set number of decimal places. The complete number is saved on the server. A common use case for the precision property is to display currency in dollars and cents, such as 19.99 or 10.00.

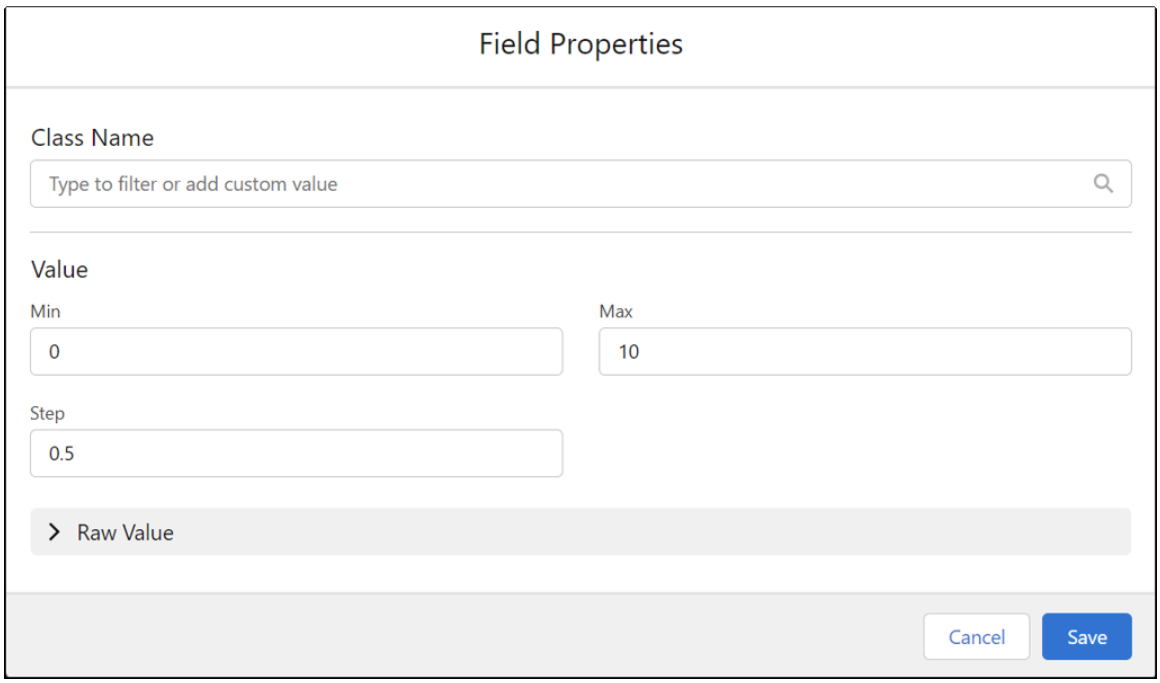
The precision property defaults to 0 if you do not set it.

The following Field Properties dialog illustrates one use of the precision property.

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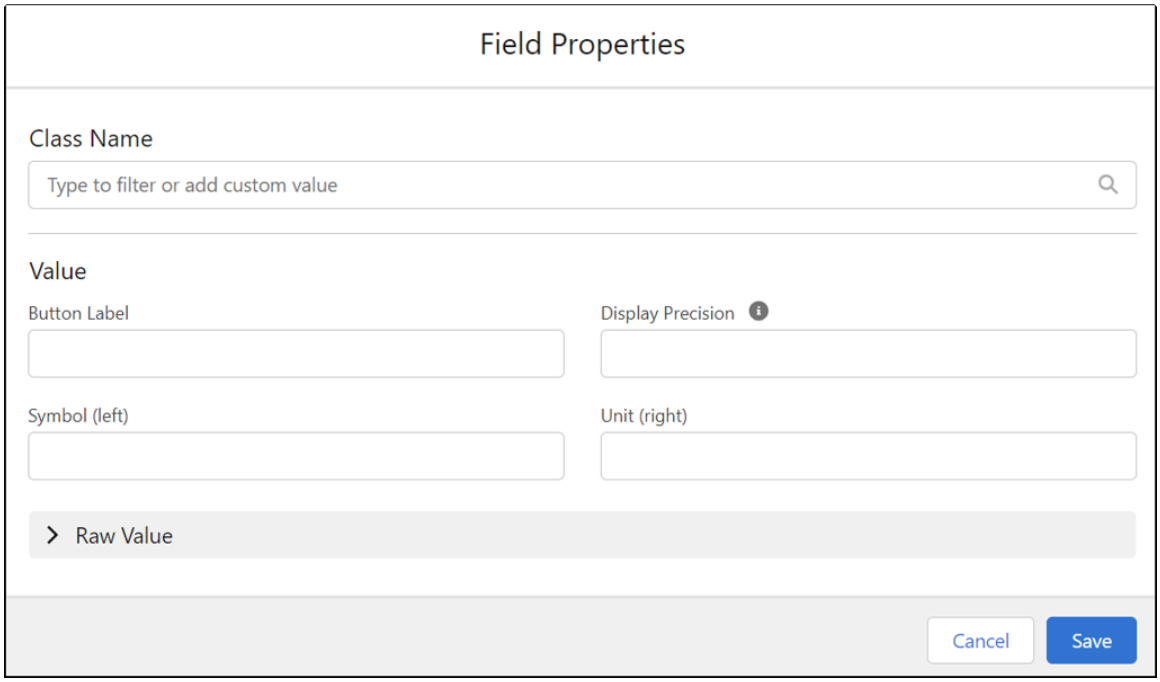

## The display-type-specific constraints slider




The step property is required for this component. Minimum and maximum values are included, but precision is not.

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### NumberWithSubmit




The precision property is included and defaults to 0. The step property is not included.

### Multi-tier structure (nested tiers)

Create complex, multi-tier layouts in CPQ by nesting tiers in other tiers using a layout CSV file. Define tier display types—such as tabs, expandable sections, and basic containers—to organize fields and achieve flexible, structured, and visually clear configuration interfaces.

In CPQ, there are two basic container types: tiers and column sets. This article focuses on the top-level container (tiers) and how to achieve more complex layouts by nesting different types of tiers.

**Note:** As of May 23, 2023, nesting tiers is not supported in the Layout Wizard or in the layout editor. However, you can change the display type of existing tiers, including nested tiers.

The basic CSV format for a single-tier structure looks like this:

| type | path | override source label? (Y/N) | label | variablename | Component display type |
|---|---|---|---|---|---|
| tierdef | /layout/tiers | | | | Tab |
| tier | /layout/tiers | | Tab 1 | tab1 | |
| columnset | /layout/tiers/tab1 | | | col1 | |
| field | /layout/tiers/tab1/col1 | | Sandwich Type | sandwichType | Picklist |
| tier | /layout/tiers | | Tab 2 | tab2 | |
| columnset | /layout/tiers/tab2 | | | col2 | |
| field | /layout/tiers/tab2/col2 | | Side Choice | sideChoice | Picklist |
| tier | /layout/tiers | | Tab 3 | tab3 | |
| columnset | /layout/tiers/tab3 | | | col3 | |
| field | /layout/tiers/tab3/col3 | | Toppings | toppings | MultiSelectPicklist |

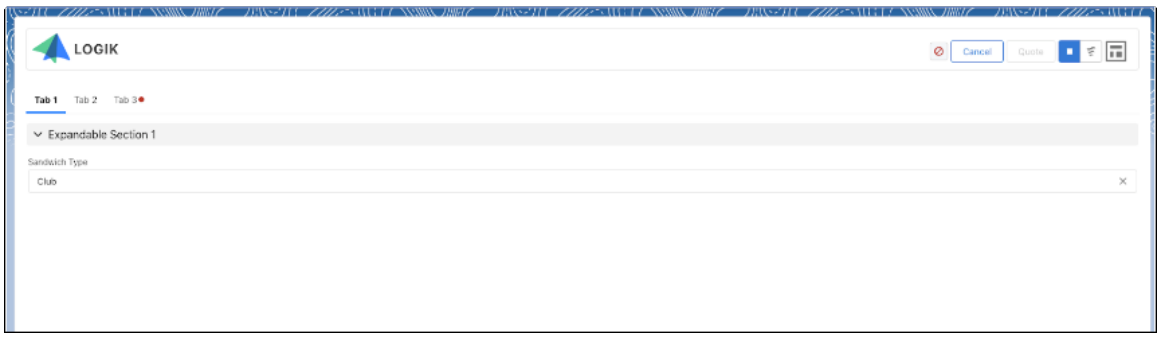
The tier definition defines the visual display of a level of tier, not just one particular tier. So in this case, all three tiers (tab1, tab2, and tab3) are defined as the Tab display type. This creates a simple structure where each tier in the CSV file appears as a tab.

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However, different types of tier display types may sometimes be nested in another tier. The simplest example is a two-tier structure. Let's build off of our first example and nest some expandable sections in one of our tabs.

| type | path | override source label? (Y/N) | label | variablename | Component display type |
|---|---|---|---|---|---|
| tierdef | /layout/tiers | | | | Tab |
| tierdef | /layout/tiers/tiers | | | | ExpandableSection |
| tier | /layout/tiers | | Tab 1 | tab1 | |
| tier | /layout/tiers/tab1 | | Expandable Section 1 | exsect1 | |
| columnset | /layout/tiers/tab1/exsect1 | | | col1 | |
| field | /layout/tiers/tab1/exsect1/col1 | | Sandwich Type | sandwichType | Picklist |
| tier | /layout/tiers | | Tab 2 | tab2 | |
| columnset | /layout/tiers/tab2 | | | col2 | |
| field | /layout/tiers/tab2/col2 | | Side Choice | sideChoice | Picklist |
| tier | /layout/tiers | | Tab 3 | tab3 | |
| columnset | /layout/tiers/tab3 | | | col3 | |
| field | /layout/tiers/tab3/col3 | | Toppings | toppings | MultiSelectPicklist |

Notice how the nested tier is defined. The tier definition row path is "layout/tiers/tiers", indicating that a tier that is below another tier in the path should be defined as an expandable section. You can then see that on rows 3 and 4, the tier "exsect1" is placed below the tier "tab1" in the path. This displays for the end-user like so:




You can extrapolate this pattern to create deeper tier structures, declaring more and more nested definitions. However, note that you cannot have multiple tier definitions at the same level. For example, the tiers in the first image shown below are valid, but the tiers in the second image are not valid, because the component display type for /layout/tiers/tiers is both ExpandableSection and VerticalTab.

Valid tiers:

| type | path | override source label? (Y/N) | label | variablename | Component display type |
|---|---|---|---|---|---|
| tierdef | /layout/tiers | | | | Tab |
| tierdef | /layout/tiers/tiers | | | | ExpandableSection |
| tierdef | /layout/tiers/tiers/tiers | | | | VerticalTab |

Invalid tiers:

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| type | path | override source label? (Y/N) | label | variablename | Component display type |
|---|---|---|---|---|---|
| tierdef | /layout/tiers | | | | Tab |
| tierdef | /layout/tiers/tiers | | | | ExpandableSection |
| tierdef | /layout/tiers/tiers | | | | VerticalTab |

## Displaying fields outside the bottom tier

A common use case of nested tiers may be to have a bottom layer nested inside a top layer tier, with some general fields displayed outside the bottom tier. This can be achieved by using an intermediary tier of the BasicContainer display type. This structure might look like this for the end user:




The layout CSV file is structured like so:

| type | path | override source label? (Y/N) | label | variablename | Component display type |
|---|---|---|---|---|---|
| **tierdef** | /layout/tiers | | | | Tab |
| **tierdef** | /layout/tiers/tiers | | | | BasicContainer |
| **tierdef** | /layout/tiers/tiers/tiers | | | | ExpandableSection |
| **tier** | /layout/tiers | | Tab 1 | tab1 | |
| **tier** | /layout/tiers/tab1 | | Basic Container 1 | basic1 | |
| **columnset** | /layout/tiers/tab1/basic1 | | | col1 | |
| **field** | /layout/tiers/tab1/exsect1/col1 | | Sandwich Type | sandwichType | Picklist |
| **tier** | /layout/tiers/tab1 | | Basic Container 2 | basic2 | |
| **tier** | /layout/tiers/tab1/basic2 | | Expandable Section 1 | exsect1 | |
| **columnset** | /layout/tiers/tab1/basic2/exsect1 | | | col2 | |
| **field** | /layout/tiers/tab1/basic2/exsect1/col2 | | Side Choice | sideChoice | Picklist |
| **field** | /layout/tiers/tab1/basic2/exsect1/col2 | | Toppings | toppings | MultiSelectPicklist |

### Identify endless loops in blueprint rules

Use the Rule Cycle Report to identify endless loops that may be hard to find during ordinary operation.

#### Before you begin

Role required: Admin

#### Procedure

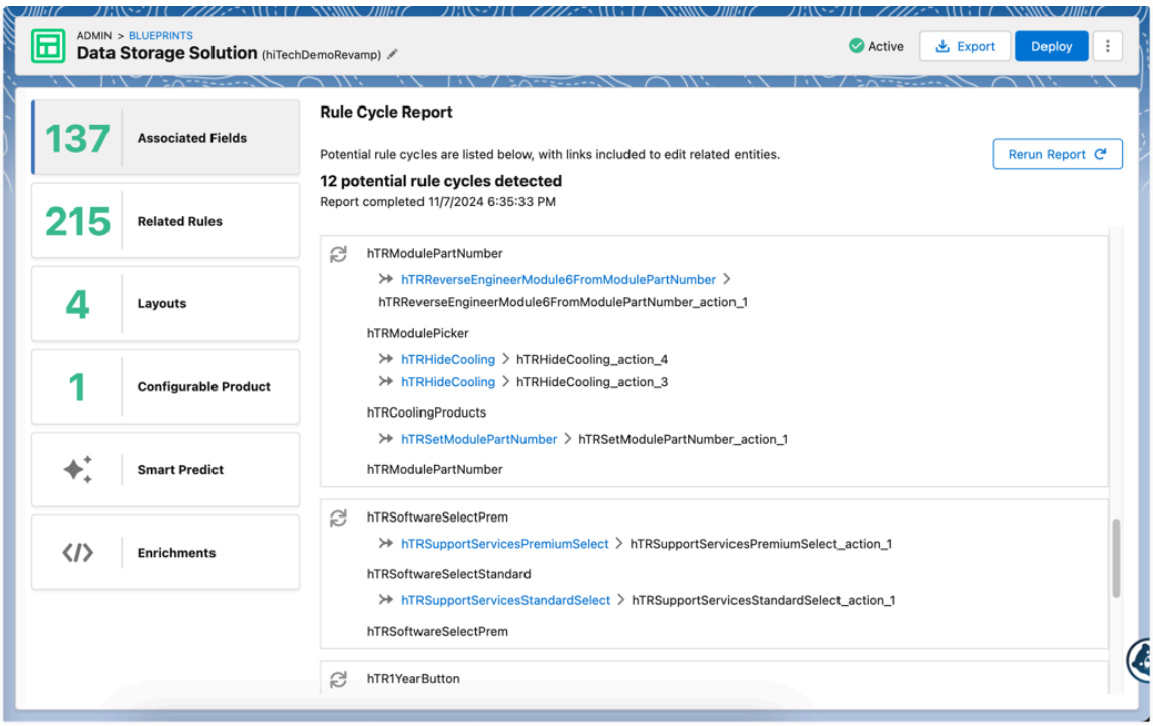
1. In CPQ Admin, select **Configuration Blueprints**, and then open a blueprint.
2. Select the **three vertical dots** icon next to **Deploy**, and then select **Rule Cycle Report**.
3. Select **Run Report**.
4. From a top-level Transaction Manager element page such as Stages, Associated Fields, or Related Rules, select the **Settings** icon in the sub-header, and then select **Rule Cycle Report**.

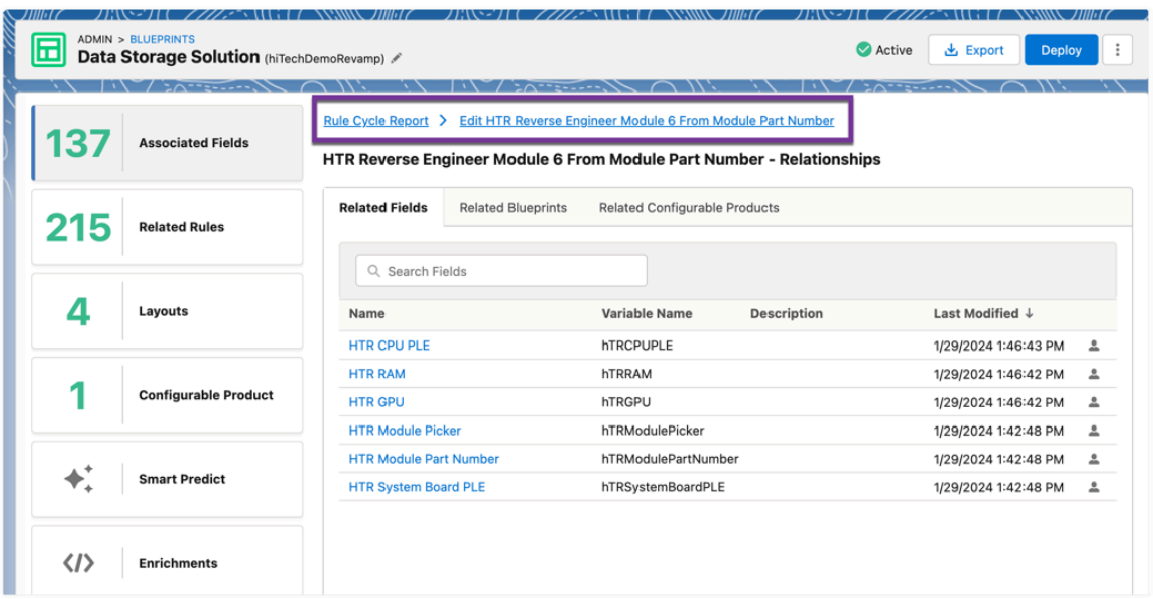
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### Result

The report provides a list of all potential circular references in the blueprint. For each record, the involved rules and fields are noted. Links help the administrator quickly review rule definitions. Often, an admin needs to examine related fields. When investigating in this way, a breadcrumb trail is provided to help the administrator navigate amongst the related components and back to the Rule Cycle Report.

The most recent Rule Cycle Report remains visible to all administrators until the report is run again by selecting **Rerun Report**.




## Set up a runtime client

Configure a runtime client. Doing so creates a token that you can use to authenticate runtime calls. This can be useful when CPQ is embedded within a VisualForce page.

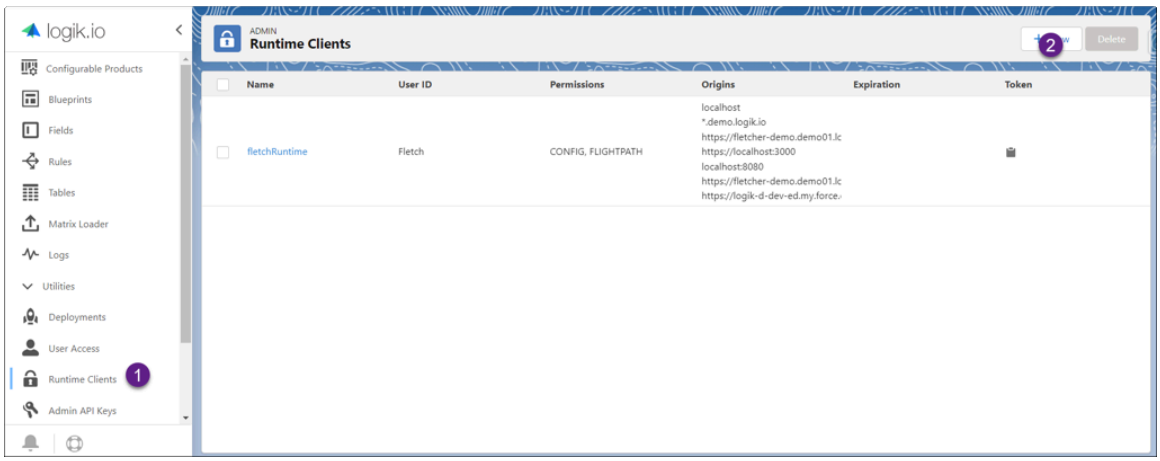
Runtime clients can be set up that provide a token for authentication of runtime calls when launching CPQ outside of the regular workflow. For example, CPQ may be started through a

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quote in Salesforce when embedding CPQ in a Visualforce page, Lightning web component, or HTML page.

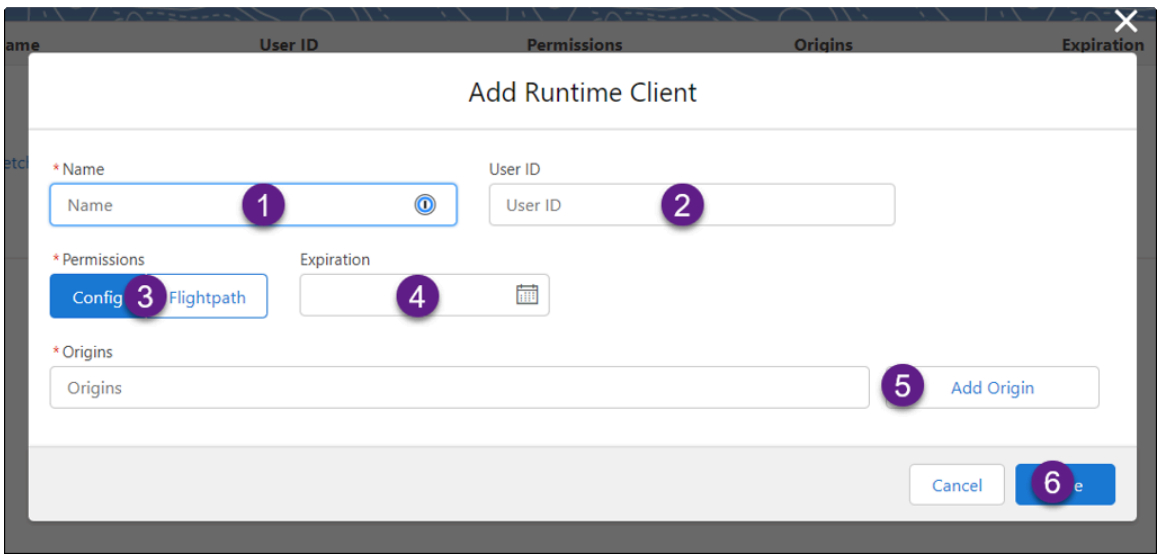
**Note:** This authentication can be used only by end users launching a CPQ configuration in runtime. To authenticate admin calls, users should leverage admin API keys. For a more complete discussion of admin API keys, see Intro to admin API keys.

## Create a runtime client




1. Navigate to the Utilities tab of the left hand navigation pane, and click **Runtime Clients**.
2. Click **New** in the upper right corner.

## Configure the client




1. Create a name for your runtime client.
2. Setting the User ID will attach it to any calls authenticated by this runtime client. This may be useful for tracking the origin of the calls.
3. For Permissions, choose either Config or Config and Flightpath. Config will allow for launching configurations. Flightpath will allow for accessing Flightpath data of the configuration for use with debugging.
4. Optionally, set an expiration date for the runtime client. This expiration date can be changed to extend or shorten the time frame during which this token can be used.

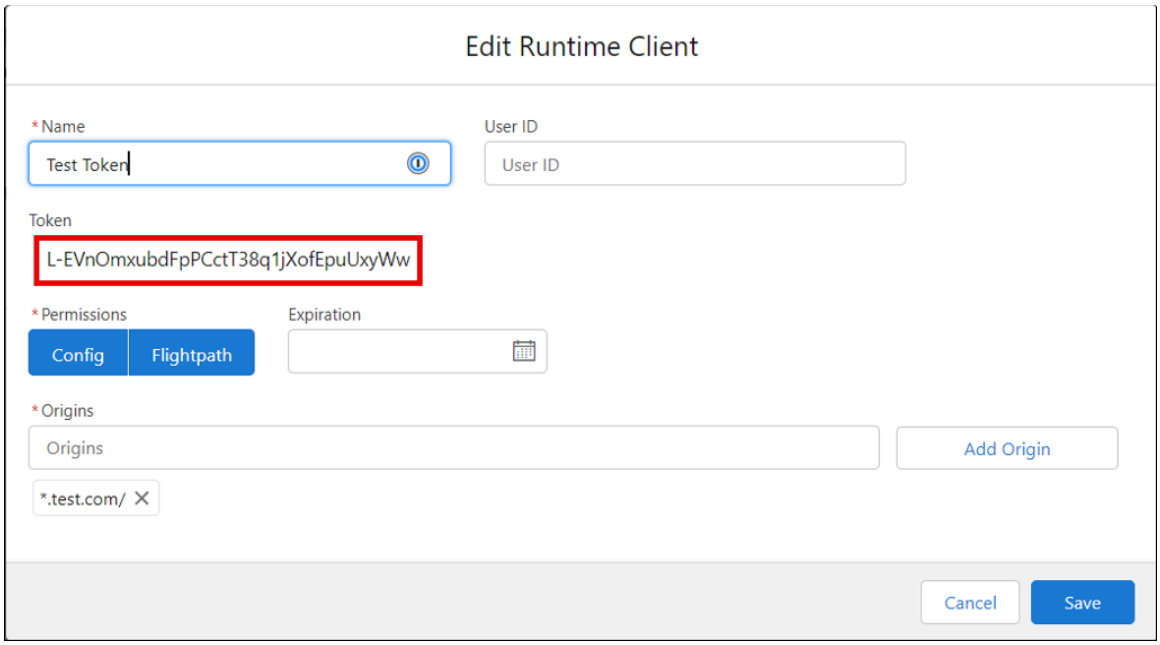
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5. Users must specify the origins of calls that aree made using this token as authentication. In the origins box, add the desired URL, such as `https://<yourCPQUrlName>.<sector>.logik.io` or `*.salesforce.com`. click `Add Origin` to add the origin, and continue adding more.

   **Note:** Make sure that your origin does not have a trailing slash. For example, use `*.salesforce.com` and not `*.salesforce.com/`.

6. When all the origins have been added, click `Save`.

When the runtime client has been created, click into it and copy the token:




**Related topics**

Use case: Embed CPQ UI in a Salesforce VisualForce page

### Customizing the CPQ UI header

Customize the CPQ UI header to reflect your brand with logos, text, and background styles. Configure header elements and buttons—such as Cancel, Reset, Return, and Switch Layout—through the layout CSV file to create a branded, user-friendly configuration experience.



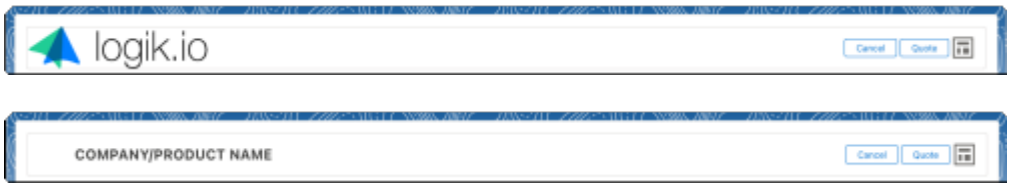

The CPQ header lets you brand the configuration page with a logo. Essential buttons and actions are also customizable. CSV layout upload supports these features.

## Branding options

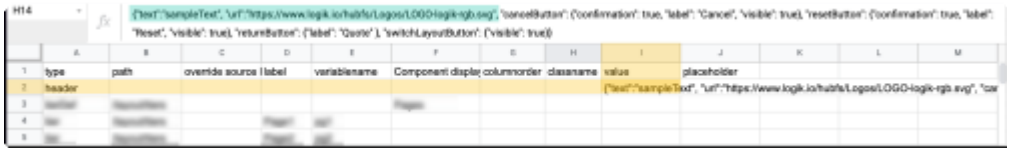
The header accommodates text, a logo, or both. If using text, the logo must be relatively narrow, so it fits without overlap.

If you want to remove or replace the blue Salesforce-like background frame, use the backgroundStyle control.

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All header elements are defined in a header row component, in the values column. Logically, the header component is the first informational row in your CSV file, with the header values definition in cell I2. The following screenshot shows a spreadsheet that is not yet exported to a file.




The header value contains instructions for several header elements, so here's a breakdown of common content in that cell:

```
{
"text":"Company/Product Name",
"url":"<image url>",
"backgroundStyle": "url(http://www.some.url/bg.png) transparent
 no-repeat top center / cover",
"cancelButton": {
 "confirmation": true,
 "label": "Cancel",
 "visible": true
 },
"resetButton": {
 "confirmation": true,
 "label": "Reset",
 "visible": true
 },
"returnButton": {
 "label": "Quote"
 },
"switchLayoutButton": {
 "visible": true
 }
}
```

As a general guideline, we recommend that administrators include both text and URL keys in the header component row. If the Admin does not intend to leverage either text or URL, they should include the key and an empty value. Examples:

`"text": ""`

The key: value pair above indicates that no text is displayed, where as the pair below leaves the image empty.

`"url": ""`

Customize the background style (the frame surrounding the configuration pane) with the following:

`"backgroundStyle": "url(http://www.some.url/bg.png) transparent no-repeat top center / cover"`

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Here, `http://www.some.url/bg.png` is the location of a publicly available image. The remaining style instructions are recommended:

Adjust the header definition in your layout spreadsheet. Export to a CSV file and upload to the appropriate blueprint. Navigation:

CPQ Admin -> Blueprints -> [click appropriate blueprint] -> Layouts tab -> [click appropriate layout name] - Import Layout.

## Button configurations

The CPQ UI offers four buttons: Cancel, Reset, Return, and Switch Layout. Return, commonly labeled Quote, is required. All others are optional.

In the following table, bracketed properties are the default values.

### Button properties

| Button | Visible | Confirmation | Default Label | Behavior |
|---|---|---|---|---|
| Cancel | [true], false | [true], false | Cancel | When configuring a solution for the first time, Cancel takes the user back to the Product Selection page in Salesforce (SFDC).<br><br>When reconfiguring, Cancel returns the user to the SFDC Quote Line Editor (QLE) without saving changes. |
| Reset | true, [false] | [true], false | Reset | Resets all fields to their initial states so that the user can start over without moving from the page. |
| Return | N/A | N/A | Quote | Pushes the bill-of-material (BOM) into SFDC and returns to the user to the QLE. |
| Switch Layout | [true], false | N/A | N/A | If multiple layouts are defined for this Blueprint, |

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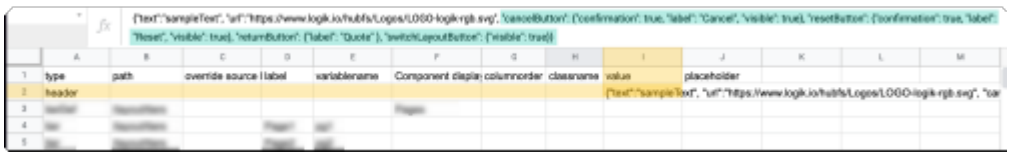
**Button properties (continued)**

| Button | Visible | Confirmation | Default Label | Behavior |
|---|---|---|---|---|
| | | | | displays the next layout. |

By default, Cancel, Return/Quote, and Switch Layout buttons display. Cancel and Reset allow the administrator to set a confirmation parameter. When true, a popup requires end users to confirm their intentions, as follows.




All header elements are defined in a header row component, in the values column. Here is a screenshot of the spreadsheet before it is exported in CSV format:



The header value contains instructions for several elements. In the graphic below, the parameters relevant to each button definition are separated by green dashed lines:




To copy this text to your local clipboard for editing, use the code block in the Branding Options section above.

Adjust the header definition in your layout spreadsheet. Export to a CSV file and upload to the appropriate blueprint. Navigation:

CPQ Admin -> Blueprints -> [click appropriate blueprint] -> Layouts tab -> [click appropriate layout name] -> Import Layout.

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## Currency display

You also use the values column of the header row component of the CSV layout upload file to configure how currency displays in the Shopping Cart. For more information, see Customizing the currency display in the shopping cart.

### Optimizing rules engine performance

You can help make your pages responsive by following a few guidelines.




In any online shopping or configuration experience, end-user engagement requires a responsive web page. CPQ achieves excellent performance as a result of its proprietary rules engine. CPQ also provides the following benefits:

- The end user receives instantaneous feedback after every input change.
- End users do not need to click an Update button for the configurator to evaluate their input. Administrators do not need to distinguish fields that automatically run from fields that must be updated through user interaction.
- Because the rules engine evaluates the optimal rule order, rules do not have to manually ordered by the admin.

Although the CPQ rules engine is engineered to process rules quickly, not all rules perform the same. Therefore, the administrator plays an essential role in optimizing the performance of the CPQ UI. Use the following rules of thumb when you build rules:

- Simple rules are best. The CPQ rules engine can quickly run tens of thousands of rules whose conditions have defined logical expressions and whose actions are defined without scripting.

  Reliance on unscripted rules allows the rules engine to determine the subset of rules that must be run in specific scenarios. Simple rules allow the rules engine to predictively optimize.

- Avoid scripting, which degrades end-user performance.

  Configuration maintenance and extension engage numerous stakeholders, many of whom prioritize task completion over end-user performance. Experience with thousands of CPQ implementations shows that administrators often don't script with performance in mind. Even implementers who script optimally cannot prevent poor decisions by future administrators.

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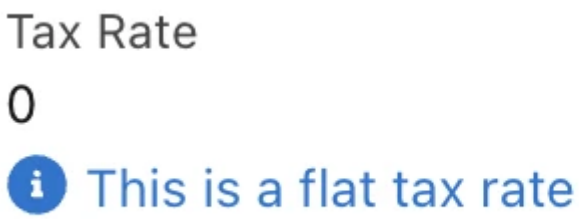
- Table lookups adversely impact end-user performance.
  - Table lookups feature inherent costs of query, matching against unbounded volumes of tabular data, and scripted post-processing of the retrieved data.
  - In contrast, some CPQ vendors simplify administration by leveraging tabular data and scripts that query and process the tables, CPQ converts these tables to many simple rules. This conversion short-cuts the queries and post-processing, eliminates inefficient coding practices, and allows the rules engine to intelligently determine when a rule should run, and the specific tasks it must accomplish.

### Change how messages are displayed to the end user

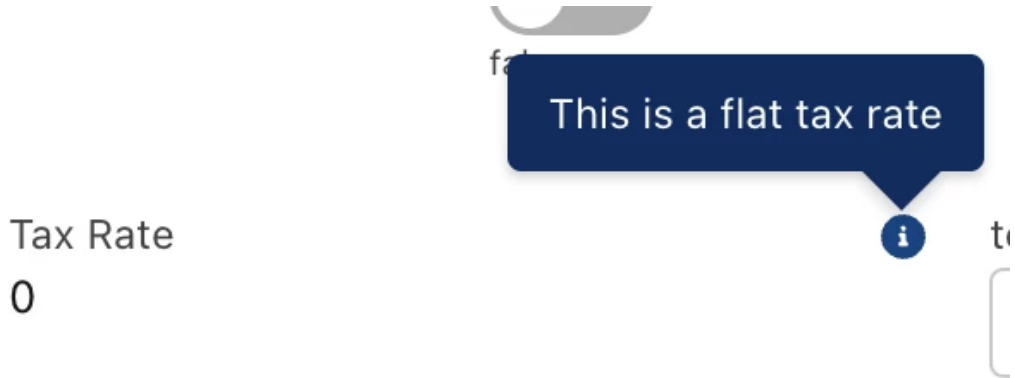
Control how messages appear in CPQ.

You can show messages to the end user in different formats.

By default, the messages shown for fields on a layout when messaging rules are fired are shown below the field.




However, you can override this behavior, such as to show an icon which can be hovered over to display the message ("tooltip").




In the layout editor, add `{“messageDisplayType”: “<type>”}` in the field properties (the gear icon) of the element where you want to add the custom message display type. Add `{"messageDisplayType": "<type>"}` to the raw value.

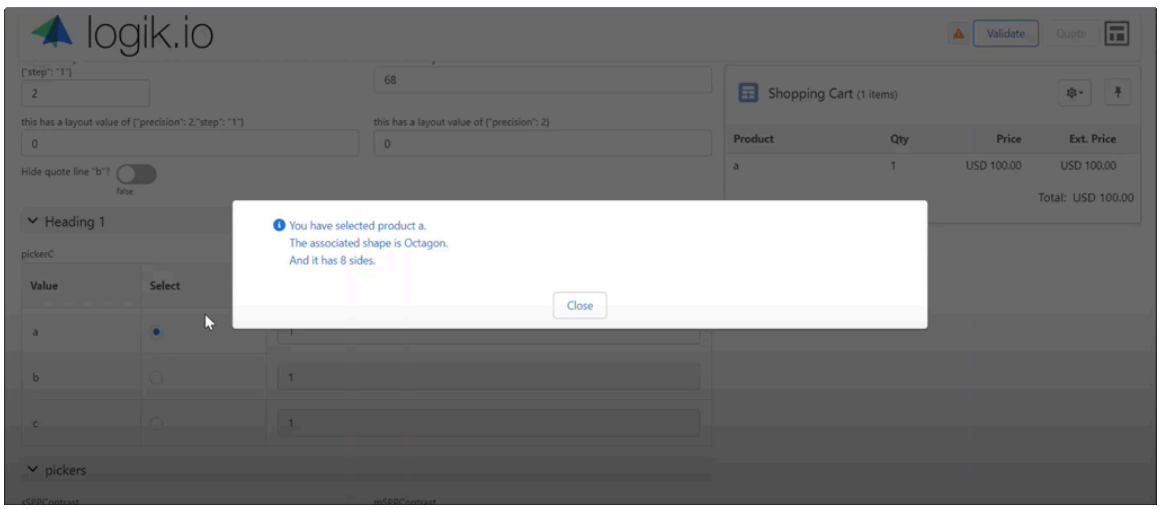
Accepted type values are `above`, `below`, `popup`, and `tooltip`. The following table provides more information.

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### Message displays in layouts

| Message display type | Supported on fields | Supported on product picker grid | Supported on fields in set grid | Supported on layout components | Description |
|---|---|---|---|---|---|
| below | Yes (Default type) | Yes (Default type) | Messages are displayed in a summary container above or below the grid, or as a hover tooltip. You can include an optional indicator on the cell. For more information, see Using sets in layouts | Yes | Messages are displayed below the target. |
| above | No | No | | Yes (Default type) | Messages are displayed above the target. |
| tooltip | Yes | Yes | | Yes | Messages are displayed in a tooltip, visible when hovering the corresponding icon. |
| popup | Yes | Yes | No | Yes | Messages are displayed within a popup. Once dismissed, the popup won't appear again until additional messages are triggered on the element. |

The following image shows a popup message ({"messageDisplayType": "popup"}).




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### ProductList.Type options: Accessory and Component

Define quantity behavior in product hierarchies. The Accessory type keeps quantity constant; The Component type multiplies it by the parent.

ProductList.Type tells CPQ whether to manipulate a product's quantity based on the parent-child hierarchy in which it falls. When defining product actions, the Type parameter in the ProductList object can accept two values:

- Accessory: When the value of ProductList.Type is set to Accessory, the quantity value set in the Product Action will be replicated as is in the CPQ shopping cart. That is, an Accessory product's quantity stays the same, no matter the quantity of its parent (if it has a parent). Accessory is the default value.
- Component: Use this value if the quantity of a child should be multiplied by the quantity of its parent. This is useful for scenarios in which the user selects a quantity for a parent and the quantity of its child item needs to be set in a specific ratio. For example, if the parent is a car and its child is a tire, the Product Action that defines the tire would have quantity = 4.

If the child's ProductList.Type is set to Component, the bill of materials will always include the correct number of tires for the number of cars requested. When car quantity = 1, tire quantity = 4; when car quantity = 3, tire quantity = 12, and so on. The calculated tire quantity will be displayed in the CPQ shopping cart and transferred to the Salesforce Quote Line Editor or ecommerce cart when saved.

This concept replicates Salesforce CPQ bundle pricing.

The following video details ProductList.Type options for manipulating product quantities:
ProductList.Type = Accessory v. Component

**Related topics**

Using ProductList.extended to populate the Quote Line record

### Using ProductList.extended to populate the Quote Line record

You can use the Extended product data object to populate custom fields on the Quote Line record.

Populate custom fields in the Quote Line record by utilizing the `extended` product data object in Advanced Product Actions.

```
ProductList.extended = { "key": "value" };
```

The key must match the API name of the fields on both the Product Option and Quote Line objects. This takes advantage of Salesforce CPQ twinning. For information about twinning in Salesforce CPQ, see the following Salesforce documentation topic:

Mapping of Custom Salesforce CPQ Fields Between Objects

In the following video, a custom text field with the variable name `Color_c` is created on both the Product Option and Quote Line objects. Then the extended product data in the advanced product action is defined as `ProductList.extended = { "Color__c": color };`. `Color_c` serves as the key, and the previously defined `color` variable in the script is assigned.

Reverse Twin ProductList.extended Data To QuoteLine

Reverse twinning extended product data also enables admins to populate quote line data directly to the Quote Line Editor (QLE). The custom Quote Line field must be added to the Line Editor field set.

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**Note:** Salesforce CPQ does not allow users to edit the following product option fields, including when passing data back from an external configurator such as CPQ.

- Product Code
- Product Configuration Type
- Product Description
- Product Family
- Product Name
- Product Quantity Scale
- Product Subscription Pricing
- Price Editable

**Related topics**

Adding custom attributes to the product list

### Adding custom attributes to the product list

Use ProductList.extended to add custom attributes such as cost, margin, and discount to a product list.

Custom attributes can be added to a product list, bill of materials, or Shopping Cart beyond the standard attributes that are provided by default. Common use cases include attributes for cost, margin, list price, discount, and so on.

## Advanced Script

To add a custom attribute to a product list, use `.extended` and provide data in JSON format in an advanced script:

```
ProductList.extended = {"cost": 62};
```

To add multiple custom fields, add to the same JSON object, as shown below:

```
var myMargin = 38;
ProductList.id = "Test Product";
ProductList.price = 100;
ProductList.extended = {"cost": 62, "margin": myMargin,
 "customText":"Example 2"};
ProductList.description = "Example 1";
ProductList.bomType = "sales";
ProductList.next();
return ProductList;
```

Some tips:

- Numbers can be entered directly as the value.
- Text should be surrounded by double quotes.
- Variables can be used for values.
- Math or other value manipulation must occur outside of the JSON. Use a variable to get the final value into the JSON object.

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## Writing to Salesforce quote line fields

Admins can also set ProductList.extended information to map to a field on a Salesforce quote line by referencing the field name in the product action when setting the ProductList.extended information.

For example, to set the description field, admins would set the ProductList.extended information to:

```
ProductList.extended = {“SBQQ__Description__c”: “Text
 Description”}
```

## Layout

To add custom ProductList attributes to a layout, use `extended.{attributename}` in the value column:

| type | path | overric | label | variablename |
|---|---|---|---|---|
| tierDef | /layout/tiers | | | |
| productlist | | | | |
| productlistcolumn | /productList/columns | | Product | displayName |
| productlistcolumn | /productList/columns | | Cost | extended.cost |
| productlistcolumn | /productList/columns | | Margin | extended.margin |
| productlistcolumn | /productList/columns | | List | price |
| productlistcolumn | /productList/columns | | Custom Text | extended.customText |
| productlistcolumn | /productList/columns | | Description | description |

### Related topics

Using ProductList.extended to populate the Quote Line record

### Displaying multiple product lists in layouts

You can configure multiple product lists for a single layout by creating and importing a layout CSV file.

In CPQ, a layout can show multiple bills of material (BOMs) at once. This can help separate different types of products or separate sales items from manufacturing details.

**Note:** To display in different BOMs, products must have different BOM types. By default, products whose BOM type is not `sales` are not created as a quote line when going through Salesforce CPQ.

Use the BOM Types to Include in Save Request admin setting to add additional BOM types to a Save request. Any BOM types added here are passed in the save request and created as quote lines when going through Salesforce CPQ.

Use the Push BOM Data to CPQ Salesforce Object admin setting to configure BOM items to be passed back and written into Salesforce as configuration line items.

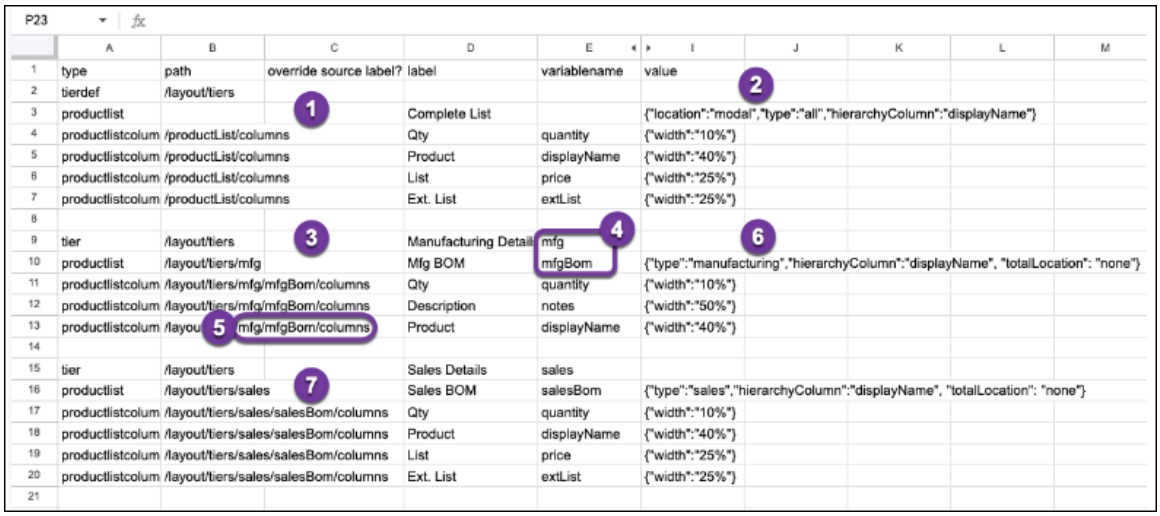
To learn how to add additional BOM types to a Save request and to configure BOM items to be written to Salesforce as configuration line items, see CPQ admin settings.

To add multiple product lists to a layout, use tiers to separate the additional BOMs. Product lists can be added by editing the layout CSV file and importing it. For information about displaying multiple BOMs in a layout, view the following video:

Multiple BOM Display

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## Multiple bills of material: CSV setup



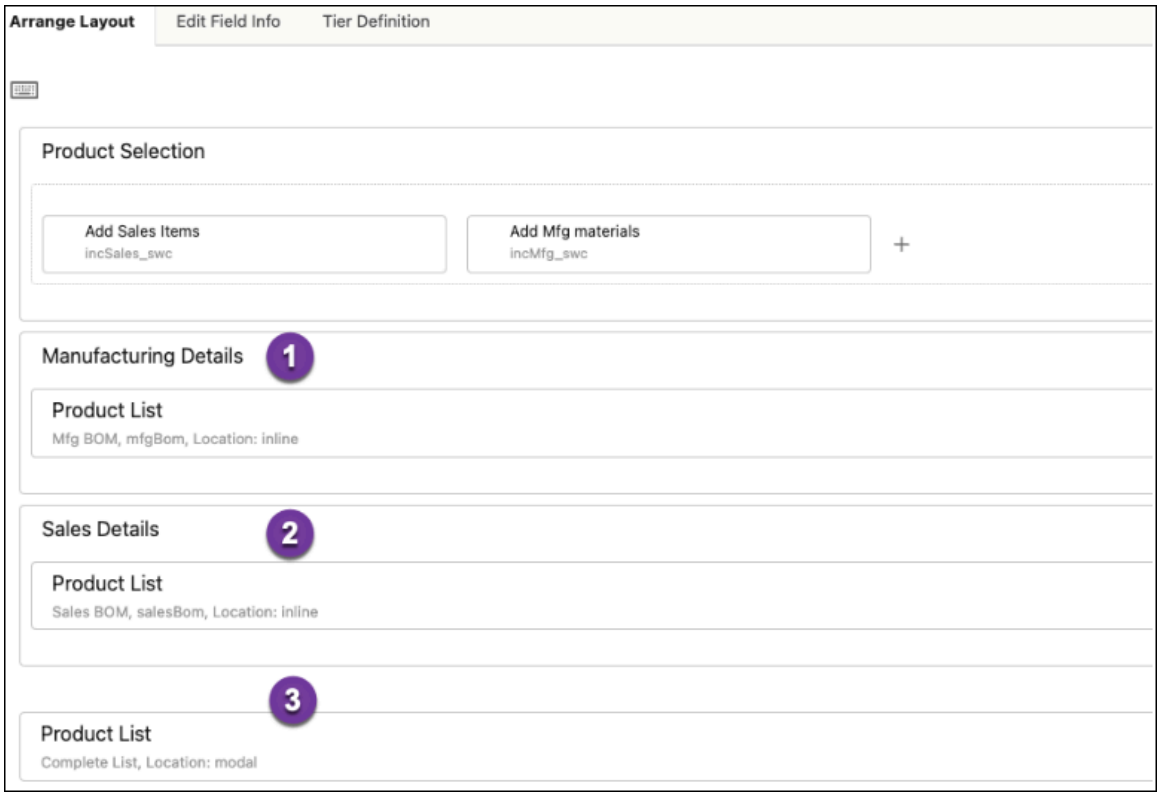
| | A | B | C | D | E | I | J | K | L | M |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | type | path | override source label? | label | variablename | value | | | | |
| 2 | tierdef | /layout/tiers | | | | | | | | |
| 3 | productlist | | | Complete List | | {"location":"modal","type":"all","hierarchyColumn":"displayName"} | | | | |
| 4 | productlistcolum | /productList/columns | | Qty | quantity | {"width":"10%"} | | | | |
| 5 | productlistcolum | /productList/columns | | Product | displayName | {"width":"40%"} | | | | |
| 6 | productlistcolum | /productList/columns | | List | price | {"width":"25%"} | | | | |
| 7 | productlistcolum | /productList/columns | | Ext. List | extList | {"width":"25%"} | | | | |
| 8 | | | | | | | | | | |
| 9 | tier | /layout/tiers | | Manufacturing Detail | mfg | | | | | |
| 10 | productlist | /layout/tiers/mfg | | Mfg BOM | mfgBom | {"type":"manufacturing","hierarchyColumn":"displayName", "totalLocation": "none"} | | | | |
| 11 | productlistcolum | /layout/tiers/mfg/mfgBom/columns | | Qty | quantity | {"width":"10%"} | | | | |
| 12 | productlistcolum | /layout/tiers/mfg/mfgBom/columns | | Description | notes | {"width":"50%"} | | | | |
| 13 | productlistcolum | /layou | mfg/mfgBom/columns | Product | displayName | {"width":"40%"} | | | | |
| 14 | | | | | | | | | | |
| 15 | tier | /layout/tiers | | Sales Details | sales | | | | | |
| 16 | productlist | /layout/tiers/sales | | Sales BOM | salesBom | {"type":"sales","hierarchyColumn":"displayName", "totalLocation": "none"} | | | | |
| 17 | productlistcolum | /layout/tiers/sales/salesBom/columns | | Qty | quantity | {"width":"10%"} | | | | |
| 18 | productlistcolum | /layout/tiers/sales/salesBom/columns | | Product | displayName | {"width":"40%"} | | | | |
| 19 | productlistcolum | /layout/tiers/sales/salesBom/columns | | List | price | {"width":"25%"} | | | | |
| 20 | productlistcolum | /layout/tiers/sales/salesBom/columns | | Ext. List | extList | {"width":"25%"} | | | | |
| 21 | | | | | | | | | | |

1. The first product list uses the same format as the default product list included in layouts
2. The value for this product list determines that this will display in a modal window and with type:all will contain all of the BOM items
3. The second product list is the manufacturing BOM, now contained in a tier as indicated in the type and path fields
4. Variable names are required to construct the path for the layout to render correctly
5. The complete path for columns is in the format `/layout/tiers/<tierVariableName>/<productListVariableName>/columns`
6. The value for this product list component does not have a location, as it is in a tier. "type":"manufacturing" will include all products with the manufacturing bomType. The total field for this product list is also hidden with "totalLocation": "none"
7. The third product list component is the sales BOM, and repeats most of the manufacturing BOM product list

See this sample layout CSV.

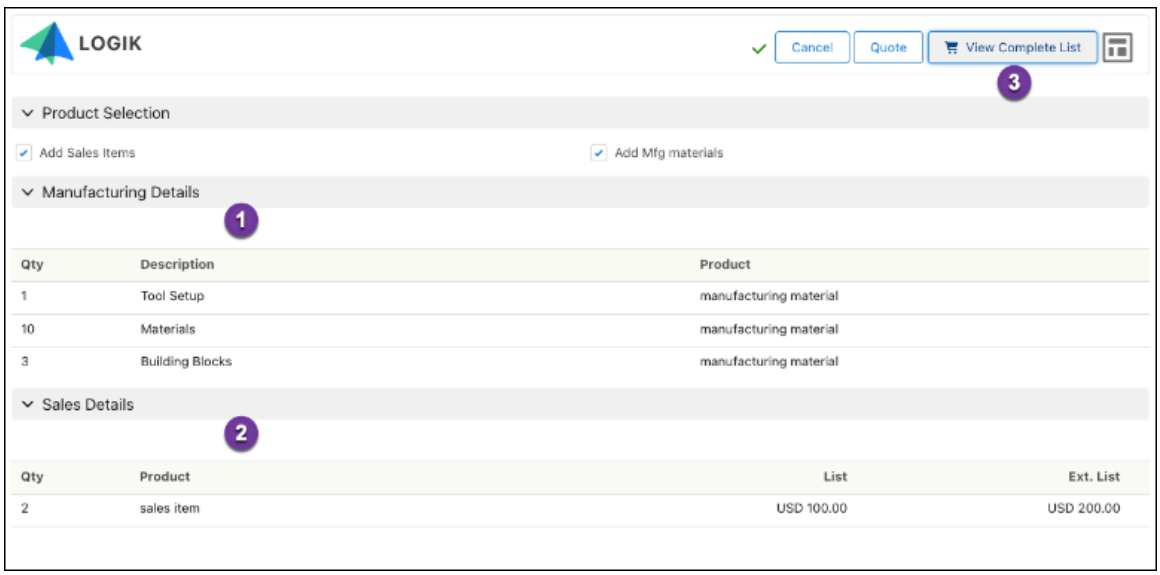
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## Multiple bills of material: layout editor




1. Display of the manufacturing BOM product list in the layout editor in a tier
2. Display of the sales BOM product list in the layout editor in a tier
3. Display of the Complete (all) product list in the layout editor as a modal window

## Final configuration experience




1. Manufacturing product list, only displaying the manufacturing bomType products
2. Sales BOM product list, only displaying the sales bomType products
3. The complete list in a new window set to show all the products from any bomType

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### Related topics

Customizing the currency display in the shopping cart

### Export the configuration BOM to a CSV file

Export the configuration bill of materials (BOM) to a customizable CSV file before the quote is finalized.

### Before you begin

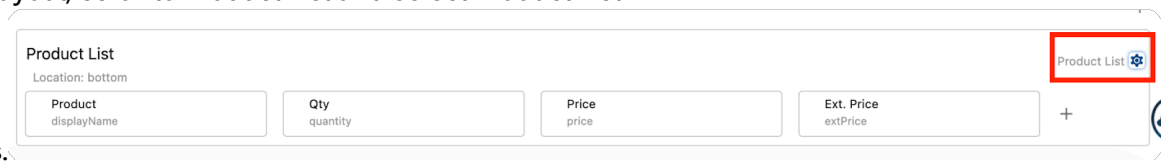
Role required: Admin

## Enhanced shopping cart with CSV export

CPQ lets you export the configuration bill of materials (BOM) before the quote is finalized by exporting the BOM to a CSV file. The BOM UI has been enhanced to enable on-screen manipulation of fields, such as resizing of columns, pinning of fields, and hiding of fields.

### Procedure

1. In your blueprint, navigate to Layouts.
2. In your layout, scroll to Product List and select Product List Settings.




3. In Settings, scroll to Raw Value and insert the following code block:

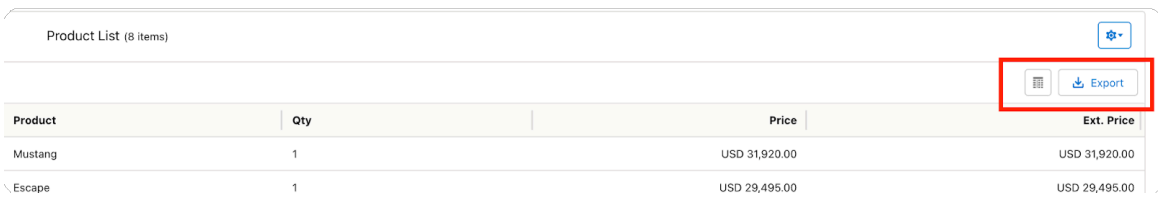
```
"advanced": {
    "export": true
}
```

`advanced` enables the enhanced shopping cart, and `export` enables the BOM export. `advanced` must be enabled to use `export`. The final code block should resemble the following:

```
{
  "location": "bottom",
  "type": "sales",
  "hierarchyColumn": "displayName",
  "advanced": {
    "export": true
  }
}
```

4. When the blueprint is enabled, deploy it and launch the configurator experience.

   In the UI, you see two new icons on the far right of the product list:




   The icon to the left of **Export** lets you manipulate the columns via the UI, such as hiding and pinning certain columns. You can also manually resize columns as you would in a spreadsheet.

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The **Export** icon lets you export the current BOM to a CSV file. This will export all contents that are visible in the BOM at the time of export.

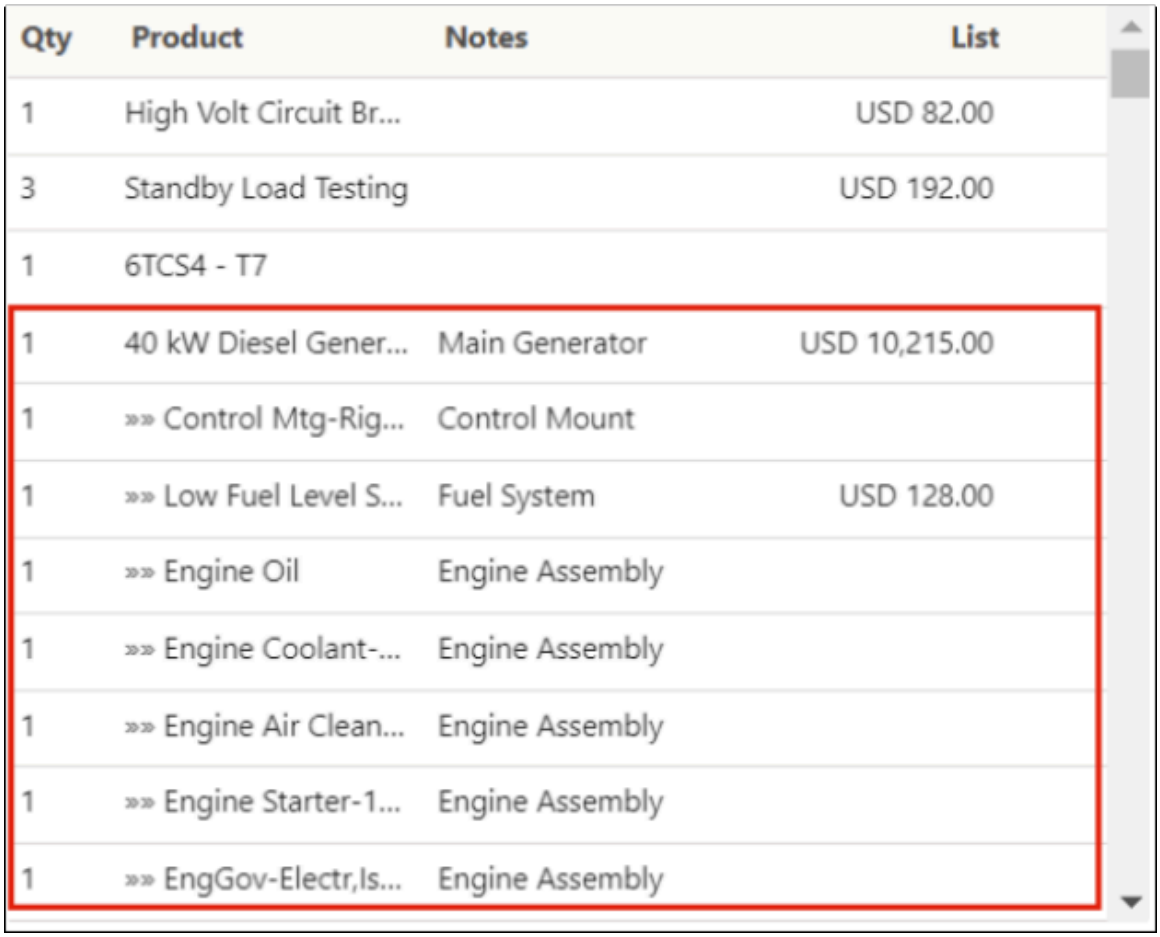
**Note:** The process requires the Quoting tool.

### Collapse parent or child BOM lines

You can configure child products to hide under their parent products unless expanded.

## Default behavior

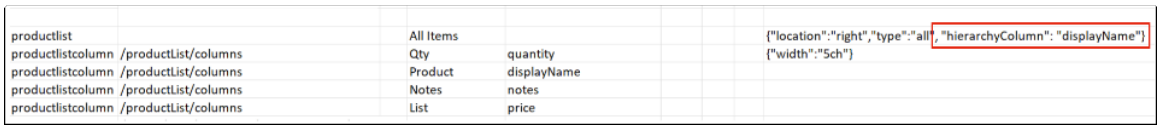
When product actions are set with a defined parent/child relationship, by default, child products are indented as in the following:



| Qty | Product | Notes | List |
|---|---|---|---|
| 1 | High Volt Circuit Br... | | USD 82.00 |
| 3 | Standby Load Testing | | USD 192.00 |
| 1 | 6TCS4 - T7 | | |
| 1 | 40 kW Diesel Gener... | Main Generator | USD 10,215.00 |
| 1 | »» Control Mtg-Rig... | Control Mount | |
| 1 | »» Low Fuel Level S... | Fuel System | USD 128.00 |
| 1 | »» Engine Oil | Engine Assembly | |
| 1 | »» Engine Coolant-... | Engine Assembly | |
| 1 | »» Engine Air Clean... | Engine Assembly | |
| 1 | »» Engine Starter-1... | Engine Assembly | |
| 1 | »» EngGov-Electr,Is... | Engine Assembly | |

## Collapsible behavior

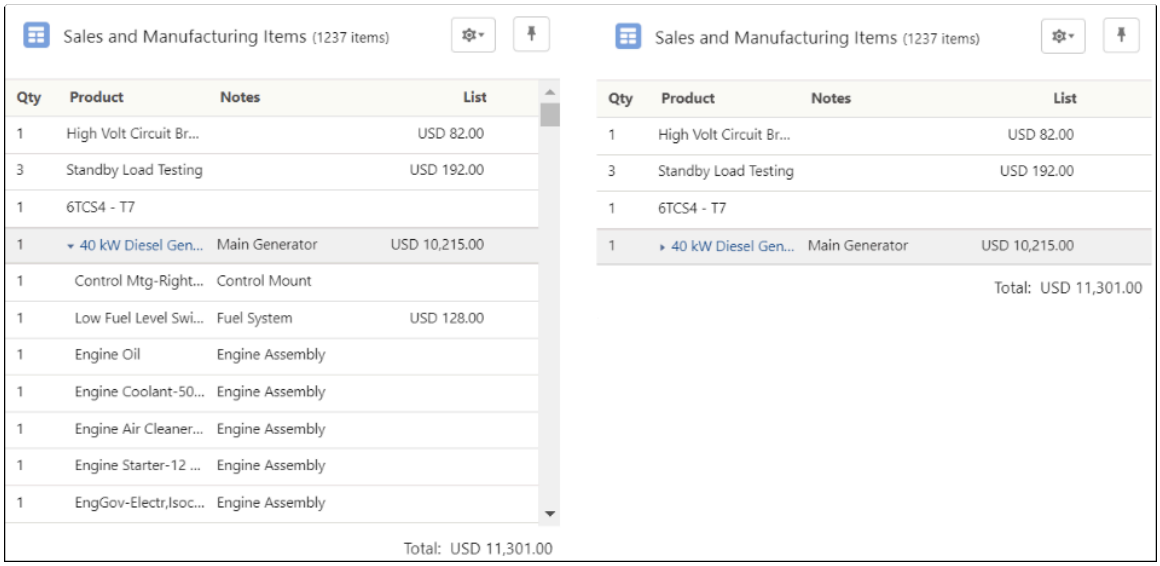
This behavior can be overridden by adding `{"hierarchyColumn": "<productListColumnVariableName>"}` to the value column of the productList element in the layout editor or in the layout CSV file.



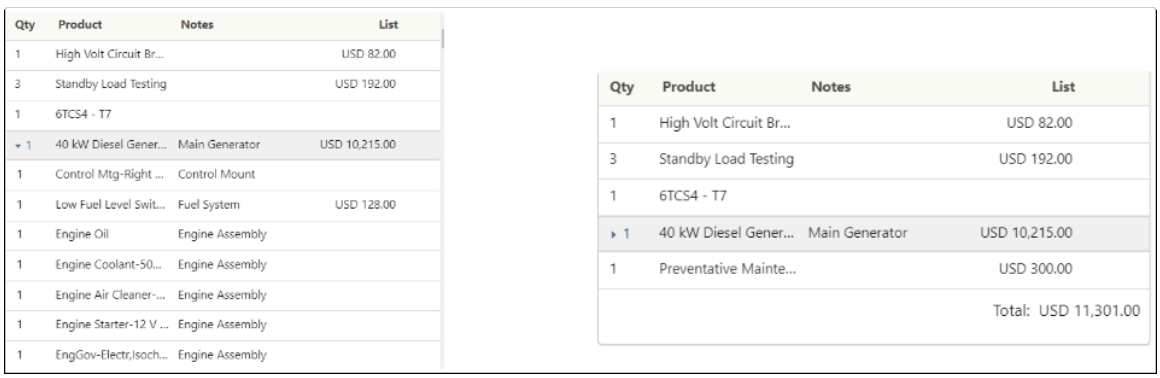
| | | | | | |
|---|---|---|---|---|---|
| productlist | | All Items | | | {"location":"right","type":"all", "hierarchyColumn": "displayName"} |
| productlistcolumn | /productList/columns | Qty | quantity | | {"width":"5ch"} |
| productlistcolumn | /productList/columns | Product | displayName | | |
| productlistcolumn | /productList/columns | Notes | notes | | |
| productlistcolumn | /productList/columns | List | price | | |

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## Result




Admins can change where the collapse arrow appears by defining a different product list column as the hierarchy column (`"hierarchyColumn"`). For example, using `quantity` in the CSV snippet above results in the following:




### Set up pricing display

You can configure how currency values appear, choose to display rollup pricing in the Shopping Cart, and display a custom message for items that have a zero price or a null price. CPQ shows only the price of the products in each bill of materials.

### Customizing the currency display in the shopping cart

Configure how currency values appear in the CPQ shopping cart. You can choose to display amounts with the ISO code (USD 25.99), currency symbol, or plain numbers.

Administrators can customize how currencies are displayed in the CPQ shopping cart.

The CPQ shopping cart displays amounts according to the Currency ISO Code partner field passed from the Salesforce.com (SFDC) quote. Unless SFDC is customized in this area, the quote's currency will determine the ISO currency code for CPQ. If no ISO currency code is provided, CPQ defaults to USD.

## Shopping cart currency display options

By default, the shopping cart displays the ISO code to the left of the currency amount.

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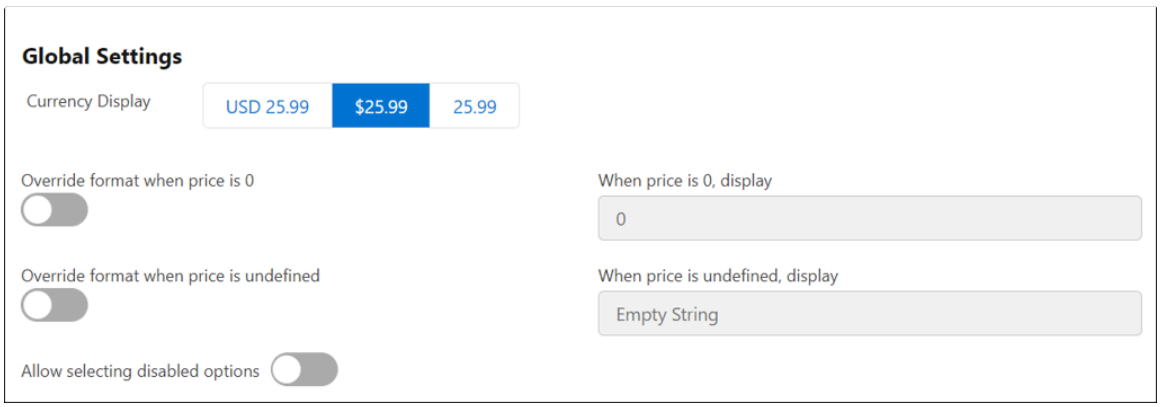



However, the currency symbol can be displayed instead.




## Setting the shopping cart currency display with the layout editor

The shopping cart currency display is defined in the layout properties, which can be found in the layout editor. For more information, see Customizing the CPQ UI header




Three currency display options are available:

- USD 25.99: Displays currencies with their currency code
- $25.99: Displays currencies with their currency symbol
- 25.99: Displays currencies as numbers

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**Related topics**

- Show rollup pricing in the shopping cart
- How price is displayed on a layout with multiple BOMs

### Show rollup pricing in the shopping cart

Configure the shopping cart to display the sum of the child items as the price of the parent item.

## Before you begin

Role required: admin

## About this task

When a BOM (bill of materials) is represented with hierarchy, such as a parent-child relationship, you can total the prices of the child items. The total displays on the parent line as a sum. CPQ rollup pricing totals direct child and parent extended list values. Rollup pricing delivers the sum of all child line prices to the shopping cart, including the price of the parent, and displays it at the parent line.

To view a script that illustrates how a hierarchical bill of materials is generated, see Adv Product Action with Product List.

The following example shows four child products rolling up to their related parent products.

Cost Rollup (6 items)

| Qty | Product | Cost per | Total Cost | Rollup Price |
|---|---|---|---|---|
| 1 | Parent A | USD 10.00 | USD 10.00 | USD 27.00 |
| 3 | »» Child 1A | USD 4.00 | USD 12.00 | USD 12.00 |
| 1 | »» Child 2A | USD 5.00 | USD 5.00 | USD 5.00 |
| 1 | Parent B | USD 10.00 | USD 10.00 | USD 43.00 |
| 5 | »» Child 1B | USD 5.00 | USD 25.00 | USD 25.00 |
| 4 | »» Child 2B | USD 2.00 | USD 8.00 | USD 8.00 |
| | | | | Total: USD 70.00 |

The next example shows a 2-tier roll-up, with child products (child1B and child 2B) rolling up to a parent (parent B). That parent rolls up to the parent product (parent A) in addition to the remaining child products (child 1A and child 2A).

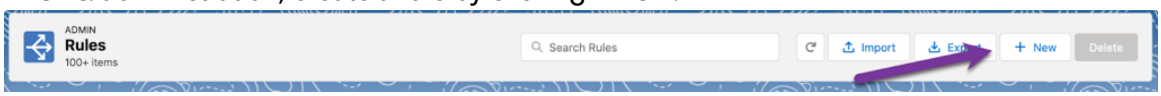
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Cost Rollup (6 items)

| Qty | Product | Cost per | Total Cost | Rollup Price |
|---|---|---|---|---|
| 1 | Parent A | USD 10.00 | USD 10.00 | USD 70.00 |
| 3 | »» Child 1A | USD 4.00 | USD 12.00 | USD 12.00 |
| 1 | »» Child 2A | USD 5.00 | USD 5.00 | USD 5.00 |
| 1 | »» Parent B | USD 10.00 | USD 10.00 | USD 43.00 |
| 5 | »» »» Child 1B | USD 5.00 | USD 25.00 | USD 25.00 |
| 4 | »» »» Child 2B | USD 2.00 | USD 8.00 | USD 8.00 |
| | | | Total: | USD 70.00 |

## Procedure

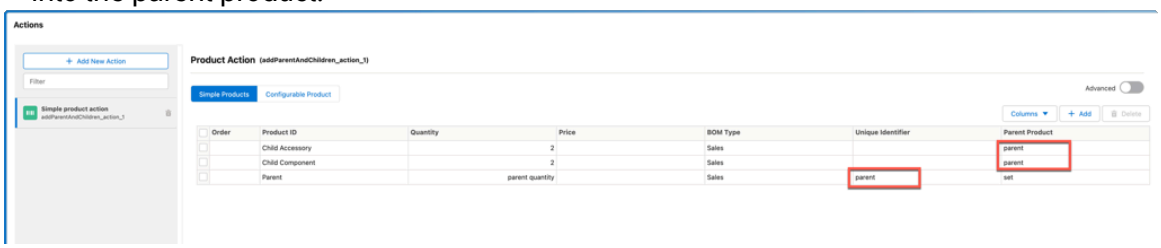
1. In CPQ administration, create a rule by clicking **+ New**.




2. Name the rule, and click **Save**.
3. Set your condition and create your product actions.
   - Start with a parent product and set the parent product ID, quantity, price, type, BOM type, and unique identifier.

     For parent products, the type should be set to Component. For child products, the type should be set to Accessory.

   - Add the unique identifier to the parent product field of any products that you want rolled up into the parent product.




4. To display the rolled-up price in your cart, add `rollUpPrice` to your shopping cart in the layout editor.
   Alternatively, define the `productlistcolumn` type in your layout CSV with the variable name `rollUpPrice`.

| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | type | path | override source l | label | variablename | Component disp | columnorder | classname | value |
| 14 | productlist | | | | | | | | {"location":"right" |
| 15 | productlistcolumi | /productList/columns | | Qty | Quantity | | | | {"width":"5ch"} |
| 16 | productlistcolumi | /productList/columns | | Product | name | | | | {"width":"20ch"} |
| 17 | productlistcolumi | /productList/columns | | Description | description | | | | |
| 18 | productlistcolumi | /productList/columns | | List | List | | | | {"width":"10ch"} |
| 19 | productlistcolumi | /productList/columns | | rollUpPrice | rollUpPrice | | | | {"width":"10ch"} |
| 20 | productlistcolumi | /productList/columns | | Ext. List | extList | | | | |

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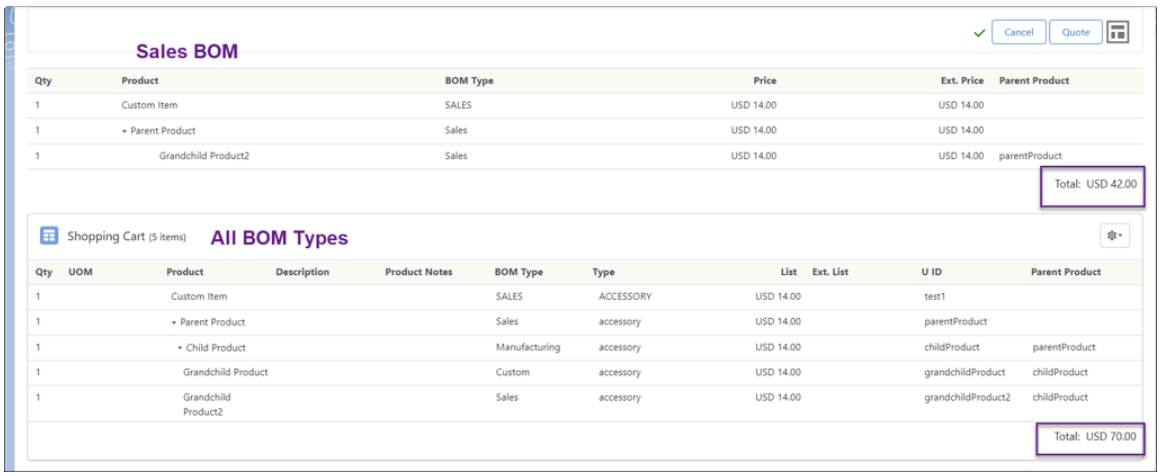
### Related topics

- Customizing the currency display in the shopping cart
- How price is displayed on a layout with multiple BOMs
- Set a custom message for zero-priced and null-priced items

## How price is displayed on a layout with multiple BOMs

CPQ shows only the price of the products in each bill of materials.

When multiple bills of material (BOMs) are displayed in a layout, CPQ automatically filters the total of each BOM to show only the price of the products contained in the BOM, filtered by BOM type. If a combined product list of all BOM types is displayed, it shows the prices of all products in the BOM. See the following example.




### Related topics

- Customizing the currency display in the shopping cart

## Set a custom message for zero-priced and null-priced items

Customize how zero-priced and null-priced items appear in CPQ layouts. Replace $0.00 or missing prices with custom messages—such as “Included,” “Pending,” or “Price TBD”—across product pickers, picklist extensions, and shopping cart components for clearer user communication.

### Before you begin

Role required: Admin

### About this task

Some configurations result in items that have a zero price or a null price. In these scenarios, the administrator may want to display a message in place of the zero or null price. Using the layout editor, you can define custom strings for null-priced or zero-priced items in product pickers, picklist extensions (with dynamic pricing), and the shopping cart.

Administrators frequently replace the $0.00 value with the display string "Included".

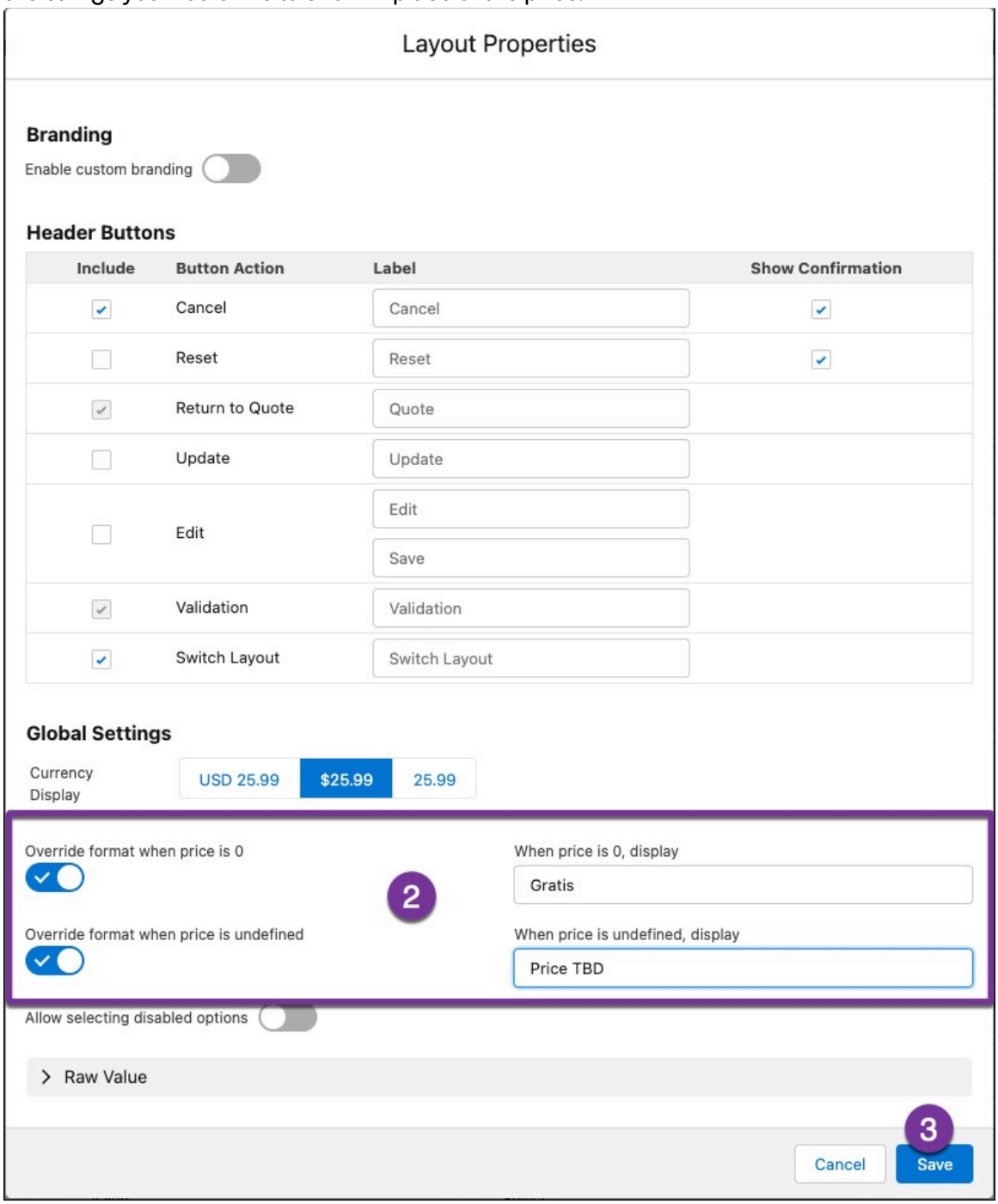
When the price is null, the solution may include components that require research or engineering before a price can be shared with the end user. When this is the case, the administrator may display strings such as "Pending" or "Price TBD". When a null-priced item is in the cart, the sum of cart items displayed in the total may be misleading. To alleviate this confusion, the administrator can define a string that overrides the cart total when null-priced items are present. For step by step instructions, see Override the shopping cart total.

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For a list of components that support null-price and zero-price overrides, see Availability of price value overrides.

### Procedure

1. In the layout editor, click the gear icon associated with the header.
2. In the Layout Properties dialog, toggle the appropriate "Override format" switches, and enter the strings you would like to show in place of the price.




3. Save the layout properties, save the layout, and deploy.

**Note:** If you want to apply distinct price display behaviors at the component level, this can be done in the layout properties of each read-only currency field, picklist extension, product picker, or product list element. When formatting is set at the element level, it overrides the format defined at the layout level.

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### Related topics

- Override the shopping cart total
- Availability of price value overrides

## Override the shopping cart total

To avoid displaying an incorrect total price, show a custom string when a bill of materials includes an item with a null price.

### Before you begin

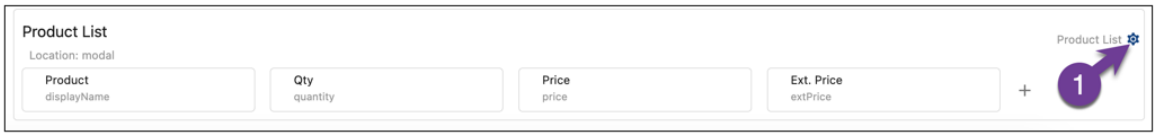
Role required: admin

### About this task

When a BOM contains null-priced items, the total price may be incorrect. You can define a custom string to display instead of the BOM total.

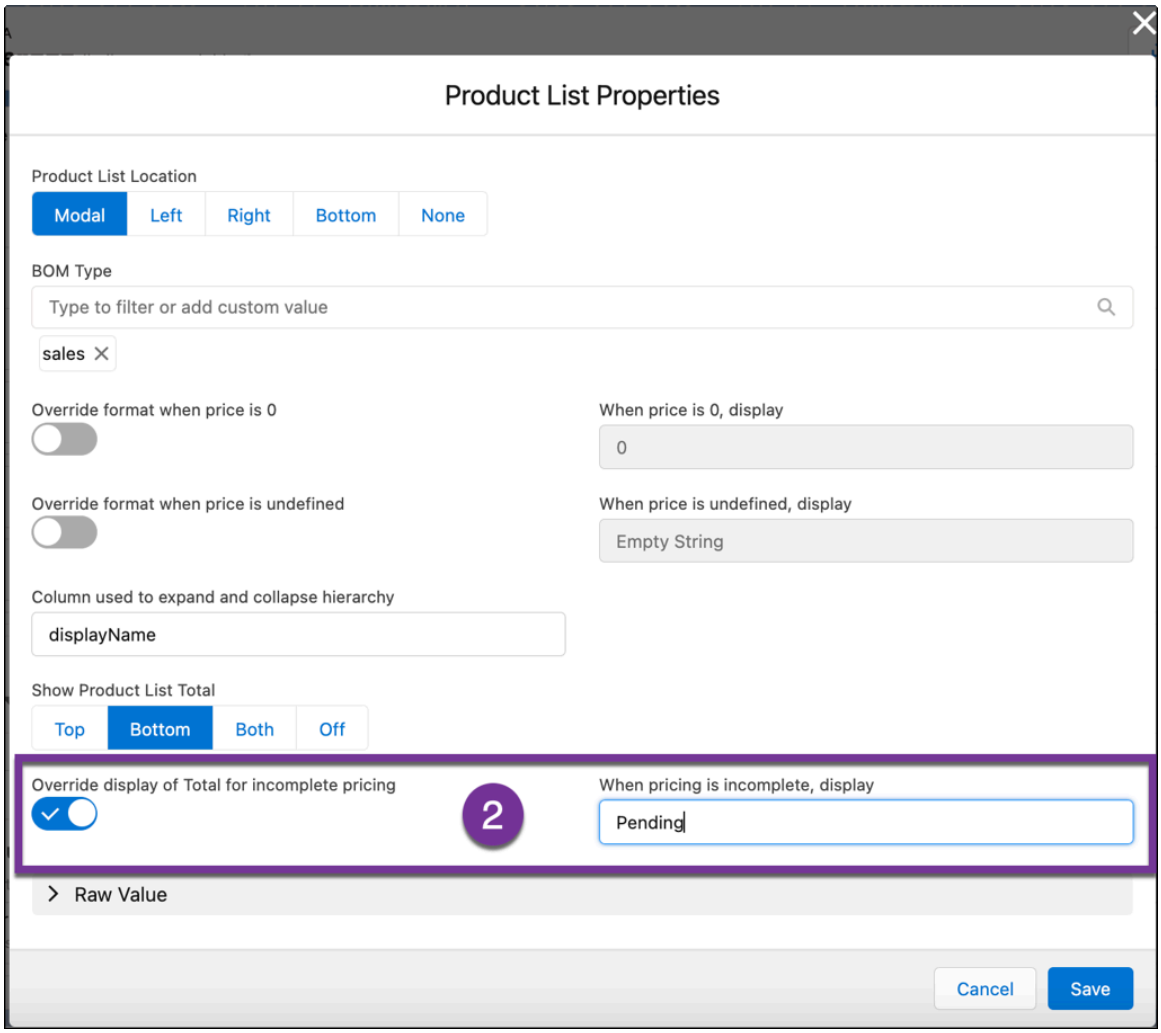
### Procedure

1. In the layout editor, open the product list properties.




2. In the properties dialog, set **Override display of Total for incomplete pricing** to true, and enter the string to display instead of the total's place.

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3. Select **Save**.

### Related topics

- Set a custom message for zero-priced and null-priced items
- Availability of price value overrides

## Availability of price value overrides

See which component types accept price-value overrides for zero-priced and null-priced items.

### Component types that accept price value overrides

| Component type | Zero-price override | Null-price override |
|---|---|---|
| Number field with ReadOnlyCurrency display type | Yes | (Cannot be set to null) |
| Picklist extension - static & dynamic pricing | Yes | Yes |
| Product Picker - price fields | Yes | Yes |
| ProductList.price | Yes | See note |

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**Component types that accept price value overrides (continued)**

| Component type | Zero-price override | Null-price override |
|---|---|---|
| ProductList.extended.<currency field> | Yes | Yes |

**Note:**

To set a null-price override on a currency field, the administrator can set `ProductList.extended.<numericField> = ""` in an advanced product action or by using the OnBom enrichment. In the layout, define this numeric field to display as currency in the column properties of the product list, and follow the instructions in Set a custom message for zero-priced and null-priced items regarding override strings in the product list properties.

**Related topics**

- Set a custom message for zero-priced and null-priced items
- Override the shopping cart total

### Configure the Matrix Loader

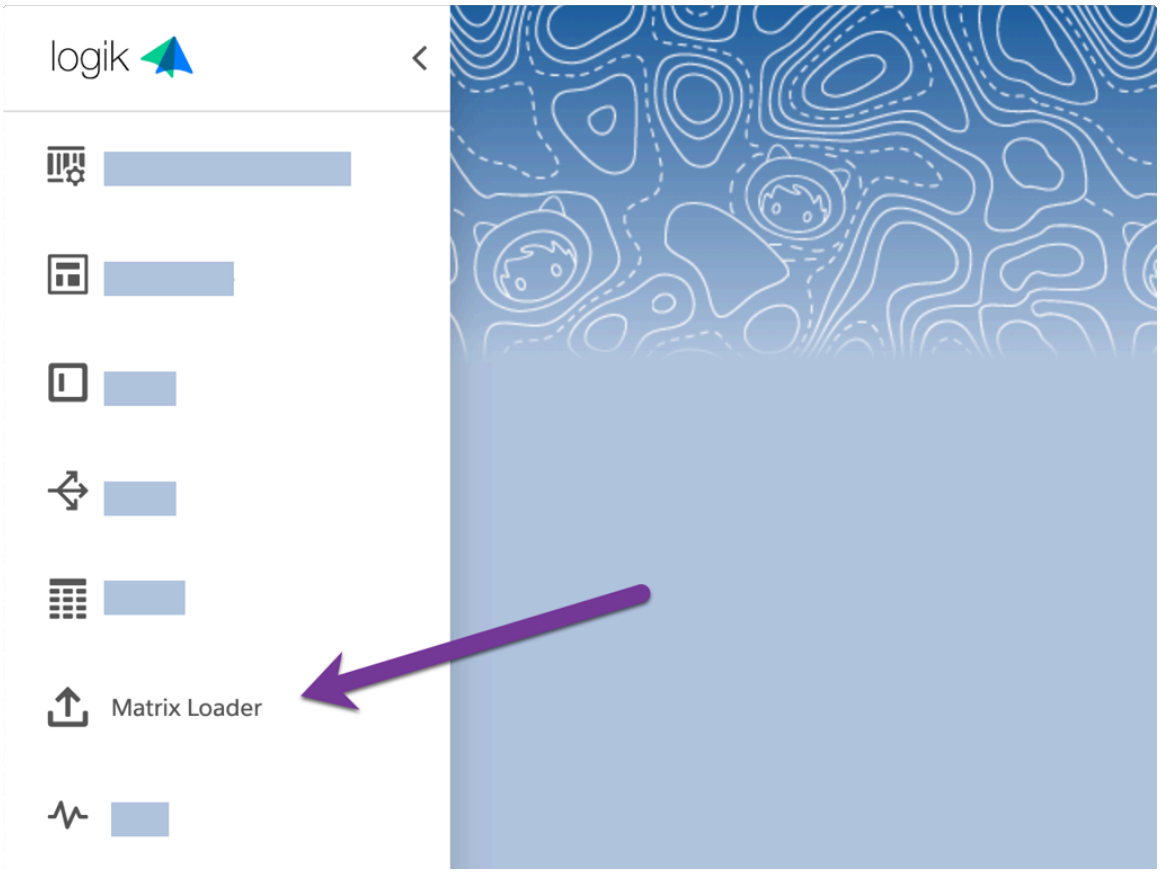
Use the Matrix Loader to efficiently add, edit, and migrate fields, field options, rules, and layouts in CPQ. Upload CSV files, validate configurations, and streamline bulk updates or environment migrations with error-handling and verification support.

The Matrix Loader is the most efficient means of adding and editing fields, field options, rules, and layouts, particularly when the number of elements gets large. When using the Matrix Loader, administrators define their configuration elements in a spreadsheet file. This spreadsheet artifact provides a backup of data in CPQ; it also facilitates fast test-to-production migration processes.

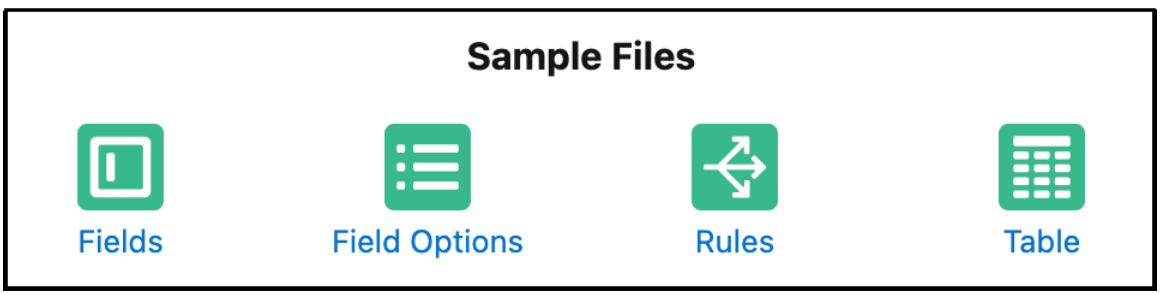
Here is a quick tutorial on how to use the Matrix Loader.

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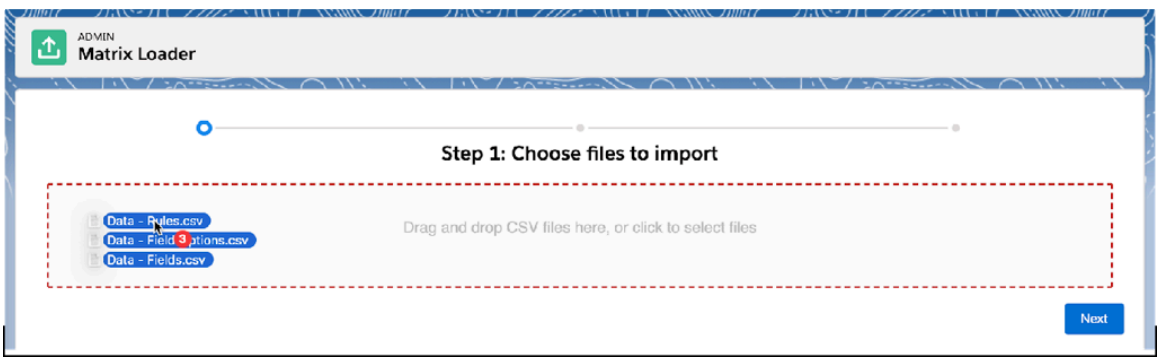
1. Click **Matrix Loader** in the navigation pane.




2. On the page that opens, export sample files in the upload formats that are accepted by the Matrix Loader: fields, field options, rules, and tables. Each sample file demonstrates a broad range of the features of the upload format.




3. Drag, or use the file browser to select the CSV files you intend to upload.

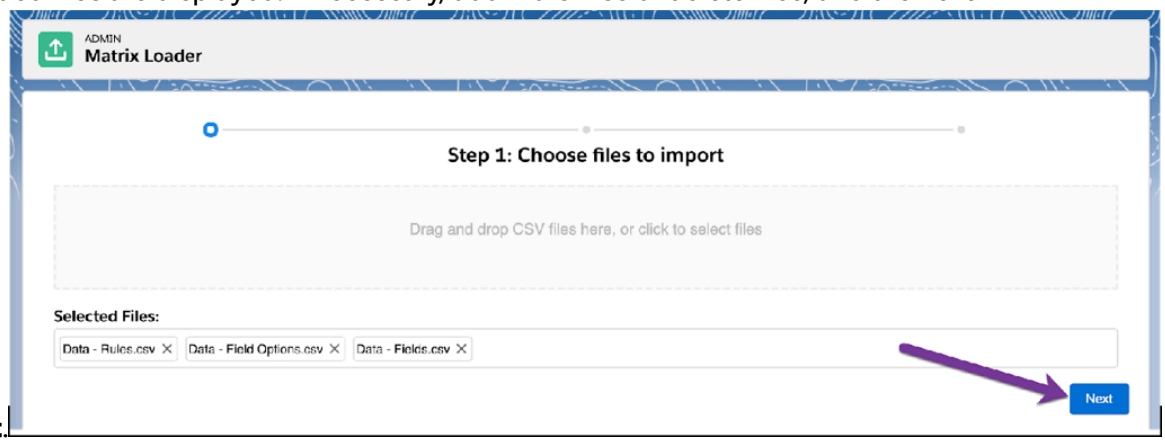



We discuss the formats of these CSV files in the following articles:

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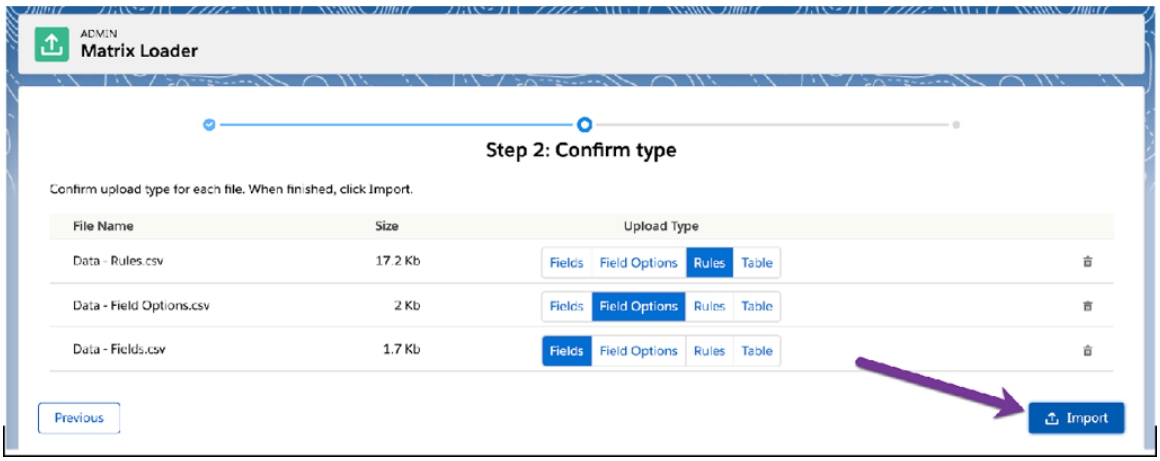
- Matrix Loader CSV fields and field options upload and export
- Matrix Loader: CSV rules upload
- Matrix Loader: CSV table upload

Queued files are displayed. If necessary, add more files or delete files, and then click **Next**.



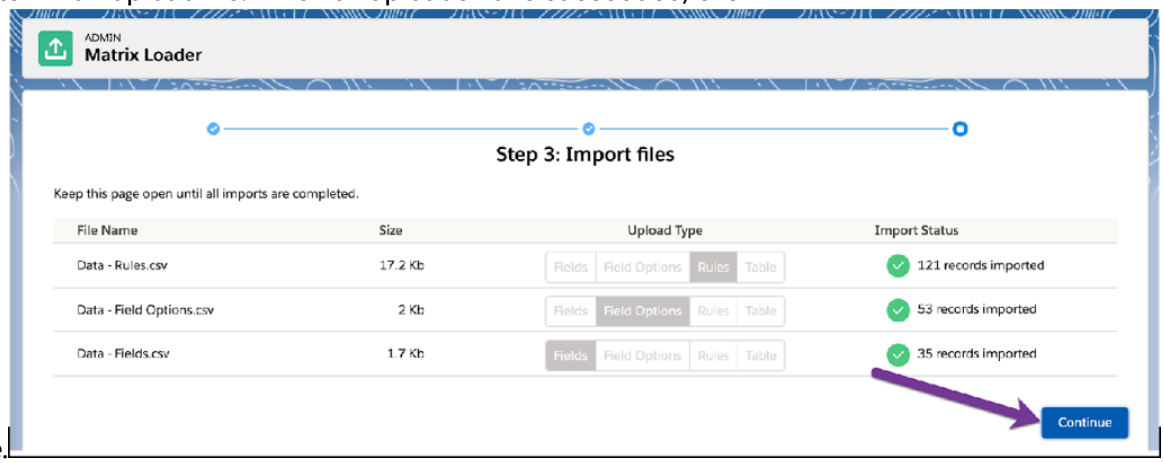

4. The Matrix Loader guesses at the contents of each file according to keywords in the file titles. Confirm that the Matrix Loader guessed the upload file types correctly. If necessary, make corrections.

   The Matrix Loader performs the uploads in the sequence necessary to ensure all elements are uploaded correctly. Click **Import**.




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5. Confirm that all the uploads succeeded. Most errors originate in a mistake or mismatch in an upload file. When all uploads have succeeded, click **Continue**.




6. In the appropriate administration areas (fields and rules, if you uploaded these files), check and confirm the elements that were created as a result of this Matrix Loader upload.

### Related topics

Matrix Loader

### Matrix Loader CSV fields and field options upload and export

Use the Matrix Loader to bulk create, edit, and export fields, field options, and product pickers in CPQ. Define data in CSV files with supported columns and formats, then upload or download them for faster configuration management and environment migration.

## CSV fields upload

All field types can be added and edited via the Matrix Loader. This section assumes the reader will work in a spreadsheet file (Google Sheets, Microsoft Excel, or similar), then export the result to a CSV file for upload to the Matrix Loader. This topic outlines the columns and data that the Matrix Loader accepts in the field upload.

### CSV file columns

| Column name | Description | Valid values | Notes |
|---|---|---|---|
| field_type | Defines the data type of the field | text \| textField boolean \| booleanField number \| numberField picklist \| pickListField | Required |
| name | The name that the admin sees on field list Admin page | Valid strings can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: { } [ ] ( ) \| \ ~ ` _ ^ @ ? < = > ; : / . - , + * ' & % $ # " ! | Required |

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### CSV file columns (continued)

| Column name | Description | Valid values | Notes |
|---|---|---|---|
| variableName | Distinct string used to reference the field | Valid field variable names consist of up to 128 letters, numbers, and underscores. The first and last character must be a letter or number. | Required; must be unique |
| required | Not currently used by the application | TRUE \| FALSE<br><br><empty> | Optional; not currently used by the application |
| defaultValue | Provide an initial value in field when config experience starts | [See note] | Optional; relevant to textField, booleanField, numberField, and single pickListField only. Multi pickListFields set defaults in the fieldOptions upload file. |
| minLength | Minimum number of characters accepted | <number> | Optional; relevant to textField only |
| maxLength | Maximum number of characters accepted | <number> | Optional; relevant to textField only |
| precision | Define digits of precision to the right of the decimal | <number> | Optional; relevant to numberField only |
| minValue | Minimum numeric value accepted | <number> | Optional; relevant to numberField only |
| maxValue | Maximum numeric value accepted | <number> | Optional; relevant to numberField only |
| selectType | Define whether pickListField is single-select or multi-select | single multi<br><br><empty> | Optional; relevant to pickListField only. If <empty>, assumes single |

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**Note:** When a field has defined values, the default value must conform to one of the defined values. For example:

- Valid Boolean field default values are TRUE and FALSE.
- If a number field has minValue or maxValue defined, the specified default value must conform to the definition.
- The default value of a single pickListField must match an option value defined for the field. This option value can be defined in a field option CSV file that is processed by the Matrix Loader in the same batch as the field CSV file.
- Text field values are limited to 2000 characters.

The order of columns is not fixed. For convenience, admins can rearrange the columns in their spreadsheet and the resulting CSV file.

The fields upload explainer file shows the variety of fields and field parameters accepted by the Matrix Loader. Cells with gray backgrounds denote that the cell is not relevant to the context of the row. To download the explainer file, in the Matrix Loader, click the Fields link in the Sample Files section.

**Note:** This file#s content is not intended to be uploaded to a environment as is. Instead, use the format examples to build an upload file that meets the requirements of your current project, export it to CSV format, and upload it to your environment by using the Matrix Loader.

Just as fields added via the Admin UI must be associated with one or more blueprints, so must fields that are added in bulk via the Matrix Loader. For instructions, see Associate a field with a blueprint.

## CSV fields export

For convenience, admins can export a CSV file of fields and field options defined in the environment via the following steps:

1. In the Admin navigation pane, click **Fields**.

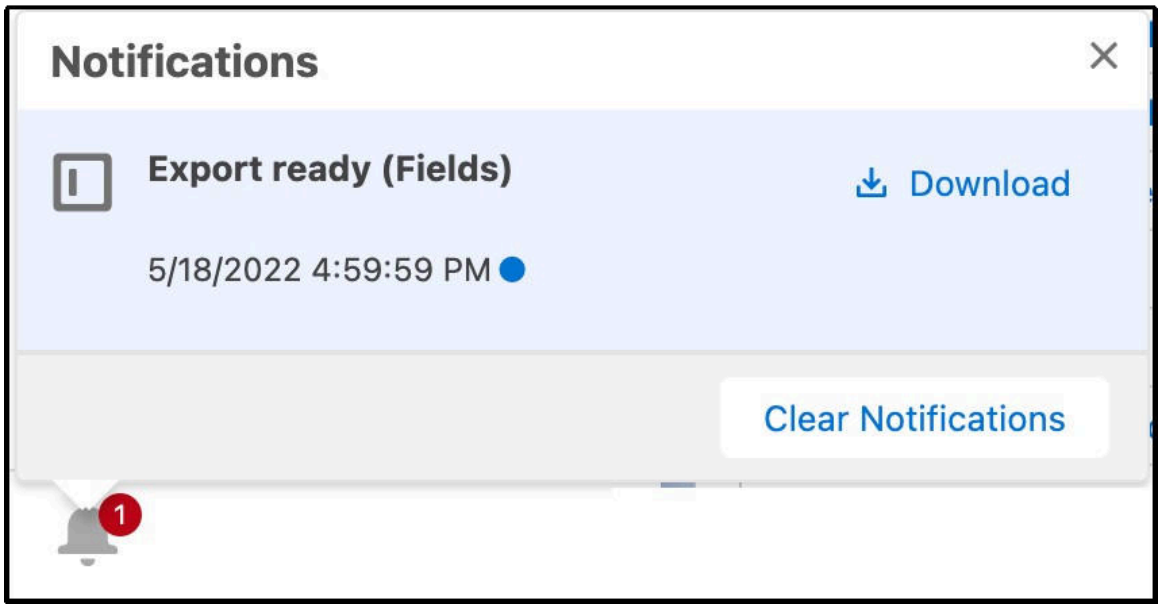
   You see a list of all defined fields.

2. (Optional) Enter a search string and press <enter> to narrow the list of fields.
3. Click **Export**. A message temporarily appears at the bottom of the page.
4. Click the notification center in the lower left corner.




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5. Click **Download** to download the CSV file.




The resulting ZIP file contains the fields CSV file and the field options CSV file.

## CSV field options upload

The field options upload defines pickListField options and attribution. This section assumes the reader will work in a spreadsheet file (Google Sheets, Microsoft Excel, or similar), then download/export the result to a CSV file for upload to the Matrix Loader. The following outlines the columns and data the Matrix Loader accepts in the field option upload.

### CSV file columns

| Column name | Description | Valid values | Notes |
|---|---|---|---|
| variableName | The variable name of the field for which this row#s option will be added | <field variableName> | Required |
| name | Option name visible to end- user | Valid strings can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: { } [ ] ( ) \| \ ~ ` _ ^ @ ? < = > ; : / . - , + * ' & % $ # " ! | Required |
| value | Distinct string will use to reference the field option | Valid field option variable names consist of up to 128 letters, numbers, and underscores. The first and last character must be a letter or | Required |

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**CSV file columns (continued)**

| Column name | Description | Valid values | Notes |
|---|---|---|---|
| | | number. Field option variable names must be unique in the scope of the same field. | |
| defaultValue | Provide an initial value in field when config experience starts | TRUE FALSE<br><br><empty> | Optional; relevant to multi pickListFields only |
| extendedDescri ption | Contextual description for Admin reference | Valid strings can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: `{ } [ ] ( ) \| \ ~ ` _ ^ @ ? <=> ; : / . - , + * ' & % $ # " !` | Optional |
| imageUrl | Image will show end-user for this pickListField option | <URL> | Optional; for use with pickListField.<br><br>Display type is defined as VisualPicker or MultiSelectVisua lPicker in layout |

The fields upload explainer file shows the variety of field options and field option parameters accepted by the Matrix Loader. Cells with gray backgrounds denote that the cell is not relevant to the context of the row. To download the explainer file, in the Matrix Loader, click the Fields link in the Sample Files section.

**Note:** This file#s content is not intended to be uploaded to a environment as is. Instead, use the format examples to build an upload file that meets the requirements of your current project, export it to CSV format, and upload it to your environment by using the Matrix Loader.

## Field options CSV export

Field options are exported in the same motion used to export fields from CPQ. For instructions, see the "CSV fields Export" section above.

## CSV upload: product picker

This section outlines the steps to create a product picker named "My product picker", which will include the following products/options:

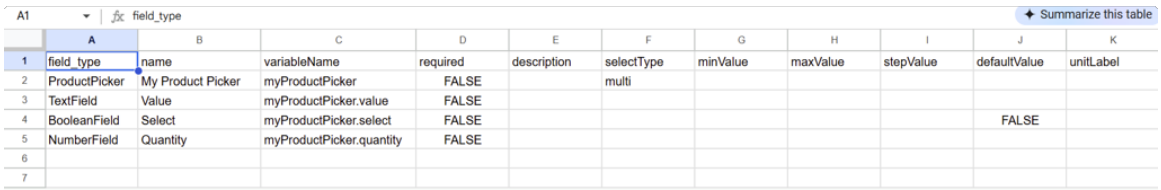
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- Option1/Product1 - Product One
- Option2/Product2 - Product Two
- Option3/Product3 - Product Three

To create a product picker, follow these steps.

1. Extract a sample CSV file for fields from the Matrix Loader.

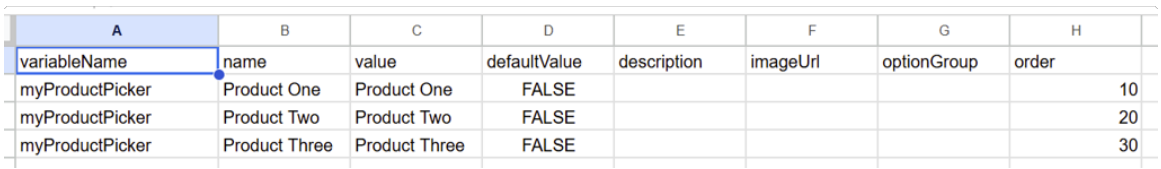
   This CSV file should contain the field information required for creating a product picker. Ensure that you add an extra line at the top of the sample file specifying the field type as product picker (this field type may not be present in the sample file).



| | A | B | C | D | E | F | G | H | I | J | K |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | field_type | name | variableName | required | description | selectType | minValue | maxValue | stepValue | defaultValue | unitLabel |
| 2 | ProductPicker | My Product Picker | myProductPicker | FALSE | | multi | | | | | |
| 3 | TextField | Value | myProductPicker.value | FALSE | | | | | | | |
| 4 | BooleanField | Select | myProductPicker.select | FALSE | | | | | | FALSE | |
| 5 | NumberField | Quantity | myProductPicker.quantity | FALSE | | | | | | | |
| 6 | | | | | | | | | | | |
| 7 | | | | | | | | | | | |

2. Extract a sample CSV file for field options from the Matrix Loader.

   This CSV file should contain the product names that will be displayed in the end-user UI for the fields created in the previous step.



| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | variableName | name | value | defaultValue | description | imageUrl | optionGroup | order |
| 2 | myProductPicker | Product One | Product One | FALSE | | | | 10 |
| 3 | myProductPicker | Product Two | Product Two | FALSE | | | | 20 |
| 4 | myProductPicker | Product Three | Product Three | FALSE | | | | 30 |

3. Create a new .yaml file.

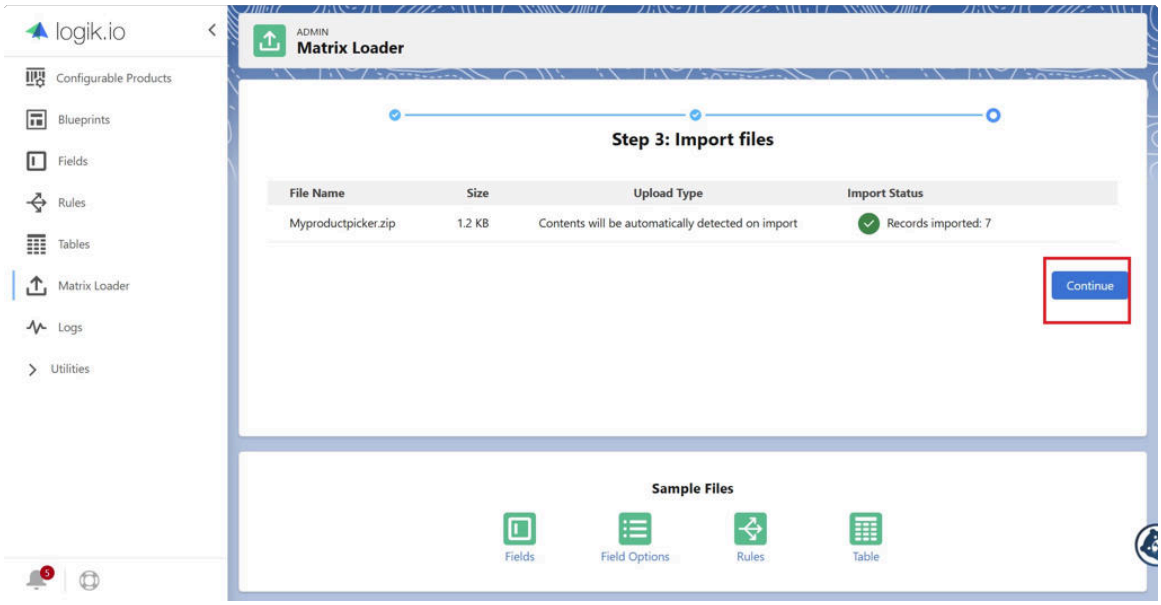
   This file should include the fields contained in the product picker, as defined in the CSV file in Step 1. The .yaml file will be used to link the two CSV files during the upload process in the Matrix Loader. Without it, the product picker will not be created.

   Example .yaml Syntax:

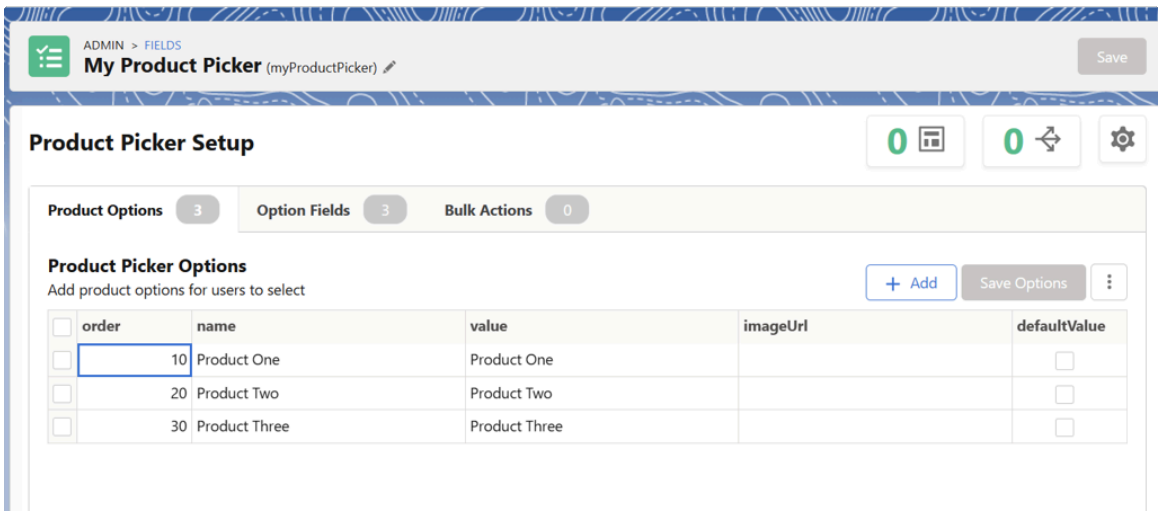
```
---
- variableName: myProductPicker
 fields:
 - variableName: myProductPicker.value
  target: ProductId
 - variableName: myProductPicker.select
 - variableName: myProductPicker.quantity
  target: ProductQuantity
```

4. Upload files to the Matrix Loader: Compress the two .csv files and the .yaml file from the previous steps into a zipped folder. Then, go to the Matrix Loader, upload the zipped folder, click **Import**, and then click **Continue**.

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5. Validate in UI: The newly created product picker should be available in the CPQ Admin fields as shown below.




## CSV export: product picker

To export a product picker, click fields in CPQ Admin. Click **Product Pickers**, select the product picker to export, and then click **Export**.

### Related topics

Matrix Loader: CSV rules upload

Matrix Loader: CSV table upload

### Matrix Loader: CSV rules upload

Use the Matrix Loader to bulk create, edit, and export rules in CPQ. Define rule conditions, actions, and logic in a CSV file to streamline configuration management and automate large-scale updates.

The the Matrix Loader enables administrators to efficiently upload and manage all rule types in CPQ. Instead of manually creating each rule in the Admin interface, you can define them in a spreadsheet, export the sheet to CSV format, and upload it directly into the environment. This

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enables faster configuration setup, easier testing, and simplified migration between sandbox and production environments.

## Rules upload structure

Each row in the CSV file represents a rule record. The following table outlines the columns and data that the Matrix Loader accepts for rule uploads.

**Accepted columns and data for rule uploads**

| Column Name | Description | Valid Values | Notes |
|---|---|---|---|
| record_type | Identifies this as a rule upload | rule | Required |
| rule_name | Name displayed on the rule list Admin page | Valid strings can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: { } [ ] ( ) \| \ ~ ` _ ^ @ ? <=> ; : / . - , + * ' & % $ # " ! | Required |
| rule_variable_name | Unique string used by CPQ to reference the rule | Valid field variable names consist of up to 128 letters, numbers, and underscores. The first and last character must be a letter or number. | Required; must be unique |
| rule_description | Contextual description for administrator reference | Valid strings can be composed of up to 255 characters, including letters, numbers, spaces, and the following special characters: { } [ ] ( ) \| \ ~ ` _ ^ @ ? <=> ; : / . - , + * ' & % $ # " ! | Optional |
| rule_status | Determines if the rule is active | active, inactive | Required; inactive rules are ignored by the engine |
| action_type | Defines the type of action executed when the rule runs | visibility, message, exclusion, inclusion, determination, product | Required |
| action_sub_type | Supplementary definition augmenting action_type | hide, info, warning, error, hidden, disabled, set, forceset, manufacturing, sales | Optional; depends on action_type |
| action_field | Field to which the action applies | <field variableName> | Required |
| action_value | Value applied to the action_field | Varies by action type | Required for message, exclusion, inclusion, or determination actions |
| action_product | Product reference for | SFDC Product Code, Product2 ID, or External ID | Required for product actions |

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**Accepted columns and data for rule uploads (continued)**

| Column Name | Description | Valid Values | Notes |
|---|---|---|---|
| | bill-of-material (BOM) actions | | |
| action_quantity | Quantity of the product added to the BOM | <positive float> or <positive integer> | Required for product actions |
| action_mandatory | Specifies whether a BOM product is optional or mandatory | TRUE, FALSE, <empty> | Optional; defaults to TRUE |
| grouping | Defines how conditions are grouped and evaluated | any, all, custom, always | Required |
| resource / operator / value | Defines condition tuples forming the rule logic | <field variableName>, operator, value | Resource, operator, and value together define the condition expression |

## Condition groupings

Condition groupings determine how rule conditions are logically combined. Supported options include:

- any: ORs all conditions defined in the row.
- all: ANDs all conditions defined in the row.
- custom: Allows complex logic expressions, such as (1 OR 2) AND 3.
- always: Applies the rule unconditionally.

## Valid operators

The following operators are supported for condition evaluation:

- equals (=, ==, equals)
- not equals (!=)
- less than (<)
- less than or equal
- greater than (>)
- greater than or equal (>=)
- contains / not contains
- in / not in

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## General guidelines

- Always verify variable names match the field references exactly.
- Keep rule descriptions concise but descriptive to aid troubleshooting.
- Use inactive status for testing new rules before enabling in production.
- Validate grouping logic (any/all/custom) carefully to avoid unintended outcomes.
- Ensure product references (Product2 ID or External ID) align with your Salesforce configuration.

## Exporting rules to CSV

Administrators can export all rule definitions from the CPQ environment to CSV format for review or migration. The resulting ZIP file contains a single CSV file of all exported rule definitions.

1. In the left Admin navigation pane, click **Rules**.
2. Optional: enter a search string and press Enter to narrow results.
3. Click **Export**. A message confirming export appears at the bottom of the page.
4. Open the Notification Center (bottom left) and click the **Download** link.

## Additional information

- Valid strings may include letters, numbers, spaces, and special characters: `{ } [ ] ( ) | \ ~ ` _ ^ @ ? < = > ; : / . - , + * ' & % $ # "`
- Rule variable names can contain up to 255 alphanumeric characters and underscores. They must begin and end with a letter or number.
- Cells with gray backgrounds in sample files denote irrelevant fields for the current context.
- Use the provided sample files (Admin → Matrix Loader → Sample Files → Rules) as a template for formatting.

### Related topics

Configure the Matrix Loader

Matrix Loader: CSV rules upload

### Matrix Loader: CSV table upload

Use the Matrix Loader to import and manage table data in CPQ. Define table schemas, prepare matching CSV files, and upload them to populate or update tables for use in rules, lookups, and configurations, with no redeployment required for data updates.

### Before you begin

**Note:** All table data can be added to CPQ via the Matrix Loader. This section assumes that the reader will work in a spreadsheet file (Google Sheets, Microsoft Excel, or similar), then download or export the result to a CSV file for upload to the Matrix Loader.

In order to upload data to a table, you must first manually define the schema for the table by creating columns. Columns include a name, data type (either number or text), and a description (optional).

Limits and boundaries:

- Rows in a table: no practical limit
- Columns in a table: no practical limit

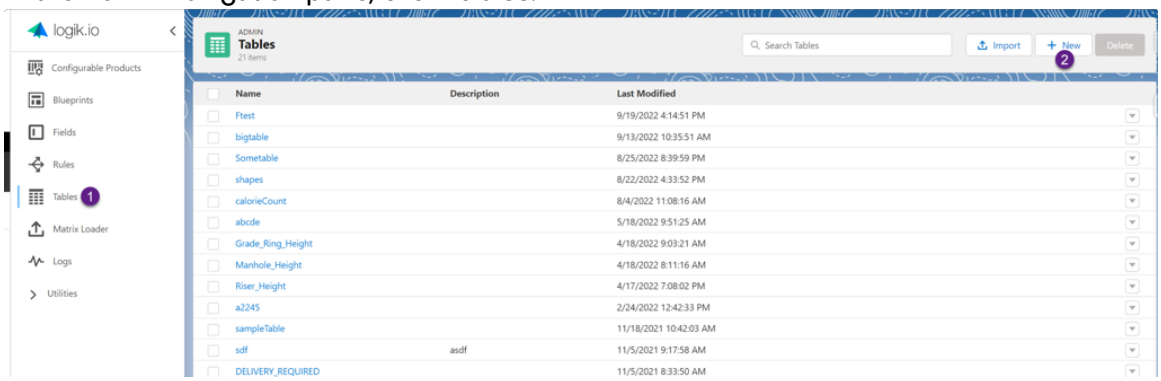
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- Length of value stored in a text-type column cell: 2000 characters
- Length of value stored in a number-type column cell: extremely high (unlikely to reach in practice)
- Scripting: lookup returns a maximum of 10,000 rows from a table

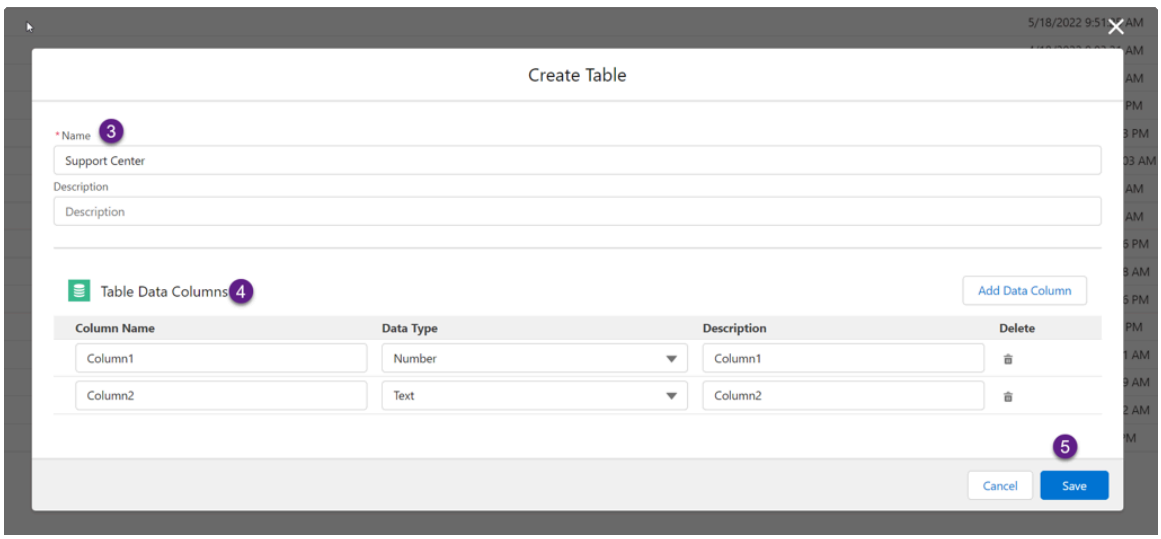
Role required: Admin

### Procedure

1. In the Admin navigation pane, click **Tables**.

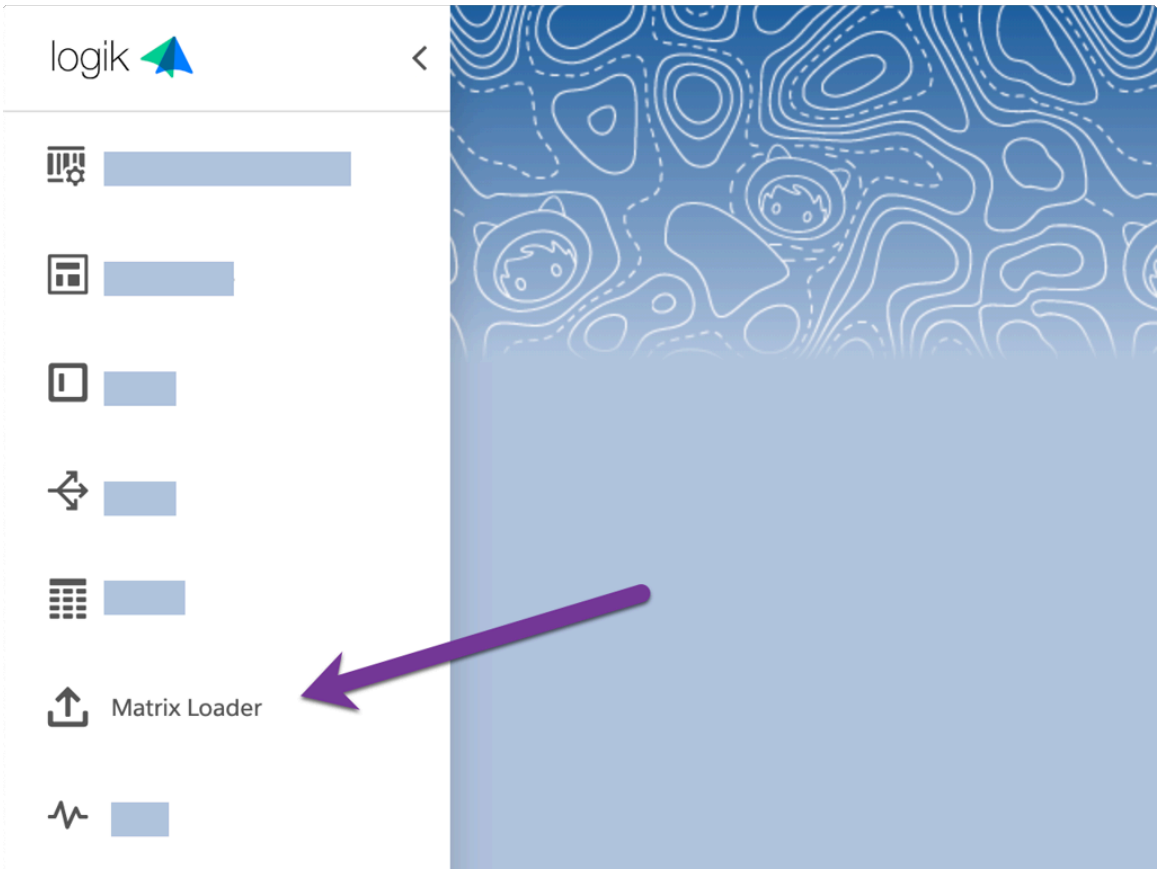



2. In the upper right, click **+ New**.
3. Name the table.

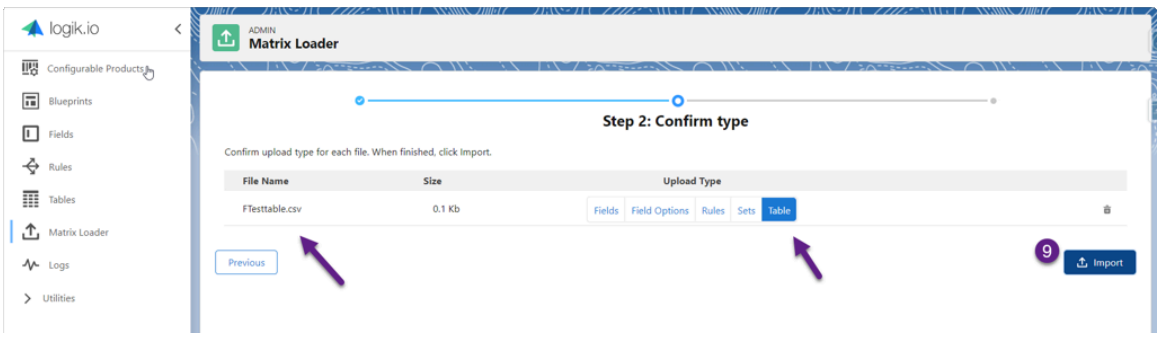



4. Name the columns, select their table type, and add a description.
5. Click **Save**.
6. Create a spreadsheet with your data.
   Name the columns exactly as named in the table that was created in the previous steps, and save the data in CSV format. Note that the name of the CSV file must exactly match the name of the table you created in order for the data to be correctly mapped to the table.
7. In CPQ Admin, click **Matrix Loader** in the navigation pane.

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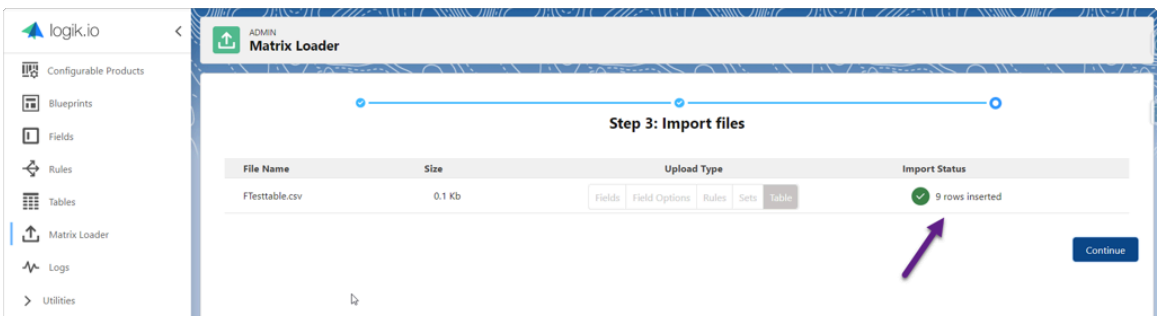

8. Upload the CSV file to the Matrix Loader.




Note that if the name of the table and CSV file contains the word "table," the Matrix Loader will automatically select the Upload Type as "table." Otherwise, you will need to manually select the Upload Type.

9. Click **Import**.

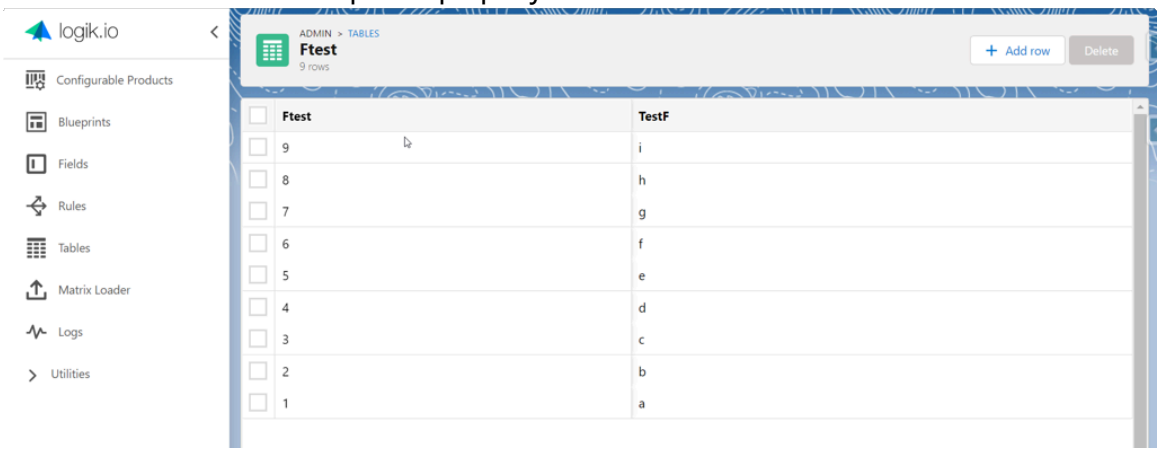
10. To confirm that the import was successful, check the import status.




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If there are error messages, confirm that the CSV file name and table name are the same, and that the column names in the table and the CSV file match exactly. Then upload the corrected CSV.

11. In the Tables section of the Admin navigation pane, click the table, and view the table to confirm that column data imported properly.




## Result

You are now ready to create queries using the new table. Updates to managed tables do not require a redeployment to take effect. However, updates to rules with lookups to those tables require a redeployment.

### Related topics

Configure the Matrix Loader

Matrix Loader: CSV rules upload

### Indexes and natural keys for managed tables

Use indexes and natural keys to improve rule engine performance and speed up table lookups.

CPQ supports the integration of natural keys and indexes for faster table lookups and heightened rules engine performance.

This enhancement to CPQ's table management system introduces compatibility with up to three natural keys per table and the addition of two indexed columns.

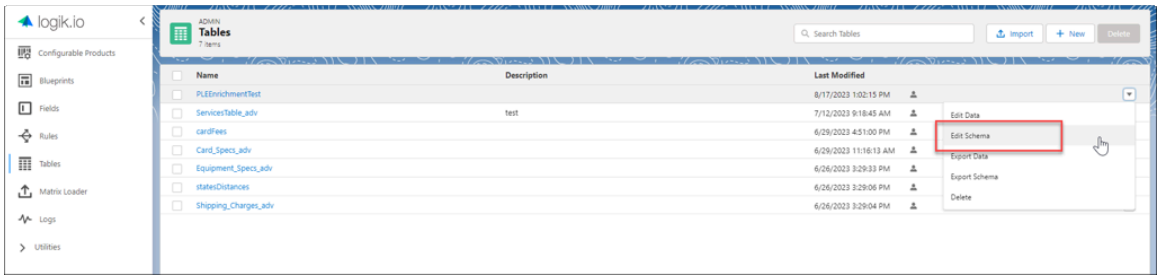
- A natural key provides a means of unique identification for data in a table.
- Indexed columns quickly locate data without having to search every row in the table every time the table is accessed.

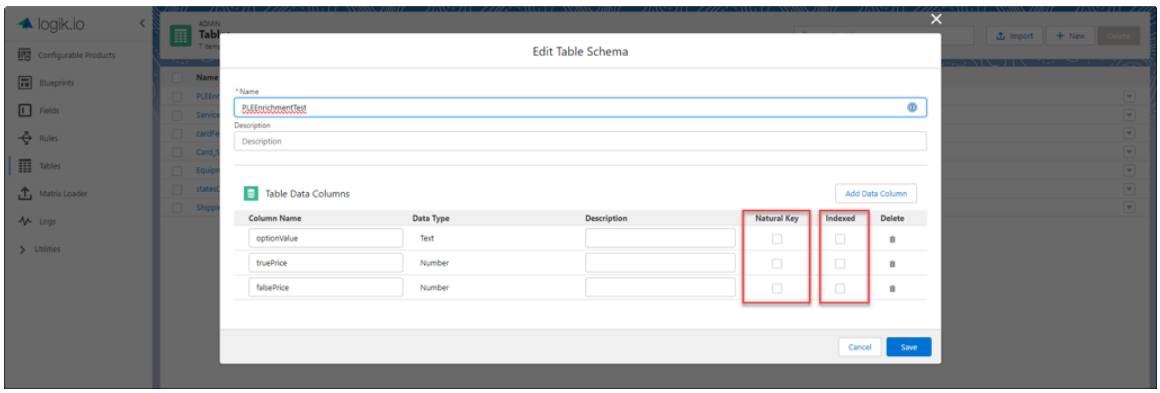
**Note:** All columns designated as natural keys undergo automatic indexing, optimizing the efficiency of query operations. Indexed columns are not required to be unique, and can work alongside natural keys for multiple data retrieval options.

Lookup functions that reference a column in their SELECT clause can benefit from the addition of indexing the column, as searches can be performed faster with no changes needed to the script.

These features can be added to a column by editing the table schema. (The schema editor opens automatically when you create a new table.)

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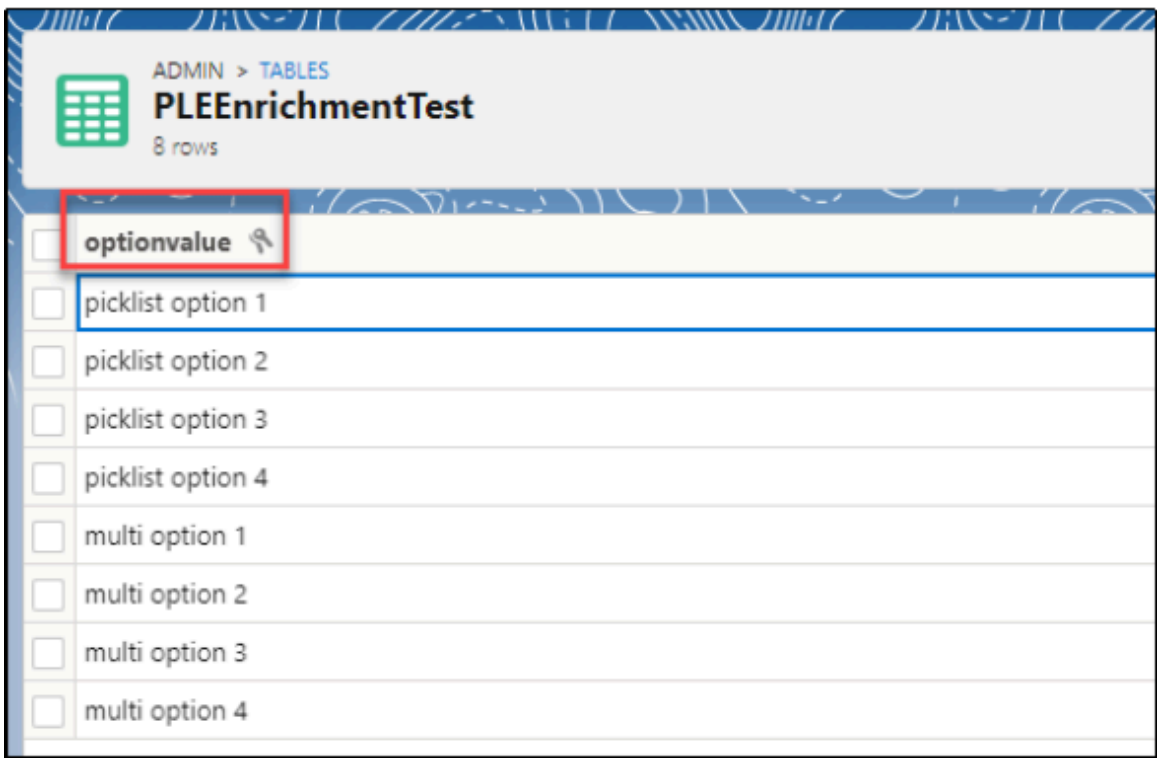



Because all natural keys are also indexed, checking the column does not allow the user to also check the Indexed column.

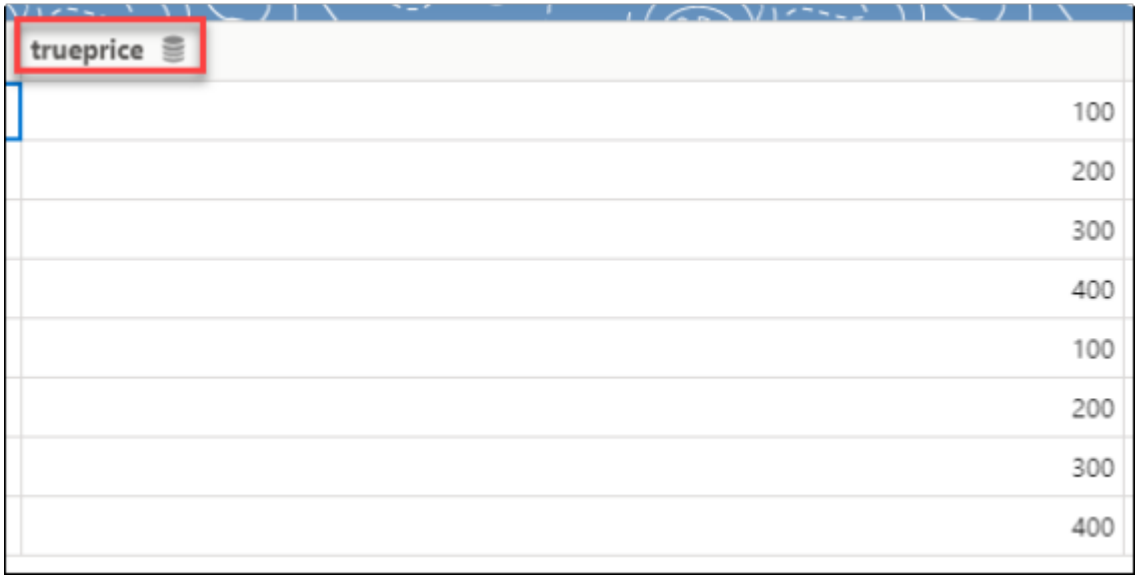



When the Natural Key column is checked, a keys icon displays in the table.




Another icon indicates which columns are indexed.

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Since natural keys act as unique identifiers in the table, internal validation makes sure that each column in the table is unique.

When adding a natural key to a column with duplicate rows, the table does not allow the schema to save.

When exporting a table, the schema file indicates whether a column is indexed or is a natural key, so when the user imports the table to another environment, the schema's column settings are saved.

## Reasons an import might fail

Some factors associated with natural keys and Indexes might hamper table import. These factors include:

- There are more than three columns set to be natural keys in the schema
- There are more than two columns set to be indexed in the schema
- A column set to be a natural key contains duplicate rows

### Related topics

Minimizing table queries

The lookup function: commands and syntax

### Using external connections with OAuth support

External connections allow enrichments to retrieve data from third-party systems to enhance configurations. When security requires OAuth, you can set up an OAuth handshake using client credentials to authenticate and access external APIs. This approach ensures secure data exchange for tasks such as pricing updates or attribute population during configuration.

Enrichments are scripts that run outside the rules engine and affect configurations in CPQ. There are five types of enrichments that can be enabled in a CPQ environment:

- On configure/reconfigure
- On BOM response
- Validation

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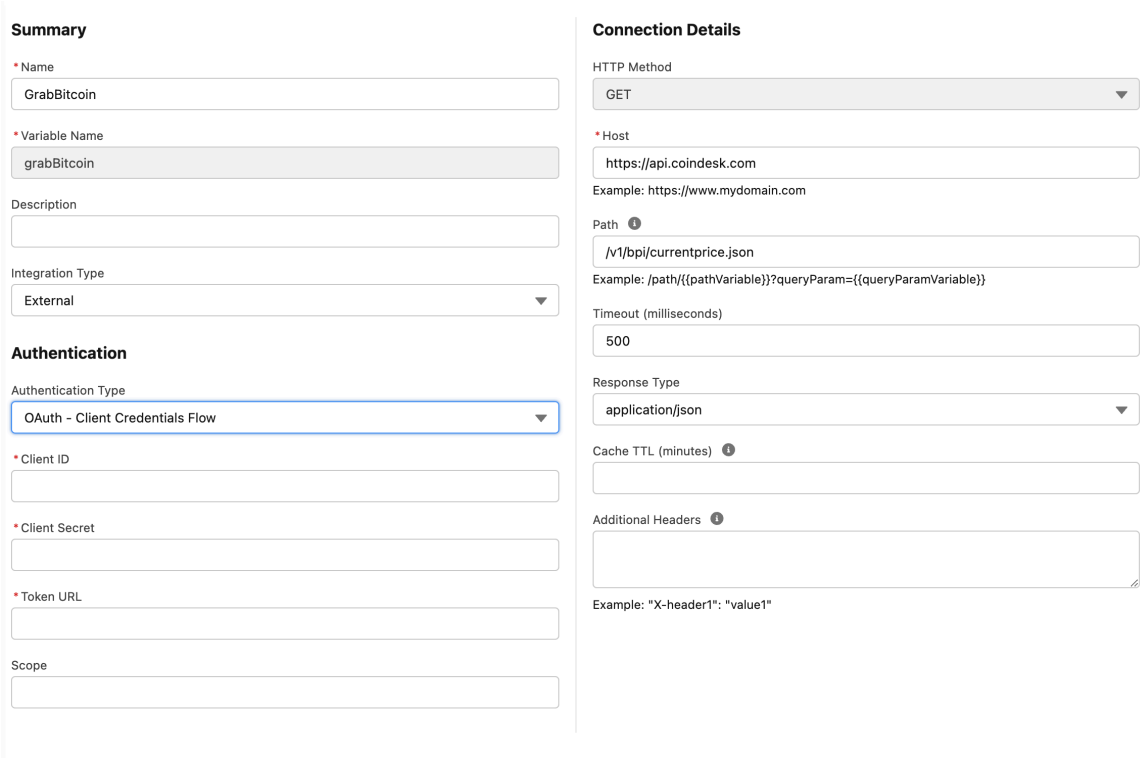
- Picklist extension pricing
- On request

External connections get data for a CPQ configuration from something outside CPQ. External connections can only be called from an enrichment.

Occasionally, an external connection requires an OAuth handshake for security purposes. For example, you may need to populate a field or an enrichment script with data from a third-party application, such as pricing or other attributes.

To set an OAuth external connection, follow these steps:

**1.** Define the external connection by visiting Admin > Utilities > External Connections.




**2.** Define your authentication token.

- If the external connection calls an open API, no authentication token is needed.
- If the external connection is Salesforce, CPQ takes care of the authentication token for you.
- If the authentication supports a bearer token, insert the bearer token provided by the external service for the purposes of authentication.
- If the authentication requires OAuth authentication:

  **a.** Select OAuth - Client Credentials Flow

  **b.** Insert the client ID

  **c.** Insert the client secret

  **d.** Insert the token URL field

  Required OAuth inputs:

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**Required OAuth inputs**

| Field | Type | Description | Validations |
|---|---|---|---|
| Client ID (Required) | varchar (unlimited) | Holds the client ID created for CPQ with the authorization server | Not empty |
| Client secret (Required) | varchar (unlimited) | Holds a tokenized reference to the client secret<br><br>The actual value is stored in the GCP secret store, except in dev environments, where the value is stored directly | Not empty |
| Token URL (Required) | varchar (unlimited) | The URL of the authorization server to exchange the client ID/secret with for a token | Not empty |
| Scope (Optional) | varchar (unlimited) | Optional - can be used to specify the scopes sent with the token request | None |

3. Specify the parameters that need to be passed to the destination server in the Path input.

   Parameter variables can be used to dynamically define the path. An example path is `/v4/latest/{{inputVariable}}`, where `{{inputVariable}}` is the section of the path that is used as the parameter variable.

   If a path is using a parameter variable, use `encodeURIComponent()` in your enrichment script when you define the variable. For an example, see the following code.

```
let inputs =
 {"inputVariable":encodeURIComponent(cfgRequest.baseCurrency.va
lue)};
let results = External.exchangeRatesAPI(inputs);
var resultsMap = results.body.rates;
```

   Line 1 defines the variable, referencing the parameter variable from our external connection “inputVariable”. A CPQ field that stores the data we want is wrapped in encodeURIComponent and completes the inputVariable path.

   Line 2 and 3 then trigger the external connection `exchangeRatesAPI` using the defined input. Additional scripting is required for the call to be narrowed down to retrieve the desired data and set a field, if that is a desired use case.

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A timeout limit is needed. We suggest 500 milliseconds as a starting point. If you find that the external connection regularly exceeds this limit, you can increase this value. However, this may slow the performance of the end-user configuration.

The following enrichment script uses an external connection. This bill of materials (BOM) enrichment queries a powerPricing API with customer data. With the customer-specific rate date retrieved from the service, the enrichment adjusts the pricing of existing ProductList records.

```
var powerInputs = {"membershipCode":cfg.eCMembershipCode,
 "icp":cfg.eCICPNumber}; let powerResponse =
 External.powerPricing(powerInputs);

let dailyCharge = 0; let ratesArr = [];

if(powerResponse.status == 200) {

for(var record of powerResponse.body) { if(record.chargeType ==
 cfg.expectedUsage) {

dailyCharge = record.dailyCharges; ratesArr = record.rates;

}

}

for(var prod of ProductList)
 { if(prod.id=="electricBillEstimator") {

let addedPrice = dailyCharge * cfg.serviceDurationInDays;
 prod.price = addedPrice;

}

if(prod.id=="Standard Rate" || prod.id=="Low Rate")
 { prod.price = dailyCharge;

}

}

for(var rateVal of ratesArr) {

ProductList.id = "Additional Charge Per KWH: " + rateVal.name;
 ProductList.quantity = 1;
ductList.bomType="Manufacturing"; ProductList.orderNumber = 2;

ProductList.price = rateVal.rate; ProductList.notes =
 rateVal.measure;
ductList.parentProduct="electricBillEstimator";
 ProductList.next();

}

}
```

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```
return ProductList;
```

### The test frame

Use a test frame to quickly validate the behavior of a configurator without creating a web page or running the full quoting flow. Load a product and pass key parameters to preview the configuration in an iframe.

The test frame streamlines testing by providing a lightweight interface to preview configuration behavior before deploying changes.

## Accessing the test frame

To access the test frame page in CPQ, navigate to the appropriate URL, replacing `{tenant}` and `{sector}` with values for your instance:

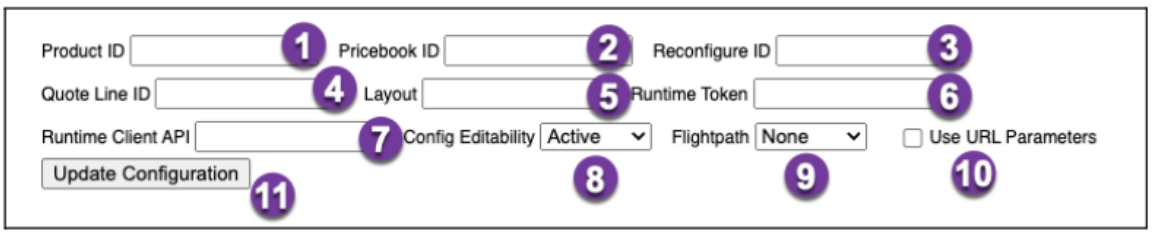
```
https://{tenant}.{sector}.logik.io/ui/configure/testFrame.html
```

Typically, the value of `{sector}` is `test` for sandbox or `prod` for production.

**Note:** If the test frame page displays CPQ administration, clear your browser cache.

## Using the test frame

The testFrame HTML provides easy inputs to a variety of parameters that can be sent to the CPQ configurator.

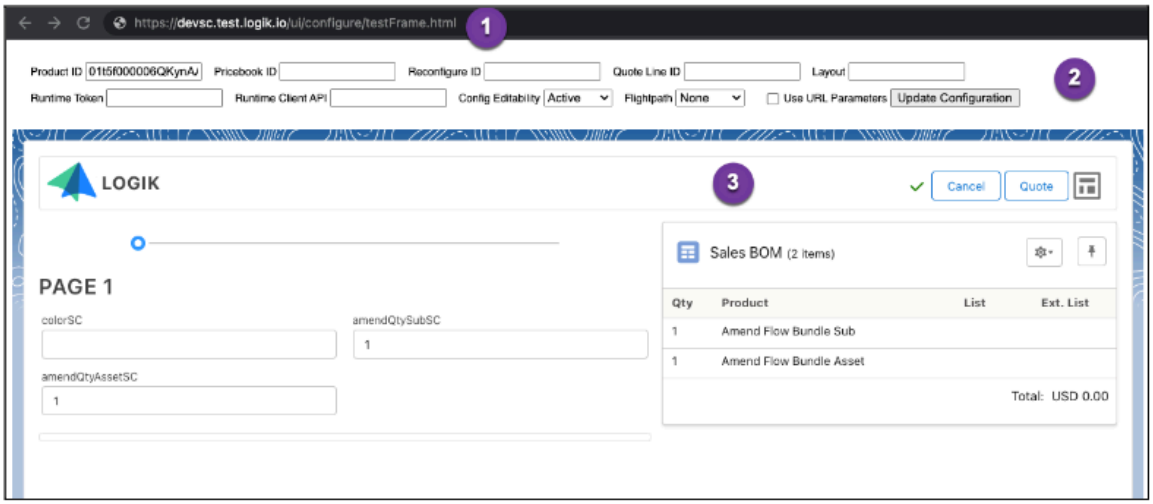



1. Product ID: Product ID of the configurable product to load
2. Pricebook ID: Salesforce Pricebook ID
3. Reconfigure ID: CPQ UUID of existing configuration to load for reconfiguration
4. Quote Line ID: Salesforce Quote Line ID
5. Layout: Name of the Layout to load from the Blueprint of the Configurable Product
6. Runtime Token: Runtime Token from CPQ Admin Setup
7. Runtime Client API: Needs to be encoded and URL-safe. Highly recommended if using the Runtime Token parameter
8. Config Editability: Control the ability to save a configuration
   - Active: Displays the Quote button on the configuration page
   - Available: Displays the Save button on the configuration page
   - None: No Save or Quote button is displayed. End user cannot save configuration
9. Flightpath: Determines whether the execution of CPQ Rules is logged
   - Active: Displays Flightpath controls and automatically starts recording
   - Available: Displays Flightpath controls and does not start recording
   - None: No Flightpath controls are displayed

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10. Use URL Parameters: if checked, use parameters from the URL instead of values in inputs.
11. Update Configuration: On click, this will send the parameters to the CPQ Configuration iframe and update.
    - If using the HTML inputs, parameters are passed via easyXDM
    - If Use URL Parameters is checked, the src of the iframe will be set using the URL parameters

### Example: test frame page




- URL to access the test frame page
- Parameter inputs
- Configuration iframe

For more information, see Use case: Embed CPQ UI in an HTML page.

### The Admin Logs utility

Learn how the Admin Logs utility helps you diagnose, monitor, and resolve configuration issues efficiently in your CPQ environment.

The Admin Logs utility provides administrators with centralized visibility into system activities, configuration errors, and integration issues. It enables quick diagnosis and resolution of problems by capturing key runtime details, error messages, and contextual data about the environment. Designed with usability and precision in mind, Admin Logs helps administrators identify issues, understand their cause, and act swiftly to maintain system stability.

Whether accessed through the Admin UI or via API, Admin Logs helps provide insights admins can use to optimize configurations and keep users productive.

## Key benefits

#### Key benefits of Admin Logs

| Benefit | Description |
|---|---|
| Centralized visibility | Monitor configuration, runtime, and integration errors in one location. |
| Real-time monitoring | Quickly refresh and filter logs to focus on the most recent or relevant time frames. |

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**Key benefits of Admin Logs (continued)**

| Benefit | Description |
|---|---|
| Faster troubleshooting | Review detailed error codes, contextual messages, and user IDs for precise diagnostics. |
| API accessibility | Retrieve log data programmatically for automation or custom dashboards. |
| Continuous improvement | Access enhanced error reporting and contextual details to help streamline ongoing maintenance and user support. |

## Accessing Admin Logs

Administrators can access Admin Logs from the CPQ Admin interface or via API, depending on their preferred workflow and use case.

To access logs, navigate to **Utilities** menu, select **Logs**. It shows the real-time logging capabilities and enable filtering, refreshing, and viewing detailed error information.

## Refreshing and filtering

The Logs interface supports real-time filtering and refresh options. Choose a time range that best suits your analysis needs:

- Past 15 minutes
- Past hour
- Past 24 hours
- All logs

**Note:** Use the refresh button to update the view with the latest events without leaving the Logs page.

## Log details format

Each log entry is displayed in a structured format, making it easy to scan and understand issues. This structure enables administrators to efficiently filter, correlate, and resolve errors across different sessions and components. The log data includes the following columns:

- Date and time: User-friendly date display and exact time in milliseconds (added February 2025).
- Error message: A descriptive summary of the issue encountered.
- Error code: CPQ unique identifier for quick cross-referencing and support requests.
- User ID: The user who encountered the error (added February 2025).

## Accessing logs via API

Administrators who prefer to query logs programmatically can access the Admin Logs API using a GET request. This is especially useful for environments with large data sets or for integrating logs into external monitoring systems. This flexibility allows admins to retrieve specific log intervals for audit or performance review without loading all historical records.

Example cURL command:

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```
curl --location '<logik tenant>/api/logs/v1/logs' \
--header 'Content-Type: application/json' \
--header 'Origin: localhost' \
--header 'Authorization: <Admin API Key>'
```

You can refine results by specifying *before* and *after* parameters in ISO 8601 date/time format:

```
curl --location '<logik
 tenant>/api/logs/v1/logs?after=YYYY-MM-
DDThh%3Amm%3AssZ&before=YYYY-MM-DDThh%3Amm%3AssZ' \
--header 'Content-Type: application/json' \
--header 'Origin: localhost' \
--header 'Authorization: <Admin API Key>'
```

## Continuous improvements

Admin Logs continually evolves to provide deeper insights and improve usability. Enhancements introduced in February 2025 include:

- Enhanced error messages: Save errors now include related configuration errors for faster issue identification.
- Contextual information: For enrichment script errors, logs now capture the specific enrichment area, affected blueprint, and revision ID for precise debugging.
- Detailed external connection errors: “Method not supported” HTTP errors now include the path and method used in the external call.
- Performance metrics: Metrics for external integrations are now tracked and available upon request through CPQ support.

## General guidelines

- Use short time filters when troubleshooting real-time configuration issues.
- Export relevant log data regularly for long-term tracking or compliance review.
- Leverage the API to automate log retrieval or integrate with your organization’s monitoring tools.
- Report unclear error codes or missing context to CPQ support for analysis and improvement.

### Flightpath

Flightpath keeps a record of rule engine activity and field changes in real time. Administrators can analyze system behavior and troubleshoot complex configuration flows with pause and restart options.

Flightpath helps administrators understand how the rules engine responds to end-user inputs. When recording, Flightpath keeps track of:

- Rules engine responses (rules run and fields changed) to end-user input
- Computation time for each rules engine run

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To help troubleshoot long user flows, the administrator can pause Flightpath and reinitiate recording any number of times.

## Demonstration

The following video demonstrates the Flightpath feature tracking rules engine responses.

Flightpath

## Prerequisites

- Salesforce-integrated use cases:

  CPQ environment Explorer 07.22 or later.

  Salesforce CPQ.io Managed Package version 1.2 or greater. Navigation in Salesforce: Admin Setup > Apps > Packaging > Installed Packages > CPQ Managed Package

  The Salesforce administrator must add the `LGK FlightPath_c` field to the Quote Line Editor field set (Salesforce: Admin Setup > Object Manager > Quote > Field Sets > Line Editor). Place the Flightpath field in the field set. Limit its visibility to the appropriate administrator roles.

- Headless/eCommerce use cases:

  Your CPQ environment must be Explorer 07.22 or later.

  Append the following text to your configure API call to CPQ: `?logExecution=<value>`. Example: `https://<siteURL>.<sector>.logik.io/c?logExecution=<value>`

  Valid values for <value> are:

  - true: CPQ configuration returns Flightpath controls. Should be shown only to administrative users.
  - false: CPQ returns no Flightpath controls. Suitable for non-administrative users such as partners, customers, and direct sales.

- End-user UI:

  Append the following to your configure URL: `&log=<value>`

  Examples:

  - Configurator:

    ```
    https://<siteURL>.<sector>.logik.io/ui/configure/<product id>?v=1&<other parameters>&log=<value>
    ```

  - Transaction management:

    ```
    https://<siteURL>.<sector>.logik.io/ui/transact/<transaction id>?v=1&log=active
    ```

    For transaction management, valid values include:

    - none
    - available
    - active

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### Setting up enrichments and rules scripting

Learn how to set up enrichments and write rules scripts to control product behavior, automate calculations, and enhance configuration logic in your application.

### The On Request enrichment

Information about an enrichment you shouldn't use.

**Important:** The On Request enrichment is almost never a recommended pattern. This enrichment type can make configuration performance dependent on outside systems and result in a less than ideal end user experience. Consult Customer Success about other ways to achieve your desired outcome.

The On Request enrichment enables the same capabilities as the On Configure/Reconfigure Enrichment, except that it is called after each field change to any field in the enrichment.

In this enrichment, all external API calls time out after five seconds.

General guidelines:

- Wrap external APIs in validation logic to ensure that they are only called when absolutely necessary.
- Always validate all data required to run an API before you directly call the API.
- Use ogic to limit running external APIs.
- Make sure that any API called in an on request enrichment is able to fully run and respond quickly.

```
// Here we use a boolean field to delay the running of
 additional code
if (cfgRequest.runOnRequest == true) {
  cfgRequest.onRequestTextField.value = "On Request Ran";
}p
cfgRequest.runOnRequest = false;
```

- Avoid non-performant or long-running APIs.

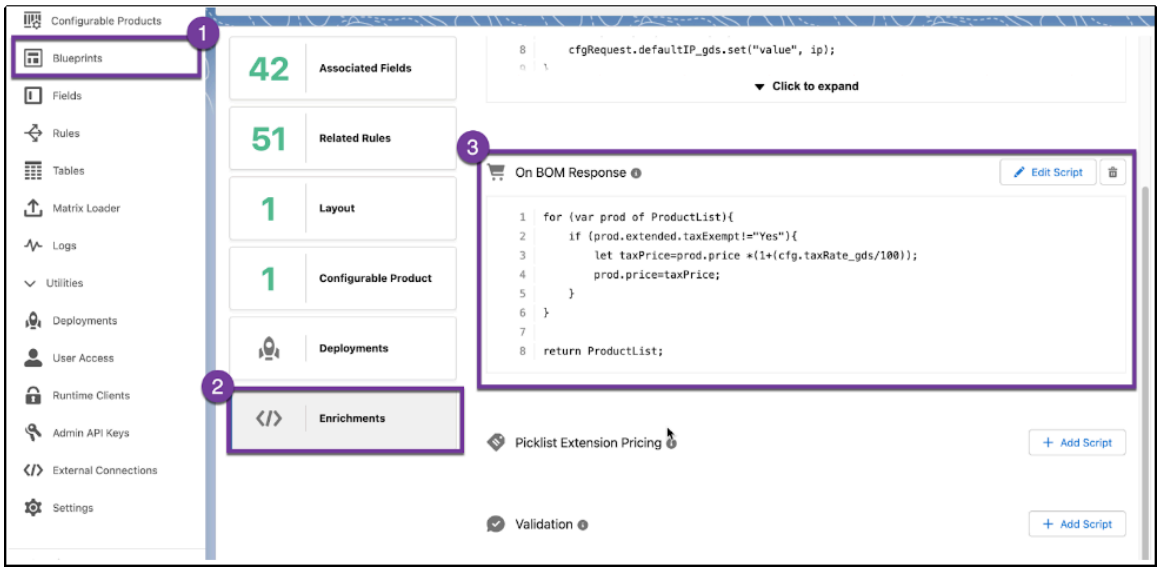
### The On BOM Response enrichment

You can use this enrichment to work with ProductList items whenever there is an update to the bill of materials.

The On BOM Response enrichment is enabled by default in environments and can be used to manipulate items in the ProductList whenever there is an update to the bill of materials (BOM).

**Note:** The CPQ environment must include rules with product actions, or there will be nothing for the enrichment to loop through.

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In the following sample, the On BOM Response enrichment loops through products and changes the price of a product.

```
//Loop over products and change price of a product
let dealProduct = cfg.blueMoonSelected;
if (dealProduct == true) {
        for(var prod of ProductList) {
                let price = prod.price * .8;
                prod.price = price;
        }
}
```

On BOM Response enrichments may request external REST services via GET or POST.

In the following sample script, the On BOM Response enrichment uses an external connection to query a powerPricing API with customer data. With the customer-specific rate data retrieved from the service, the enrichment adjusts the pricing of existing ProductList records.

```
var powerInputs = {"membershipCode":cfg.eCMembershipCode,
 "icp":cfg.eCICPNumber};
let powerResponse = External.powerPricing(powerInputs);
let dailyCharge = 0; let ratesArr = [];

if(powerResponse.status == 200) {
 for(var record of powerResponse.body) {
  if(record.chargeType == cfg.expectedUsage) {
   dailyCharge = record.dailyCharges;
   ratesArr = record.rates;
  }
 }
 for(var prod of ProductList) {
  if(prod.id=="electricBillEstimator") {
   let addedPrice = dailyCharge * cfg.serviceDurationInDays;
   prod.price = addedPrice;
  }
   if(prod.id=="Standard Rate" || prod.id=="Low Rate") {
   prod.price = dailyCharge;
  }
 }
 for(var rateVal of ratesArr) {
```

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```
  ProductList.id = "Additional Charge Per KWH: " + rateVal.name;
  ProductList.quantity = 1;
  ProductList.bomType = "Manufacturing";
  ProductList.orderNumber = 2;
  ProductList.price = rateVal.rate;
  ProductList.notes = rateVal.measure;
  ProductList.parentProduct = "electricBillEstimator";
  ProductList.next();
 }
}

return ProductList;
```

## The difference between the rules engine BOM and the enriched BOM

There are two versions of the BOM during runtime: the rules engine BOM, which is based on the results of product rules during runtime, and the enriched BOM, which is the result of the BOM enrichment.

The BOM enrichment's ProductList object (referenced in the script) is the result of the rules engine BOM, not the enriched BOM. This is to make sure there are no infinite loops. Suppose that the script were to reference its own ProductList that it returns, and the script were set up to increase the price of certain objects by a percentage on BOM update. In this case, the next time the contents of the BOM were updated, the price increase would happen again and again.

To prevent this situation, the enriched BOM is not referenced by any rule or enrichment other than the validation enrichment's ProductList. While this makes sure that the BOM enrichment can function outside the rules engine, it also means that if a condition is met in the BOM enrichment, those conditions can be met again the next time the BOM is updated, because any change to the BOM in the BOM enrichment script that stops that condition will not be referenced.

With external connections, this is not a problem as long as the response is consistent. However, if the response changes when fired multiple times, such as when generating a string or saving a certain time, it will update each time the BOM is updated.

The BOM Response enrichment might be used to:

- dynamically change the price of products in the BOM. This can be either a static or dynamic change rate, such as a shipping fee being static and taxes being dynamic.
- change attributes of products in the BOM that are reliant on some condition in the BOM, such as the quantity of free stickers given out once $100+ of tax has been quoted.
- remove a line item from the BOM.

### Passing array variables using Salesforce external connection

You must use single quote strings when making a SOQL query to Salesforce.

Salesforce supports only single quote strings in a SOQL query. Therefore, the following inputs would not be recognized by Salesforce.

```
let inputs = { "productsArray": '("Tablet10", "Laptop13",
 "Laptop15")' }
```

Instead, use single quotes as in the following snippet.

```
let inputs = { "productsArray": "('Tablet10', 'Laptop13',
 'Laptop15')" }
```

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The following sample script pulls Salesforce IDs.

```
// Array of Salesforce IDs
const idList = ['0066e00001pGlTUAA0', '0066e00001pGlTTAA0',
 '0066e00001pGlTPAA0'];

// Create a string to pass to the SOQL IN query
// first part: "('" = opening parenthesis and single quote
// middle part: idList.join("','") = join all the Salesforce Ids
 with single quote, a comma and single quote
// last part: "')" = single quote and closing parenthesis
const soqlIn = "('" + idList.join("','") + "')";

// inputs to the SOQL query and calling SF connection
const inputs = {"idList": soqlIn};
const response =
 Salesforce.<yourExternalConnectionVariableName>(inputs);
```

### Related topics

- Using external connections with OAuth support
- Passing data from Salesforce to CPQ fields

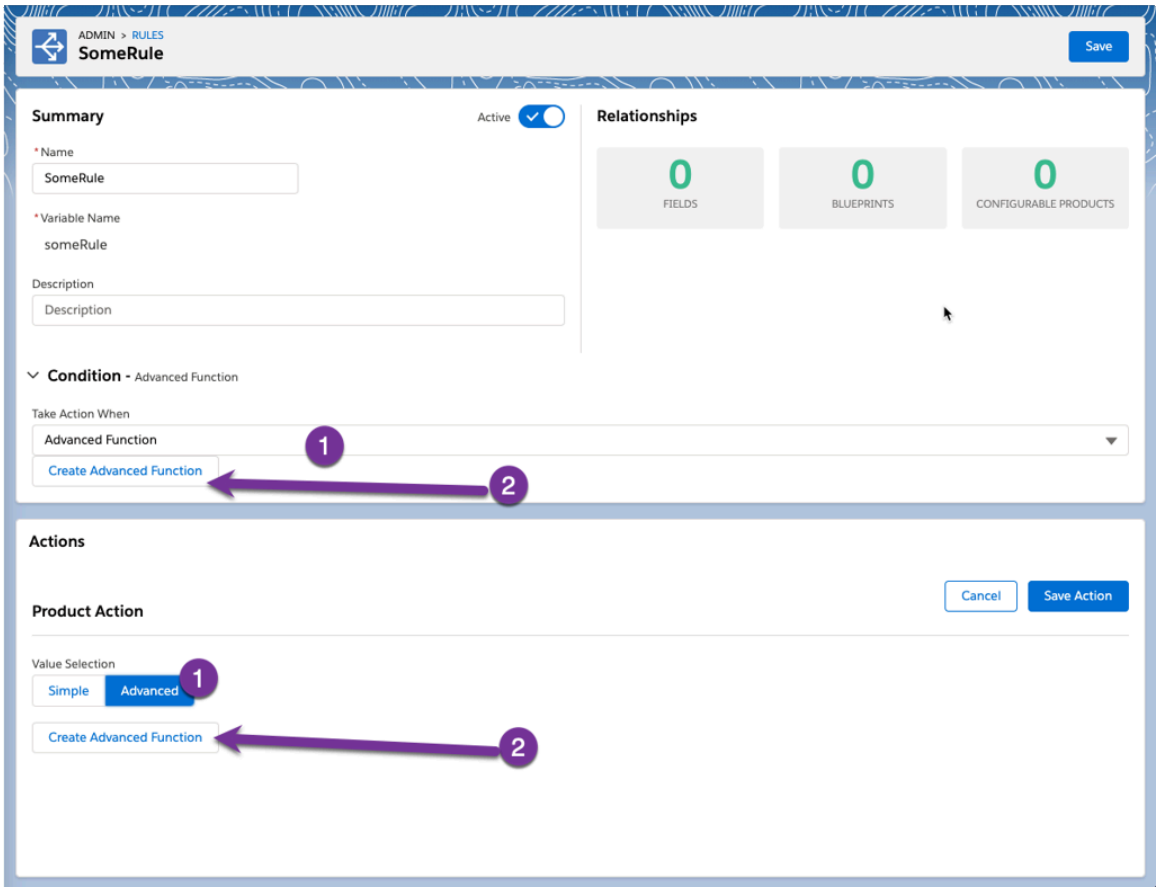
## Create scripts

Learn how to create advanced functions using the scripting interface.

Some use cases require an advanced condition or action. Other times, the administrator may prefer script versus leveraging simple rules. For these occasions, CPQ offers the ability to write scripts in key areas.

Scripting is available in rule actions and conditions, behind the Advanced menu choice or toggle.

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When you click **Create Advanced Function**, the script editor opens, including the tools you need to write a script.

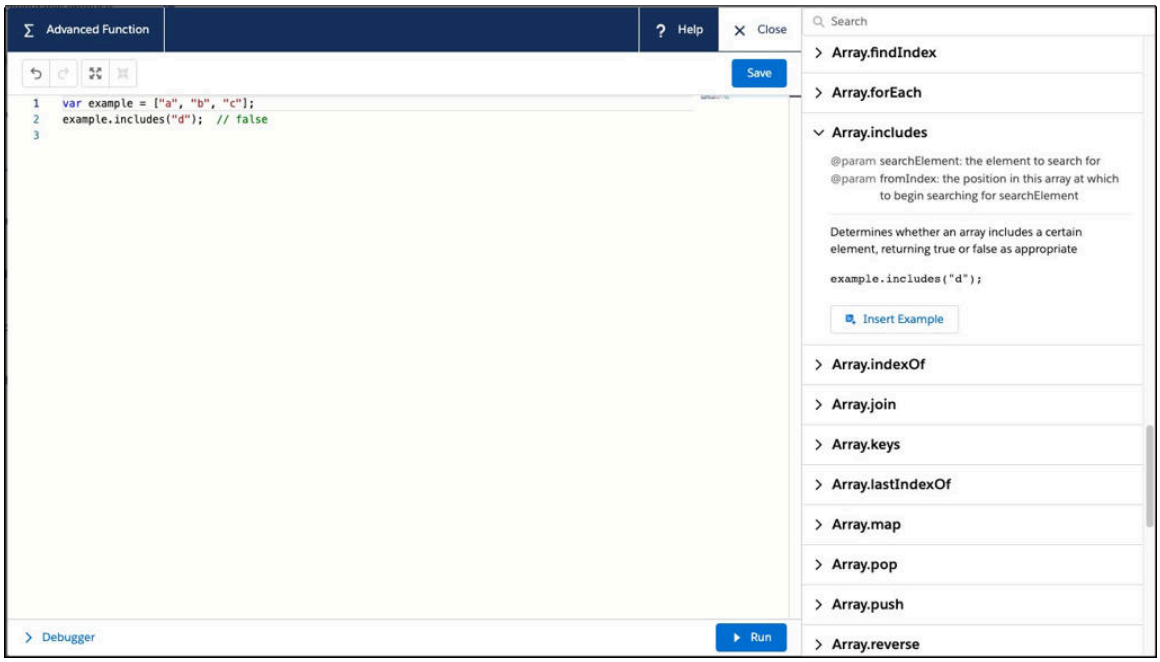
When the script editor first opens, it provides the expected return format of the script.

- Advanced conditions return true or false.
- Advanced hiding rules return a text string.
- Advanced determination rules return the type of the field that they are setting.
  - A determination rule that sets a number returns a number.
  - A determination rule that sets a multi-select picklist returns an array.
- Advanced inclusion and exclusion rules return an array.
- Product rules return ProductList.

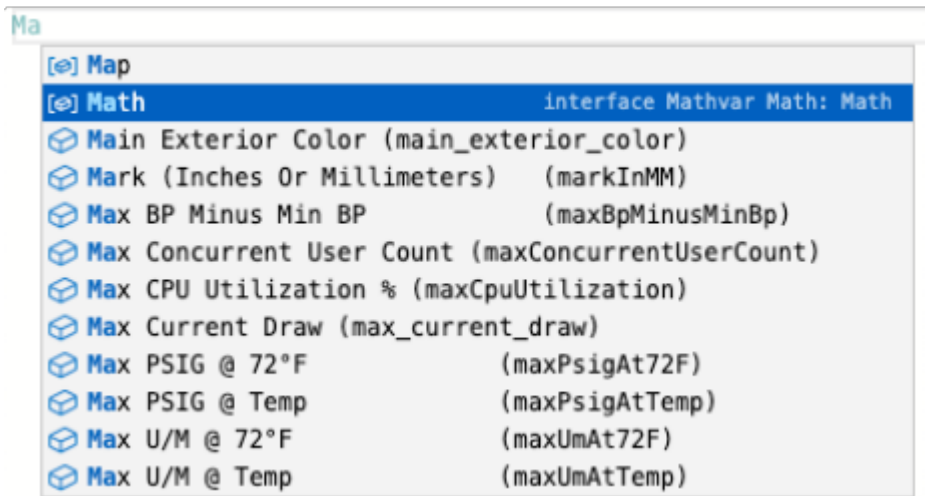
For more details and a script sample, review the "Advanced product actions" section of Rules.

The **? Help** button opens a menu of available functions. Each entry includes a description of the function, the parameters it accepts, its output, and an example that can be inserted at the current location of the cursor in the script.

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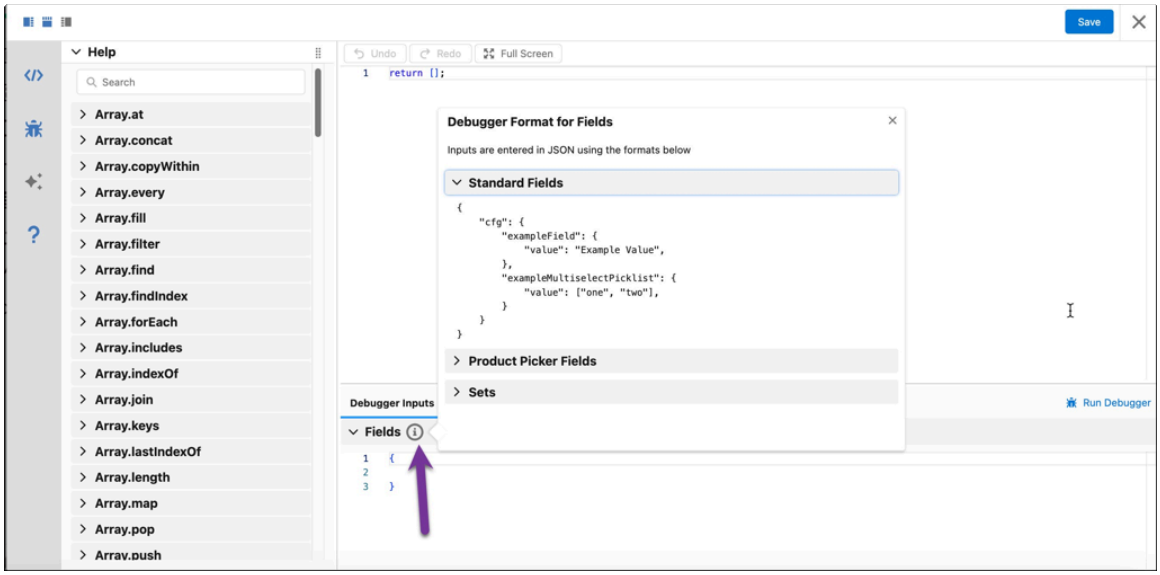



As you type in the script editor, suggestions are provided, including functions, configurable field variable names, and local variables. Using this feature helps eliminate mismatched variable names and typing errors. In the screenshot below, typing `Ma` gives the user two available functions (Map and Math) and a list of all matching fields. Additional inputs narrow the list of matching options.




At the bottom of the scripting interface, the debugger lets you test your script by defining values for the variables (fields) that it references. Debugger input is provided in JSON format. For your convenience, review field-specific formats in the fields information help (arrow).

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It can be helpful to save your debugger inputs as comments in your script for easy pasting into the debugger when you need to test the script.

Calls to `console.log()` in the script are returned in the debugger output.

Also see the following sample scripts:

- Sample Message Script - Array and Map Function
- Sample Number Field Determination
- Sample Product Rule Scripts
- Sample Product Rule Script With For Loop
- Sample Text Field Determination

**Related topics**

CPQ scripting language reference

Sample scripts

Using comments and the console to debug scripts

Scripting: Checking for first and subsequent configurations

Scripting: How to populate set values

### CPQ scripting language reference

View the operators, objects, and keywords that CPQ supports, together with information about type conversion, type checking, alternative scripts for unsupported operations, and accessing object properties.

CPQ uses a JavaScript-like language to dynamically change the value of fields and BOM data via rules and enrichments. JavaScript is a complex language built over almost thirty years, and while we are unable to replicate every piece of functionality that a developer would normally expect while coding, CPQ scripting remains a powerful tool to assist in the dynamic configuration of products.

The capabilities of CPQ scripting are always expanding. Check back to see the most up-to-date features.

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## Supported operators

Arithmetic operators:

**+**
: Addition

**-**
: Subtraction

*****
: Multiplication

**/**
: Division

**%**
: Modulus

**++**
: Increment

**--**
: Decrement

String operators:

**+**
: Concatenation

**+=**
: Addition assignment

Assignment operators:

**=**
: Assignment

**+=**
: Addition assignment

**-=**
: Subtraction assignment

Comparison operators:

**==**
: Equal to

**===**
: Equal value and equal type

**!=**
: Not equal to

**!==**
: Not equal value nor equal type

**>**
: Greater than

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**<**
: Less than

**>=**
: Greater than or equal to

**<=**
: Less than or equal to

Logical operators:

**&&**
: And

**||**
: Or

## Supported objects

Each object supported can be declared with the following:

**[ ]**
: Array

**" "**
: String

**( )**
: Number

**true | false**
: Boolean

**{ }, new Map( )**
: Map

**new Date( )**
: Date

`undefined`, NaN, and `null` are unsupported.

**Note:** Date objects cannot be returned, but they can be referenced and manipulated with the Date APIs in the Help menu.

## Supported keywords

- `var`
- `let`
- `const`
- `new`
- `if`
- `else if`
- `else`
- `for`

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- `for/of`
- `return`

We do not support `while` or unconditional `for` loops with `break`, because of the risk of infinite loops halting performance.

We do not support functions, as the script itself should be small enough to be considered one function. If your script is long with many conditions and variables, consider creating a managed table and using a table query. For more information about using managed tables and table queries, see Matrix Loader: CSV table upload and Minimizing table queries.

### Alternative scripts for unsupported operations

Assignment multiplication and division (/= or *=): `number = number * otherNumber;`, `number = number / otherNumber;`

Exponentiation (x**y): `Math.pow(x, y);`

### Type conversion

Convert arrays to strings: `Array.toString()`

Convert numbers to strings: `[number] + ""`

Convert numeric strings to numbers: `[string] - 0`

**Note:** Strings cannot be treated as arrays, but `.length` does work for strings.

### Type checking

The following returns a Boolean value indicating whether an input is a number: `LGK.isNumber(123)`

### Accessing object properties

You can access the properties of map objects such as `cfgRequest` in two ways.

```
objectName.propertyName
//or
objectName["propertyName"]
```

This is helpful in order to replace large amounts of repetitive code with results from a Table Lookup, since the “propertyName” text could instead be replaced by a variable.

For example, consider a blueprint with the following fields associated with it, and a managed table named shipstatebooleantest.

- shipState
- boolean1
- boolean2
- boolean3
- quantity1
- quantity2
- quantity3

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**shipstatebooleantest**

| id | shipState | trueBoolean | quantityTest | rowQuantity |
|---|---|---|---|---|
| 1 | Arizona | boolean1 | quantity1 | 1 |
| 2 | Maine | boolean2 | quantity2 | 2 |
| 3 | California | boolean3 | quantity3 | 3 |

Instead of having an identical `if` statement check what `shipState` is and setting the Boolean values and quantities accordingly, you could instead replace it with only one `if` statement that sets the values based on the results of a table lookup.

In the following On Configure/Reconfigure script, if the `shipState` field has a value, the fields that are returned by the lookup function are set. If the `shipState` field is blank, then all Boolean and quantity fields are set.

```
if (cfgRequest.shipState.value != "" &&
 cfgRequest.shipState.value != null){
 var fieldMapping = lookup("Select
 trueBoolean,quantityTest,rowQuantity from
 shipstatebooleantest where shipState = :value", { "value":
 cfgRequest.shipState.value });
 console.log(fieldMapping);
 if (fieldMapping != []){
  cfgRequest[fieldMapping[0].trueBoolean].set("value",true);

 cfgRequest[fieldMapping[0].quantityTest].set("value",fieldMappi
ng[0].rowQuantity);
 }
}
else{
 var fieldMapping = lookup("Select
 trueBoolean,quantityTest,rowQuantity from
 shipstatebooleantest");
  console.log(fieldMapping);
  for (var row of fieldMapping) {
   cfgRequest[row.trueBoolean].set("value",true);
   cfgRequest[row.quantityTest].set("value",row.rowQuantity);
  }
}
```

If your instance of CPQ needs functionality not described here, contact support@logik.io with your use case.

### Related topics

- Sample scripts
- Using comments and the console to debug scripts
- Scripting: Checking for first and subsequent configurations

## Sample scripts

View a selection of commonly requested sample scripts.

This article shows some commonly requested sample scripts. If you would like to see more examples, please send a message to documentation@logik.io with your suggestions.

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Sample number field determination:

```
var count64 = 0;
var count32 = 0;
var perCoreProcessing = 40; //assuming 8 processors with 5
 TFlops compute
var cpu64Processing = 64*perCoreProcessing;
var cpu32Processing = 32*perCoreProcessing;
var cpu16Processing = 16*perCoreProcessing;
var remainingCompute = cfg.estPeakOps;
if(cfg.allowCPU64 == true) { //64 core allowed so divide by that
 count64 = remainingCompute/cpu64Processing;
 remainingCompute = remainingCompute%cpu64Processing;
}
if(cfg.allowCPU32 == true) {
 count32 = remainingCompute/cpu32Processing;
 remainingCompute = remainingCompute%cpu32Processing;
}
return count32;
```

Sample text field determination:

```
var retStr = "";
retStr = retStr + "64 vCPUs: " + Math.round(cfg.cpu64Count);
retStr = retStr + "\\n32 vCPUs: " + Math.round(cfg.cpu32Count);
retStr = retStr + "\\n16 vCPUs: " + Math.round(cfg.cpu16Count);
retStr = retStr + "\\n8 vCPUs: " + Math.round(cfg.cpu8Count);
retStr = retStr + "\\n1 vCPUs: " + Math.round(cfg.cpu1Count);
return retStr;
```

Sample product rule script:

```
//Base Product
var baseProductP2ID = "BP_ID";
var inputs = {"g2BaseProduct": cfg.g2BaseProduct};
var resultSet = lookup("SELECT Product2Id, ProductName FROM
 Dummytable WHERE ProductCode = :g2BaseProduct", inputs);
for (var row of resultSet) {
 ProductList.id = row.get("Product2Id");
 ProductList.quantity = cfg.orderQty;
 ProductList.bomType = "SALES";
 ProductList.uom = "EA";
 ProductList.level = 1;
 ProductList.notes = row.get("ProductName");
 ProductList.parentProduct = "01t5f000000uJgoAAE"; //parent
 product identifier. In this case top product being configured
 from SFDC
 baseProductP2ID = row.get("Product2Id");
 ProductList.uniqueIdentifier = baseProductP2ID; //Parent
 ...SF ProductID; not req'd if this has no other children
 ProductList.next();
 break;
}
```

Sample product rule script with `for` loop:

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```
//var timesReplicate = cfg.numberOfComputeClusters; //this
 doesn't work yet.. If it does, we will replicate that many
 times easier
var timesReplicate = [1,1,1,1,1,1,1,1,1,1]; //dummy 10 times
 loop based on 10x boolean true, Double loop for 100
for (var parentStep of timesReplicate) {
 for (var step of timesReplicate) {
  if(cfg.cpu16Count > 0) {
   ProductList.id = "01t5f000000v50CAAQ";
   ProductList.quantity=Math.round(cfg.cpu16Count);
   ProductList.notes="Provisioning " +
 Math.round(cfg.cpu16Count) + " number of 16 core vCPUs";
   if(cfg.sendDirectlyToProvisioning == true) {
    ProductList.bomType = "Manufacturing";
    ProductList.level = 2;
   } else {
    ProductList.bomType = "SALES";
   }
   ProductList.next();
  }
  if(cfg.cpu8Count > 0) {
   ProductList.id = "01t5f000000v50DAAQ";
   ProductList.quantity=Math.round(cfg.cpu8Count);
   ProductList.notes="Provisioning " + Math.round(cfg.cpu8Count)
 + " number of 8 core vCPUs";
   if(cfg.sendDirectlyToProvisioning == true) {
    ProductList.bomType = "Manufacturing";
    ProductList.level = 2;
   } else {
    ProductList.bomType = "SALES";
   }
   ProductList.next();
  }
  if(cfg.cpu32Count > 0) {
   ProductList.id = "01t5f000000v50BAAQ";
   ProductList.quantity=Math.round(cfg.cpu32Count);
   ProductList.notes="Provisioning " +
 Math.round(cfg.cpu32Count) + " number of 32 core vCPUs";
   if(cfg.sendDirectlyToProvisioning == true) {
    ProductList.bomType = "Manufacturing";
    ProductList.level = 2;
   } else {
    ProductList.bomType = "SALES";
   }
   ProductList.next();
  }
  if(cfg.cpu64Count > 0) {
   ProductList.id = "01t5f000000v50JAAQ";
   ProductList.quantity=Math.round(cfg.cpu64Count);
   ProductList.notes="Provisioning " +
 Math.round(cfg.cpu64Count) + " number of 64 core vCPUs";
   if(cfg.sendDirectlyToProvisioning == true) {
    ProductList.bomType = "Manufacturing";
    ProductList.level = 2;
   } else {
    ProductList.bomType = "SALES";
```

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```
   }
   ProductList.next();
  }
  if(cfg.cpu1Count > 0) {
   ProductList.id = "01t5f000000v50SAAQ";
   ProductList.quantity=Math.round(cfg.cpu1Count);
   ProductList.notes="Provisioning " + Math.round(cfg.cpu1Count)
 + " number of 1 core vCPUs";
   if(cfg.sendDirectlyToProvisioning == true) {
    ProductList.bomType = "Manufacturing";
    ProductList.level = 2;
   } else {
    ProductList.bomType = "SALES";
   }
   ProductList.next();
  }
 }
}
console.log("Added line items 100 times");
return ProductList;
```

Sample array and map functions:

```
var productidArr = ["test123", "chtest123"];
var inputs = {"productids": productidArr};
var resultSet = lookup("SELECT uniqueidentifier, bomtype FROM
 bominformation WHERE productid IN (:productids)", inputs);

var prodTypeMap = new Map();
for (var row of resultSet) {
 prodTypeMap.set(row.get("uniqueidentifier"),
 row.get("bomtype"));
}
var itemTypeManuf = productidArr.every((value) => {return
 prodTypeMap.get(value) != "Manufacturing";});
if (isGood == false) {
 return "Sales type item found";
}
var summary = "";
productidArr.forEach((item, index) => {summary += index + " " +
 item + ". ";});
return summary;
```

How to pull multi-select picklist values from SFDC to twinned multi-select picklist field in CPQ in the On Configure/Reconfigure enrichment:

```
let x = (cfgRequest.yourTwinnedLogikField.value).split(";");
cfgRequest.yourTwinnedLogikField.set("value", x);
return cfgRequest;
```

How to concatenate field values into a string:

```
stringVar = "";
stringVar = stringVar.concat(cfg.varible1, cfg.variable2,
 cfg.variable3);
return stringVar;// returns selected values of
 "variable1variable2variable3"
```

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How to imitate a CONTAINS function:

```
var yourVariable = "Field Value"; // Replace with your actual
 Field value
if (yourVariable.includes("CU")) {
 // Code you wish to execute when Field Value contains "CU"
} else if (yourVariable.includes("AL")) {
 // Code you wish to execute when Field Value contains "AL"
} else {
 // Code you wish to execute when Field Value doesn't contain
 "CU" or "AL"
};
```

**Related topics**

CPQ scripting language reference

### General guidelines for scripting

Write efficient scripts using a JavaScript-like language. Follow these general guidelines for naming, variables, and table access.

This guide will walk you through the general guidelines for writing efficient and reliable scripts in CPQ using a JavaScript-like language. Following these guidelines will help you create maintainable, readable, and well-performing code.

## Quick summary

- Place declarations at the top
- Comment thoughtfully
- Indent brackets
- Use descriptive variable names
- Name variables consistently
- Avoid "new"
- Avoid loose equality ("==")
- Use "const" before "let" and "let" over "var"
- Minimize table lookups

## Place declarations at the top

Placing variable and function declarations at the top of your script improves readability and prevents unexpected variable hoisting issues.

```
1 // Declare and initiate at the beginning
2 let firstName = "";
3 let lastName = "";
4 let price = 0;
5 let discount = 0;
6 let fullPrice = 0,
7 const myArray = [];
8 const myMap= {};
```

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## Comment thoughtfully

Use comments to explain complex logic, assumptions, or any non-obvious behavior in your code. Avoid redundant comments that merely repeat the code.

## Indent brackets

Properly indenting your code improves its visual structure and makes it easier to understand, especially when dealing with nested blocks.

```
1 // Good
2 if (condition) {
3 // ...
4 if (nestedCondition) {
5 // ...
6 }
7 }
8
9 // Bad
10 if (condition) {
11 // ...
12 if (nestedCondition) {
13 // ...
14 }
15 }
```

## Use descriptive variable names

Choose names that are meaningful and describe the purpose of the variable or function. This makes your code self- documenting and easier for others to understand.

```
1 //Good
2 let quoteId = cfgRequest.partner.quote.id.value;
3 let lineID = cfgRequest.partner.quote.lineId.value;
4 let currencyISO =
 cfgRequest.partner.quote.currencyIsoCode.value;
5 let priceBookID = cfgRequest.partner.quote.pricebookId.value;
6
7 if (quoteId != null) {
8 cfgRequest.quoteIDTest.set("value", quoteId);
9 }
10
11 if (lineID != null) {
12 cfgRequest.lineIDTest.set("value", lineID);
13 }
14
15 if (currencyISO != null) {
16 cfgRequest.currencyISOCodeTest.set("value", currencyISO);
17 }
18
19 if (priceBookID != null) {
20 cfgRequest.pricebookIDTest.set("value", priceBookID);
21 }
22
23 //Bad
24 let x1= cfgRequest.partner.quote.id.value;
25 let x2= cfgRequest.partner.quote.lineId.value;
```

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```
26 let x3= cfgRequest.partner.quote.currencyIsoCode.value;
27 let x4= cfgRequest.partner.quote.pricebookId.value;
28
29 if (x1 != null) {
30 cfgRequest.quoteIDTest.set("value", x1);
31 }
32
33 if (x2 != null) {
34 cfgRequest.lineIDTest.set("value", x2);
35 }
36
37 if (x3 != null) {
38 cfgRequest.currencyISOCodeTest.set("value", x3);
39 }
40
41 if (x4 != null) {
42 cfgRequest.pricebookIDTest.set("value", x4);
43 }
```

### Name variables consistently

Consistent naming conventions enhance code readability and maintainability. Choose either camelCase or snake_case and stick to it. Logik field variable names use camelCase, so most organizations stay with this convention for readability.

```
1 // camelCase
2 let firstName = "JohnDoe";
3
4 // snake_case
5 let last_name = "Smith";
```

### Avoid the "new" keyword

Using the `new` keyword can use more resources, lead to memory leaks, and cause unintended behaviors. Instead, use the literal notation for object creation if possible.

- Use `" "` instead of `new String( )`
- Use `( )` instead of `new Number( )`
- Use `false` instead of `new Boolean( )`
- Use `{ }` instead of `new Map( )`
- Use `[ ]` instead of `new Array( )`

### Avoid loose equality ("==")

The loose equality operator can lead to unexpected type coercion. For accurate comparisons, use the strict equality operator (`===`).

```
1 // Good
2 if (count === 5) {
3 // ...
4 }
5
6 // Bad
7 if (count == "5") {
```

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```
8 // ...
9 }
```

### Use "const" before "let" and "let" over "var"

Choose variable declaration based on scope and mutability requirements. Use `const` for variables that won't be reassigned and `let` for variables that will change. `var` is also acceptable but is a holdover from previous versions of JavaScript.

```
1 // Using const for unchanging values
2 const TAX_RATE = 0.15;
3
4 // Using let for mutable values
5 let itemCount = 5;
```

## Minimize table lookups

Excessive table queries can impact performance. Minimize queries by fetching necessary data once and storing it in variables.

To learn about general guideliines for using the `lookup` function, see Minimizing table queries.

**Related topics**

Create scripts

CPQ scripting language reference

### Scripting: How to populate set values

View a detailed example of how to use an On Configure/Reconfigure blueprint enrichment script to load field values into a set.

This article demonstrates how to use an “On Configure/Reconfigure” blueprint enrichment script to load field values into a set.

This example shows making a SOQL call to Salesforce using an external connection to get the last names of all of the account contacts and preloading them into a set for further configuration.

## Prerequisites

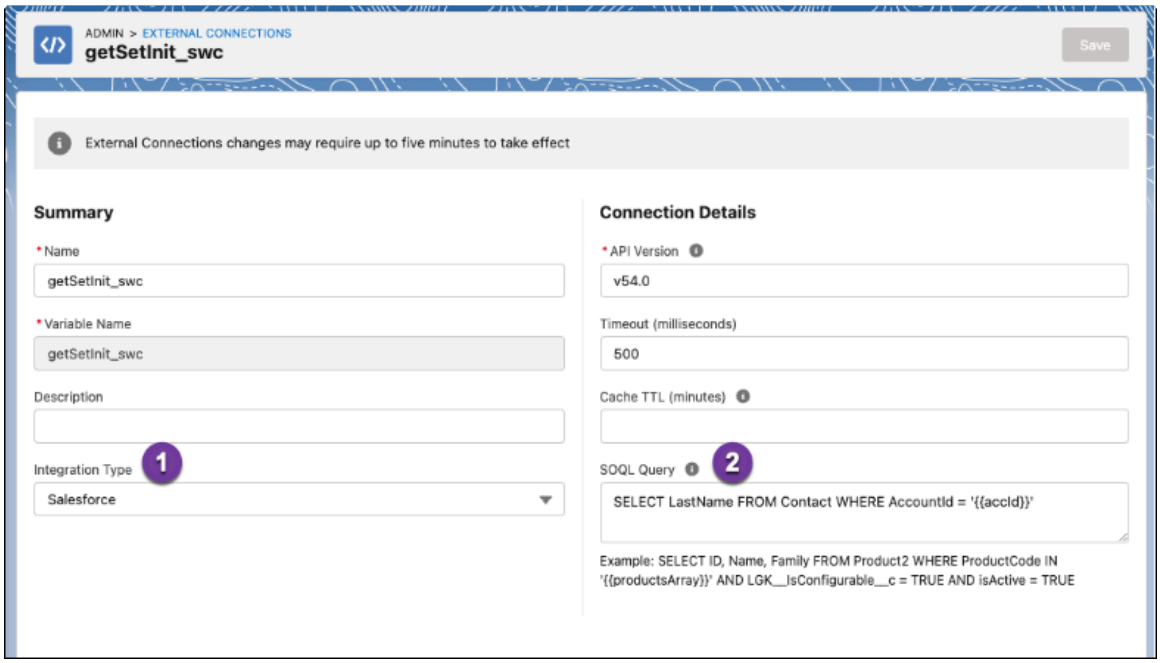
To complete this example you need:

- Enrichments enabled in your CPQ instance
- External connections enabled in your CPQ instance
- A set created and associated with the blueprint
- A text field associated with the set

## External connection: SOQL call

In the CPQ Admin screen, find the external connections under Utilities.

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1. Set the integration type to Salesforce.
2. Define the SOQL query to make. In this example, we are retrieving all the contacts that are associated with a particular account and storing the last name.

SOQL query:

```
SELECT LastName FROM Contact WHERE AccountId = '{{accId}}'
```

## On Configure/Reconfigure script

In the blueprint, navigate to the enrichments area, and add the script to the “On Configure/Reconfigure” enrichment.

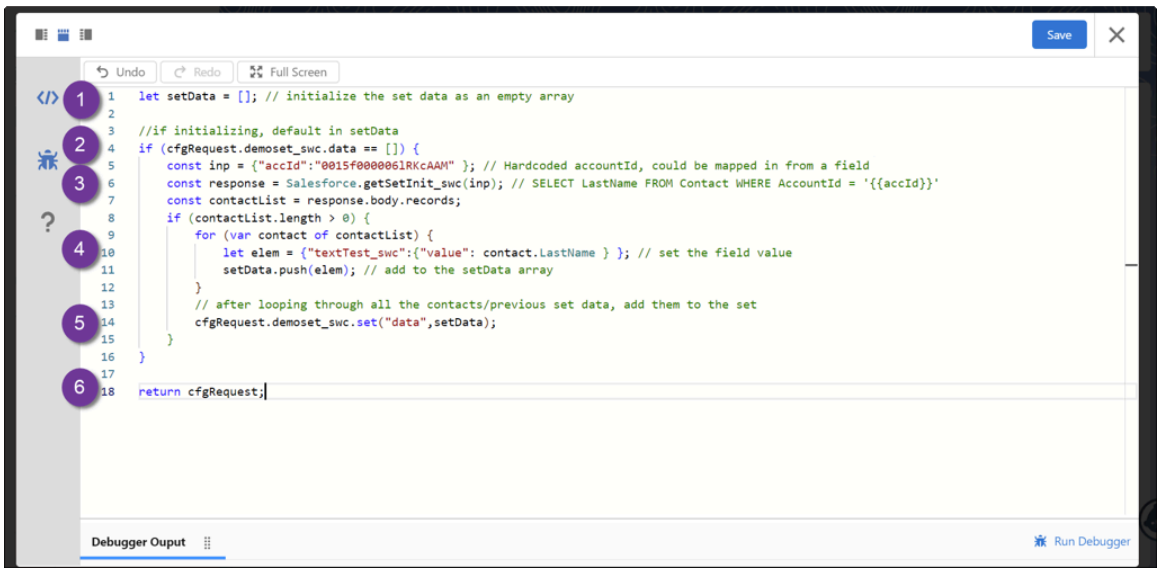
```
let setData = []; // initialize the set data as an empty array

//if initializing, default in setData
if (cfgRequest.demoset_swc.data == []) {
 const inp = {"accId":"0015f0000061RKcAAM" }; // Hardcoded
 accountId, could be mapped in from a field
 const response = Salesforce.getSetInit_swc(inp); // SELECT
 LastName FROM Contact WHERE AccountId = '{{accId}}'
 const contactList = response.body.records;
 if (contactList.length > 0) {
  for (var contact of contactList) {
   let elem = {"textTest_swc":{"value": contact.LastName } }; //
 set the field value
   setData.push(elem); // add to the setData array
  }
  // after looping through all the contacts/previous set data,
 add them to the set
  cfgRequest.demoset_swc.set("data",setData);
 }
}

return cfgRequest;
```

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## Script walkthrough




1. The setData array is initialized as an empty array (line 1).
2. Check whether the set already has data in it, either from the API payload or from a previous configuration (line 3).
3. Define the inputs for the query to Salesforce (line 5). In this example, the account ID is hard coded but could be passed from a field or mapped from a twin field on the quote. Make the SOQL query to Salesforce by using the external connection that was defined, then save the response (line 6) and get the records array (line 7).
4. If the call returned records (line 8), loop over the records (line 9) and set the field value of “textTest_swc” to the contact LastName (line 10). Finally, add the new set element to the setData array (line 11).
5. After looping through the contacts, add all of the setData to the set, “demoSet_swc”, in the configuration request (line 14).
6. Finally, return the updated configuration request (line 18).

To reuse this script, make changes to the following lines:

1. Line 5: Update the account ID (0015f000006IRKcAAM) to a new value, or twin a field from the quote.
2. Line 6: Update the name of the Salesforce connection.
3. Line 10: Update the field name (textTest_swc) to a field in the set that you are using.
4. Line 16: Update the set name (demoset_swc) to the name of the set that you are using.

## Setting data from an external connection each configuration

If instead you want defaulted data to overwrite whatever the user had entered in the previous configuration, delete the `if` clause in line 4.

If you want only certain fields in the set to overwrite user-edited fields, but you want to keep other fields between configurations, you must reference the set indexes explicitly:

```
cfgRequest.[setName].data[i].set("fieldName",{"value":"fieldValue"});
```

Replace the following to use in your enrichment:

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- `setName`: The variable name of your set
- `fieldName`: The variable name of your field
- `i`: An existing index at which you would like to determine the field's value
- `fieldValue`: The value you would like to set for the field

**Note:** To ensure that you are not referencing an empty data array, this call must occur after the set default code in the enrichment script. Otherwise, it will cause a null reference error upon initialization.

You also must guarantee that the index you are referencing in the data exists. Including a check for the length of the set data array is a good way to guarantee that it exists. See the following example.

```
if (cfgRequest.setTest.data.length >= 1) {

 cfgRequest.setTest.data[0].set("setTestNumberField",{"value":ca
rdNumber});
     cfgRequest.setTest.data[0].set("setTestSingleSelect
 picklist",{"value":"set option 1"});
}
```

Notice that while the `length` function returns "1", the index is "0", because indexes are referenced starting at 0 as the first index.

## Configuration experience

Use Case: Using the Init enrichment to Populate set values

### The Picklist Extension Pricing enrichment

Use the Picklist Extension Pricing enrichment to adjust pricing according to location or other factors.

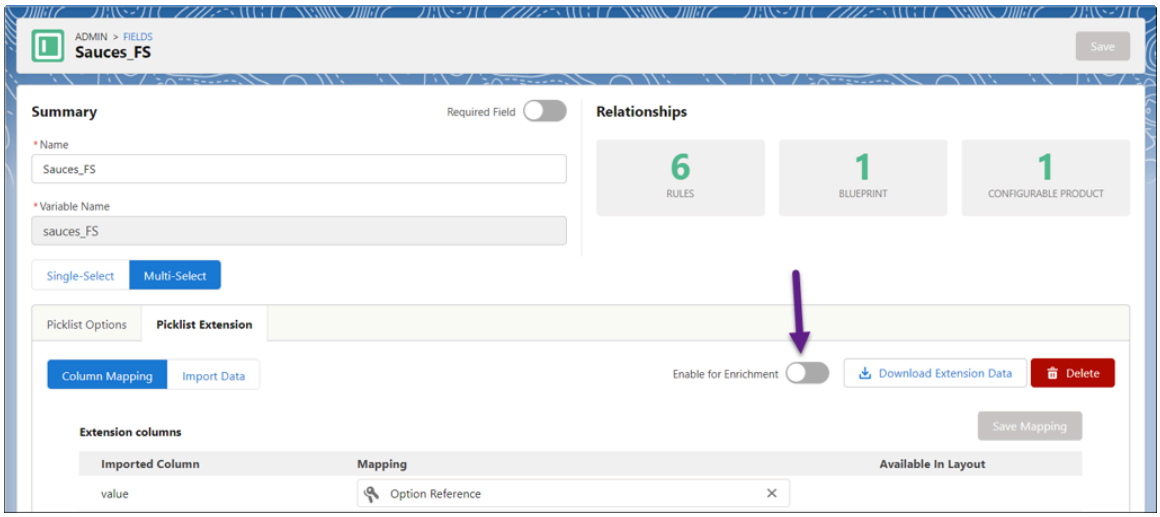
The Picklist Extension Pricing enrichment can be used to dynamically change the pricing of Field Options in designated picklist extension fields.

## Prerequisites

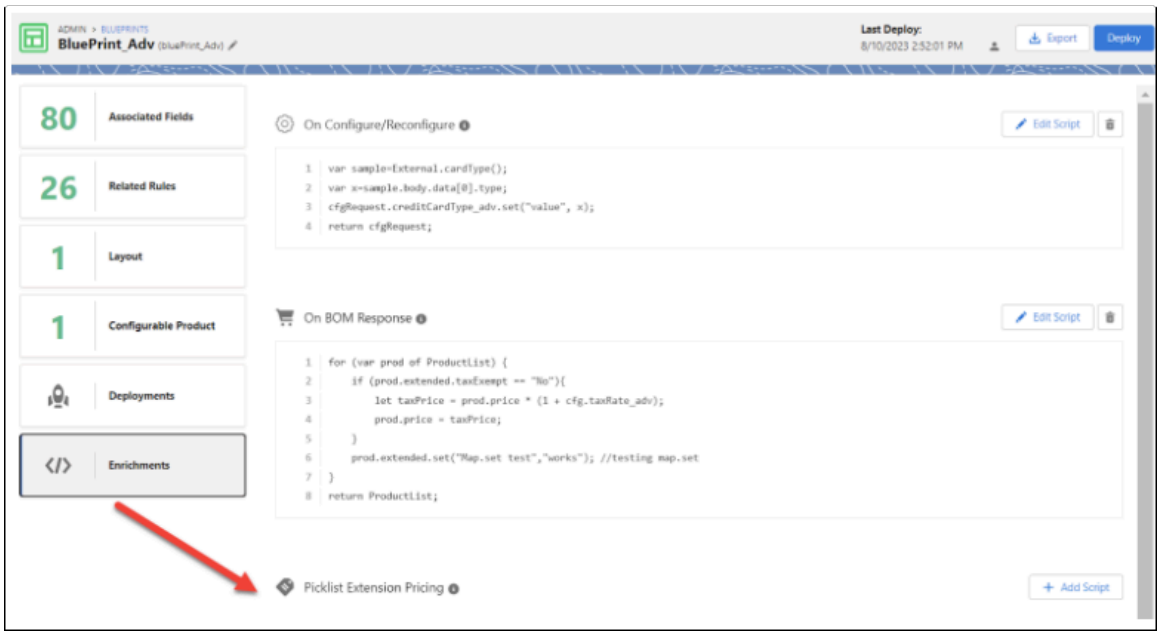
Submit a support case requesting the enrichment be enabled for your environment. Please provide a use case for using the enrichment. To submit a support case, use the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

Picklist extension fields need to have the "Enable for enrichment" toggle turned on to be affected by the enrichment.

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The enrichments tab will be shown when navigating to a blueprint in the CPQ Admin.




Watch this demonstration of the Picklist Extension Pricing enrichment in action.

PLE enrichment Script Demo

## Demonstration script

The following script was used in the demonstration video.

```
let sourcesArr = [];
let componentArr = [];
let accessoryArr = [];

pleRequest.forEach(o => {
    if(o.fieldVariableName == "alternateEnergySources") {
        sourcesArr.push(o.optionValue);
        //o.price = "1000";
    }
    if(o.fieldVariableName == "alternateEnergyComponents") {
        componentArr.push(o.optionValue);
```

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```
        //o.price = "900";
    }
    if(o.fieldVariableName == "alternateEnergyAccessory") {
        accessoryArr.push(o.optionValue);
        //o.price = "800";
    }
});

var sourceMap = new Map();
if(sourcesArr != null && sourcesArr.length != 0) {
    var sourceRows = lookup("Select Energy, BasePrice from
 AlternateEnergyPricing where Zip = :zip and Energy IN
 (:value)", { "zip": cfg.zipCode, "value": sourcesArr });
    for (var row of sourceRows) {
        sourceMap.set(row.get("Energy"), row.get("BasePrice"));
    }
} else {    //source PLE not part of request. So populate this
 map for other PLEs
    console.log("Entered non PLE in request case");
    sourcesArr = ["Solar", "Wind", "Nuclear"];
    var sourceRows = lookup("Select Energy, BasePrice from
 AlternateEnergyPricing where Zip = :zip and Energy IN
 (:value)", { "zip": cfg.zipCode, "value": sourcesArr });
    for (var row of sourceRows) {
        sourceMap.set(row.get("Energy"), row.get("BasePrice"));
    }
    console.log(sourcesArr);
    console.log(sourceMap);
}

var multiplierMap = new Map();
if(cfg.alternateEnergySources != "") {
    var multiplierRows = lookup("Select Group, Factor
 from AlternateEnergyMultiplier where Zip = :zip and
 Energy = :energyVal", { "zip": cfg.zipCode, "energyVal":
 cfg.alternateEnergySources });
    for (var row of multiplierRows) {
        multiplierMap.set(row.get("Group"), row.get("Factor"));
    }
}
let sourcePrice = sourceMap.get(cfg.alternateEnergySources);
if(sourcePrice != null) {
        pleRequest.forEach(o => {
        if(o.fieldVariableName == "alternateEnergySources") {
            o.price = sourceMap.get(o.optionValue);
        }
        if(o.fieldVariableName == "alternateEnergyComponents") {
            let compPrice = multiplierMap.get("Component");
            if(compPrice != null) {
                o.price = sourcePrice*compPrice;
            }
        }
        if(o.fieldVariableName == "alternateEnergyAccessory") {
            let multA = multiplierMap.get("Accessory");
            if(multA != null) {
                o.price = sourcePrice*multA;
            }
```

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```
        }
    });
}

console.log(sourcesArr);
console.log(componentArr);
console.log(accessoryArr);
console.log(sourceMap);
console.log(multiplierMap);

return pleRequest;
```

## Sample design, use cases, and pleRequest elements

Sample enrichment script design:

1. Loop through picklist options and store them for reference later (pleRequest.forEach())
2. Get prices for options and store them (either via table lookup or in the function itself)
3. Set the price for the right option (pleRequest.forEach())

Use cases:

- ZIP code dependent pricing
- Price multipliers and discounts
- Delta pricing
- Independent component pricing subtraction

pleRequest elements:

- pleRequest.fieldVariableName: variable name of the picklist field
- pleRequest.optionValue: picklist options defined in the field
- pleRequest.productId: ID of the product in the PLE mapping
- pleRequest.price: price to be set in the extension

Referencing elements in the `pleRequest` object is similar to referencing objects such as `ProductList`, `cfg`, and `cfgRequest`. If a variable is substituted into `pleRequest` (either in a `for` loop or using the `forEach` function), the element is still referenced after the variable, followed by a period.

**Related topics**

CPQ scripting language reference

### Library functions

Library functions can speed implementation and reduce maintenance costs by enabling code reuse across rules.

Library functions enable efficient code reuse across rules and enrichments. They are designed to minimize redundant logic, speed up implementation, and reduce maintenance costs, especially in complex scenarios that involve high-SKU or physics-driven configurations.

## Attributes and capabilities

Centralized management: Search and manage library functions through a dedicated UI.

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Reusable and namespaced: Define a library function once and invoke it using `fn.functionName(params)`.

Configurable parameters: Define input parameters with data types and default values. Parameter schemas can be modified post-creation, allowing flexibility in managing function inputs.

Customized output: Specify return types.

Callable across modules: Library functions are callable in both the configurator and ServiceNow Quote Experience.

Managed table queries: Library functions support managed table lookups.

## Enabling library functions

Submit a support ticket to enable library functions.

**Note:** Submit a support ticket by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

Once library functions are enabled, turn on the new UI by navigating to **Utilities** > **Settings** > **Admin Version** > **New**, and clicking **Save**.

This setting can be toggled at any time.

## Supported input/output data types

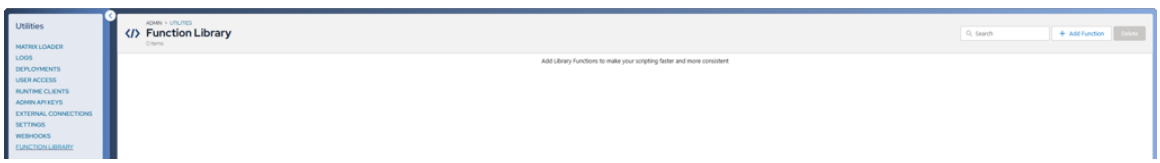
### Supported input/output data types

| Type | Description |
|---|---|
| TEXT | Plain text strings |
| NUMBER | Numeric values |
| BOOLEAN | Logical true/false values |
| DATE | Dates (without time component) |
| JSON OBJECT | JSON formatted objects |
| ARRAY | Ordered collections of values |

**Note:** Empty MAP or ARRAY types are not supported. Unsupported types default to TEXT.

## Usage examples

Library functions can be found in the function library (in the Utilities section).

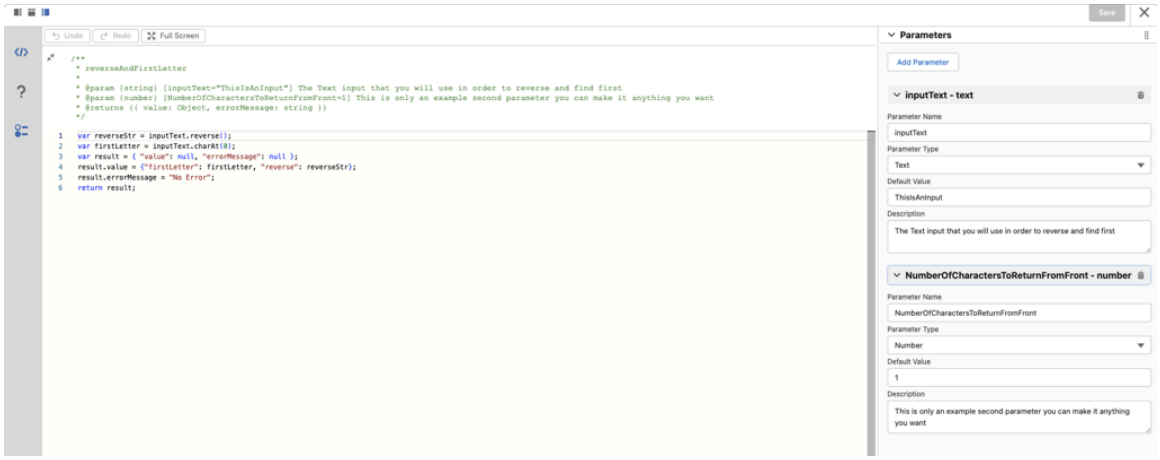



To add a function:

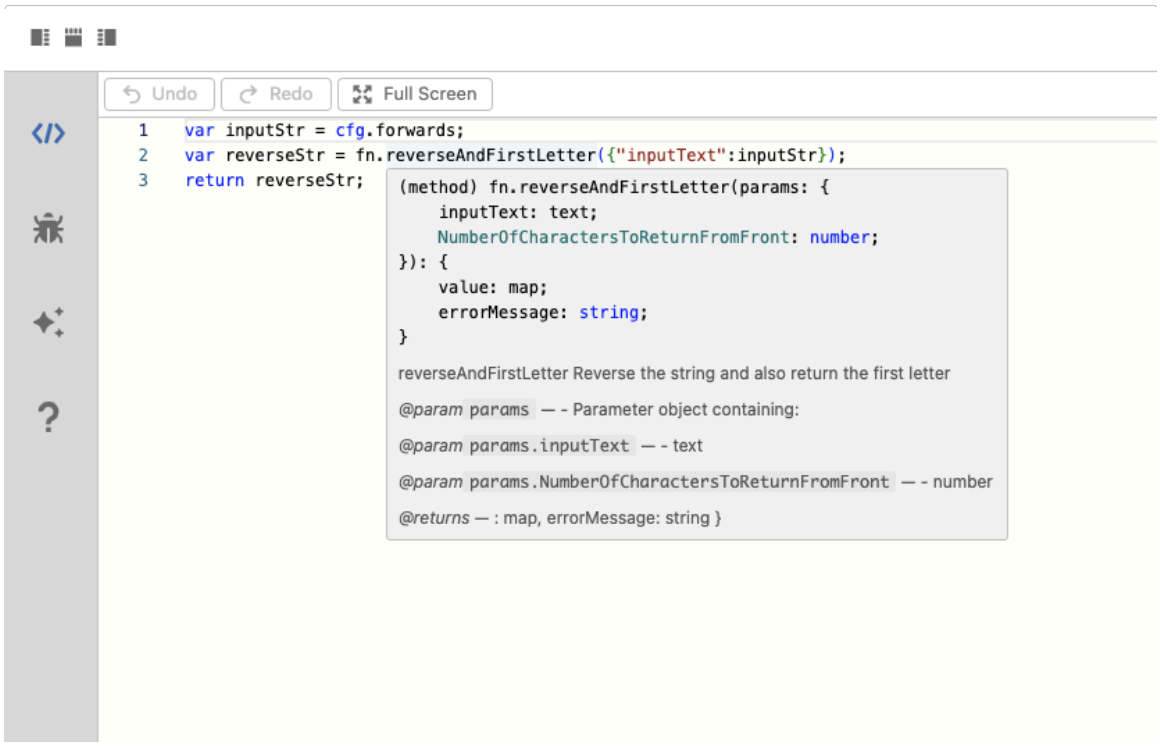
1. On the Function Library tab, click **Add Function**.
2. Name the function, specify the return type, and enter a description.

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Script content:




Calling the function:




## Limitations

- Recursive calls are not supported.
- External API calls and async operations are not supported.
- Parameters are passed by copy, not by reference.
- Functions must be free of side effects, external calls, and CPQ field references.

## General guidelines

- When a library function changes, redeploy the affected blueprints.
- When defining a function, name and describe its inputs to provide visibility into its usage.

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### The lookup function: commands and syntax

Use the lookup function to return information from a user-managed table.

CPQ uses a SQL-based query language to look up user-managed tables.

The lookup function returns up to 10,000 rows from a table and times out after 30 seconds if the search is still querying. For information about uploading CSV files into managed tables, see Matrix Loader: CSV table upload.

To learn about general guidelines for using the lookup function, see Minimizing table queries.

## Supported commands

- SELECT selects columns from a table (separated by ",")
- FROM selects the table that the query will take data from
- WHERE sets the conditions where the other columns will be searched from
- AND conjoins two WHERE conditions (both must be true)
- OR conjoins two WHERE conditions (either can be true)

## Syntax

Example query:

```
var tableResults = lookup("SELECT column1, column2 FROM
 tableName WHERE column3 = :key1 OR (column4 != :key2
 AND column5 IN :list)", {"key1": "value",
 "key2":cfg.[singleFieldName], "list":cfg.[multiFieldName]});
```

The first parameter is the SQL-based command string used to query the managed table.

The second parameter is the key-value map to be inserted into the query. The values can be constants, variables, or fields.

The tableResults variable holds the resulting array. This variable cannot be returned itself. Results must be referenced by index (`tableResults[0], tableResults[1]...`) and can contain any number of results, or none.

If you receive the error "...Index '0' is out of bounds..." when working with table lookup, you are probably trying to reference an empty array. We recommend running a null check on your table results.

Comparators:

**=**
: Is equal to

**!=**
: Is not equal to

**>**
: Is greater than

**<**
: Is less than

**>=**
: Is greater than or equal to

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**IN**

Is equal to any (in a set)

The format for IN works for any collection in the following format:

```
lookup("SELECT column1 FROM table WHERE column2 IN
 (:options)",{options = cfg. [multi picklistField]});
```

**Related topics**

Minimizing table queries

Indexes and natural keys for managed tables

### Minimizing table queries

Learn how to minimize queries to maximize performance.

The more queries you have, the more they impact performance. This article discusses two ways to minimize queries to help keep performance as fast as possible.

## Implementing rules

When you create a configuration, consider how you might implement it to minimize queries.

For example, suppose you have a table of the length, width and height of various components. Once you select a part number, you want to query those values to calculate the volume. The best way to query that information depends on the use case and where the values are needed downstream of the query.

If the configuration only uses the total volume, the best approach is to put the query in the advanced determination rule for the volume, similar to this simplified code:

- Query L,W and H from table
- Var vol = L*W*H
- Return vol

Total queries: 1.

However, if you are writing a volume rule and you know you will need to use the length, width and height values elsewhere, the above code is not appropriate. Instead, you should write your determination rule as follows:

- Var vol=L*W*H
- Return vol

You should have the queries in the determination rules. Determination rules can only define one field at a time, so this would need three determination rules—one rule each for length, width and height—and three queries. Doing this prevents running a fourth query (one in each length, width and height rule, and one in the volume determination rule).

Another way to reduce queries is to be aware of the fields associated with a rule. Suppose you have a query in a rule that references a lot of fields. The rule runs every time one of the fields associated with that rule changes. Therefore, the query runs every time.

Let's say you need to calculate the volume and then multiply that volume by density (which could change based on material the user selects) to get the total weight. The user does not need to use volume anywhere else downstream. Here is a sample script:

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- Query L,W,H from table
- Var vol= L*W*H
- Var mass = vol * cfg.density
- Return mass

The problem is that every time the density changes, the rule runs and then the query runs. But the values of L, W and H do not change. Therefore, the processor has to go to the table, find the values for L, W and H, and redefine the variable `vol` to the same value it was before. A better approach is to calculate volume as a separate field with a separate rule. Then, write the mass rule as follows:

```
var mass = cfg.volume * cfg.density;
return mass;
```

Mass still recalculates every time, but it is intended to. No processing time is wasted doing unnecessary querying and redefining values.

## Querying a list

As seen above with L,W and H, you can pull multiple columns from a table in a single query. At other times, you might want to query the table on multiple values. For example, suppose you have a multiselect picklist (field name `selectedColors`) of different colors. You also have a "hues" table that has a red, blue and green column to tell you the ratios.

If you wanted to query the table for all the selected options of the multiselect picklist, there are two options.

```
for (color of cfg.selectedColors){
        var tableResults=lookup("Select blue, red, green from
 hues where value := value", {"value": color});
        //more code
```

This `for` loop means that the number of queries is based on the number of selected options for the `selectedColors` field. Alternatively, the following code queries the table once.

```
var tableResults=lookup("select blue, red, green from hues where
 value in (:list)", {"list": cfg.selectedColors});
```

This method is better.

For more information on what is supported in a query, see The lookup function: commands and syntax.

### Debugging in CPQ

How to use the debugger to perfect your scripts before deployment.

When you need to fix a script in CPQ, the debugging tool in Advanced Functions and Enrichment Scripts can help. This guide shows you how to write debug JSONs to isolate and test your scripts before deployment. By following these best practices for debugging faulty scripts, you can help ensure your blueprints run flawlessly.

## General guidelines for debugging

Using `console.log()`: When coding a complex behavior, you may have to check whether certain values are set or manipulated the correct way. Instead of seeing only what is returned by

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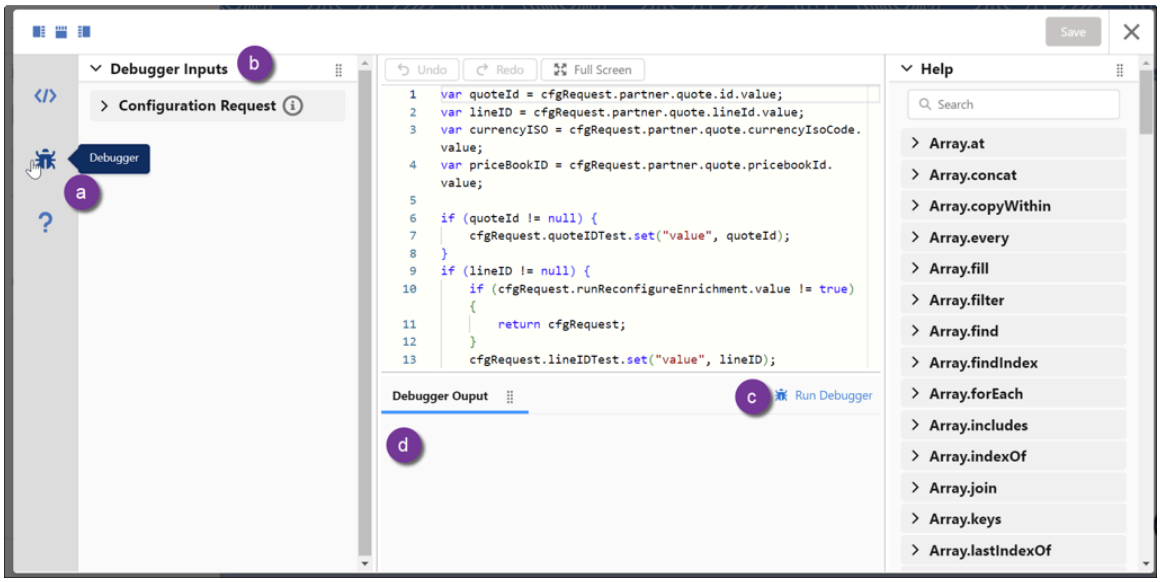
the rule, use the `console.log([variableName])` function in a script to show the value of the variable at that line when run in the debugger.

Comment out blocks of codes: When a script becomes long, it may be necessary to comment large sections of code to see where the behavior originates. This can usually be done by using `//` or `/* */` and then debugging.

Comment out debug JSON for future use: If you are continually updating a rule during implementation, it's a good idea to save your debugging JSON either at the top or bottom of the script inside a comment block. That way, when the script is saved, the JSON can also be saved for future reference.

For more tips on these features, see Using comments and the console to debug scripts.

## How to use the debugger




When in the script editor:

- Toggle the dubugger options by clicking the bug icon (a).
- Enter your JSON in the Debugger Inputs section (b), as it would appear when your rule runs during configuration.
- Run your rule with the debugger inputs by clicking **Run Debugger** in the Debugger Output panel.

> **Note:** The script does not have to be saved in order to run the debugger. The state of the script when the button is clicked is used when testing.

- Returned objects and console.log information appear in the Debugger Output panel (d).

The CPQ debugger uses JSON format, which is written using attribute-value pairs. The attributes are the variable names of the fields used in the rule, and the value is the field's data in its object format.

> **Note:** As long as a field is referenced in the rule or enrichment, it must have a corresponding attribute in the JSON, or the script cannot be run in the debugger.

Also note:

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- The JSON package is wrapped using curly brackets ({ })
- Each field is separated by a comma (,).
- Each attribute-value pair is separated by a colon (:).

The structure of the JSON you use depends on the object type of each field, as well as whether the script is being used for a rule or an enrichment.

## Field-specific JSON formatting

- Text, numbers, Boolean values, and single-select picklists fields are the easiest fields to debug, as they correspond to simple, singular-value objects such as strings, numbers, and Boolean values.

```
{
 "cfg":{
  "textField": "value",
  "singleSelect picklist": "value",
  "numberField": 123,
  "booleanField": true
 }
}
```

- Date fields use the ISO-8601 international standard to hold date information. If a field inputs dates in the debugger, the data should be a string in the format `YYYY-MM-DDThh:mm:ss.sssZ`.

```
{
 "cfg":{
  "dateField": "2024-01-01T00:00:00.000Z"
 }
}
```

- Multi-select picklists are in the form of an array that contains strings. Even with only one option selected, the strings should be in an array format when debugging, wrapped by square braces ([ ]) and separated by commas (,).

```
{
 "cfg":{
  "multiSelect picklist": [
   "option 1",
   "option 2"
  ]
 }
}
```

- Product pickers are unique to reference in a rule or enrichment, since they have their own type of simple rules, bulk actions. They can be referenced only by their picklist option, treating them as a single-select or multi-select field. Or, the debugger can reference a product picker subfield or aggregate using the key `pkr`.

```
{
 "cfg": {
  "productPickerSS": "selectedValue",
  "productPickerMS": [
   "selectedValue1",
   "selectedValue2"
```

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```
  ]
 },
 "pkr": {
  "productPicker2": {
   "value": "productPicker2_option1",
   "select": true,
   "quantity": 100,
   "exampleSubfield": "Example Value",
   "aggregates": {
    "quantity_max": 100
   }
  }
 }
}
```

Note that when you reference a product picker subfield in a rule, you need to use the `pkr` object and not `cfg`.

```
let x = pkr.productPickerName.subFieldName
```

- Sets cannot be referenced by advanced functions, but the fields contained in them can. Due to the nature of the set field, a set's rows can be determined and referenced only in the On Configure/Reconfigure enrichment. However, you can test for when a field such as optionValue is in a rule.

```
{
 "set": {
  "exampleSet": {
   "index": 1,
   "optionValue": "product1",
   "selectOption": true,
   "size": 2,
   "aggregateExample1": 1
  }
 }
}
```

To learn more about defaulting a set's fields, see Scripting: How to populate set values.

## Context-specific JSON formatting

Field inputs are entered in JSON format, using the field variable name as the key and the intended value as the value.

```
{
  "cfg": {
    "exampleField": "Example Value"
  }
}
```

On configuration and reconfiguration, inputs are entered in JSON format, using the field variable name as the key. The value is an object consisting of two properties: *`value`* and *`userEdited`*. *`value`* should be set to the intended field value. *`userEdited`* is a Boolean value.

## Context-specific JSON formatting: fields

```
{
 "cfgRequest": {
```

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```
  "exampleField": {
   "value": "Example Value",
   "userEdited": false
  },
  "exampleMultiselect picklist": {
   "value": [
    "one",
    "two"
   ],
   "userEdited": false
  }
 }
}
```

For more information about how to use the *userEdited* property, see Scripting: Checking for first and subsequent configurations

## Context-specific JSON formatting: product pickers

```
"cfgRequest": {
 "pkr": {
   "productPicker1": {
     "data": [
      {
       "value": {
        "value": "productPicker1_option1",
        "userEdited": false
       },
       "select": {
        "value": true,
        "userEdited": false
       },
       "quantity": {
        "value": 100,
        "userEdited": false
       },
       "exampleSubfield": {
        "value": "Example Value",
        "userEdited": false
       }
      }
     ],
     "aggregates": {
      "quantity_max": {
       "value": 100
      }
     }
    }
   },
  "productPicker2": {
   "value": "productPicker2_option1",
   "userEdited": false
  }
 }
}
```

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### Context-specific JSON formatting: sets

```
{
 "cfgRequest": {
  "set": {
   "exampleSet": {
    "data": [
     {
      "index": {
      "value": 1
      },
      "optionValue": {
       "value": "product1",
       "userEdited": false
      },
      "selectOption": {
       "value": true,
       "userEdited": false
      },
      "textField": {
       "value": "a",
       "userEdited": false
      }
     }
    ],
    "size": {
     "value": 1,
     "userEdited": false
    },
    "aggregateExample1": {
     "value": 1
    }
   }
  }
 }
}
```

### Context-specific JSON formatting: product pickers in sets

```
 "cfgRequest": {
  "set": {
   "exampleSet": {
    "data": [
     {
      "index": {
       "value": 1
      },
      "optionValue": {
       "value": "product1",
       "userEdited": false
      },
      "selectOption": {
       "value": true,
       "userEdited": false
      },
      "productPicker1InSet": {
       "value": [
```

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```
        "option1_Of_productPicker1InSet",
        "option2_Of_productPicker1InSet"
       ],
      "userEdited": false
      },
      "pkr": {
       "productPicker2InSet": {
        "data": [
         {
          "value": {
           "value": "option1_Of_productPicker2InSet",
           "userEdited": false
          },
          "select": {
           "value": true,
           "userEdited": false
          },
          "quantity": {
           "value": 100,
           "userEdited": false
          }
         }
        ],
        "aggregates": {
         "quantity_max": {
         "value": 100
         }
        }
       }
      }
     ],
     "size": {
      "value": 1,
      "userEdited": false
     },
     "aggregateExample1": {
      "value": 1
     }
    }
   }
  }
}
```

On BOM Response enrichment:

Product List: Inputs are entered as an array of objects in JSON format, using the property variable name as the key, and the intended value as the value.

```
[
 {
  "id": "test product",
  "quantity": 2
 },
 {
  "id": "test product2",
  "quantity": 5,
```

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```
  "bomType": "MANUFACTURING"
 }
]
```

Picklist extension Pricing enrichment:

picklist extension Request: Inputs are entered as an array of objects in JSON format, using the property variable name as the key, and the intended value as the value. In the example, “set” and “index” are only needed if using a set.

```
[
 {
  "fieldVariableName": "myField1",
  "set": "mySetVariableName1",
  "index": 1,
  "optionValue": "Option 1",
  "productId": "myProduct1",
  "productUniqueIdentifier": "myId"
 }
]
```

## If the debugger’s behavior is different from runtime behavior

In most cases, the debugging JSON needs to exactly match what would normally be entered during runtime as valid values for the fields. Make sure that you're using the correct data type or structures described above.

In other cases, similar rules may be acting on the same field. In this situation, the debugger will not be helpful, as it can only show the behavior of one rule at a time. To isolate the problem, it might be necessary to inactivate individual rules and redeploy.

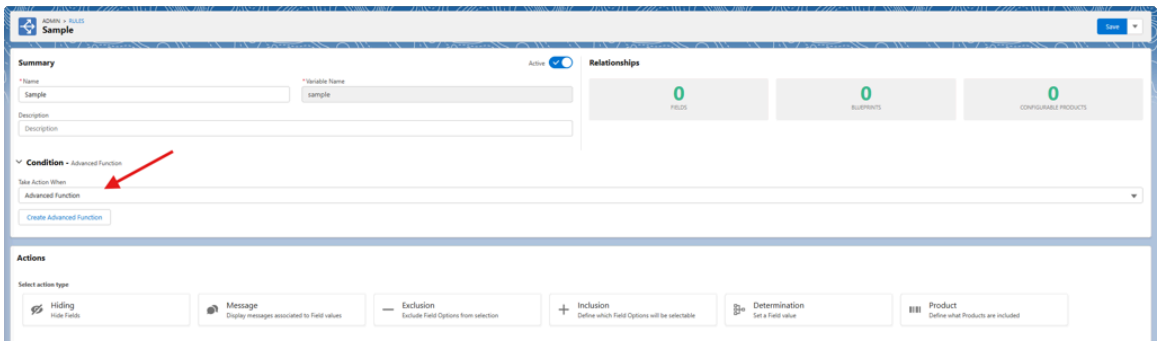
If neither method is successful, open a case with our support team by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

### Using comments and the console to debug scripts

Learn how comments and the console can help you debug your scripts.

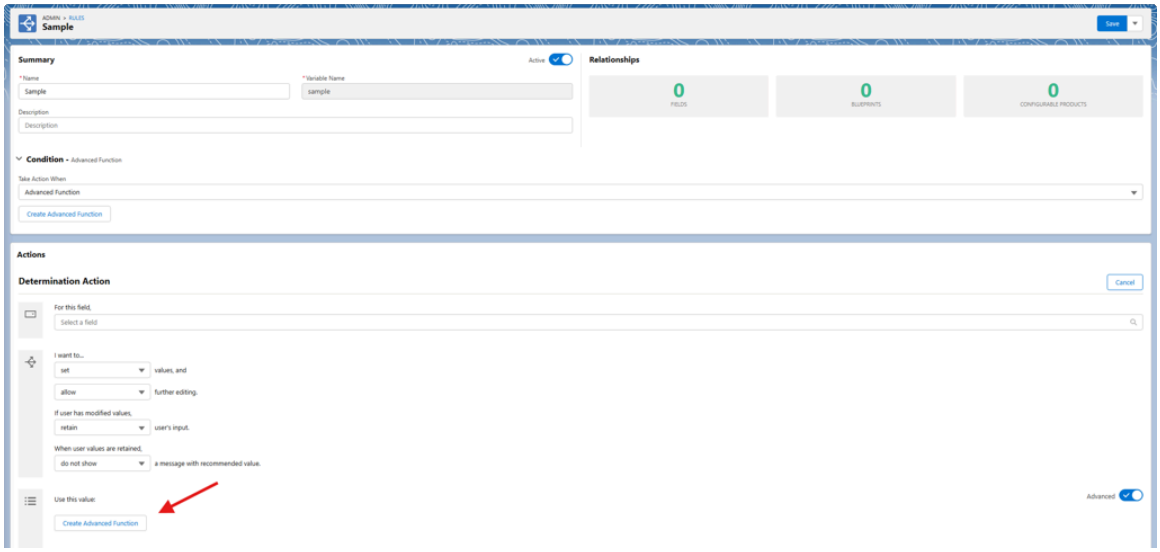
CPQ has several areas where the admin can use scripts to define behavior. These include advanced conditions for rules, advanced actions for rules, and enrichments.

## Advanced conditions for rules

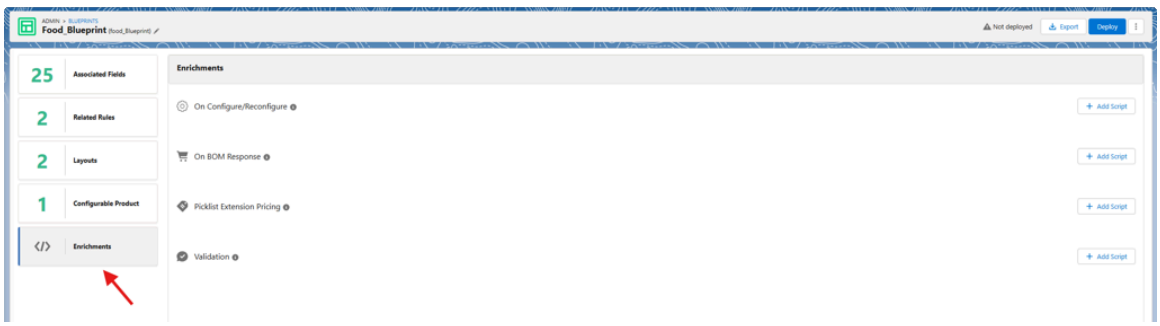



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## Advanced actions for rules




## Enrichments

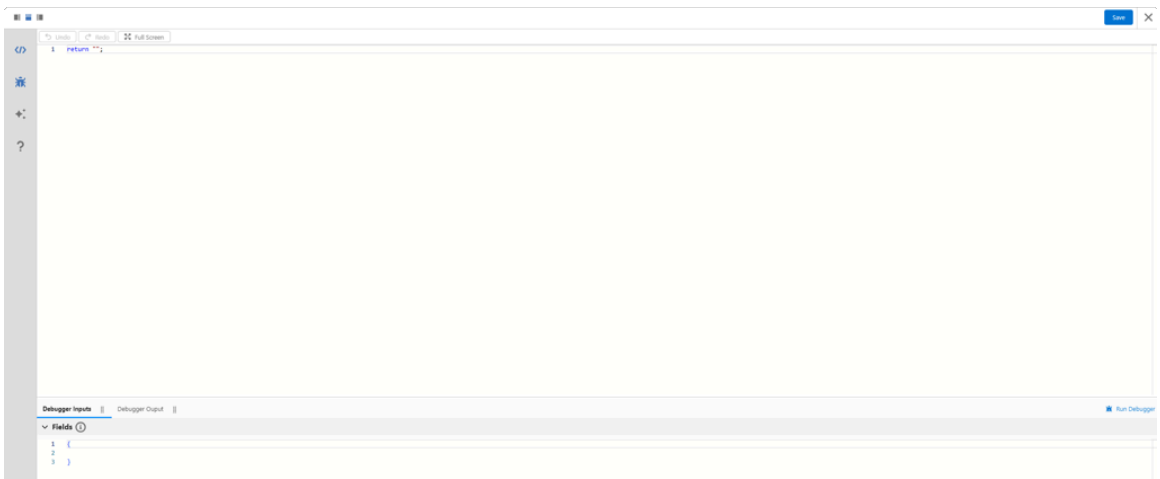



This article highlights a few key features to help you test and prepare your code before you deploy it in a blueprint.

**Note:** The scripting language in CPQ is JavaScript-like, meaning it follows JavaScript-style syntax but lacks the full capabilities of JavaScript.

## Console.log

When the admin starts to write a script, the CPQ Admin looks like this:

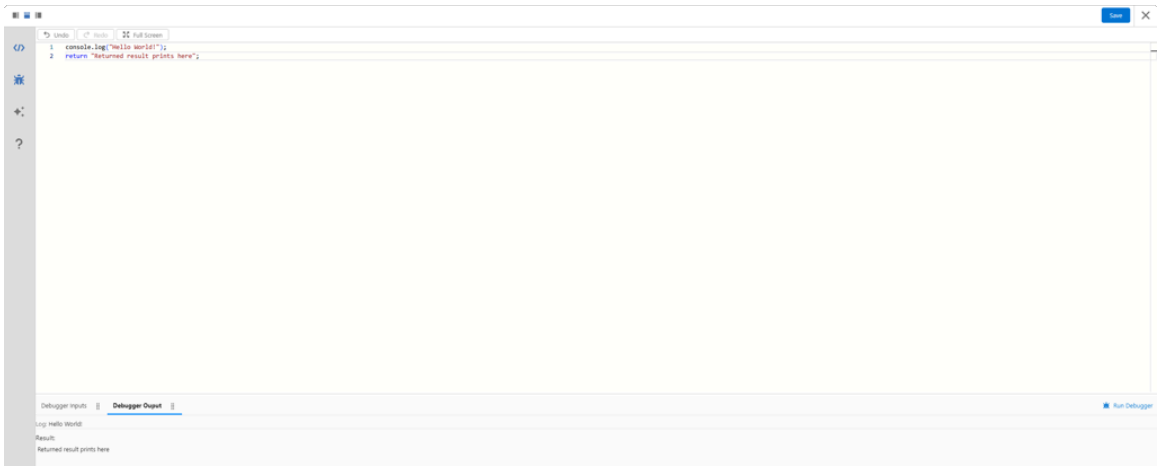



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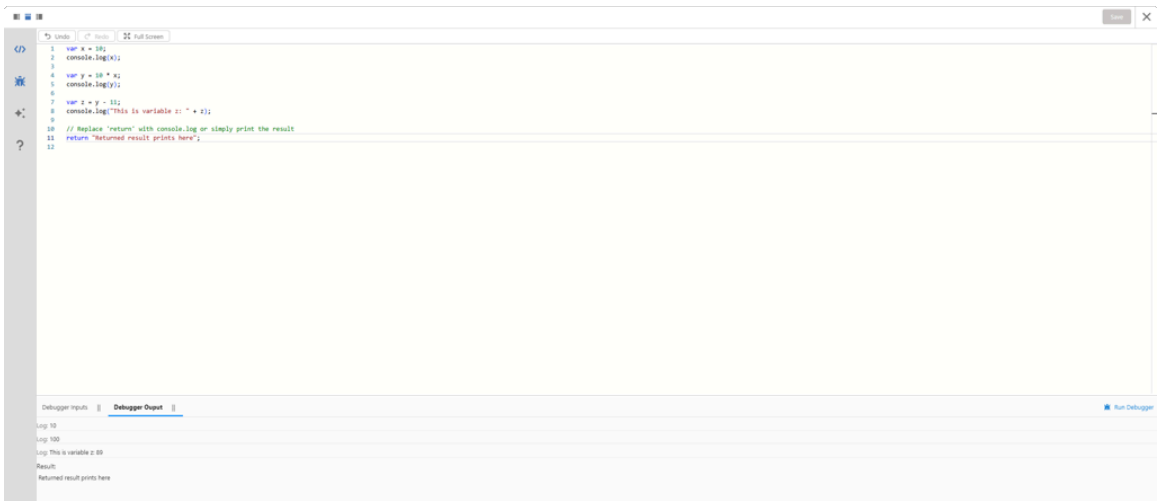
Clicking **Run Debugger** in the lower panel raises the debugger and the Debugger Output section. This section is also called the console.

This box shows the output of the script based on the script and the inputs added to the debugger (if applicable). For example, the BOM enrichment script shows the updated BOM based on the enrichment and inputs put in the debugger.

Lines of code can be logged to the console. So, you can send text to the console, as in the following:




You can also log variables, which is helpful to make sure your script is working correctly. You can add text to the log to help the lines of code stand out:




## Comments

Comments are lines of code that the script ignores. Comments have a few uses. First, it is very helpful to future coders (and to you, when you revisit the code much later) if you have commented on how and why you coded lines of the script as you did. Commenting can also be used to save code to use again. And if you do not use a block of code but may want to use it later, you can comment it so it does not affect your current work.

You can write comments on a single line or across multiple lines.

To add single-line comments, use two slashes. Anything written after the slashes on the same line is ignored by the script.

```
// This comment is ignored by the script
```

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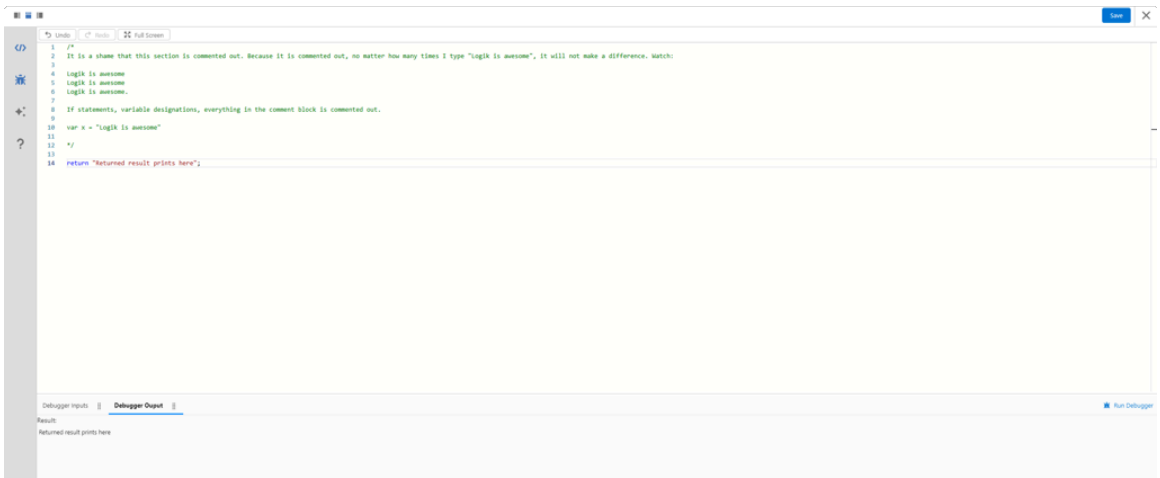
However, any code before the slashes is still executed. For example, in the image below, the variable `be4comment` remains 12345, as the script ignores the comment "67890" following the slashes.



To create a multiline comment, add a slash and an asterisk before the comment. Add an asterisk and a slash after the comment.

```
/*
Your comment goes here.
It can span multiple lines.
*/
```

When you add a multiline comment, be careful not to comment out important elements such as closing brackets, parentheses, or return statements.



When you frequently revisit or modify a rule that takes inputs from many other fields, it can be helpful to paste the input into the debugger section as a multiline comment. This way, when you return to work on the rule later, you won't need to rewrite the inputs.

```
/* inputs
{"Field1": "testValue1",
    "Field2Quantity": 2,
      "Field3": "testValue3"
    },
*/
```

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### Test a CPQ configuration

Two ways to test a CPQ configuration without creating a quote in Salesforce

Assuming that you have a layout for your blueprint, there are two ways to test your CPQ configurations without creating a quote in Salesforce. You can access all the capabilities of your configuration and see how your layout appears to an end user.

For more information, see the following topics:

The test frame

Use case: Displaying the CPQ native UI via direct URL

### Referencing a product picker

You can reference a product picker in the On BOM, Pricing, and Validation enrichments by modifying your enrichment script.

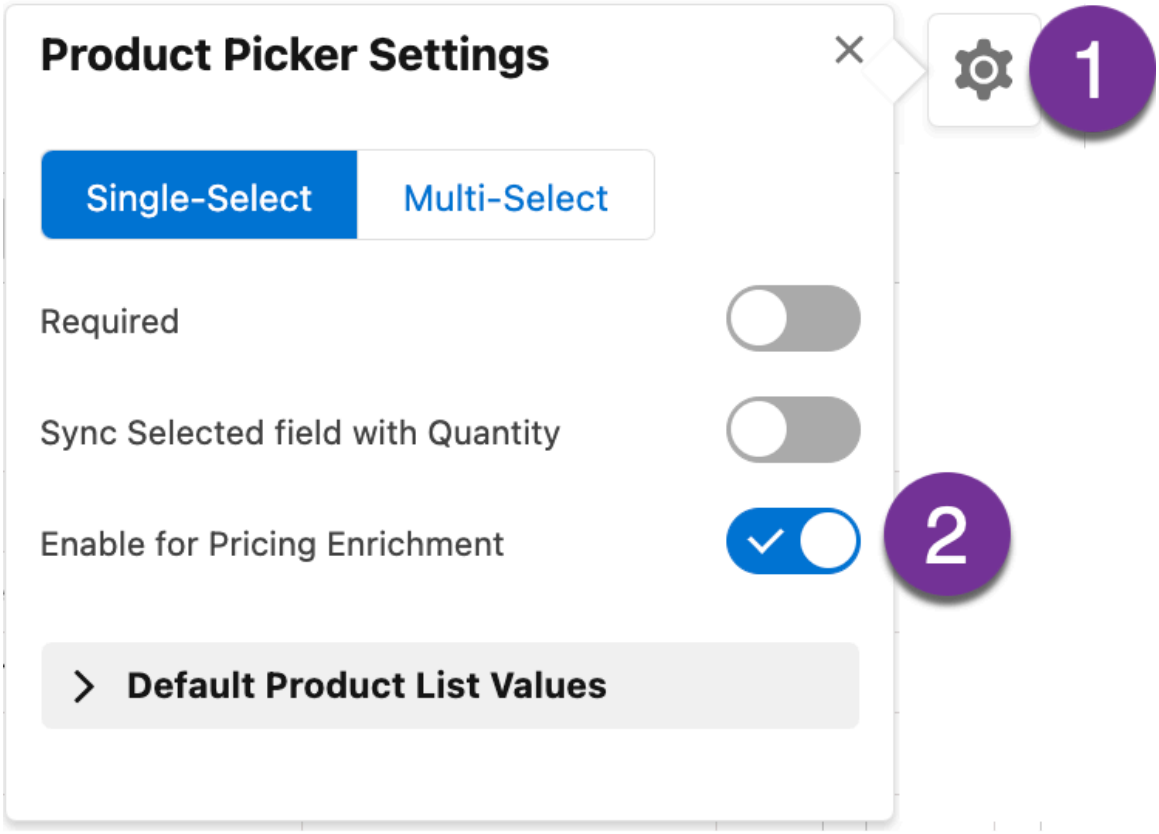
Product pickers are available for reference in On BOM, Pricing, and Validation Enrichments.

When referencing a product picker in any of these scenarios, use the `pkr.<Product Picker varname>` notation in your enrichment script. As an example, the following snippet iterates over the options in `somePicker` and creates a map where each record's option value and quantity are stored.

```
var quantityMap = new Map();
pkr.somePicker.data.forEach((row) => {
 quantityMap.set(row.value, row.quantity);
 }
);
```

If you intend to use the Pricing enrichment to dynamically set prices for the product picker options, be sure to enable this feature on the product picker. To do this, in the product picker administration page, click the cog to open the Product Picker Settings dialog. Then, turn on **Enable for Pricing Enrichment**.

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In the related blueprint's Picklist Extension Pricing enrichment, your script will work as follows:

```
pleRequest.forEach((option) => {
 if (quantityMap.has(option.optionValue)) {
  option.productId = option.optionValue;
  option.price = blah; // complete this to suit your use case
 }
});
```

### Scripting: Checking for first and subsequent configurations

You can test whether a configuration is being initialized or being reconfigured, and set code to execute based on the result.

Sometimes it is necessary to execute code only when the configuration is being initialized, or only when it is being reconfigured. For example, you might want to set a field to its default values at the beginning of a configuration, but keep the user's selection during any future edit.

The methods below can be combined without interfering with one another and can lead to flexible and unique code behaviors for your configurable products.

## userEdited: running only when a field was not edited

Two field properties can be accessed in the On Configure/Reconfigure enrichment: *`value`* and *`userEdited`*. While the *`value`* property holds the data contained in the field and is usually what will be accessed when scripting, *`userEdited`* contains a Boolean value that stores whether the field has been changed by the end user.

This can be used in if statements to write a default value only when the field has not been changed by the user. For example:

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```
if (cfgRequest.[fieldVariableName].userEdited == false) {
      //code to run
}
```

All fields will have the *userEdited* property set to false when the configuration is initialized, but when reconfiguring, some will be set to true based on the changes made by the user. If you'd like a behavior to occur only when a field has or hasn't been edited, write the code to execute after one of these checks.

### The lineId partner field

Alternatively, if you'd like to make only one check in the On Configure/Reconfigure enrichment script, and have Salesforce integration, the *lineId* partner field will only be populated with the Salesforce ID of the parent configurable product's quote line when reconfiguring. It will not be populated when a configuration is initialized.

This is because when a CPQ configuration is initialized, this ID does not yet exist, because the configuration has yet to be saved. Only after a CPQ configuration has been created and the quote line editor saved are any quote lines created in Salesforce. So, when we see that the *lineId* partner field is present, we can be sure that the current session is due to a reconfiguration, not a new configuration.

Script writers can take advantage of this distinction by putting any code that must be run only on initialization or reconfiguration under a check for this value.

Here is how the field can be referenced in the On Configure/Reconfigure enrichment:

```
cfgRequest.partner.quote.lineId.value;
```

If the behavior should only happen when the configuration is initialized, you could add the following check:

```
if (cfgRequest.partner.quote.lineId.value == null) {
      //code to run
      return cfgRequest;
}
```

Adding the `return cfgRequest;` line in the check guarantees that any code after the check for the line ID will not be executed.

Similarly, if the behavior should happen only when the configuration is reconfigured, add the inverse check:

```
if (cfgRequest.partner.quote.lineId.value != null) {
      //code to run
      return cfgRequest;
}
```

For more information on partner fields, see CPQ fields, system fields, and partner fields.

### isInitial: creating a text field

Another way to guarantee that a distinction is present (regardless of whether Salesforce is used as an entry point into the configurator) is to create a field that checks whether the current configuration is due to an initialization or a reconfiguration.

Create a text field with the variable name `isInitial`. Associate the field with your blueprint. Then, in the On Configure/Reconfigure enrichment, add the following lines:

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```
if (cfgRequest.isInitial.value === "Yes" ||
 cfgRequest.isInitial.value === "No") {
      cfgRequest.isInitial.set("value","No");
}
else
{
c fgRequest.isInitial.set("value","Yes");
}
```

On initialization, the `isInitial` field will be blank. Therefore, the script will set the value of `isInitial` to Yes in the `else` clause.

On the first reconfiguration, `isInitial` will be Yes. Therefore, the script will set the value of `isInitial` to No in the `if` clause.

On every subsequent reconfiguration, `isInitial` will be No, and will remain No.

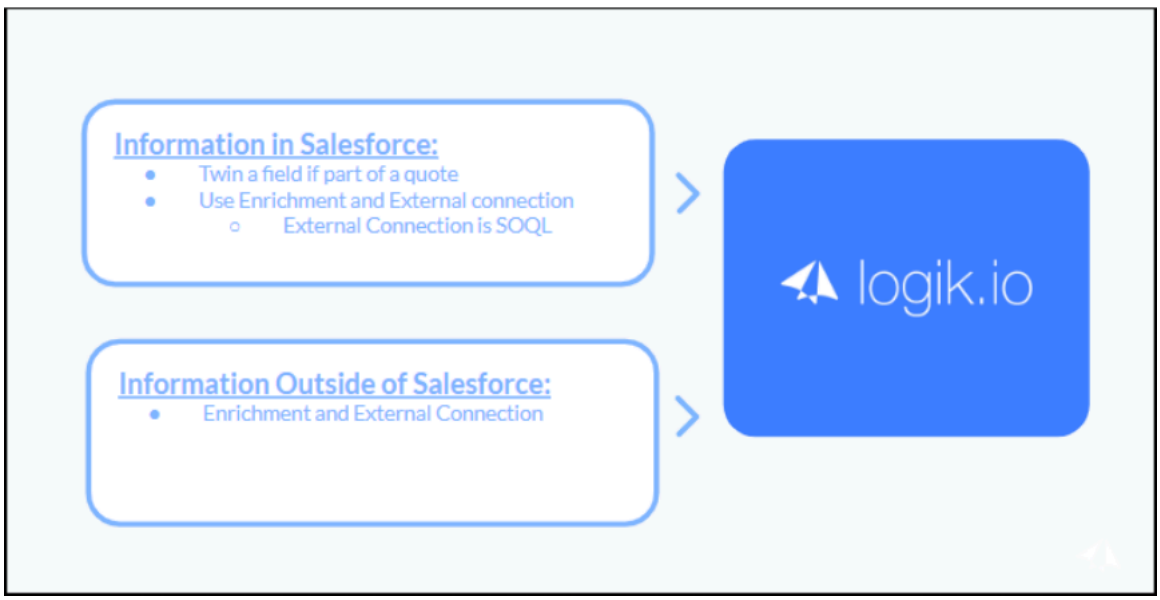
This method has the added benefit of not having to save the entire QLE in SFDC in order to make the distinction between an initialization or reconfiguration. The method immediately detects when the user enters the configurator a second time.

This method also includes the ability to reference the new field as a condition in rules, such as making a rule fire specifically on initialization or reconfiguration. It does not require the behavior to exist only in the On Configure/Reconfigure script. However, to keep the configuring experience similar from the end user's perspective, you should be wary of making too many behavioral differences between initialization and reconfiguration.

### Passing data from Salesforce to CPQ fields

Learn how to pass information from Salesforce into CPQ using the On Configuration/Reconfigure enrichment.

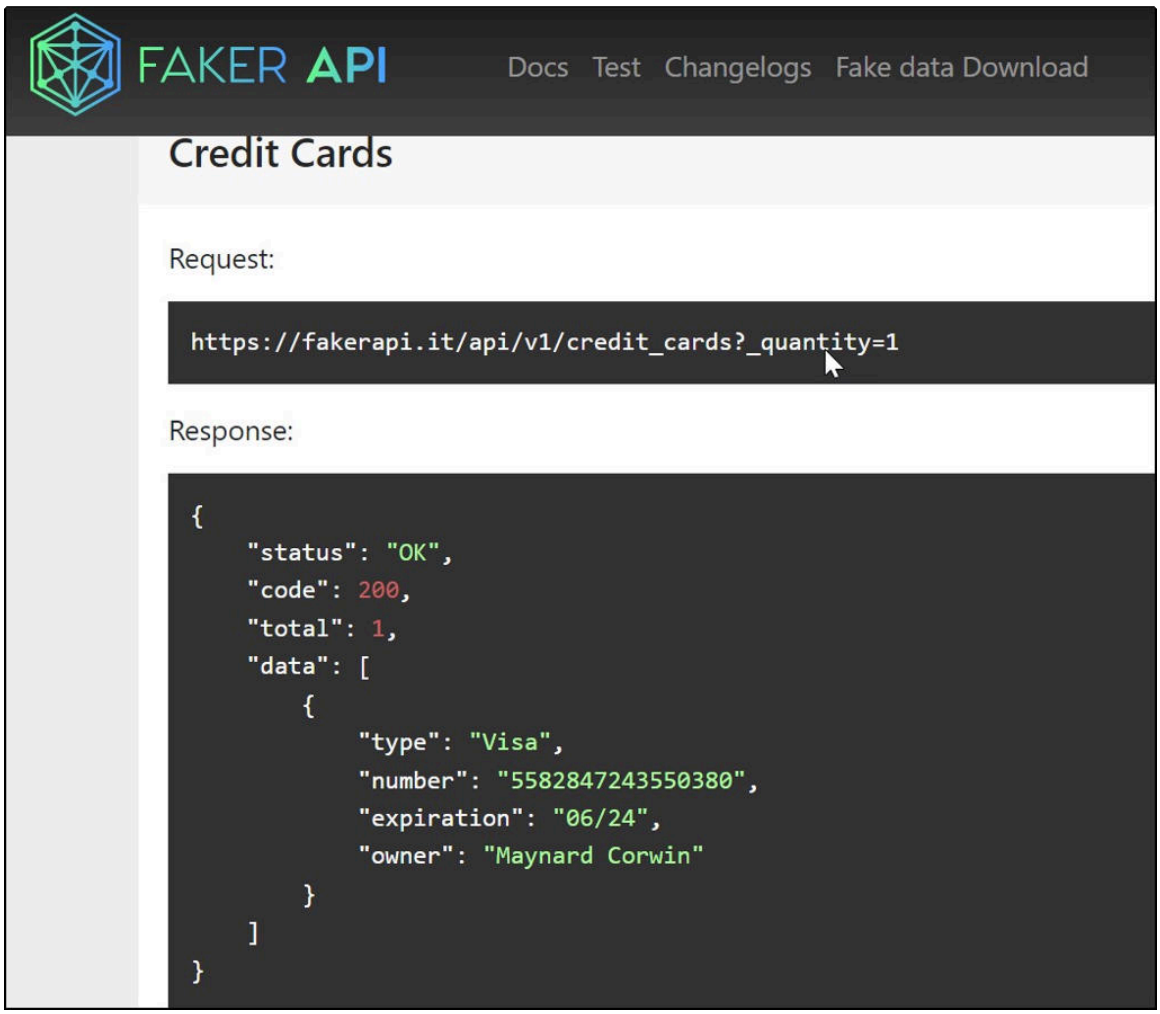
Sometimes a CPQ configuration needs information from outside the configuration passed into the configuration on initialization. There are several ways to do this.




If the information can be found on the Salesforce quote, use the twinning method of data transfer. External data would be assigned to a field in CPQ.

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In this example, CPQ uses the On Configuration/Reconfigure enrichment (called "Init enrichment" here) to send an API call to the website "FakerAPI.it". This website sends an API response with fake credit card information.




Our goal is to populate a field in CPQ with the credit card type (Visa, MasterCard, or other).

## Setup

The first step of using an enrichment and external connection is to set it up. For instructions, see Using external connections with OAuth support. (Note that the examples in this link focus mostly on the On BOM Response enrichment. This article complements the other because it focuses more on the Init enrichment.)

The following information is used for our external connection to FakerAPI.it.

| Parameter | Value |
|---|---|
| Name | CardType |
| variableName | cardType |
| host | https://fakerapi.it |
| path | /api/v1/credit_cards?_quantity=1 |
| Authentication Type | None |

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| Parameter | Value |
|---|---|
| timeout | 500 |

Next, the field in CPQ must be created and associated with the blueprint that uses the enrichment. All four CPQ field types can be assigned data from the enrichment. The data assigned to the field from the API response just needs to match the field.

## Scripting the Init enrichment

The final step is to write the script for the Init enrichment. The enrichment's language is based on JavaScript, and users are encouraged to look at the Help section of the advanced function editor for most of the sample scripts needed. The following lines of code are not in the Help section, so are documented here.

To reference an external connection in an enrichment, use the following:

```
Var {varName} =
 External.{externalConnectionVariableName}(inputs)
```

If calling to Salesforce, change `External` to `Salesforce`.

```
Var {varName} =
 Salesforce.{externalConnectionVariableName}(inputs)
```

If there are no inputs, use empty parentheses.

In the Init enrichment, the Fields item changes to Configuration Request, which is referenced in the script as `cfgRequest`. This item is used to define fields in the CPQ configuration that is being initialized. Therefore, if external data is passed to CPQ, it is assigned from the `cfgRequest` JSON object and values have to be programmed into it. That can be scripted two ways (Items in curly braces ( { } ) and in italics are determined by the user):

```
cfgRequest.{LogikVariableName}.set(“value”, “{value}”) ;
```

```
cfgRequest.{LogikVariableName}.value = “{value}” ;
```

For example, suppose the company Solar Fare Well sells and installs solar panels. They want to assign two external values to their configurator: which way the roof faces and the square footage of the roof. Their Init enrichment might have the following lines of code:

```
cfgRequest.roofDirection.value= “North”;
cfgRequest.sqft.set(“value”, 500);
```

Notice that the number does not need quotes around it.

The Configuration Request item contains all the requests on the configuration. This includes fields that are twinned into CPQ. Moreover, `cfgRequest` is populated with the twinned fields before the Init enrichment script runs. This means that twinned fields can be used as variables (inputs) for the enrichment script and external connection, which can affect the output from the script and external connection. The following snippet shows the formatting options when getting values from `cfgRequest`.

```
var x = cfgRequest.{varName}.get(“value”);
```

```
x= cfgRequest.{varName}.value;
```

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## Sample script solution

When implementing the above code, the first step is to look at the JSON response from the external connection call.

Using the external connection defined above, the following enrichment script returns an API response similar to the one that follows just below.

```
var sample=External.cardType();
return sample;
```

```
"body": {
 "total": "1",
 "code": "200",
 "data": [
  {
   "owner": "Mercedes Emmerich",
   "number": "2410279364686428",
   "expiration": "04/25",
   "type": "American Express"
  }
 ],
 "status": "OK"
}
```

Note that this is not the entire API response, and that card data changes with each API call. As expected, this matches the API response from the website.

Next, we need to parse down to the card type. The formatting examples in the Advanced Function Help section can help you identify how to parse the JSON object response.

The following enrichment script returns the result that follows.

```
var sample=External.cardType();
var x=sample.body.data[0].type;
cfgRequest.cardType_adv.set("value", x);
return cfgRequest;
```

```
{
  "cardType_adv": {
    "userEdited": false,
    "value": "American Express"
  }
}
```

So in CPQ, the cardType_adv field is defined as “American Express”.

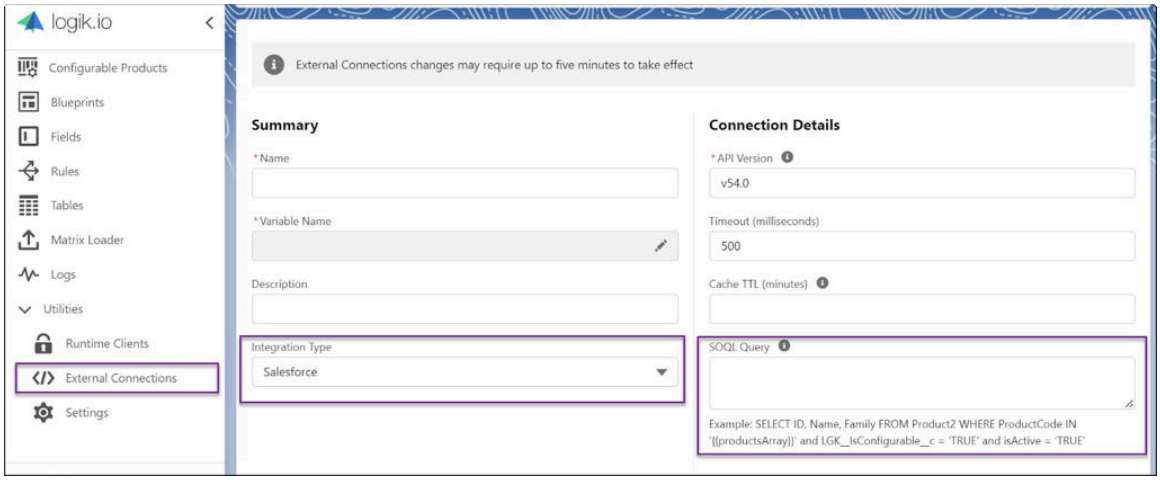
## Query data from Salesforce (SOQL)

As mentioned earlier, data that is in a Salesforce quote can be twinned into CPQ. However, if the data is found elsewhere in Salesforce, the Init enrichment has Salesforce as the external connection, and you perform a query using Salesforce Object Query Language (SOQL). If you are unfamiliar with the SOQL language, you can find out more at Salesforce’s Trailhead site.

To use SOQL in the enrichment, the only difference from the examples above is a change to the external connection. In CPQ Admin, click **Utilities**, click **External Connections**, and then click **New**. This is how you normally create an external connection.

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For the field integration type, select **Salesforce**. This provides a box for you to enter your SOQL query.




**Related topics**

Twinning: pulling Salesforce CPQ quote information into CPQ

### API overview and resources

Learn about the APIs that are available in CPQ to manage configurations.

CPQ provides APIs for both the end user (runtime) for configurations and the administrative side for setup and management.

The runtime APIs support the standard create, read, update, and delete functions for CPQ configurations, along with the ability to retrieve bill of materials (BOM) data from CPQ. These APIs can be used to build a headless or custom UI for end users to create CPQ configurations.

Administrative APIs can be used to work with blueprints, fields, sets, product pickers, rules, managed tables, and the Matrix Loader for imports and exports. The admin APIs can be integrated or automated to perform routine tasks like data migration.

## API resources

The following resources can help you get started with CPQ APIs.

To view a Github repository with OpenAPI specifications and Postman collections for CPQ APIs, see:

API Documentation

For interactive and explorable API documentation with code examples for both runtime and admin APIs, see:

CPQ API Reference

## Authenticating API calls

Runtime API calls are authenticated using runtime client tokens defined in CPQ Admin. For more information about runtime API calls and runtime client tokens, see:

Intro to runtime API calls

Administrative API calls are authenticated with admin API tokens that are also set up in CPQ Admin. For more information about admin API tokens and permissions, see:

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Intro to admin API keys

**Related topics**

- Runtime APIs
- Authenticating CPQ API calls
- Additional configuration APIs
- Admin APIs: Blueprint import and export
- Admin APIs: Managed tables

### Intro to runtime API calls

Runtime, or buyside, APIs are used to create, update, and save configurations.

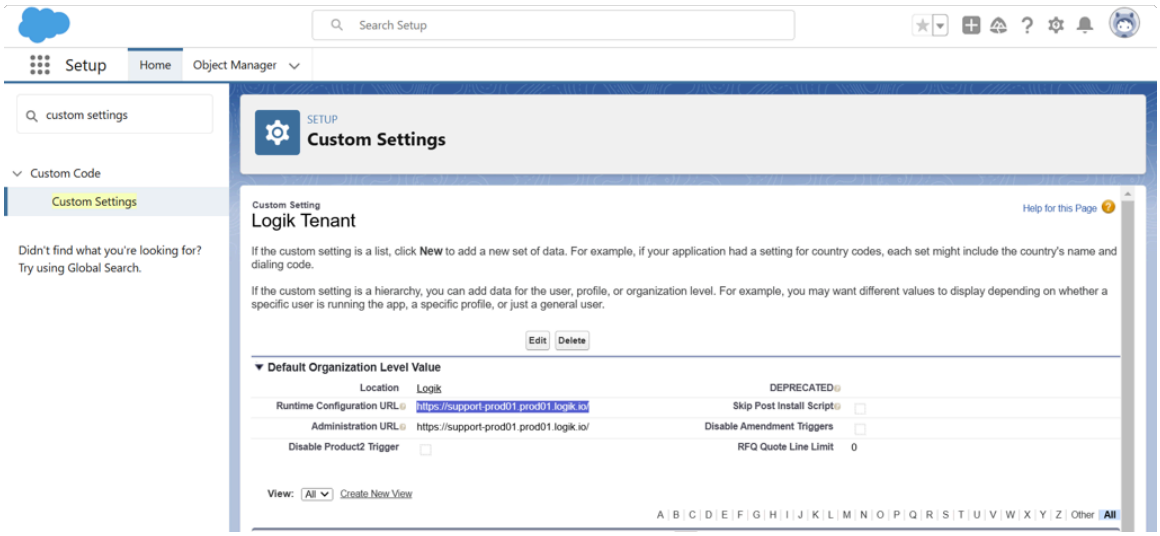
CPQ APIs are divided into two categories: runtime APIs and admin APIs. In this article, we introduce the runtime APIs.

Runtime APIs are used to create, read, update, and delete configurations, and are the same APIs that are used in the CPQ End User Configurator. They are also commonly referred to as the "buyside" APIs.

**Note:** For the most updated information on sample codes and other details, see API Documentation.

All API calls follow this base URL format: `https://<yourTenant>.<sector>.logik.io/api/`. In this URL, yourTenant represents your unique listed CPQ tenant name, and sector is the sector where your CPQ environment is located.

If you are a Salesforce user, you can find your tenant URL by clicking **Setup** in your Salesforce account. In the Quick Find box, search for or click **Custom Settings**, and then click **Manage**. Your tenant URL will be displayed.

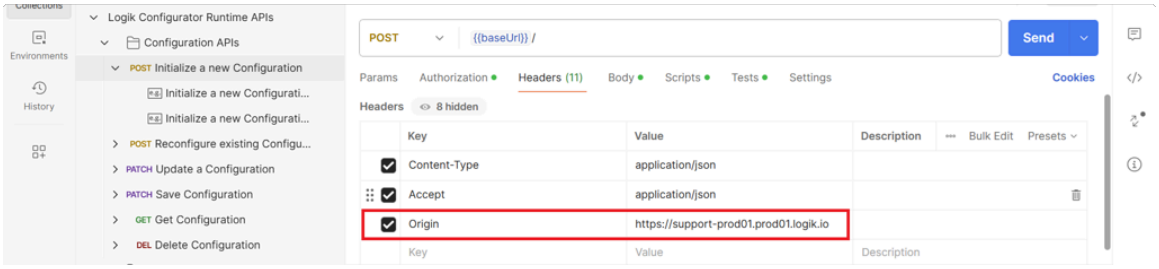



All runtime API calls require bearer token authentication using a unique token that is available in the runtime client. They also require that the origin URL configured in the runtime client appears in the request header.

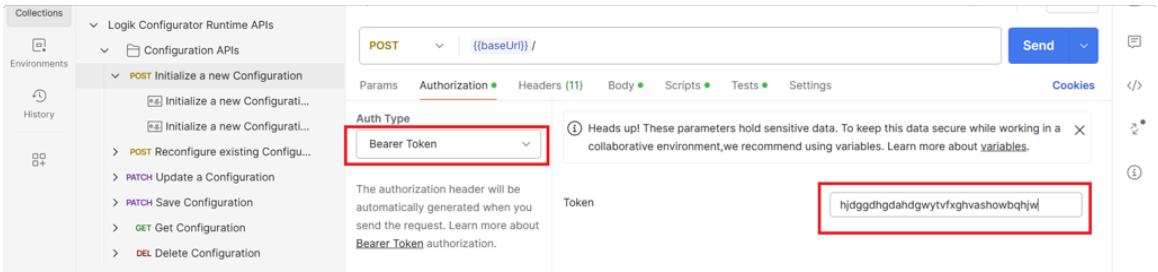
To authenticate, collect the bearer token and the origin URL from CPQ Admin → Utilities → Runtime Client. For each API call in a Postman, add the following header:

```
Key: Origin
Value: <yourOrigin>
```

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In the Authorization tab of Postman or your API tool, select **Bearer Token**, and then input the unique token you copied from CPQ Admin.




**Note:** The token in the image is a dummy value that does not correspond to any actual environment. It appears only for illustrative purposes.

## Basic runtime API calls

- The initial configure call starts the configuration process by passing the ID of the configurable product, and returns a configuration UUID for later use.

  Example (cURL):

```
curl -X POST https://<yourTenant>.<sector>.logik.io/api/ \
-H "Authorization: Bearer <yourBearerToken>" \
-H "Origin: <yourOrigin>" \
-H "Content-Type: application/json" \
-d '{
    "sessionContext": {
        "stateful": true
    },
    "partnerData": {
        "product": {
            "configuredProductId": "{{configProductId}}",
        }
    },
    "fields": []
}'
```

  Example (response):

```
{
  "configurationId": "{uuid}"
```

  You also use this API call for reconfiguring, providing a previously saved configuration UUID in the POST body.

  Example reconfigure (cURL):

```
curl -X POST https://<yourTenant>.<sector>.logik.io/api/ \
-H "Authorization: Bearer <yourBearerToken>" \
```

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```
-H "Origin: <yourOrigin>" \
-H "Content-Type: application/json" \
-d '{
    "sessionContext": {
        "stateful": true
    },
    "partnerData": {
        "product": {
            "configuredProductId": "{{configProductId}}",
            "configurationAttributes": {
                "LGK__ConfigurationId__c": "{{uuid}}"
            }
        }
    },
    "fields": []
}'
```

- The update configuration call updates an existing configuration by passing the configuration UUID and desired field values, and returns all possible fields and their values.

  Example (cURL):

```
curl -X PATCH https://<yourTenant>.<sector>.logik.io/api/{uuid}
 \
-H "Authorization: Bearer <yourBearerToken>" \
-H "Origin: <yourOrigin>" \
-H "Content-Type: application/json" \
-d '{ "fields": { "color": "blue", "size": "large" } }'
```

  Example (response):

```
{
  "fields": {
    "color": "blue",
    "size": "large",
    "price": "$100"
  }
}
```

- The get BOM call passes the configuration UUID and retrieves the Bill of Materials (BOM) for the configuration. It returns the current BOM for the configuration.

  Example (cURL):

```
curl -X GET
 https://<yourTenant>.<sector>.logik.io/api/{uuid}/bom \
-H "Authorization: Bearer <yourBearerToken>" \
-H "Origin: <yourOrigin>"
```

  Example (response):

```
{
  "bom": [
    { "item": "componentA", "quantity": 2 },
    { "item": "componentB", "quantity": 1 }
  ]
}
```

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- The save call saves the configuration in CPQ. This ensures that the configuration UUID can be used and reconfigured in the future.

  This process asynchronously populates our custom objects, configuration field data sets, and configuration line items in Salesforce.

  Example (cURL):

```
curl --location --request PATCH
 'https://mpanigrahi-demo.demo01.logik.io/api/6d0ef6fd-4c88-44
f3-a296-b03421c369c6' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Origin: https://mpanigrahi-demo.demo01.logik.io' \
--header 'Authorization: <<RUNTIME TOKEN>>' \
--header 'Cookie:
 LGKSESSION=NDA5OWJmNmEtNDhhOS00YTc4LTk3ODktZTg0OGYyOGIwMjZk' \
--data
 '{"fields":[{"variableName":"name_d1","value":"megha","dataTyp
e":"text"}],"responseState":{"setPagination":{"collections":{"p
ageSize":10,"pageNumber":0},"fields":{"pageSize":10,"pageNumber
":0},"componentTypes":{"pageSize":10,"pageNumber":0}},"defaultP
agination":{"pageSize":10,"pageNumber":0},"searchValues":{}}}'
```

  For more details on the sample code, refer to the full API reference documentation:

  https://api-docs.logik.io/#introduction

### JSON sample

```
info:
_postman_id: e8370e58-ff12-4662-adac-3e35052b59ba name: Sample
 Runtime Calls
schema:
 https://schema.getpostman.com/json/collection/v2.1.0/collection
.json item:
name: 'Logik: Initial Configure' event:
listen: test script:
exec:
"var jsonData = JSON.parse(responseBody);\r"
pm.collectionVariables.set("configId", jsonData.uuid); type:
 text/javascript
request: auth:
type: bearer bearer:
- key: token
value: '{{logikAccessToken}}' type: string
method: POST header:
key: content-type value: application/json type: text
key: Origin
value: '{{logikOriginHeader}}' type: text
body:
mode: raw
raw: " {\r\n \"sessionContext\": {\r\n \"stateful\":
 true\r\n },\r\n \"partnerData\": {\r\n \"product options:
raw:
language: json
url:
```

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```
raw: '{{logik}}' host:
- '{{logik}}' response: []
name: 'Logik: Update Configuration' request:
auth:
type: bearer bearer:
key: token
value: '{{logikAccessToken}}' type: string
method: PATCH header:
key: content-type value: application/json type: text
key: Origin
value: '{{logikOriginHeader}}' type: text
body:
mode: raw
raw: "{\r\n \"fields\": [\r\n
 {\"variableName\":\"juBool1\",\"value\":\"True\"},\r\n
 {\"variableName\":\"juBool2\",\"value options:
raw:
language: json
url:
raw: '{{logik}}{{configId}}' host:
- '{{logik}}{{configId}}' response: []
name: '(Optional): Logik: Retrieve BOM' request:
auth:
type: bearer bearer:
key: token
value: '{{logikAccessToken}}' type: string
method: GET header:
key: content-type value: application/json type: text
key: Origin
value: '{{logikOriginHeader}}' type: text
url:
raw: '{{logik}}{{configId}}/bom' host:
'{{logik}}{{configId}}' path:
bom response: []
name: 'Logik: Save' event:
listen: test script:
exec:
"var jsonData = JSON.parse(responseBody);\r"
"pm.collectionVariables.set(\"logikTotal\", jsonData.total);\r"
pm.collectionVariables.set("logikLineItems", jsonData.products);
 type: text/javascript
request: auth:
type: bearer bearer:
- key: token
value: '{{logikAccessToken}}' type: string
method: PATCH header:
key: content-type value: application/json type: text
key: Origin
value: '{{logikOriginHeader}}' type: text
body:
mode: raw
raw: "{\r\n \"fields\": []\r\n}" options:
raw:
language: json
url:
raw: '{{logik}}{{configId}}?save=true' host:
'{{logik}}{{configId}}' query:
```

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```
key: save value: 'true'
response: []
name: '(Optional): Logik: Reconfigure' event:
listen: test script:
exec:
"var jsonData = JSON.parse(responseBody);\r"
pm.collectionVariables.set("configId", jsonData.uuid); type:
 text/javascript
request: auth:
type: bearer bearer:
- key: token
value: '{{logikAccessToken}}' type: string
method: POST header:
key: Origin
value: '{{logikOriginHeader}}' type: default
key: Authorization
value: Bearer Armqrz8jv-1CO5mcWmcrDnXZlV9bbOTmGg type: default
disabled: true body:
mode: raw
raw: "{\r\n \"sessionContext\": {\r\n \"stateful\":
 true\r\n },\r\n \"partnerData\": {\r\n \"product\": {\r\n
 \"configuredProductId\" options:
raw:
language: json
url:
raw: '{{logik}}' host:
- '{{logik}}' response: []
```

For more information about CPQ APIs, see the following eight-slide presentation:

APIs.

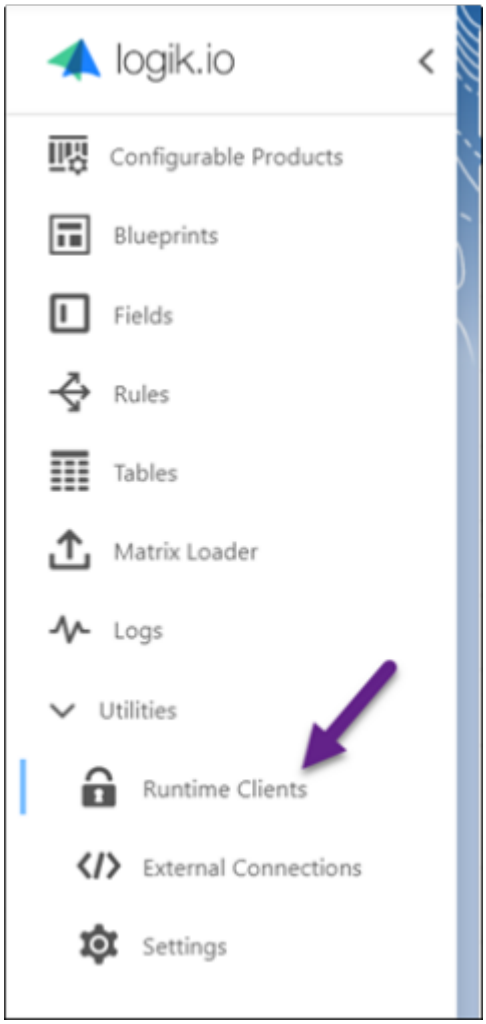
### Authenticating CPQ API calls

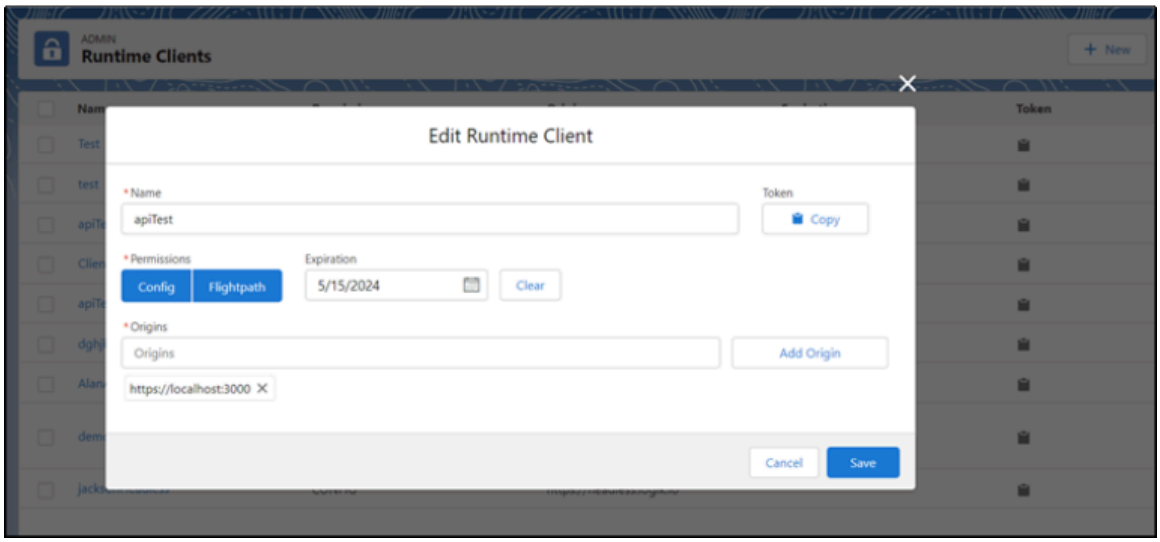
Secure CPQ API calls with admin API keys, JWT tokens, session cookies, or Google IdP for runtime and Admin tasks.

## Authenticating runtime API calls

When using CPQ in a headless manner, you authenticate your configuration session by using a runtime client. To create a runtime client, navigate to the CPQ Admin UI, click **Utilities** in the sidebar, and then click **Runtime Clients**. From here, specify the origin of your call, whether it is an external URL or an origin specified in the header of your call. You can also give your client an expiration date. After you save your client, you can copy the token and use it as the bearer token in other runtime API calls.

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For more information on CPQ runtime calls, see Intro to runtime API calls.

## Authenticating admin API calls

There are four ways to authenticate your admin API calls:

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- Admin API keys

  Admin API keys are the recommended way of authenticating admin API calls. For information about setting up admin API Keys, see:

  CPQ: admin API Keys.

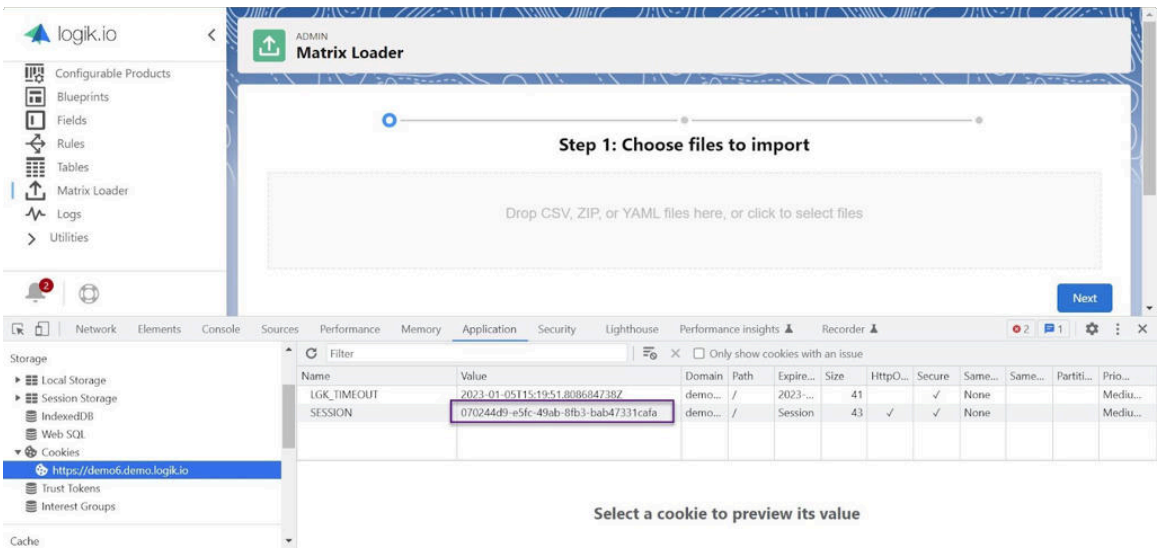
- JWT token

  To ensure tighter security for long-term admin API authentication, we leverage the Salesforce JWT web token. For steps to initialize this access flow, see:

  Admin APIs: Authentication using a Salesforce-connected app

- Session cookies

  To authenticate a short term admin session, you can leverage your browser's session cookie. Navigate to the cookies in your browser's console, and take the session cookie. Enter the cookie in your request header as a keyed pair: `"Cookie":"SESSION=<yourSessionCookie>"`




- Google IdP

  If you are not connected to a Salesforce environment and choose not to use admin API keys, you can use Google IdP to authenticate. If you do not use Google IdP, open a support case to discuss options for admin API authentication.

  **Note:** Create a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

### Intro to admin API keys

You can use admin API calls to access Admin functionality without using the Admin UI interface and a browser.

CPQ provides admin API keys that you can use to access admin functionality via API calls instead of using a browser and the CPQ Admin interface.

For an introduction to CPQ admin API keys, view the following video:

Admin API keys

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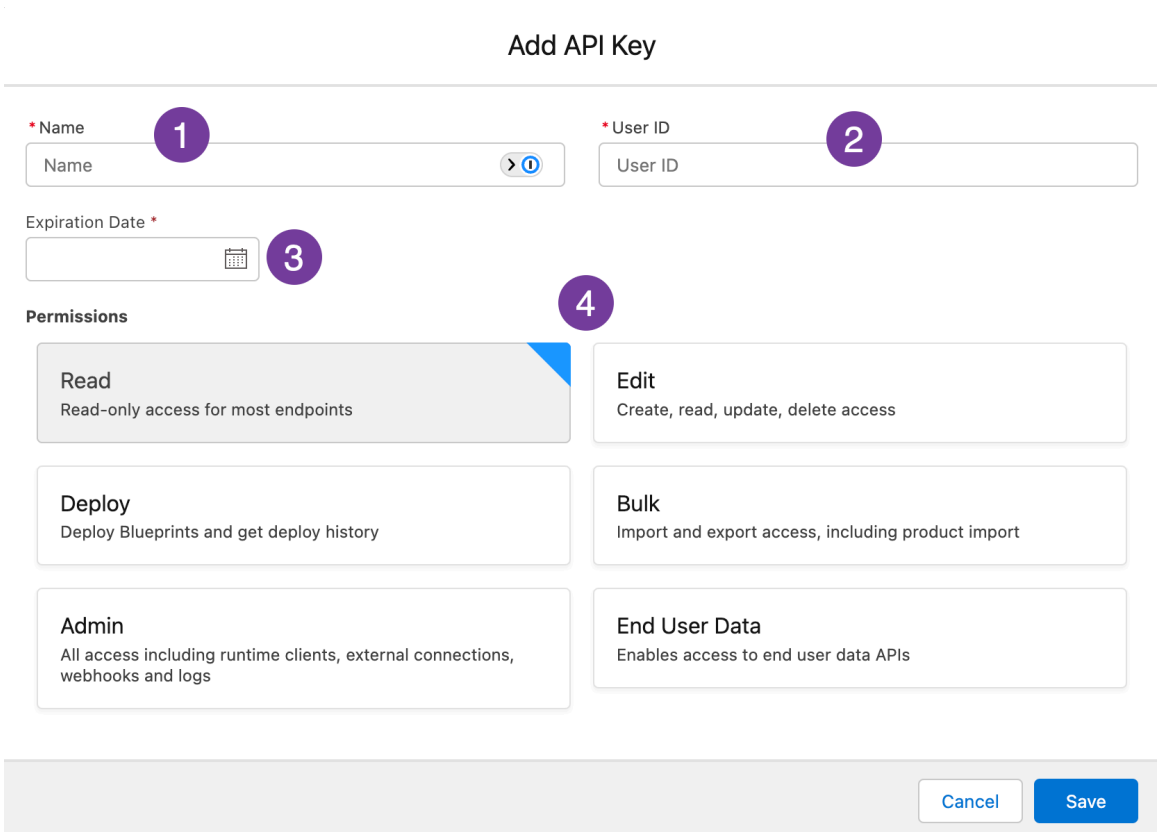
## Admin API keys page

To get to the Admin API Keys page in CPQ, click the arrow to expand the Utilities section in CPQ Admin. The Admin API Keys tab appears in the menu.




## Add an admin API key

To add a new admin API key, click **New** at the top of the screen.

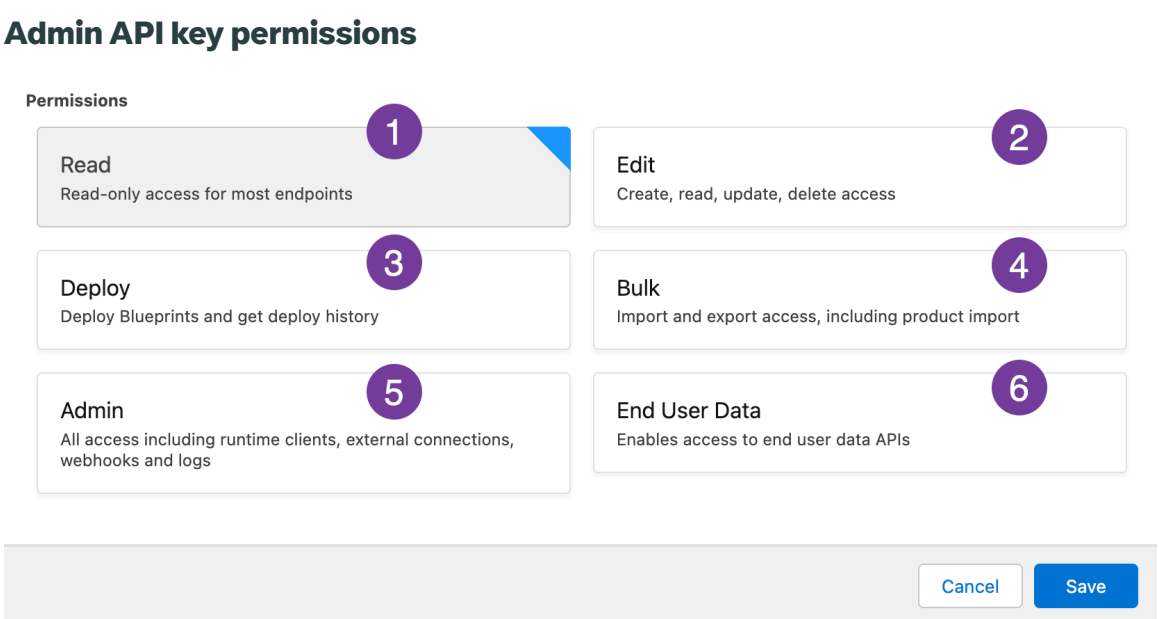



All parameters are required.

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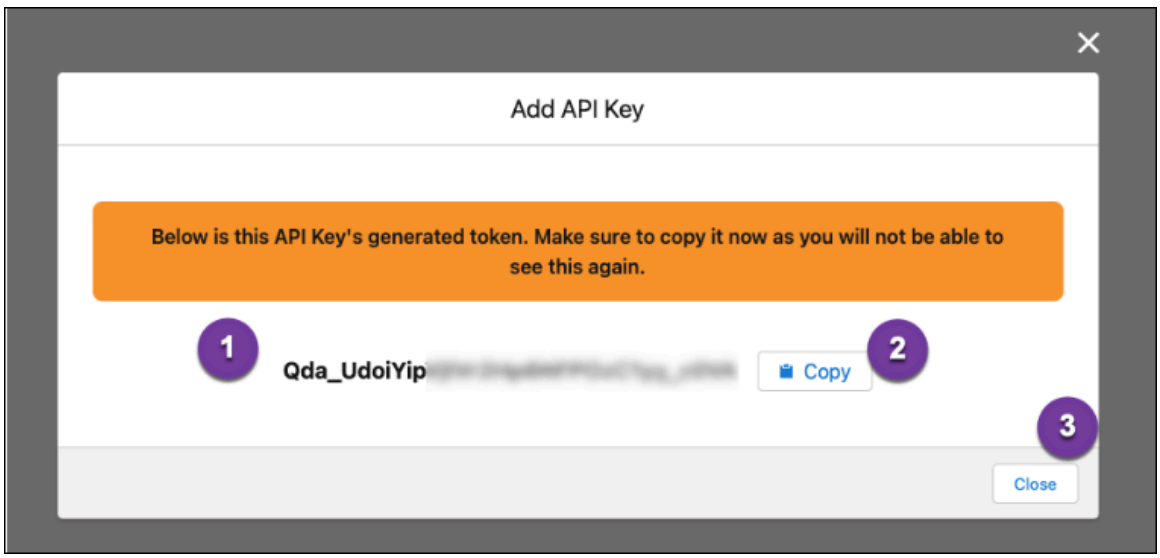
1. Name: the name of the admin API key
2. User ID
3. Expiration Date: the expiration date of the key
4. Permissions: the permissions assigned to the key

Choose the permissions that fit your use case before clicking **Save**.




1. Read (required, default): read-only access, typically for GET requests
2. Edit: create, read, update, and delete access for most objects, including fields and rules
3. Deploy: allows the deployment of blueprints and access to deployment history
4. Bulk: allows importing and exporting data, such as managed tables, to and from CPQ
5. Admin: full permissions to all Admin functionality
6. End User Data: access to end user data APIs

When you are finished assigning permissions, click **Save**. The dialog box updates to show the new admin API key.




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1. View the admin API key
2. Copy the key to the clipboard
3. Close the dialog box

**Important:** You can copy an admin API key only when it is created. Make sure to copy and store the key.

## Accessing admin APIs by using API keys

To use an admin API key in API requests, use the API key with Bearer Token authentication.

- Header: Authorization Header
- Key: authorization
- Value: Bearer <Admin API key>

Example header:

```
authorization: Bearer Qda_UdoiYipb15Le11En8axEuN71FA6Vt_cw
```

When you use an admin API key, you use different endpoints to access the admin APIs.

- For general Admin endpoints (`/a/Admin/...`) the endpoint to use is (`/api/Admin/...`).

  For example (retrieving a list of rules):

  - API call in Admin UI: `/a/Admin/v3/rules?page=0&size=100&sort=modified%2CDESC`
  - API call using Admin Keys: `/api/Admin/v3/rules?page=0&size=100&sort=modified%2CDESC`
- For managed table endpoints (`/a/managed_tables/...`) the endpoint to use when accessing with an API key is (`/api/managedTables/...`)

  For example (retrieving the schema of a managed table):

  - API call in Admin UI: `/a/managed_tables/v1/managedTables/{tableName}/metadata`
  - API call using Admin Keys: `/api/managedTables/v1/managedTables/{tableName}/metadata`

**Related topics**

Admin APIs: Authentication using a Salesforce-connected app

### Admin APIs: Authentication using a Salesforce-connected app

We recommend that you use admin API keys to authenticate admin API calls. An older method is documented here.

CPQ administration APIs are useful to facilitate new product introduction, data transfer, test-to-production operations, and so on. For use cases in which CPQ leverages Salesforce for user authentication, this article walks you through the steps required to build a Salesforce connected app and retrieve a JSON web token [JWT] that can be used to authenticate calls to CPQ administration APIs.

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**Note:**

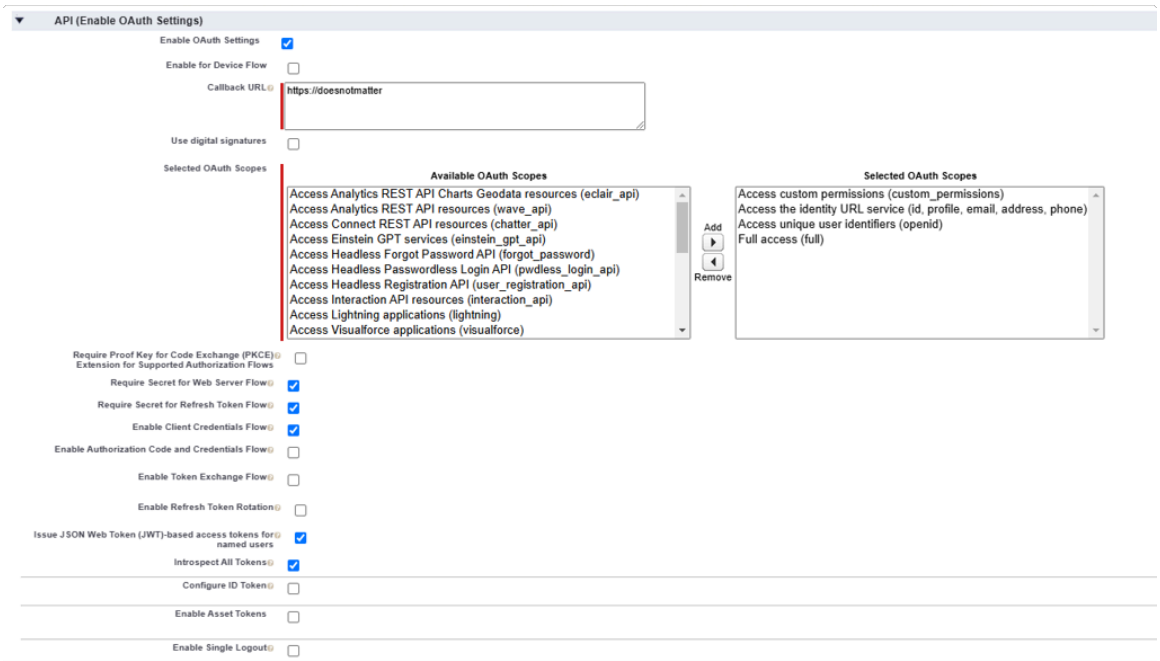
- The release of admin API Keys has made this setup unnecessary and is now the recommended method of authentication of admin API calls. See Intro to admin API keys.
- The JWT method that was recommended before February 2025 has been deprecated by Salesforce. Instead, follow the updated steps in this article.

The JWT can be used as a bearer token to authenticate CPQ administration APIs to manipulate managed tables, write rules, deploy blueprints, and more.

## Creating or updating a connected app for JWT authentication

If you're updating an existing app, these instructions assume that you've created a connected app following the instructions in the legacy asset token flow.

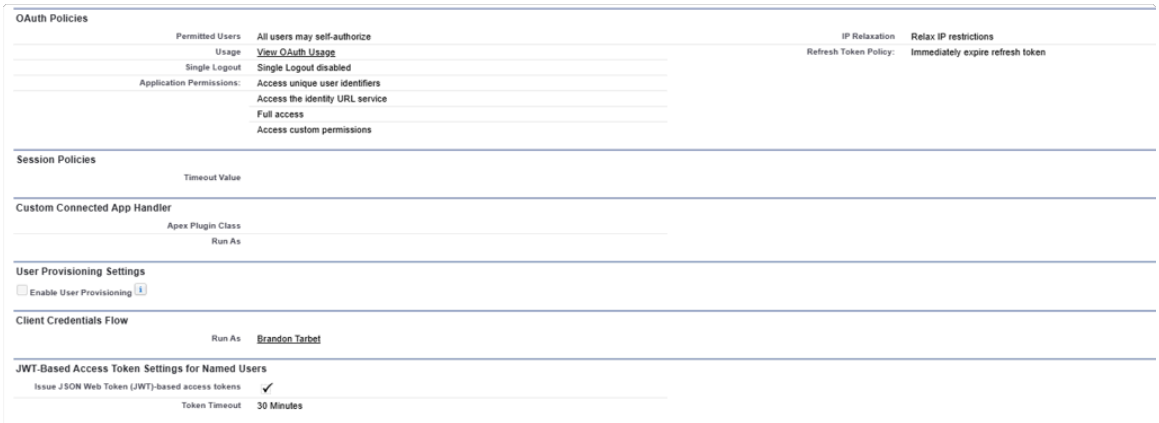
1. Go to Salesforce Setup, Apps → App Manager.
2. Create a new connected app, or update your existing JWT app to match the image below.




3. Click **Manage** in your JWT connected app.
4. Edit policies.
   - There will be a new section labeled Client Credentials Flow. Select your integration user in the **Run As** option.
   - There will be a second new section labeled JWT-Based Access Token Settings for Named Users. Check **Issue JSON Web Token (JWT)-based access tokens**, and select a default timeout.

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- Click **Save**. Your policies should resemble the following:




## Generating the JWT

The following Postman collection can be used to generate a JWT for your instance:

https://logikio.atlassian.net/wiki/spaces/CS/pages/1615036449/Admin+APIs+Authentication+via+Salesforce+Connected+App

For in-depth instructions, see:

OAuth 2.0 Client Credentials Flow for Server-to-Server Integration

You can find the client ID and secret by viewing the Consumer Key and Secret → Manage Consumer Details field in the connected app you created above.

Note that a single call to Salesforce generates a token. Based on the **Issue JSON Web Token (JWT)-based access tokens for named users** setting in your connected app, the access token returned here is a JWT that you can use as a bearer token for CPQ APIs.

### Admin APIs: Blueprint import and export

You can export a blueprint to back it up, or export and import a blueprint to move it from one CPQ environment to another.

The CPQ blueprint admin APIs provide the import and export API calls for working with blueprints. Common use cases include migrating blueprints across CPQ environments and backing up blueprints. To view the CPQ blueprint admin APIs, see:

CPQ blueprint admin APIs

For a comprehensive list of all CPQ APIs, see the CPQ API Reference:

API documentation introduction.

You can also view the CPQ open source API documentation on Github:

https://github.com/opensource/API-Documentation

To learn how to set up admin API keys for calling blueprint APIs, see:

Intro to admin API keys

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## Blueprint export APIs

To export a blueprint via the APIs, the Export blueprint call passes the variable name of the blueprint to start the export job. In response, the call receives a Job ID that can be queried to retrieve the status and to download the blueprint as a ZIP file.

The sequence of API calls to export and download a blueprint is:

1. Export the blueprint

   Use the blueprint variable in the payload to initiate the export. The Job ID can be polled for the status of the export.

2. Check the job status

   To check the status, use the Job ID that is returned after the export call. When the status is COMPLETED, proceed to step 3.

3. Download the export

   Use the same Job ID to download a ZIP file that contains the blueprint.

To view the source code for the Export blueprint call, see the openSource API documentation from the Github.

Export blueprint call

## Blueprint import APIs

To import a blueprint, the Import blueprint call passes a ZIP file of the blueprint to begin an import job.

The sequence of API calls to import a blueprint is:

1. Import the blueprint

   Select the ZIP file that includes the blueprint. The Job ID can be polled for the status of the import.

2. Checkthe job status

   To check the status, use the Job ID that is returned after the import call. When the status is SUCCESS, the job is complete.

To view the source code for the Import blueprint call, see:

Import blueprint call

### Admin APIs: Managed tables

Information about APIs that interact with managed tables

Use Admin API keys to interact with the CPQ APIs for managed tables. Bulk-level permissions are necessary for your admin API key to authenticate calls related to managed tables. For more information on these APIs, see the full API documentation:

CPQ API documentation

The following Postman collection demonstrates how to retrieve and manipulate table metadata and data using the deprecated JWT authorization noted below:

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Postman Collection managed tables APIs

The following operations are demonstrated in this collection:

- Retrieving a list of all tables defined in an environment
- Manipulating table metadata (schema)
  - Retrieving table metadata
  - Uploading table metadata
  - Adding table metadata
  - Deleting table metadata
- Manipulating table data
  - Retrieving table data
  - Adding a table data row
  - Updating a table data row
  - Deleting a table data row
  - Uploading table data via CSV
  - Exporting table data to CSV
  - Getting the status of an export job
  - Replacing a table

All calls use JWT authorization. The bearer token is stored in the global variable `{{logik_admin_BearerToken}}`. For instructions for generating JWT, see:

Admin APIs: Authentication using a Salesforce-connected app

### Runtime APIs

CPQ provides a set of APIs for building front-end applications and manipulating configurations. These are the buyside or runtime APIs that customers and end users can use to create, update, and save CPQ configurations.

Runtime APIs support the standard create, read, update, and delete functions for CPQ configurations, along with the ability to retrieve bill of materials (BOM) data from CPQ.

CPQ provides accessible runtime APIs and a quick start for developers through open source repositories containing API collections that can be imported and tested.

## Runtime API setup

The base URL format for all runtime API calls is `https://<tenant>.<sector>.<cpq>/api/`. The `<tenant>` is the listed tenant name and `<sector>` is the appropriate sector where the environment is located (usually `test` or `prod`).

Find the CPQ tenant URL in Salesforce by navigating to **Setup**, searching for **Custom Settings** in the **Quick Find** box, and then selecting **Manage** next to CPQ Tenant.

Runtime API calls are authenticated through a combination of a bearer token and the defined origin in the runtime client. The origins of the runtime application are set when a runtime client is created in the CPQ **Admin** settings.

Add two headers to each request to authorize these API calls as mentioned in the following table:

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**Mandatory headers for runtime API requests**

| Header | Key | Value |
|---|---|---|
| Origin Header | origin | <runtimeClientOrigin> |
| Authorization Header | authorization | Bearer <runtimeToken> |

Sample headers:

- origin: localhost
- authorization: Bearer vEqzz4BVkb15Le11En8axEuN71FA6Vt_cw

## Create a configuration

The *`create configuration`* call passes the ID of the configurable product and receives in response a CPQ configuration ID that can be used to specify this configuration in later calls.

**POST**

| | |
|---|---|
| HTTP method | POST |
| URL | https://<tenant>.<sector>.logik.io/api/ |
| Path parameters | N/A |
| Query parameters | N/A |

The two key pieces of the payload are:

- The ID of a CPQ enabled product, with a blueprint that is deployed
- The CPQ configuration UUID that is being reconfigured

Sample URL:

`https://dev1.test.cpq/api/`

Sample payload:

```
{
  "sessionContext":
  {
    "stateful": true
  },
  "partnerData":
  {
    "product":
    {
      "configuredProductId": "<Id of a Logik.io Enabled
 Product>",
    }
  },
  "fields": []
}
```

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**Note:** You can also initialize the configuration by passing field values to the fields array in the following format:

```
{
  "variableName": "<Field Name>", "value": "<Field Value>"
}
```

Sample response:

```
{
  "fields": [<ARRAY OF FIELD OBJECTS>],
  "uuid": "08176434-9b1e-4fc8-b2c4-8aba2c35fda3",
  "revision": 0,
  "relatedChanges":
  [
    {
      "key": "products",
      "type": "PRODUCT"
    }
  ],
  "valid": true,
  "messages": [],
  "productChange": true,
  "products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
  "total": 30,
  "layouts": [<ARRAY OF LAYOUTS>]
}
```

## Reconfigure a configuration

The *reconfigure* API call is similar to the *create configuration* call. The *reconfigure* call passes the ID of the configurable product and an existing CPQ configuration ID. In return, it receives a new Configuration ID with the same field data as the prior configuration but allows changes to be made.

**Note:** The *UUID* field in the response payload contains the new CPQ configuration ID. Use the new configuration ID for all operations going forward in the reconfiguration process, including update, save, and retrieve BOM.

**POST**

| | |
|---|---|
| HTTP method | POST |
| URL | https://<tenant>.<sector>.logik.io/api/ |
| Path parameters | N/A |
| Query parameters | N/A |

The two key pieces of the payload are:

- The ID of a CPQ enabled product, with a blueprint that is deployed
- The CPQ configuration UUID that is being reconfigured

Sample URL:

`https://dev1.test.Logik/api/`

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Sample payload:

```
{
  "sessionContext":
  {
    "stateful": true
  },
  "partnerData":
  {
    "product":
    {
      "configuredProductId": "<Id of a Logik.io Enabled
 Product>",
      "configurationAttributes":
      {
        "LGK__ConfigurationId__c": "<uuid>"
      }
    }
  },
  "fields": []
}
```

Sample response:

```
{
  "fields": [<ARRAY OF FIELD OBJECTS>],
  "uuid": "d98d60cd-9379-4b7b-86fd-de828c340f80",
  "revision": 0,
  "relatedChanges":
  [
    {
      "key": "products",
      "type": "PRODUCT"
    }
  ],
  "valid": true,
  "messages": [],
  "productChange": true,
  "products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
  "total": 30,
  "layouts": [<ARRAY OF LAYOUTS>]
}
```

## Update a configuration

Updating a configuration requires a configuration to be loaded using either the *`create configuration`* or *`reconfigure`* API calls. The *`update configuration`* call passes a CPQ Configuration ID and any desired field values, and in response, receives the updated configuration from CPQ.

**PATCH**

| | |
|---|---|
| HTTP method | PATCH |
| URL | https://<tenant>.<sector>.cpq/api/ |
| Path parameters | N/A |

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**PATCH (continued)**

| Query Parameters | Name | Allowed Value | Required? | Default if not specified |
|---|---|---|---|---|
| | delta | true \| false | optional | true |
| | save | true \| false | optional | false |

Query parameters:

*delta*

If *delta=true*, CPQ sends back only data that has changed based on the update that was sent. This is the default behavior.

If *delta=false*, CPQ sends back the entire configuration and BOM data in response.

*SAVE*

- If *save=true*, CPQ saves the configuration and sends the data to a webhook or writing the data into custom objects in Salesforce. This is the behavior of the save configuration call.
- If *save=false*, CPQ updates this configuration and sends the updated data back in the response. This is the default behavior, and this is the behavior of the update call.

Sample URL:

`https://dev1.test.logik.io/api/fbc3d32c-7f86-4461-b144-986a0e8a5768`

Sample payload:

```
{
  "fields":
  [
    {
      "variableName": "orderQty",
      "value": 3
    }
  ]
}
```

Sample response:

```
{
  "fields": [],
  "uuid": "fbc3d32c-7f86-4461-b144-986a0e8a5768",
  "revision": 0,
  "relatedChanges":
  [
    {
      "key": "products",
      "type": "PRODUCT"
    }
  ],
  "valid": true,
  "messages": [],
  "productChange": true,
```

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```
  "products": null
}
```

## Save a configuration

Saving a configuration is a subset of the update configuration. It requires a configuration to be loaded using either the *create configuration* or *reconfigure* API calls. The *save configuration* call passes a CPQ configuration ID and any desired field values, and in response, receives the updated configuration from CPQ.

**Note:** The only difference between a normal update call and a save call is the addition of the query parameter *save=true* in the URL. If set to false or excluded, this is a normal update call.

If the save API is called in the Salesforce backend then CPQ asynchronously creates and populates the custom objects 'Configuration Field Data Sets' and 'Configuration Line Items' with the appropriate data.

If your CPQ instance has a webhook configured, when the save API is called, the data is sent to the endpoint specified in the webhook setting. See Webhooks.

**Note:** This ends the configuration session. Further edits or updates to the configuration must be started from the create configuration or reconfigure API calls.

### PATCH

| | | | | |
|---|---|---|---|---|
| HTTP method | PATCH | | | |
| URL | https://<tenant>.<sector>.cpq/api/ | | | |
| Path parameters | N/A | | | |
| Query Parameters | Name | Allowed Value | Required? | Default if not specified |
| | delta | true \| false | optional | true |
| | save | true \| false | optional | false |

Query parameters:

*delta*

If *delta=true*, CPQ sends back only data that has changed based on the update that was sent. This is the default behavior.

If *delta=false*, CPQ sends back the entire configuration and BOM data in response.

*save*

If *save=true*, CPQ saves this configuration and (depending on the settings) performs additional actions such as sending the data to a webhook or writing the data into custom objects in Salesforce.

If *save=false*, CPQ updates this configuration and sends the updated data back in the response. This is the behavior of the update call.

Sample cURL request:

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```
curl --location --request PATCH
 'https://mpanigrahi-demo.demo01.logik.io/api/6d0ef6fd-4c88-44
f3-a296-b03421c369c6' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Origin: https://mpanigrahi-demo.demo01.logik.io' \
--header 'Authorization: <<RUNTIME TOKEN>>' \
--header 'Cookie:
 LGKSESSION=NDA5OWJmNmEtNDhhOS00YTc4LTk3ODktZTg0OGYyOGIwMjZk' \
--data
 '{"fields":[{"variableName":"name_d1","value":"megha","dataType
":"text"}],"responseState":{"setPagination":{"collections":{"pag
eSize":10,"pageNumber":0},"fields":{"pageSize":10,"pageNumber":0
},"componentTypes":{"pageSize":10,"pageNumber":0}},"defaultPagin
ation":{"pageSize":10,"pageNumber":0},"searchValues":{}}}'
```

Sample response:

```
{
"fields": [<ARRAY OF FIELD OBJECTS>],
"uuid": "8817655d-7a11-41ef-a9fd-59c2855a3e4b",
"revision": 1,
"valid": true,
"messages": [],
"productChange": false,
"products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
"total": 0
}
```

## BOM APIs

The BOM APIs are useful for retrieving the final output of configuration. You can use the BOM APIs to retrieve the entire BOM, or specific subsets, such as sales or manufacturing BOMs.

The *`Get BOM`* call passes a CPQ Configuration ID and in return receives the current BOM generated by the current state of the configuration. There are 3 built in BOM types: "all", "sales" and "manufacturing". You can dynamically add additional BOM types by setting the *`bomType`* field on the product.

**Note:** If the BOM type is not included, the API returns the entire BOM.

### GET

| | | | |
|---|---|---|---|
| HTTP method | GET | | |
| URL | https://<tenant>.<sector>.cpq/api/<uuid>/bom/<bomType> | | |
| Path Parameters | Name | Allowed Value | Required? |
| | <uuid> | 32 character CPQ configuration UUID | required |
| | <bomType> | name of the BOM to retrieve | optional |
| Query parameters | N/A | | |

Sample response:

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```
{"products": [
        {
            "id": "01t5f000006QKysAAG",
            "quantity": 1,
            "bomType": "Sales",
            "orderNumber": 10,
            "type": "accessory",
            "name": "Amend Flow Bundle Sub",
            "partnerId": "01t5f000006QKysAAG",
            "productCode": "AFBC-SC",
            "externalId": "",
            "productFamily": "Miscellaneous",
            "description": "",
            "uom": "",
            "price": 5,
            "extPrice": 5,
            "level": 0,
            "rollUpPrice": 5
        },
        {
            "id": "01t5f000006QKz2AAG",
            "quantity": 1,
            "bomType": "Sales",
            "orderNumber": 20,
            "type": "accessory",
            "name": "Amend Flow Bundle Asset",
            "partnerId": "01t5f000006QKz2AAG",
            "productCode": "AFBC2-SC",
            "externalId": "",
            "productFamily": "Miscellaneous",
            "description": "",
            "uom": "",
            "price": 25,
            "extPrice": 25,
            "level": 0,
            "rollUpPrice": 25
        }
    ]}
```


For information about additional configuration APIs and sample scenarios, see Additional configuration APIs.

### Additional configuration APIs

These CPQ configuration APIs let you retrieve or delete an existing configuration. They complement the runtime APIs and are useful for viewing full configuration details and for removing configurations no longer needed. Use them alongside the standard create, update, reconfigure, and BOM APIs to support end-to-end configuration workflows.

This article is a followup to Runtime APIs. For more information on authentication and setup,see that article.

These API endpoints to get a configuration and delete a configuration from CPQ are included for completeness.

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## Get configuration

CPQ configurations can be retrieved from the CPQ servers by sending a GET request, which will return the entire configuration in the response. If you only need the product data of the outputs, consider using one of the GET BOM API calls.

**Note:** This does not load a configuration into the CPQ rules engine for updates to fields and re-running of rules. If you need to make updates to an existing configuration, use the Reconfigure API call.

### The GET request

| HTTP method | GET | | |
|---|---|---|---|
| URL | https://<tenant>.<sector>.cpq/api/<uuid> | | |
| Path parameters | <uuid> | 32 character CPQ configuration UUID | required |
| Query parameters | N/A | | |

Sample URL:

https://dev1.test.cpq/api/71e62fe7-e59b-4a91-94af-64718e0d4eae

Sample response:

```
{
"fields": [<ARRAY OF FIELD OBJECTS>],
"uuid": "08176434-9b1e-4fc8-b2c4-8aba2c35fda3", "revision": 0,
"relatedChanges": [
{
"key": "products",
"type": "PRODUCT"
}
],
"valid": true, "messages": [], "productChange": true,
"products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
"total": 30,
"layouts": [<ARRAY OF LAYOUTS>]
}
```

## Delete configuration

CPQ configurations can be deleted, but it is not typically necessary. This API deletes the configuration from CPQ and will not be available for future retrieval of the configuration, BOM, or updates to the configuration.

**Note:** This API will only delete the configuration from the CPQ servers. If the configuration has been persisted in another application (i.e. Quotelines have been created in Salesforce, Orders have been placed in Ecommerce), no changes will be made to that data.

### The DELETE request

| HTTP method | DELETE |
|---|---|
| URL | https://<tenant>.<sector>.logik.io/api/<uuid> |

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**The DELETE request (continued)**

| HTTP method | DELETE | | |
|---|---|---|---|
| Path parameters | <uuid> | 32 character CPQ configuration UUID | required |
| Query parameters | N/A | | |

Sample URL: https://dev1.test.logik.io/api/71e62fe7-e59b-4a91-94af-64718e0d4eae

Sample response:

```
{ }
```

## Sample use cases

A new customer comes to a website, configures a product, and checks out.

1. Start a new configuration → Create New Configuration API call
2. Make updates to the configuration → Update Configuration API call
3. Save the final configuration back to CPQ → Save Configuration API call

A customer returns and wants to place an order for a product similar to one that they have purchased before.

1. Perform a reconfiguration, using an existing CPQ Configuration Id → Reconfigure API Call
2. Save back to CPQ → Save Configuration API call

An order for a complex manufactured product is placed, and the engineering team needs to know what parts they need and which sub-assemblies to build.

Retrieve the “Manufacturing” bill of materials for an existing configuration → Get BOM API call.

### The RFQ (Request for Quote) API

CPQ adds additional functionality to the Salesforce CPQ package APIs. This functionality lets you add products and data to an existing Salesforce CPQ quote.

As part of the CPQ integration package with Salesforce CPQ, CPQ provides an API to add a CPQ configured product, sales BOM products and BOM data to a new or existing Salesforce CPQ quote (`SBQQ__Quote__c`). This provides CPQ functionality in addition to the Salesforce CPQ package APIs.

Salesforce CPQ package APIs

View a video about the Request for Quote API:

https://youtu.be/e0nxElTIzq8

## URL and endpoint

Two HTTP methods are exposed for the endpoint:

- POST for creating a new quote and adding a product and configuration
- PATCH for adding a new product and configuration to an existing quote

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This API is exposed as an Apex Rest Service in the Salesforce org with a path of `/services/apexrest/LGK/request-quote`: for example, `https://<yourInstance>.salesforce.com/services/apexrest/LGK/request-quote`, where `<yourInstance>` is the personal domain of your Salesforce org.

## Setup and authorization

This API is exposed in the Salesforce org and requires authorization with Salesforce to be accessed and called. See Salesforce Help on Authorization options for making API calls. This API can also be tested using the Salesforce Workbench Application.

In CPQ, the only step is to ensure that in Admin settings, **Push BOM Data to ServiceNow CPQ Salesforce Object** is enabled. CPQ uses the data stored in the Configuration Line Items (LGK__ConfigurationLineItem__c) to create any additional sales BOM lines on the quote and write the BOM Data field on the quote line.

**Note:** The API will also respect normal Salesforce user access levels, so if the authenticated Salesforce user (or a partner site itself, via sharing settings) does not have certain object or field level access, the API call may fail or not behave as expected. The user calling the API needs access to the standard Salesforce CPQ and related objects as well as the CPQ Configuration Line Item object and its fields.

A short list of necessary objects includes:

- Pricebook
- Product feature (for the “Dynamic” feature on the product)
- Quote
- Product
- Quote line
- Config Line Item

If there is an issue with the API, make sure the user not only has access to the object or fields, but also to the specific record. This is always true, but because partner profiles start off with less access to records, they are more susceptible to the problem.

To use these APIs, create and save a CPQ configuration, making note of the configuration ID that will be used for the calls. Also copy the product ID of the configurable product that was used to create the configuration demo.

## Create new quote and add product

The create quote and add product API call can be very useful if CPQ is being used outside the traditional Salesforce CPQ context. This can enable an omni channel experience without exposing end users to the Salesforce CPQ Quote Line Editor.

**POST**

| | |
|---|---|
| HTTP method | POST |
| URL | https://<yourInstance>.salesforce.com/services/apexrest/LGK/request-quote |
| Path parameters | N/A |
| Query parameters | N/A |

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The required parameters in the request body are:

**configurableProductId**

The CPQ enabled configurable product ID

**configurationId**

The CPQ configuration UUID received after saving a configuration

**pricebookId**

The Salesforce ID of the Pricebook2 record that has a valid pricebook entry for the product

- –
- –
- –

If included, *accountId* and *opportunityId* are populated on the newly created quote.

Sample URL: `https://demoloik.my.salesforce.com/services/apexrest/LGK/request-quote`

Sample request payload:

```
{
  "configurableProductId": "01t5f000003w24zAAA",
  "configurationId": "eeec456c-a4f6-407a-94b1-03e8b6cf29ea",
  "pricebookId": "01s5f000000AsLDAA0" }
```

Sample response:

```
{
  "attributes" : {
    "type" : "SBQQ__Quote__c",
    "url" :
 "/services/data/v57.0/sobjects/SBQQ__Quote__c/a0q5f0000057YAYA
A2"
  },
  "Name" : "Q-00162",
  "Id" : "a0q5f0000057YAYAA2",
  "SBQQ__LineItemCount__c" : 3,
  "SBQQ__LineItems__r" : {
    "totalSize" : 3,
    "done" : true,
    "records" : [ {
      "attributes" : {
        "type" : "SBQQ__QuoteLine__c",
        "url" :
 "/services/data/v57.0/sobjects/SBQQ__QuoteLine__c/a0m5f000007ZY
r6AAG"
      },
      "SBQQ__Quote__c" : "a0q5f0000057YAYAA2",
      "Id" : "a0m5f000007ZYr6AAG",
      "Name" : "QL-0001001",
      "SBQQ__ProductName__c" : "AFB"
    }, {
      "attributes" : {
        "type" : "SBQQ__QuoteLine__c",
```

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```
        "url" :
 "/services/data/v57.0/sobjects/SBQQ__QuoteLine__c/a0m5f000007ZY
r7AAG"
      },
      "SBQQ__Quote__c" : "a0q5f0000057YAYAA2",
      "Id" : "a0m5f000007ZYr7AAG",
      "Name" : "QL-0001002",
      "SBQQ__ProductName__c" : "Simple Amend Child Subscription"
    }, {
      "attributes" : {
        "type" : "SBQQ__QuoteLine__c",
        "url" :
 "/services/data/v57.0/sobjects/SBQQ__QuoteLine__c/a0m5f000007ZY
r8AAG"
      },
      "SBQQ__Quote__c" : "a0q5f0000057YAYAA2",
      "Id" : "a0m5f000007ZYr8AAG",
      "Name" : "QL-0001003",
      "SBQQ__ProductName__c" : "Simple Amend Child Asset"
    } ]
  },
  "SBQQ__Type__c" : "Quote"
}
```

## Add product to quote

The Add Product to Quote API can be used when additional configurations are added to a single quote, either generated through the normal CPQ flow, through manual record creation, or through one that has already been created using the Create New Quote API above.

**PATCH**

| | |
|---|---|
| HTTP method | PATCH |
| URL | https://<yourInstance>.salesforce.com/services/apexrest/LGK/request-quote |
| Path parameters | N/A |
| Query parameters | N/A |

The required parameters in the request body are:

**configurableProductId**

the CPQ enabled configurable product ID

**configurationId**

The CPQ configuration UUID received after saving a configuration

**quoteId**

The Salesforce ID of the SBQQ__Quote__c record to add this configuration to

If included, *quoteLineGroupId* adds the newly created quote line to the specified quote line group.

Sample URL: `https://demologik.my.salesforce.com/services/apexrest/LGK/request-quote`

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Sample request body:

```
{
    "configurableProductId": "01t5f000002SwERAA0",
    "configurationId": "8978145d-35ba-4633-8139-e305ea4b9874",
    "quoteId": "a0q5f0000057YATAA2",
}
```

Sample response body:

```
{
    "attributes": {
        "type": "SBQQ__Quote__c",
        "url":
 "/services/data/v57.0/sobjects/SBQQ__Quote__c/a0q5f000005MNDhA
AO"
    },
    "Name": "Q-00286",
    "Id": "a0q5f000005MNDhAAO",
    "SBQQ__LineItemCount__c": 1,
    "SBQQ__LineItems__r": {
        "totalSize": 1,
        "done": true,
        "records": [
            {
                "attributes": {
                    "type": "SBQQ__QuoteLine__c",
                    "url":
 "/services/data/v57.0/sobjects/SBQQ__QuoteLine__c/a0m5f00000Ahs
ZsAAJ"
                },
                "SBQQ__Quote__c": "a0q5f000005MNDhAAO",
                "Id": "a0m5f00000AhsZsAAJ",
                "Name": "QL-0003664",
                "SBQQ__ProductName__c": "Cloud Workload
 Configurator"
            }
        ]
    },
    "SBQQ__Type__c": "Quote"
}
```

Salesforce CPQ Extension APIs Postman Collection :

```
{
 "info": {
  "_postman_id": "2562674d-051d-4663-b3ed-482e6be1b78f",
  "name": "Logik Salesforce CPQ Extension APIs",
  "schema":
 "https://schema.getpostman.com/json/collection/v2.1.0/collectio
n.json""
 },
 "item": [
  {
   "name": "Salesforce Authentication",
   "item": [
    {
     "name": "Salesforce Authentication",
```

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```
    "event": [
     {
      "listen": "test",
      "script": {
       "exec": [
        "var jsonData = pm.response.json();",

 "pm.collectionVariables.set(\"salesforce_access_token\",
 jsonData.access_token);"
       ],
       "type": "text/javascript"
      }
     }
    ],
    "request": {
     "method": "POST",
     "header": [],
     "body": {
      "mode": "formdata",
      "formdata": []
     },
     "url": {
      "raw":
 "{{salesforce_domain}}/services/oauth2/token?username={{salesfo
rce_username}}&password={{salesforce_password}}&grant_type=passw
ord&client_id={{salesforce_client_id}}&client_secret={{salesforc
e_client_secret}}",
       "host": [
        "{{salesforce_domain}}"
       ],
       "path": [
        "services",
        "oauth2",
        "token"
       ],
       "query": [
        {
         "key": "username",
         "value": "{{salesforce_username}}"
        },
        {
         "key": "password",
         "value": "{{salesforce_password}}"
        },
        {
         "key": "grant_type",
         "value": "password"
        },
        {
         "key": "client_id",
         "value": "{{salesforce_client_id}}"
        },
        {
         "key": "client_secret",
         "value": "{{salesforce_client_secret}}"
        }
       ]
```

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```
      }
     },
     "response": []
    }
   ]
  },
  {
   "name": "Logik CPQ Extension APIs",
   "item": [
    {
     "name": "Create New Quote",
     "request": {
      "method": "POST",
      "header": [
       {
        "key": "Content-Type",
        "value": "application/json",
        "type": "default"
       }
      ],
      "body": {
       "mode": "raw",
       "raw": "{\n    \"configurableProductId\":
\"{{configurableProductId}}\",\n    \"configurationId\":
\"{{configurationId}}\",\n    \"pricebookId\":
\"{{pricebookId}}\",\n    \"accountId\": \"{{accountId}}\",\n
 \"opportunityId\": \"{{opportunityId}}\"\n}",
       "options": {
        "raw": {
         "language": "json"
        }
       }
      },
      "url": {
       "raw":
"{{salesforce_domain}}/services/apexrest/LGK/request-quote",
       "host": [
        "{{salesforce_domain}}"
       ],
       "path": [
        "services",
        "apexrest",
        "LGK",
        "request-quote"
       ]
      }
     },
     "response": []
    },
    {
     "name": "Add to Existing Quote",
     "request": {
      "method": "PATCH",
      "header": [
       {
        "key": "Content-Type",
        "value": "application/json",
```

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```
        "type": "default"
       }
      ],
      "body": {
       "mode": "raw",
       "raw": "{\n    \"configurableProductId\":
\"{{configurableProductId}}\",\n    \"configurationId\":
\"{{configurationId}}\",\n    \"quoteId\": \"{{quoteId}}\",\n
 \"quoteLineGroupId\": \"{{quoteLineGroupId}}\"\n}",
       "options": {
        "raw": {
         "language": "json"
        }
       }
      },
      "url": {
       "raw":
"{{salesforce_domain}}/services/apexrest/LGK/request-quote",
       "host": [
        "{{salesforce_domain}}"
       ],
       "path": [
        "services",
        "apexrest",
        "LGK",
        "request-quote"
       ]
      }
     },
     "response": []
    }
   ],
   "auth": {
    "type": "bearer",
    "bearer": [
     {
      "key": "token",
      "value": "{{salesforce_access_token}}",
      "type": "string"
     }
    ]
   },
   "event": [
    {
     "listen": "prerequest",
     "script": {
      "type": "text/javascript",
      "exec": [
       "let sfToken =
pm.collectionVariables.get('salesforce_access_token');",
       "if(sfToken == null) {",
       "    console.error('Run Salesforce Authentication
first')",
       "}"
      ]
     }
    },
```

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```
    {
     "listen": "test",
     "script": {
      "type": "text/javascript",
      "exec": [
       ""
      ]
     }
    }
   ]
  }
 ],
 "event": [
  {
   "listen": "prerequest",
   "script": {
    "type": "text/javascript",
    "exec": [
     ""
    ]
   }
  },
  {
   "listen": "test",
   "script": {
    "type": "text/javascript",
    "exec": [
     ""
    ]
   }
  }
 ],
 "variable": [
  {
   "key": "salesforce_domain",
   "value": "https://demologik6.my.salesforce.com"",
   "type": "default"
  },
  {
   "key": "salesforce_username",
   "value": "",
   "type": "default"
  },
  {
   "key": "salesforce_password",
   "value": "",
   "type": "default"
  },
  {
   "key": "salesforce_client_id",
   "value": "",
   "type": "default"
  },
  {
   "key": "salesforce_client_secret",
   "value": "",
   "type": "default"
```


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```
  },
  {
   "key": "salesforce_access_token",
   "value": ""
  },
  {
   "key": "configurableProductId",
   "value": "",
   "type": "default"
  },
  {
   "key": "configurationId",
   "value": "",
   "type": "default"
  },
  {
   "key": "pricebookId",
   "value": "",
   "type": "default"
  },
  {
   "key": "accountId",
   "value": "",
   "type": "default"
  },
  {
   "key": "opportunityId",
   "value": "",
   "type": "default"
  },
  {
   "key": "quoteId",
   "value": "",
   "type": "default"
  },
  {
   "key": "quoteLineGroupId",
   "value": "",
   "type": "default"
  }
 ]
}
```

### The CPQ Reconfigure API

The CPQ Reconfigure API headlessly invokes CPQ services to reconfigure a quote bundle.

The CPQ Reconfigure API is a custom Salesforce API that invokes CPQ services headlessly. Unlike RFQ, this API is used to reconfigure an existing quote bundle.

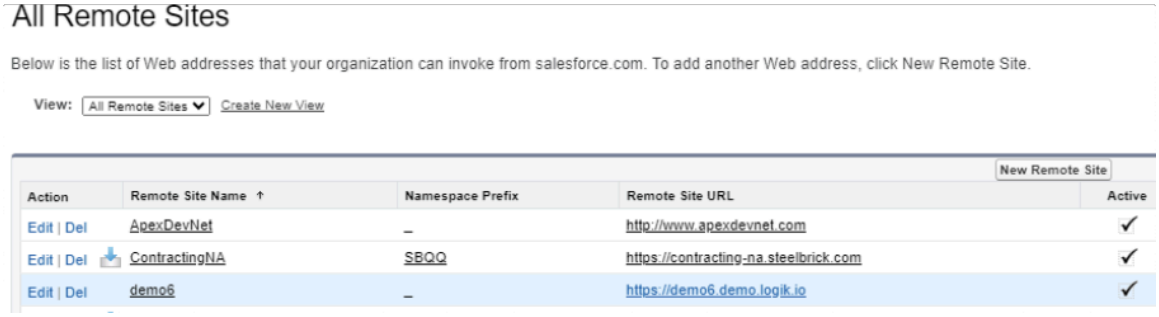
## Prerequisites

The Runtime Client Token must be set in the Admin Custom Settings page in Salesforce. The token must include an origin that matches the CPQ URL, which cannot include a trailing slash (/) character.

The Runtime Configuration URL must also be set in the Admin Custom Settings page. In most cases, this should match the administration URL on the same page.

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In Salesforce Setup, go to Security, and then to Remote Site Settings. Add a new remote site with your CPQ domain as the URL.




**Important:** This API relies on *uniqueIdentifier* to match child lines. If you don't have unique *uniqueIdentifier* values for products, child lines may update incorrectly.

## API details

Endpoint: `/services/apexrest/LGK/cpq-quote-lines/reconfigure`

**Note:** Request endpoints and parameters are case sensitive.

Methods: Receives and returns `application/json`.

PATCH: The method currently only supports two fields, `configurationId` and `configurableQuoteLineId`.

Response: A quote (`SBQQ__Q__c`) record.

**Note:** The quote info returned will include info on all quote lines, not just the ones being added by the request. For example, if the configuration with three line items gets added to a quote that already had two lines on it, the quote info returned will included all five lines.

Request example:

```
{
 "configurationId":"86ec190e-cba8-4b1d-a2dc-ba47714a22b5",
 "configurableQuoteLineId":"a137d00000977oWAAQ"
}
```

Response example:

```
{
"attributes": {
"type": "SBQQ__Quote__c",
"url":
 "/services/data/v56.0/sobjects/SBQQ__Quote__c/a0zR0000003f3GLI
AY"
},
"Name": "Q-00090",
"Id": "a0zR0000003f3GLIAY",
"SBQQ__LineItemCount__c": 4,
"SBQQ__LineItems__r": {
"totalSize": 4,
"done": true,
"records": [
{
"attributes": {
```

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```
"type": "SBQQ__QuoteLine__c",
"url":
 "/services/data/v56.0/sobjects/SBQQ__QuoteLine__c/a0vR0000005LP
RxIAO"
},
"SBQQ__Quote__c": "a0zR0000003f3GLIAY",
"Id": "a0vR0000005LPRxIAO",
"Name": "QL-0000122",
"SBQQ__ProductName__c": "LGK Machine"
},
{
"attributes": {
"type": "SBQQ__QuoteLine__c",
"url":
 "/services/data/v56.0/sobjects/SBQQ__QuoteLine__c/a0vR0000005LP
RyIAO"
},
"SBQQ__Quote__c": "a0zR0000003f3GLIAY",
"Id": "a0vR0000005LPRyIAO",
"Name": "QL-0000123",
"SBQQ__ProductName__c": "Analytics Software"
},
{
"attributes": {
"type": "SBQQ__QuoteLine__c",
"url":
 "/services/data/v56.0/sobjects/SBQQ__QuoteLine__c/a0vR0000005LP
S2IAO"
},
"SBQQ__Quote__c": "a0zR0000003f3GLIAY",
"Id": "a0vR0000005LPS2IAO",
"Name": "QL-0000124",
"SBQQ__ProductName__c": "Extended Warranty"
},
{
"attributes": {
"type": "SBQQ__QuoteLine__c",
"url":
 "/services/data/v56.0/sobjects/SBQQ__QuoteLine__c/a0vR0000005LP
S3IAO"
},
"SBQQ__Quote__c": "a0zR0000003f3GLIAY",
"Id": "a0vR0000005LPS3IAO",
"Name": "QL-0000125",
"SBQQ__ProductName__c": "Scanner"
}
]
},
"SBQQ__Type__c": "Quote"
}
```


Requests can be made directly through Apex. The argument is a `Map<String,Object>` with the same fields used in the REST API. For example:

```
Map<String, Object> requestBody = new Map<String, Object>{
  'configurableQuoteLineId' => '01t8a000005hldvAAA',
  'configurationId' => '79a3ffdd-7dd0-41f6-8700-4bd7506407c7'
```

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```
};
String result =
 LGK.CpqReconfigureApiController.reconfigure(requestBody);
```

The response is a JSON formatted string representing the quote object, similar to the response in the REST APIs.

## Custom field mapping

If a field on the Quote Line object in Salesforce has a name that matches, custom values can be written from the `extended` or `pricing` information in a CPQ product.

### API calls for navigating sets in ServiceNow CPQ

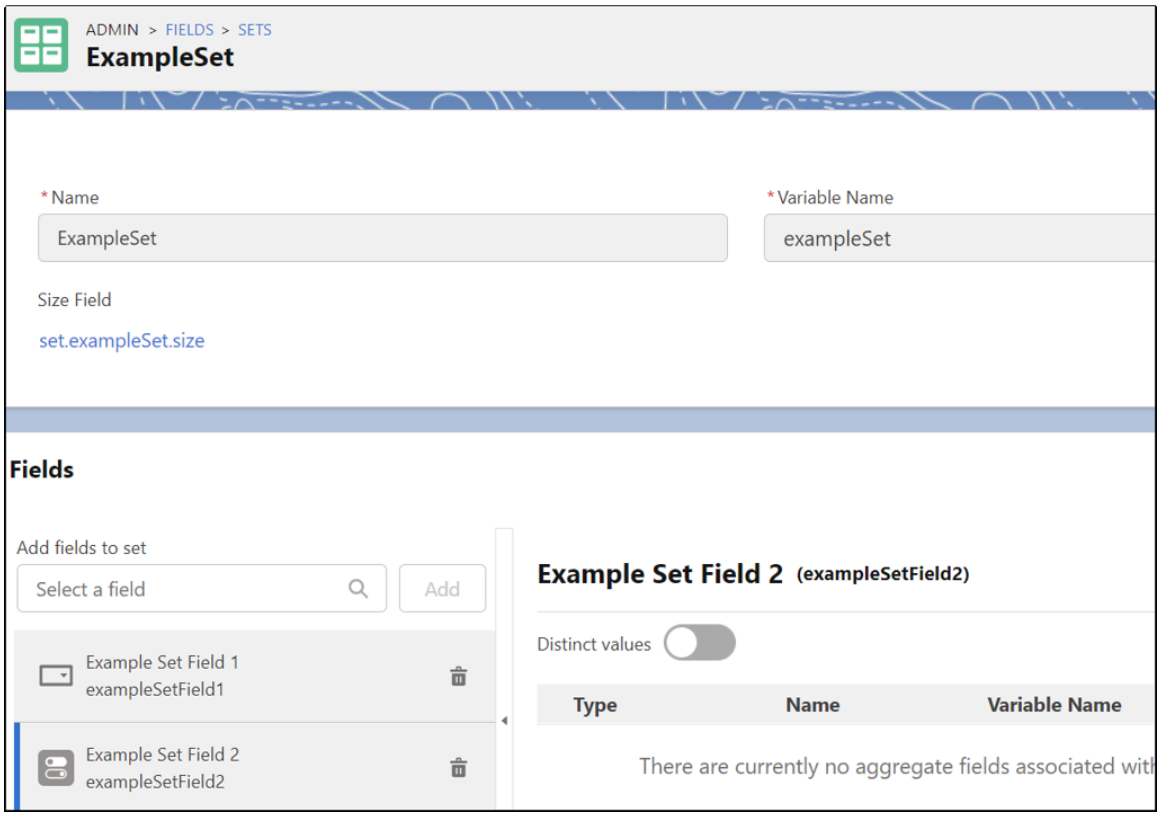
Understand how to use sets in a headless environment using API calls.

## Setup

The following set and fields were created for this example:

- Field: Example set field 1
  - Picklist with options A, B, C
  - Field variable: exampleSetField1
- Field: Example set field 2
  - Boolean
  - Field variable: exampleSetField2
- Set: Example set
  - Contains Fields exampleSetField1 and exampleSetField2
  - Variable name: exampleSet (therefore, size field is set.exampleSet.size)

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## Row identifier and row index

Every time a set is expanded to include a new row, the new row has a row identifier and a row index assigned to it. These are how you change the set.

- The row identifier starts at 1 and increases incrementally by 1. This number is used to add or remove rows from the set.
- The row index starts at 0 and increases incrementally by 1. This number is used to adjust values of Fields in the set.

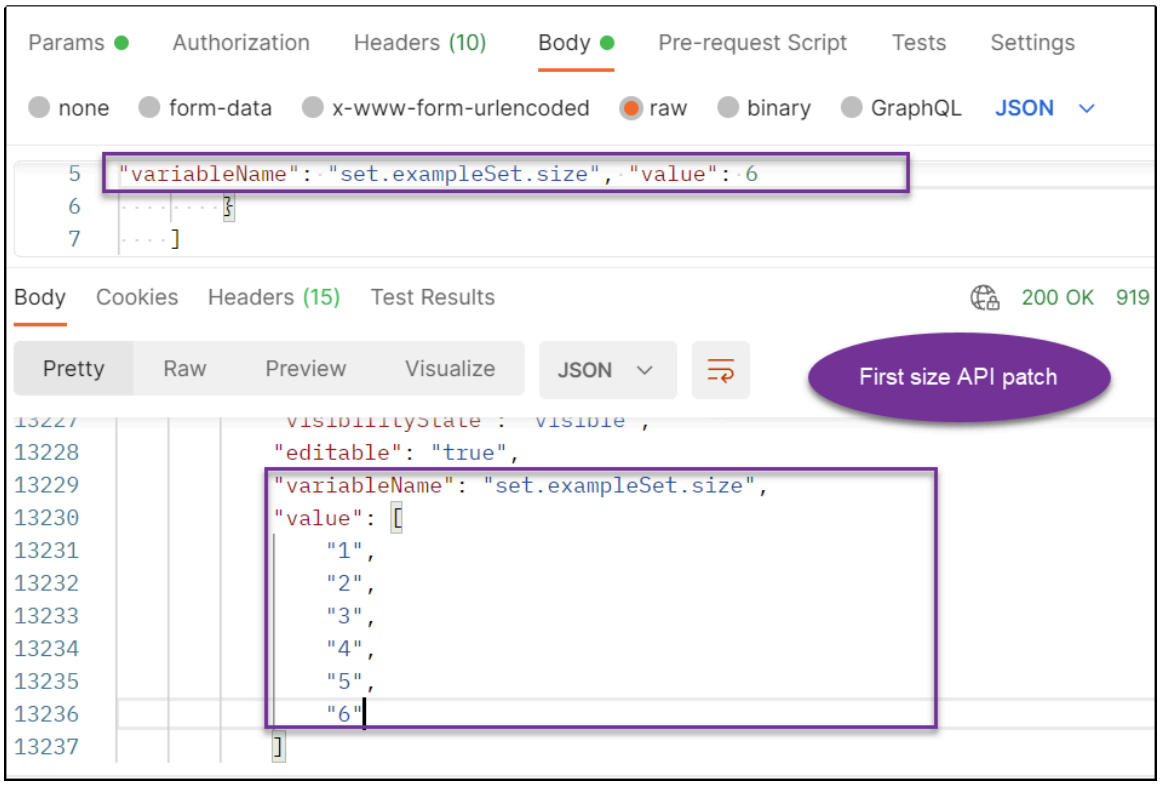
After every API call that changes the set, the rows are organized. Due to the reorganization, the row index and row identifiers are reassigned. This is explained in greater detail in the examples below.

## Changing the set size

There are two ways to change the number of rows in a set: by sending a single number, and by sending specific values for the row identifiers.

The first way to change the number of rows in a set is to send a single number (the number of rows) as the value of the size variable in the API call. This method offers less control, but is useful if you know the total number of rows in the set you want to build. In the following example, the number 6 is set as the value of the size and it creates row identifiers 1-6. To edit the fields in these rows, you would use the row index numbers of 0-5.

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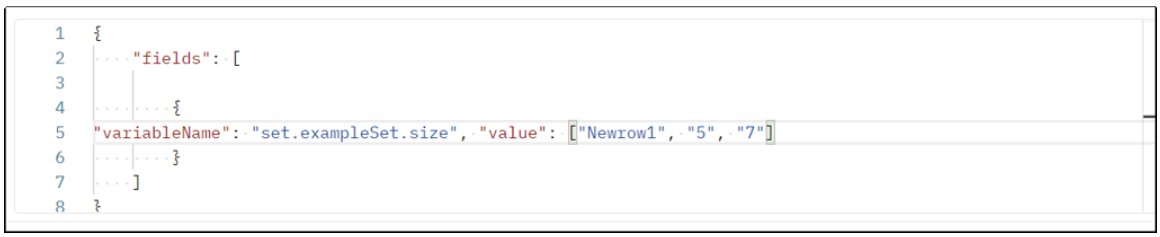



The second way to edit the size of the array is to send values in the placeholder for each row of the array. This is useful for adjusting the rows of the array with precision. Depending on what values are added to the API call and their order, a combination of the following three changes will occur:

- If the API call references a value that is not among the current row identifiers, it will create a new row in the position of the new value.
- If the API call does not reference any value that is among the current row identifiers, the row will be deleted from the array.
- If the API call references a value that is among the current row identifiers, it will put that array row in the position of the row identifier in the API call.

Previously, the size of ExampleSet was set to 6, which resulted in the row identifiers [“1”, “2”,”3”,”4”,”5”,”6”].

Now, the following API call is sent to the same environment:



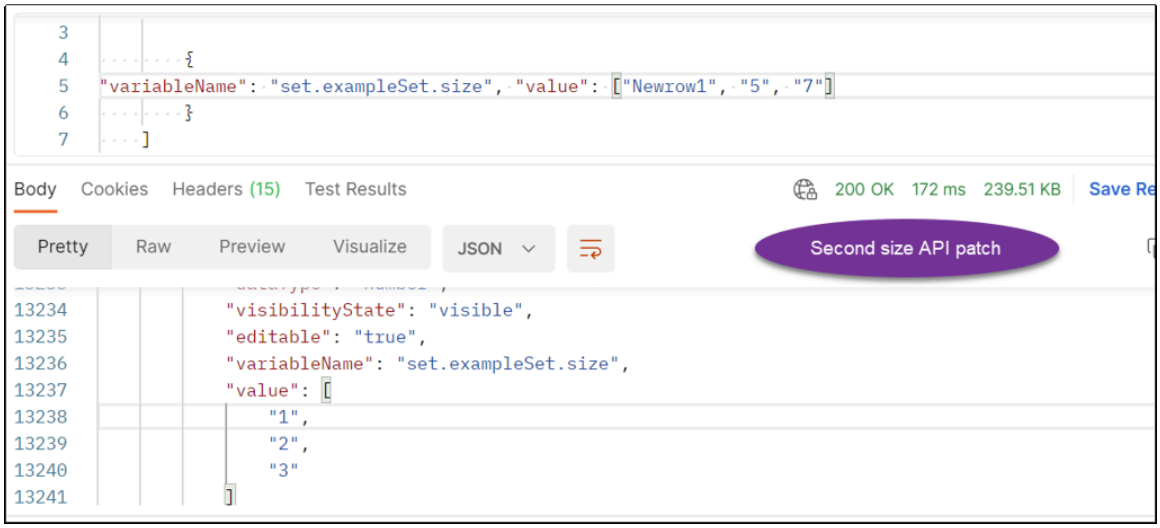

When this call is sent, the following occurs:

- No row identifier is called “Newrow1”. Therefore, a new row ( with the fields in the row set to defaults) is inserted before any known row identifiers. (This is the first change listed above.)
- A row identifier is called “5”. In the API call, it is in the second position (after NewRow1). Therefore, it will move to the second row position. (This is the second change listed above.)

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- No row identifier is called “7”. Therefore, a new blank row is inserted in position 3. (First change.)
- The row identifiers “1”, “2”, “3”, “4”, and “6” are not referenced in the API call. Therefore, they are deleted. (Third change listed above.)

When all changes from the API call are complete, the row identifiers are reset.




The following table shows this in greater detail, including the index values, which will be discussed in the next section.

**Array size modification example**

| Size field new identifier | Value sent in API call | Old row identifier | New index | Old index |
|---|---|---|---|---|
| 1 | Newrow1 | Did not exist | 0 | Did not exist |
| 2 | 5 | 5 | 1 | 4 |
| 3 | 7 | Did not exist | 2 | Did not exist |
| {deleted rows} | 1,2,3,4 and 6 were not sent in API call defining size | 1,2,3,4 and 6 | Deleted | 0,1,2,3 and 5 |

Important details to note:

- After this API call, the row with row identifier 5 (and index 4) now has the row identifier 2 (and an index of 1) that need to be used for all future API calls.
- Once a row is deleted from the array, it is deleted completely. So a new API call that references row identifier 6 would be referencing a new row. All earlier data and changes to fields in row identifier 6 are no longer relevant and cannot be referenced.
- This is helpful for changing the order of rows.

One final note: If the API patch call "variableName": "set.exampleSet.size", "value": ["Newrow1", "5", "7"] is sent more than once, the three old rows are deleted and three new rows are created. This would lose the data that was previously in 5.

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## Changing set fields

The next step is to define values for the fields in the set. Assume that the following call occurs after the first size API patch sets the size to six rows. To change Example Set Field 1 and Example Set Field 2 for several rows, the following code would be added to the fields section of an API call:

```
{{
            "set": "exampleSet",
            "index": 0,
            "variableName": "ExampleSetField1",
            "value": "A"
        },
        {
            "set": "exampleSet",
            "index": 4,
            "variableName": "ExampleSetField1",
            "value": "B"
        },
{
            "set": "exampleSet",
            "index": 4,
            "variableName": "ExampleSetField2",
            "value": "True"
        },
{
            "set": "exampleSet",
            "index": 5,
            "variableName": "ExampleSetField1",
            "value": "C"
        },
```

This would result in the following:

**Set field change example 1**

| Row Identifier | 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|---|
| Index | 0 | 1 | 2 | 3 | 4 | 5 |
| example SetField 1 | A | | | | B | C |
| example SetField 2 | | | | | True | |

If the second size API patch from above is sent, the following would result:

**Set field change example 2**

| Size Field New Identifier | 1 | 2 | 3 |
|---|---|---|---|
| Size Field Old Identifier | {new row, see above} | 5 | {new row, see above} |

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**Set field change example 2 (continued)**

| | | | |
|---|---|---|---|
| Old Index | {new row} | 4 | {new row} |
| New Index | 0 | 1 | 2 |
| exampleSetField 1 | | B | |
| exampleSetField 2 | | True | |

### Webhooks

Webhooks are endpoints that can receive a POST request whenever a configuration is saved.

CPQ supports webhooks: endpoints that can receive a POST request when a configuration is saved. Once a webhook has been configured, it is called on every save configuration action.

To enable webhooks, log a case with support. Only one webhook can be created per CPQ environment.

**Note:** Create a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

## Webhook use cases

Webhooks can be used to integrate data from CPQ to other downstream systems. Use cases include:

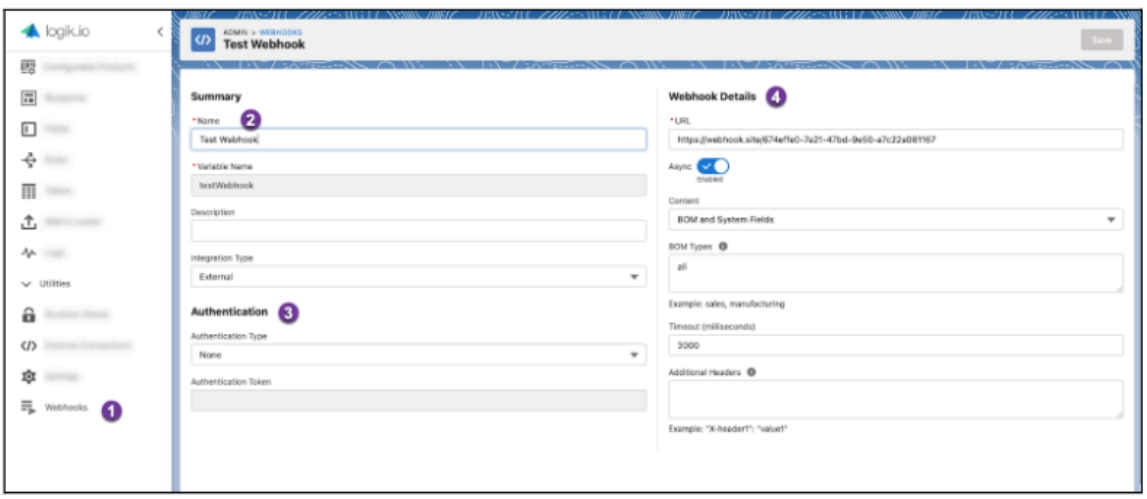
- Displaying the CPQ native UI via direct URL and sending the config result, via webhook, to a third-party destination. See:

  Use case: Displaying the CPQ native UI via direct URL

- Sending config data directly to a quoting or order management system
- Pushing the configuration result to middleware that can manipulate the data and pass it along to downstream systems

Webhook demo

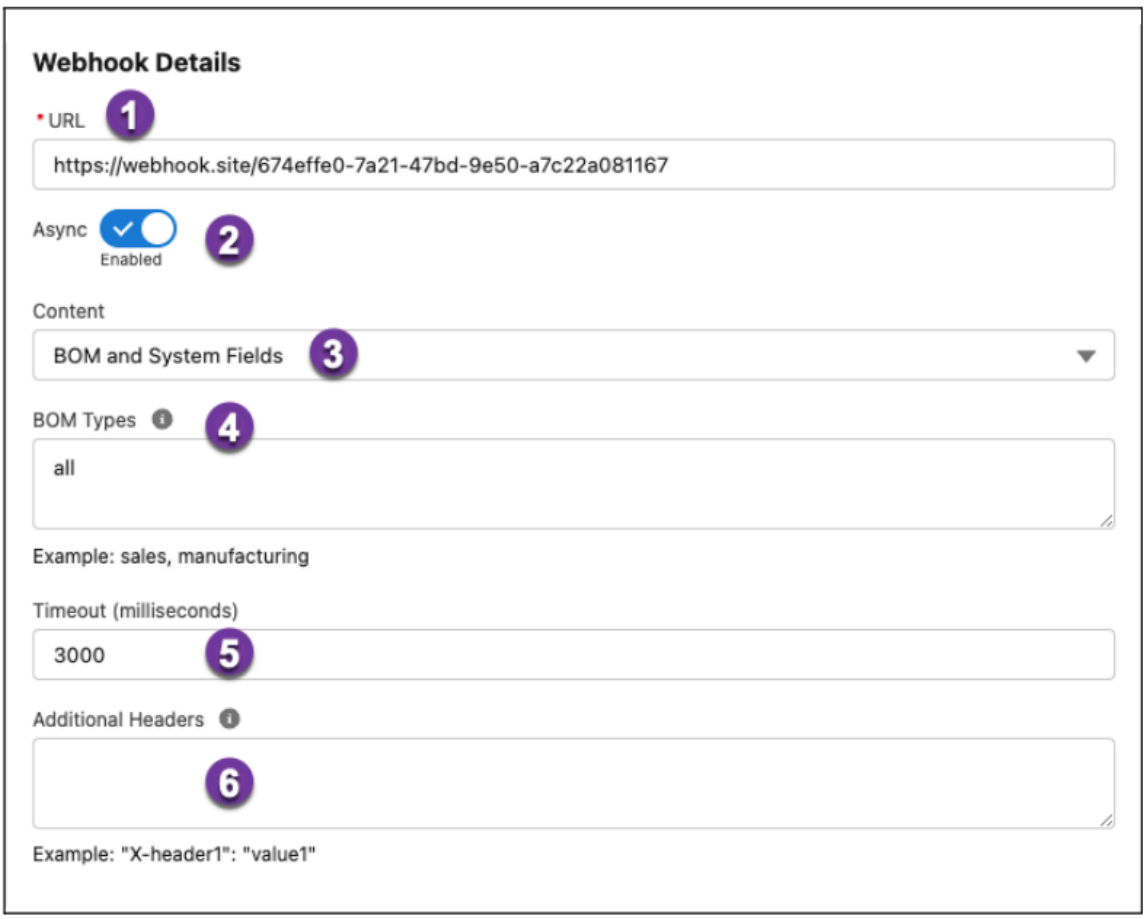
## Webhook setup




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- When webhooks are enabled, they can be found in the Utilities menu in the CPQ Admin screen.
- Summary: Webhook configuration is similar to external connections. The Name, Description and Integration type can all be defined.
- Authentication: Webhooks support both no authentication (None) as well as bearer token authentication (Bearer Token).
- Webhook Details: Additional details of the webhook can be specified as well to control the behavior.

## Webhook details




1. URL: The endpoint to receive the data from CPQ on save of a configuration. Must be able to receive an HTTP POST request.
2. Async: When enabled, ensures that the end user is redirected immediately when a configuration is completed and does not wait for a response from the server before exiting. The save process is asynchronous.

   When disabled, this ensures that the webhook process is resolved before the user is redirected. The save process is synchronous.
3. Content: The data that CPQ should send to the endpoint.
   - Config Data: all admin-created configuration fields and their input values
   - BOM and System Fields: all system configuration fields and their values; the bill of materials (as specified in the BOM Types input immediately below)
4. BOM Types: The BOM types to be sent in the request.

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5. Timeout: The timeout value in milliseconds
6. Additional Headers: Additional headers that should be sent along with the request, entered as quoted key value pairs. For example, `"X-header1": "value1"`

### Example webhook body

The body that the webhook sends to the external resource looks like the following. This example covers product pickers and the built-in system fields from an environment.


```
{
  "uuid": "8014a955-49c4-4d63-a15a-8c91cef6f6f4",
  "fields": [
    {
      "userEdited": false,
      "dataType": "array",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "pp",
      "uniqueName": "pp",
      "value": ["alpha"],
      "optionSet": {
        "selectedOptions": [
          {
            "label": "alpha",
            "state": "visible",
            "value": "alpha",
            "imageUrl": null,
            "orderNumber": 10
          }
        ],
        "options": [
          {
            "label": "alpha",
            "state": "visible",
            "value": "alpha",
            "imageUrl": null,
            "orderNumber": 10
          },
          {
            "label": "beta",
            "state": "visible",
            "value": "beta",
            "imageUrl": null,
            "orderNumber": null
          }
        ]
      },
      "rows": {
        "content": [
          {
            "index": 0,
            "fields": [
              {
                "userEdited": false,
                "dataType": "text",
                "visibilityState": "visible",
```


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```
            "editable": "false",
            "variableName": "pp.value",
            "uniqueName": "pp-0-pp.value",
            "value": "alpha",
            "set": "pp",
            "index": 0
          },
          {
            "userEdited": true,
            "dataType": "boolean",
            "visibilityState": "visible",
            "editable": "true",
            "variableName": "pp.select",
            "uniqueName": "pp-0-pp.select",
            "value": true,
            "optionSet": {
              "options": [
                {
                  "label": "true",
                  "state": "visible",
                  "value": "true",
                  "imageUrl": null,
                  "orderNumber": null
                },
                {
                  "label": "false",
                  "state": "visible",
                  "value": "false",
                  "imageUrl": null,
                  "orderNumber": null
                }
              ]
            },
            "set": "pp",
            "index": 0
          },
          {
            "userEdited": false,
            "dataType": "number",
            "visibilityState": "visible",
            "editable": "true",
            "variableName": "pp.quantity",
            "uniqueName": "pp-0-pp.quantity",
            "value": 1,
            "set": "pp",
            "index": 0
          },
          {
            "userEdited": false,
            "dataType": "text",
            "visibilityState": "visible",
            "editable": "true",
            "variableName": "pp.data",
            "uniqueName": "pp-0-pp.data",
            "value": "",
            "set": "pp",
            "index": 0
```


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```
            }
          ],
          "label": "alpha",
          "state": "visible",
          "value": "alpha",
          "imageUrl": null,
          "orderNumber": 10,
          "productDetails": {}
        },
        {
          "index": 1,
          "fields": [
            {
              "userEdited": false,
              "dataType": "text",
              "visibilityState": "visible",
              "editable": "false",
              "variableName": "pp.value",
              "uniqueName": "pp-1-pp.value",
              "value": "beta",
              "set": "pp",
              "index": 1
            },
            {
              "userEdited": false,
              "dataType": "boolean",
              "visibilityState": "visible",
              "editable": "true",
              "variableName": "pp.select",
              "uniqueName": "pp-1-pp.select",
              "value": false,
              "optionSet": {
                "options": [
                  {
                    "label": "true",
                    "state": "visible",
                    "value": "true",
                    "imageUrl": null,
                    "orderNumber": null
                  },
                  {
                    "label": "false",
                    "state": "visible",
                    "value": "false",
                    "imageUrl": null,
                    "orderNumber": null
                  }
                ]
              },
              "set": "pp",
              "index": 1
            },
            {
              "userEdited": false,
              "dataType": "number",
              "visibilityState": "visible",
              "editable": "true",
```


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```
                "variableName": "pp.quantity",
                "uniqueName": "pp-1-pp.quantity",
                "value": 0,
                "set": "pp",
                "index": 1
              },
              {
                "userEdited": false,
                "dataType": "text",
                "visibilityState": "visible",
                "editable": "true",
                "variableName": "pp.data",
                "uniqueName": "pp-1-pp.data",
                "value": "",
                "set": "pp",
                "index": 1
              }
            ],
            "label": "beta",
            "state": "visible",
            "value": "beta",
            "imageUrl": null,
            "orderNumber": null,
            "productDetails": {}
          }
        ],
        "pageable": "INSTANCE",
        "last": true,
        "totalPages": 1,
        "totalElements": 2,
        "size": 2,
        "number": 0,
        "sort": { "empty": true, "sorted": false, "unsorted":
true },
        "numberOfElements": 2,
        "first": true,
        "empty": false
      }
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productCode",
      "uniqueName": "sys.productCode",
      "value": "CC-LGK"
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "partner.quote.pricebookId",
      "uniqueName": "partner.quote.pricebookId",
      "value": ""
    },
```


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```
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "partner.quote.currencyIsoCode",
      "uniqueName": "partner.quote.currencyIsoCode",
      "value": "USD"
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productFamily",
      "uniqueName": "sys.productFamily",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productDescription",
      "uniqueName": "sys.productDescription",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "partner.quote.id",
      "uniqueName": "partner.quote.id",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productUOM",
      "uniqueName": "sys.productUOM",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "number",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productPrice",
      "uniqueName": "sys.productPrice",
      "value": 0
    },
    {
      "userEdited": false,
      "dataType": "text",
```


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```
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productName",
      "uniqueName": "sys.productName",
      "value": "CheckConfig"
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "partner.quote.lineId",
      "uniqueName": "partner.quote.lineId",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "number",
      "visibilityState": "visible",
      "editable": "false",
      "variableName": "pp.aggregates.quantity_sum",
      "uniqueName": "pp.aggregates.quantity_sum",
      "value": 1
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.productId",
      "uniqueName": "sys.productId",
      "value": "CC-LGK"
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.actionContext",
      "uniqueName": "sys.actionContext",
      "value": ""
    },
    {
      "userEdited": false,
      "dataType": "text",
      "visibilityState": "visible",
      "editable": "true",
      "variableName": "sys.currentDate",
      "uniqueName": "sys.currentDate",
      "value": "2023-08-04"
    }
  ],
  "products": [
    {
      "id": "alpha",
      "quantity": 1,
      "bomType": "SALES",
```


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```
      "type": "accessory",
      "extended": { "data": "" },
      "pricing": {
        "productSellingModelId": "OneTime_OneTime_2023_07_05",
        "endDate": null,
        "startDate": null,
        "ProductId": "01tHr000007i4B5IAI",
        "StartingUnitPriceSource": "System",
        "ListPrice": 99.99,
        "TotalLineAmount": 99.99,
        "ListPriceTotal": 99.99,
        "StartingPriceTotal": 99.99,
        "Quantity": 1.0,
        "PricingTermCount": 1,
        "NetUnitPrice": 99.99,
        "StartingUnitPrice": 99.99,
        "PricebookEntryId": "01uHr00000FYKDUIA5",
        "TotalAdjustmentDistAmount": 0,
        "TotalAdjustmentAmount": 0,
        "TotalPrice": 99.99,
        "SalesItemType": "Product"
      },
      "name": "alpha",
      "partnerId": "01tHr000007i4B5IAI",
      "productCode": "alpha",
      "externalId": "",
      "productFamily": "",
      "description": "",
      "uom": "",
      "price": 99.99,
      "extPrice": 99.99,
      "level": 0,
      "rollUpPrice": 99.99
    }
  ],
  "total": 99.99
}
```


### The LocationLookup field

Any text type can be defined as a LocationLookup component display type, which lets you use Google's API to pull address data.

The LocationLookup field component display type leverages Google's Places API to pull address data that can be used for unique location configuration and pricing. Any text field type can be defined as a LocationLookup component display type by using the layout editor or by directly editing a layout CSV file.




To see it in action, view the following video:

Location Lookup Field Component Display Type

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To use a LocationLookup field, you first need to have a valid API key from Google with permission to access Google Places. The API key must be configured for both the Maps JavaScript API and the Places API.

The value of the field requires two properties: *key* and *fieldMapping*.

```
{
  "key": API-Key-string,
  "fieldMapping":
 {"[field1VariableName]":"[returnedPlaceType]","[field2VariableN
ame]":"[returnedPlaceType]"}
}
```

The key property refers to the API key.

Use the fieldMapping property to instruct the UI to map the returned place data to different fields in the configuration. This property can take either a string or an object of key:value pairs (both strings).

If a string is provided:

- The string should be the variable name of a field in the configuration
- The returned data from the API will be converted to a string and mapped to the field's value

If an object is provided:

- The keys will be the variable name of the field in the configuration
- The values will be the JSON path to the data from the API that should be mapped to the field

For more details on what that data looks like, see: Place Details

When you map address components, these come back as an array of the different component values, so there is no straightforward path. The UI expects something in the following format:

```
address_components.[component type]
```

Note that not every type listed is guaranteed to be returned by the place details API. To find the supported types, see the following Google website:

Place Types

Example field value:

```
{
    "key": "**********",
    "fieldMapping": {
        "formattedAddress": "formatted_address",
        "sublocality": "address_components.sublocality",
        "city": "address_components.locality",
        "stateForLocation":
 "address_components.administrative_area_level_1",
        "zipCode": "address_components.postal_code"
    }
}
```

This mapping also works in sets. Note that the location field, and all of the fields listed in the mapping, must also be part of the set. Cross-index or global fields are not supported in a set.

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Some common mappings from the Google Places API include:

- `formatted_address` (returns the whole address in human-readable form)
- `address_components.locality` (returns the city)
- `address_components.administrative_area_level_1` (returns the state)
- `address_components.country`
- `address_components.postal_code`
- `address_components.street_number`
- `address_components.route` (returns only the street name)

### Enable solution configuration

Enable solution configuration for an environment to let admins link multiple blueprints into connected configuration sessions.

#### Before you begin

Solution configuration is an environment-level feature that is off by default. Contact Support with your environment details to request enablement.

Role required: admin

#### About this task

Solution configuration must be enabled in each environment where you want to use it. After Support enables it, admins can create configurable product actions and define field mappings in that environment.

#### Procedure

1. Open a blueprint in the admin.
2. Navigate to the **Rules** section and add a product action.
   Verify that **Configurable Product Action** is available in the action type selector.

   **Trouble?**
   If **Configurable Product Action** does not appear, re-confirm with Support that enablement was applied to the correct environment.

#### Result

Configurable product actions are available in the admin for the enabled environment. You can now link blueprints to create solution configurations.

#### What to do next

After enabling solution configuration:

- To link your first parent and child blueprints, see Create a configurable product action.
- To review structural limits before designing a solution, see Solution configuration limits.

#### Related topics

Solution configurations

### Create a configurable product action

Create a configurable product action to link a child blueprint to a parent blueprint so that a child configuration is created when the action's condition is met.

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### Before you begin

- Solution configuration is enabled in your environment. For more information, see Enable solution configuration.
- The parent blueprint and child blueprint are created and deployed.
- The configurable product associated with the child blueprint exists and has the correct blueprint assigned to it.

Role required: admin

### About this task

A configurable product action is a type of product action that, when its condition evaluates to true, creates a child configuration using the specified blueprint. Each configurable product action adds one child configuration. To add multiple child configurations from a single rule, add multiple configurable product actions to that rule.

**Important:** Once you mark a product action as configurable, you cannot change it back to a standard product action.

### Procedure

1. Open the parent blueprint in the admin.
2. Navigate to the Rules section and open the rule where you want to add the configurable product action.
3. Add a product action and set the action type to **Configurable Product Action**.
4. In the **Product ID** field, enter the product ID of the configurable product that the child configuration represents.
5. In the **Blueprint** field, select the child blueprint to use for the child configuration.
   If you are creating an advanced configurable product action, set the **Product ID** and **Blueprint** fields outside the advanced script.
6. Set the condition for the action.
   When the condition evaluates to true, the child configuration is created. When it evaluates to false, the child configuration is removed.
7. Save and deploy the blueprint.

### Result

When the condition is met during a buyer's configuration session, a child configuration using the specified blueprint is added to the solution. The solution navigation sidebar appears in the buyer's session when the first child configuration is added.

## Example: Field descriptions

#### Configurable product action form

| Field | Description |
|---|---|
| Product ID | Product identifier of the configurable product to add when the condition is true. The configurable product must have the target blueprint associated with it. |
| Blueprint | Child blueprint used to create the child configuration. The blueprint must be deployed. |
| Condition | Rule condition that triggers creation of the child configuration when it evaluates to true, and removes the configuration when it evaluates to false. |

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### What to do next

After creating a configurable product action:

- To pass field values from the parent blueprint to the child, see Define field mappings for a solution configuration.
- To test the action, launch the product in the quoting application and verify that the child configuration is created. See Launch a solution.

#### Related information

Field mapping in solution configuration

Solution configuration limits

Add configurable products to a solution

## Define field mappings for a solution configuration

Define field mappings on a configurable product action to pass field values from the parent blueprint to the child blueprint when a child configuration is created.

### Before you begin

- A configurable product action exists on the parent blueprint. For more information, see Create a configurable product action.
- The source fields (on the parent blueprint) and the target fields (on the child blueprint) exist and are of the same field type.

Role required: admin

### About this task

Field mappings are defined as part of a configurable product action. Each mapping specifies a source field on the parent blueprint and a target field on the child blueprint. The value of the source field is passed to the target field when the child configuration is created, and again whenever the source field value changes during a session.

Target fields become read-only in the child configuration — the buyer cannot change a mapped value directly. To continue mapping across multiple levels in a solution hierarchy, define the relevant mappings on each blueprint in the chain independently.

### Procedure

1. Open the parent blueprint in the admin.
2. Navigate to the configurable product action where you want to add field mappings.
3. In the **Field Mapping** section of the configurable product action, select **Add Mapping**.
4. In the **Source Field** column, select the field on the parent blueprint whose value you want to pass.
5. In the **Target Field** column, select the field on the child blueprint that receives the value. The field type must match the source field type. For supported types, see Field mapping supported field types.
6. Repeat steps 3–5 for each additional field you want to map.
7. Save and deploy the blueprint.

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### Result

Field values from the source fields on the parent blueprint are passed to the target fields on the child blueprint when a child configuration is created, and again when source field values change during a session.

## Example: Field descriptions

#### Field mapping form

| Field | Description |
|---|---|
| Source field | Field on the parent blueprint whose value is passed to the child configuration. Supported types: Number, Text, Boolean, Picklist. System fields can be source fields. |
| Target field | Field on the child blueprint that receives the value from the source field. Must be the same type as the source field. Becomes read-only in the child configuration. System fields cannot be target fields. |

### What to do next

After defining field mappings:

- To test mapping behavior, launch the parent product in the quoting application and verify that the target fields receive the expected values in the child configuration. See Launch a solution.
- To verify field type compatibility, see Field mapping supported field types.

#### Related topics

Create a configurable product action

Field mapping supported field types

#### Solution configuration setup

Solution configuration lets CPQ admins manage multiple blueprints in a single configuration. Configurable product actions include a blueprint definition and can pass data between configurations via defined fields.

Solution configuration is an environment level feature that is off by default. To have it enabled in an environment, log a case with CPQ Support.

Configurable product actions are a new type of product action that can be added to rules. They are similar to standard product actions, but have a blueprint defined and can include field mapping to pass data between configurations. Advanced configurable product actions require that the product ID and the blueprint fields are defined outside of the script.

## Benefits

- For administrators:
  - Independent deployment: Each blueprint can be deployed independently, which allows for finer granularity when making changes or updates to a blueprint.
  - Separation of concerns: Administrators can segment out logical components from a configuration and allow different groups to work on blueprints without conflicting.
  - Blueprint reusability: Blueprints can be reused both as part of a solution, multiple solutions, or as an independently configurable product. This leads to less duplication when a blueprint is needed for multiple contexts and less overhead for maintenance.
- For end users:

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- End users can seamlessly work through multiple configurations without needing to re-launch CPQ each time.
- You can clone the child configuration if it is a set-based configuration. The original node in a set must be in the valid state. Cloned nodes are independent of the original edits to a cloned node do not affect the source node.
- You can also add a blank node or remove node from the navigation sidebar.

## The end user experience

- Launching a solution: Users launch the configurable product that they want to start from, just as they do normally. Whichever configurable product is launched becomes the root product for the solution.
- Adding configurable products: When any of the defined rules that have a configurable product action are triggered, a new child configuration is created if a valid configurable product with a deployed blueprint is found.
- When additional configurable products are added to the configuration, solution navigation becomes available and shows a list of the current configurable products, including the root configurable product.
- Changing the condition of a configurable product action rule to false removes the configuration and configurable product, just as in a normal product action. This also removes changes to fields, products, nested children, or other items.
- Viewing the bill of materials: When a configuration becomes a solution, the default product list component is hidden and replaced by the **View Full Solution** button in all configurations. In a solution, **View Full Solution** displays the entire solution BOM. Additional product lists added as tiers reflect only the currently selected configurable product and any of the child configurations below it.

## Potential errors with configurable product actions

Errors related to configurable product actions may include the following:

- The configurable product is not found
- The configurable product does not have a blueprint associated with it
- The configurable product does not have a deployed blueprint
- The blueprint does not exist
- The blueprint is not deployed
- The blueprint has changed

## Field mapping

Field mapping defines which fields have data passed to or from them. Field mapping happens on creation of a child configuration or when a mapped source field is changed. Fields are only mapped a single level, to continue the mapping define the mapped fields on each blueprint. Fields can only be mapped to the same type of field: text to text, number to number, and so on.

Entire sets and product pickers cannot be mapped.

## Node cloning for solution configurations

Node cloning lets you duplicate an existing, valid solution configuration node to use as the starting point for a new node. When you clone a node, both the fields and their values are copied — so you don't have to re-enter configuration data for each new node from scratch.

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Cloned nodes are fully independent of the original. Changes you make to a cloned node don't affect the source node, and changes to the source node don't affect the clone.

Cloning is available from the solution configuration in a set using the navigation sidebar. A node must be in a valid state before you can clone it — this prevents incomplete configurations from being duplicated. When you clone a node that has a dependent set, a corresponding child node is created as part of the cloning operation.

## Layout

Each solution component displays its own layout from the layouts associated with the current blueprint.

When in a solution, the header, background style, buttons and product list display comes from the solution root layout that is defined in the root blueprint.

The solution navigation sidebar automatically appears when additional configurable products are added during a configuration.

## Bill of materials (BOM)

The bill of materials shows the items from the currently viewed configuration and any child configurations below. The entire solution BOM can be viewed at the solution root.

The BOM hierarchy is still defined via the parent product and the unique identifier fields in product actions. It is independent of the solution hierarchy, and one does not necessarily reflect the other. A child configuration may add top level items to the bill of materials.

## Other options

- Sets make it easy to handle large numbers of rows with potentially different configurations. They support cloning rows, while set repeater layout options provide visual similarity.
- Product pickers work well with lightly configurable products and can be customized with additional fields and bulk actions.
- Depending on the downstream system, making multiple independent configurations may provide more flexibility than a single solution configuration.

### Related topics

Node cloning for solution configuration

### Solution configuration terms and considerations

Understand terminology, design considerations, and limits associated with solution configuration, which lets CPQ admins manage multiple blueprints in a single configuration.

Solution configuration gives CPQ admins the ability to create and manage multiple blueprints that can work together in the end user side to provide a seamless configuration experience. For users familiar with other vendors, this is conceptually similar to “system configuration” and “nested bundles".

## Terminology

**Solution**

The overall collection of blueprints (configurations) that are linked together. On the buyside, a configuration becomes a solution when at least one child configuration is added from a configurable product action.

**Solution root**

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The topmost configurable product in a solution has one or more child configurations. This is the configurable product and blueprint that is started from (launched from eCommerce, CPQ, or other sources) on the buyside.

**Parent (Source) blueprint**

A blueprint that includes a rule with a configurable product action for another blueprint, hierarchically has at least one child blueprint, and may have parent blueprints itself.

**Child (Target) blueprint**

A blueprint that is used to create a child configuration, hierarchically has at least one parent, and may have children itself, if defined in rules. It must have a valid configurable product associated with it to be used.

**Configurable product action**

An extension of the product action that defines the child blueprint, configurable product, and (optionally) field mappings.

**Field Mapping**

A field that has the data be mapped between blueprints. Part of the configurable product action.

**Source field**

The field on the parent blueprint that is used for the value in a field mapping.

**Target field**

The field on the child blueprint that has its value set from the field mapping.

**Solution hierarchy**

The relationship between configurable products (solution components) in a solution configuration. This does not determine how products appear in the BOM.

**Solution BOM**

The bill of materials as a rollup across all the configurations. This contains all the products that have been added across the solution, including children, grandchildren, and so on. The solution bill of materials is what is returned upon saving a solution.

## Design considerations and limits

Solution configuration is still under active development.

- Field mapping:
  - Data can flow only from parent to child configurations.
  - Field values are only mapped down a single level at a time, such as parent to child, or child to grandchild.
  - Fields can only be mapped to the same type of field, such as picklist to picklist. You cannot map picklist to text, or perform other type conversions in the mapping.
  - Only number, text, Boolean, and picklist fields can be mapped.
    - Mapping of an entire Set or entire product picker is not supported.
    - Product picker subfields cannot be mapped to a field on the child.
    - Fields that are in a set can be mapped to a field on the child.
  - Any target fields are read only during configuration. The value is set to the same value of the source field.

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- A system field can be used as a source field, but cannot be set as a target field.
- System fields always reflect the values of the source configuration that started the configuration.

- Layout and solution navigation:
  - Navigation in a solution is done using the Solution Navigation sidebar. No additional component or work needs to be done on a layout.
  - Solution navigation: Users can also navigate to configurations by clicking the configurable product in the solution BOM.
  - The header and header actions in the layout of the solution root are used across all configurations in a solution. This includes things like currency display settings and any custom branding.
    - Save (Quote) and Cancel actions in the header are not scoped to the currently viewed blueprint. They apply to the whole solution.
    - Reset, Validate (if a validation enrichment exists on the blueprint), and Change Layout apply to the currently viewed blueprint.
- Configurable product actions:
  - Configurable product actions are limited to adding only a single configurable product per product action. If multiple configurable products are needed, use multiple product actions in a rule.
  - Once a product action has been marked as configurable, it cannot be changed back to a simple product action.
  - Configurable product actions are supported in simple and advanced product actions.

    Advanced functions still have the product ID and the blueprint set outside of the advanced script.

  - Configurable product actions triggering conditions are placed in a set and create multiple configurations.
- Limits
  - The solution hierarchy supports a maximum depth of 4 (including the root product). The bill of materials can have an arbitrary depth to the hierarchy.
  - The total number of configurations in a single solution configuration session is 20: the solution root, plus up to 19 active children across all depths.
  - No circular references are allowed in the solution hierarchy. For example, when BP1>BP2, BP2 cannot create another configuration of BP1.
- Product list and bill of materials:
  - Bill of material: BOM hierarchy is still controlled via the *`parentProduct`* and *`uniqueIdentifier`* properties in the product action. Therefore, different configurations in a solution can add products at other levels in the BOM hierarchy.
  - When using the *`parentProduct`* and *`uniqueIdentifier`* attributes for product hierarchy, if two child products have the same parent product and product ID but should both be displayed as separate in the BOM, each requires a unique identifier. This ensures that the UI treats them as unique products when listing them.
  - Product list: When a configuration becomes a solution, the default product list in the layout goes away and is replaced by a **View Full Solution** button at the bottom of the Solution Navigation sidebar.

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- This behavior can be customized in the default product list component of the solution root, in the Solution Settings section.
- Columns displayed in the solution BOM follow the settings in the default product list of the solution root.
- To display an additional product list, add it in a tier in the layout of the blueprint. This product list is scoped to that configuration and any child configurations.

### Node cloning for solution configuration

Node cloning lets you duplicate an existing solution configuration node in a set, producing an independent copy that you can modify without affecting the source.

In solution configuration, a set groups related configuration nodes. When you need a new node that resembles an existing one, cloning that node is faster and less error-prone than building a new one from scratch. The cloned node starts as an exact copy of the source, then diverges as you edit it.

Cloning is available from the solution configuration navigation sidebar. You can clone any node in the set that is in a valid state. Nodes in an invalid state cannot be cloned.

When you clone a node, the following are copied to the new node:

- All field values, including set-based fields, boolean fields, number fields, picklists, product fields, and text fields.
- Child configurations associated with the source node, preserving their structure and field values.
- Nested child configurations, so that the full hierarchy of the source node is reproduced in the clone.

The cloned node is independent of the source. Changes you make to the clone do not affect the source node, and changes to the source do not affect the clone.

## Relationship to existing set repeater controls

Cloning is an additional option in the solution configuration navigation sidebar. It does not replace the existing set repeater controls. The following controls continue to be available alongside Clone and Delete:

- Add row above
- Add row below
- Copy row
- Delete row

**Note:** Adding a blank node remains available as it was before this capability was introduced. Use Clone when you want a pre-filled copy of an existing node. Use Add when you want to start from an empty node.

## Node hierarchy and recursive cloning

A cloned node can itself be the parent of child and grandchild configurations. When you clone a parent node, the full hierarchy beneath it is reproduced in the new node. This means you do not need to rebuild nested configurations manually after cloning. The depth of the hierarchy that can be cloned depends on the configuration design. Solution configuration supports cloning up to four levels deep.

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### Customizing CPQ with themes

Custom themes let you customize your layout. You can enable custom themes by submitting a feature enablement request.

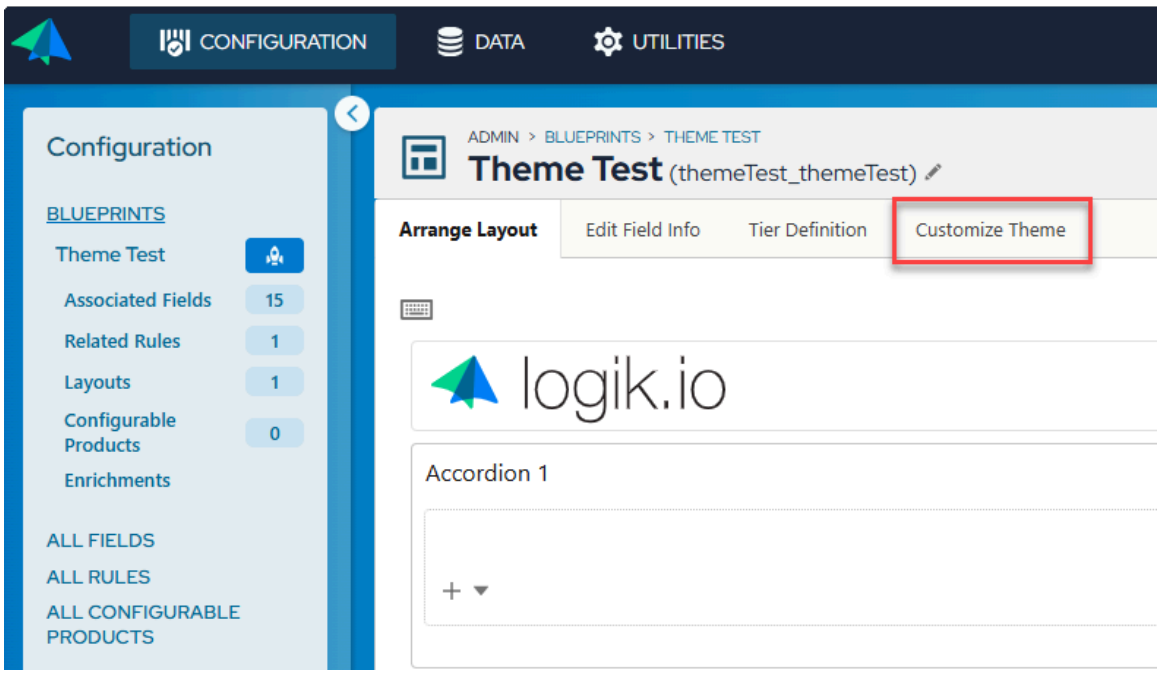
CPQ admin users can edit a custom theme to customize the look and feel of their layout.

To access the custom theme options in the layout editor, submit a CPQ Feature Enablement Request to enable themes.

## Getting started

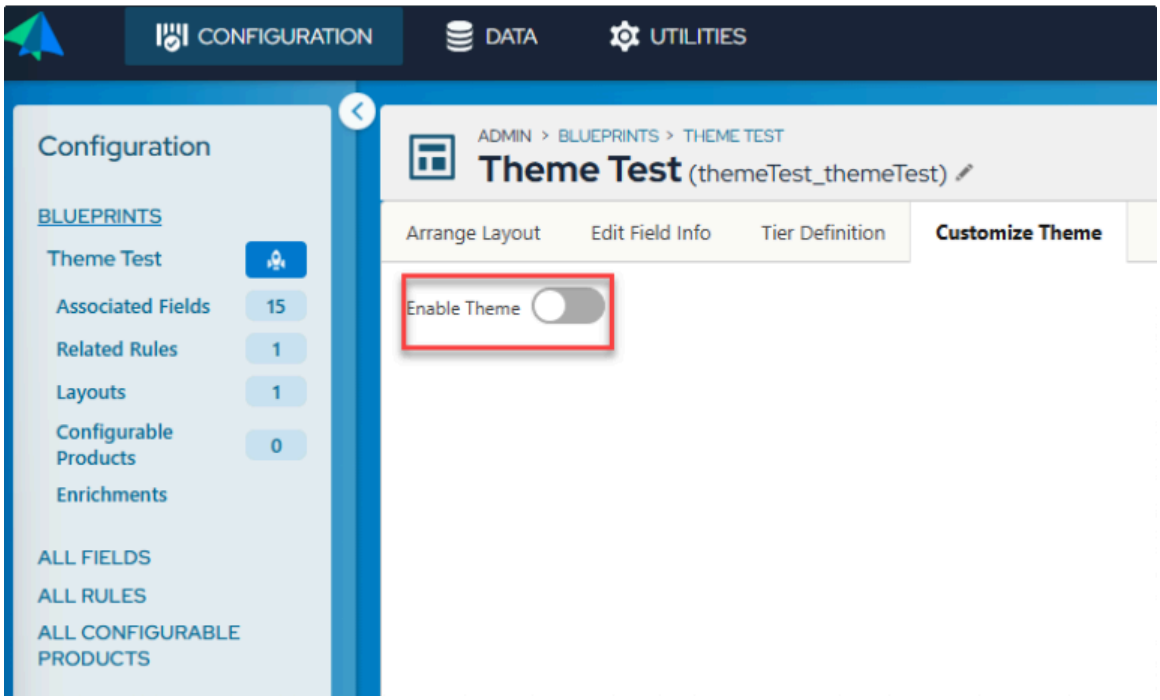
From the blueprint page, select a layout, and then click the Customize Theme tab at the top of the page.

**Note:** This tab appears only if the theme feature is enabled for your tenant.




On the Customize Theme tab, click to turn on **Enable Theme**. (By default, this option is off.)

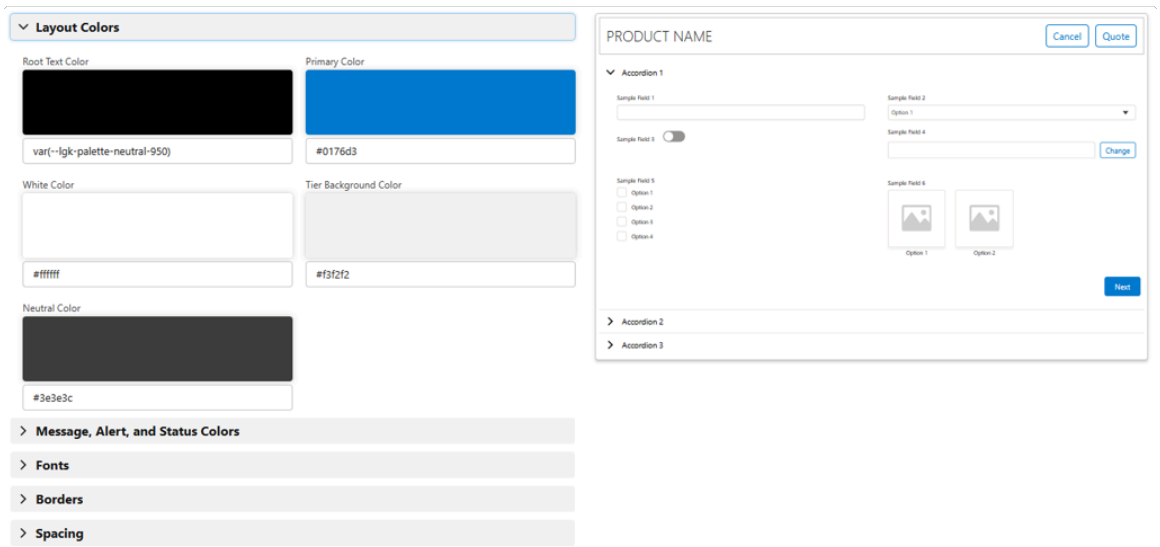
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When this option is turned on, you see the full Theme Editor screen.

## The visual editor

The visual editor includes five sets of options and an interactive preview. The standard CPQ theme is applied by default, but you can modify any fields to start customizing your theme.




The following options are available in the visual editor.

### Visual editor options

| Option | Description |
|---|---|
| Root Text Color | Default font color used in the layout |
| Primary Color | Color used most often for buttons and selections |

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**Visual editor options (continued)**

| Option | Description |
|---|---|
| Primary Background Color | Default color used for the background and containers |
| Secondary Background Color | Default color used for tier items such as expandable section backgrounds |
| Neutral Color | Secondary color used for fields such as hint text |
| Success Color | Background color for success message banners |
| Info Color | Background color for neutral message banners |
| Warning Color | Background color for warning message banners |
| Error Color | Color for error messaging and field validation |
| Font Size | Default font size; small, medium, large |
| Border Radius | Determines border shape for fields where 0 = Square and 16 = Round |
| Border Width | Determines overall size of the border for fields; none, normal, thick |
| Spacing | Determines overall padding for the layout; tight, normal, loose |

## The JSON editor

The JSON editor provides additional control by using overrides for any element included in the theme.

By default, the values for the current theme are shown, but a user can manually enter new key value pairs to modify the theme. The structure of the theme JSON is already provided in the editor. Clicking in the editor lets the user type in the code block. Any changes made in the visual editor are represented in the JSON editor, and vice versa.

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A toggle hides or shows the standard CPQ theme as a reference for fields you may want to revert without discarding the entire theme.

If you want to overwrite a layout element that is not included in the sample data, you can inspect the layout to determine the field to change. Fields that begin with `--lgk-` are customizable in a theme.

The following example demonstrates inspecting a toggle.




To overwrite an element, add the field name and the modified value in the properties section of the theme override. The format should not include the `--lgk-` but should just be `"fieldname" : "value"`.

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The following are example theme overrides.

**Custom Theme Overrides**

```
{
  "properties": {
    "palette-primary-50": "#f0f7ff",
    "palette-primary-100": "#eef4ff",
    "palette-primary-200": "#d8e6fe",
    "palette-primary-300": "#78b0fd",
    "palette-primary-400": "#1b96ff",
    "palette-primary-500": "#0176d3",
    "palette-primary-600": "#0b5cab",
    "palette-primary-700": "#014486",
    "palette-primary-800": "#032d60",
    "palette-primary-900": "#03234d",
    "palette-primary-950": "#001639",
    "palette-primary-color": "var(--lgk-palette-primary-500)",
    "palette-primary-backgroundColor": "var(--lgk-palette-primary-500)",
    "palette-primary-borderColor": "var(--lgk-palette-primary-500)",
    "palette-primary-hover": "var(--lgk-palette-primary-600)",
    "palette-primary-disabled": "var(--lgk-palette-primary-300)",
```

## Using a custom font

A theme can support a custom font through a hosted URL entered in either the visual editor or the JSON editor. This font file needs to be hosted so that it is accessible to the theme. For a custom font, you need to provide a name and the font source URL.




### Image Viewer setup

The Image Viewer adds images to fields for viewing in a media carousel.

The image viewer allows a Logik Admin to add featured images to supported fields that can be viewed in a media carousel. Set up the Image Viewer in the Logik Admin to display images on your layout.

## Supported field display types

- Static Image
- MultiSelectProductPickerGrid
- MultiSelectVisualProductPicker
- ProductPickerGrid
- VisualProductPicker

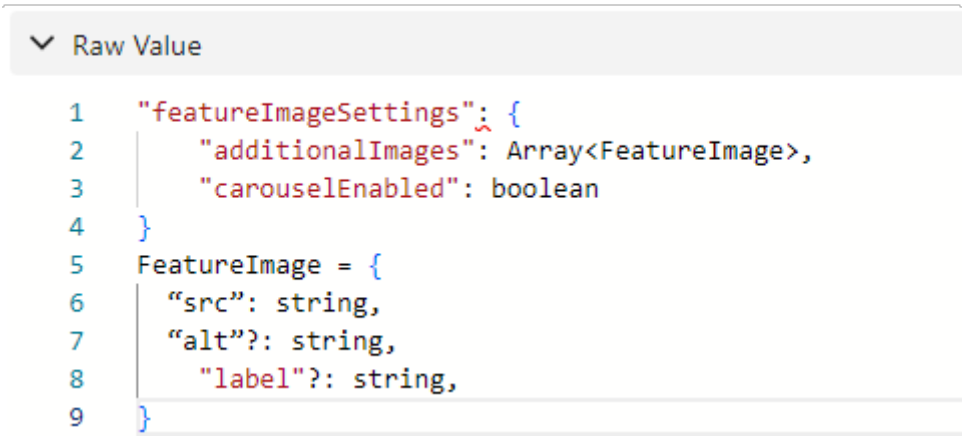
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- MultiSelect picklistGrid
- SingleSelect picklistGrid
- Multiselect Visual Picker
- Visual Picker

### Static images

To display the Image Viewer for a Static Image field, follow these steps:

1. Open the layout where you want to add the Image Viewer.
2. Hover over the field and click the gear icon.
3. Open the raw value menu and add the following code, replacing placeholder text with your values:




4. Click **Save**, and deploy the blueprint.

### Raw value details for Image Viewer

Add the following to the "Raw Value" section of an image display component through the Admin UI. `Array<FeatureImage>` is an array of your additional feature images in the Feature Image type format, and `carouselEnabled` is set to true or false.

```
"featureImageSettings": {
      "additionalImages": Array<FeatureImage>,
      "carouselEnabled": boolean
  }
```

By default, `carouselEnabled` is false.

### Defining a feature image

```
FeatureImage = {
  "src": string,
  "alt"?: string,
  "label"?: string,
}
```

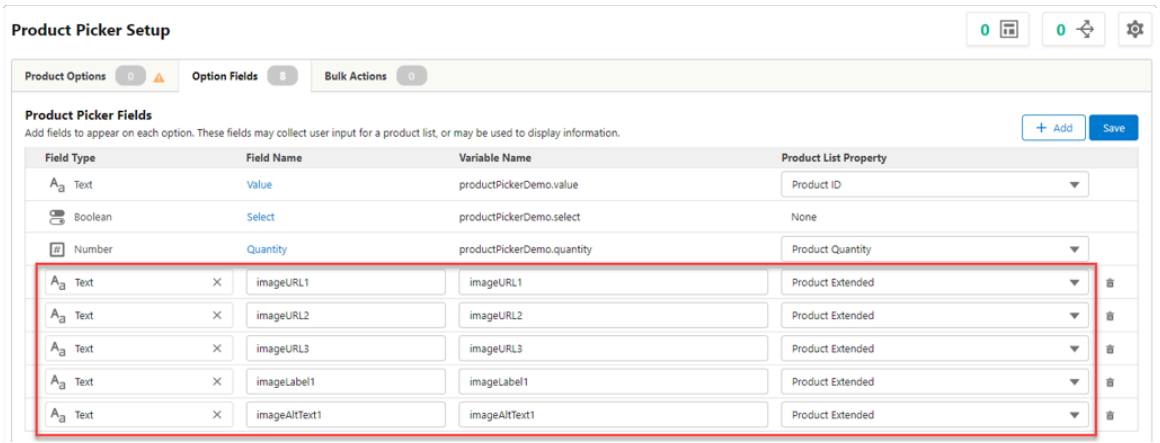
### Product Pickers

To display the Image Viewer for a product picker field, follow these steps:

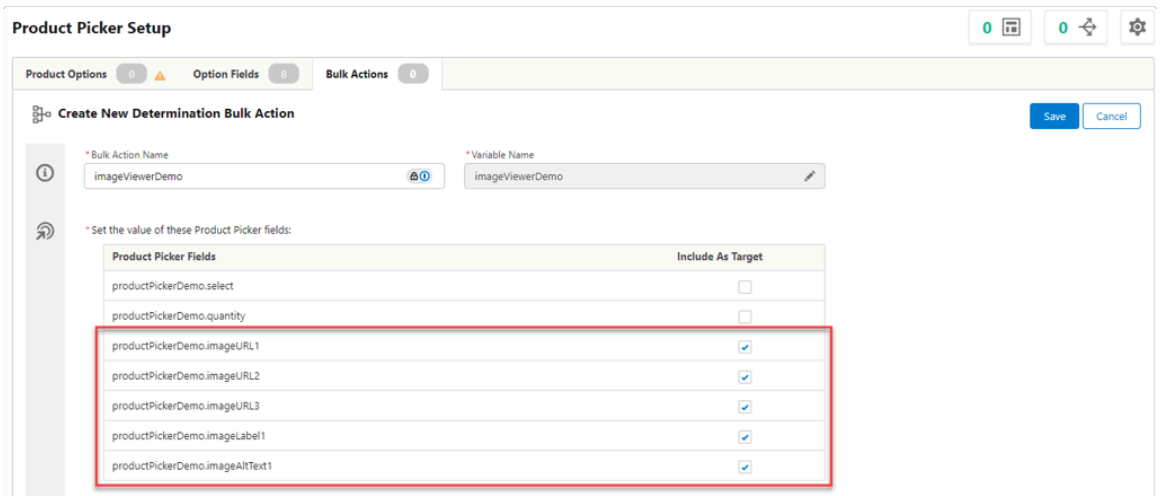
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1. Select your product picker field.
2. Select the Option Fields tab.
3. Click **+ Add**.
   - Set the Field Type to Text.
   - Set the Product List Property to Product Extended.
4. Create one Text field for each image to include in the Image Viewer.

> **Note:** Create additional fields for each type to display alt text or a label. These fields are not required.

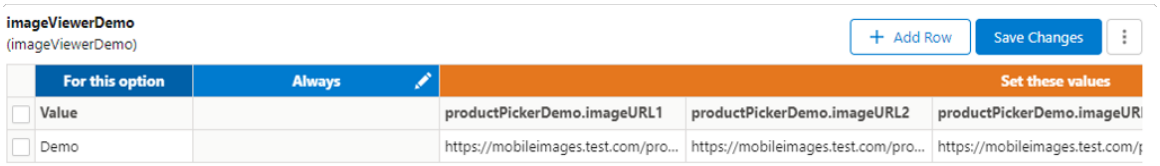



5. Select the Bulk Actions tab.
6. Click Add New Action.
7. Select type Determined Action.
8. Enter a Bulk Action Name.
9. Select all of the fields added for your Image Viewer.



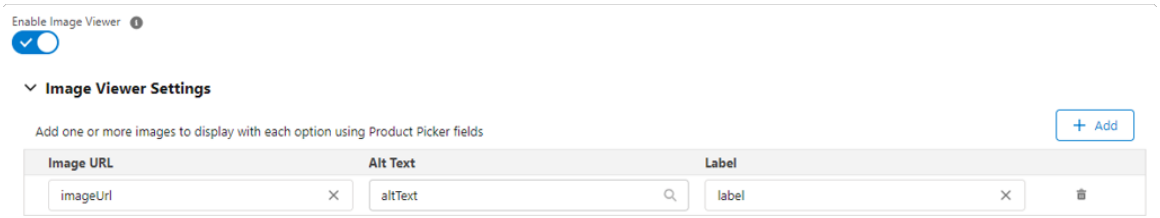

10. Click **Save**.
11. On the Bulk Actions tab, provide the URL for each image as well as text for labels and alt text if desired.

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12. Click **Save**
13. Open a layout that includes the product picker field.
14. Hover over the field and click the gear icon.
15. Toggle Enable Image Viewer to On.
16. Expand the Image Viewer Settings section.
17. Select the fields created from steps 3-4 that correspond to Image URL, Alt Text, and Label.

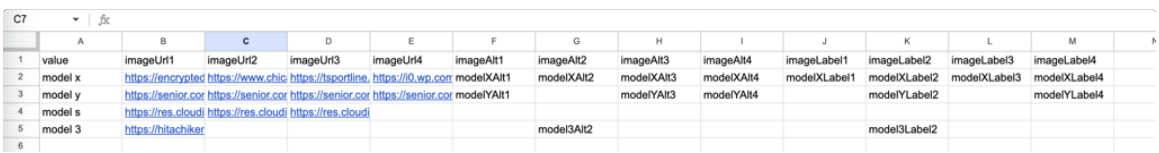
    Alt Text and Label are optional.
18. Click **+ Add** and repeat step 17 for each image that you want to include.




19. Click **Save**, and deploy the blueprint.

## Picklists

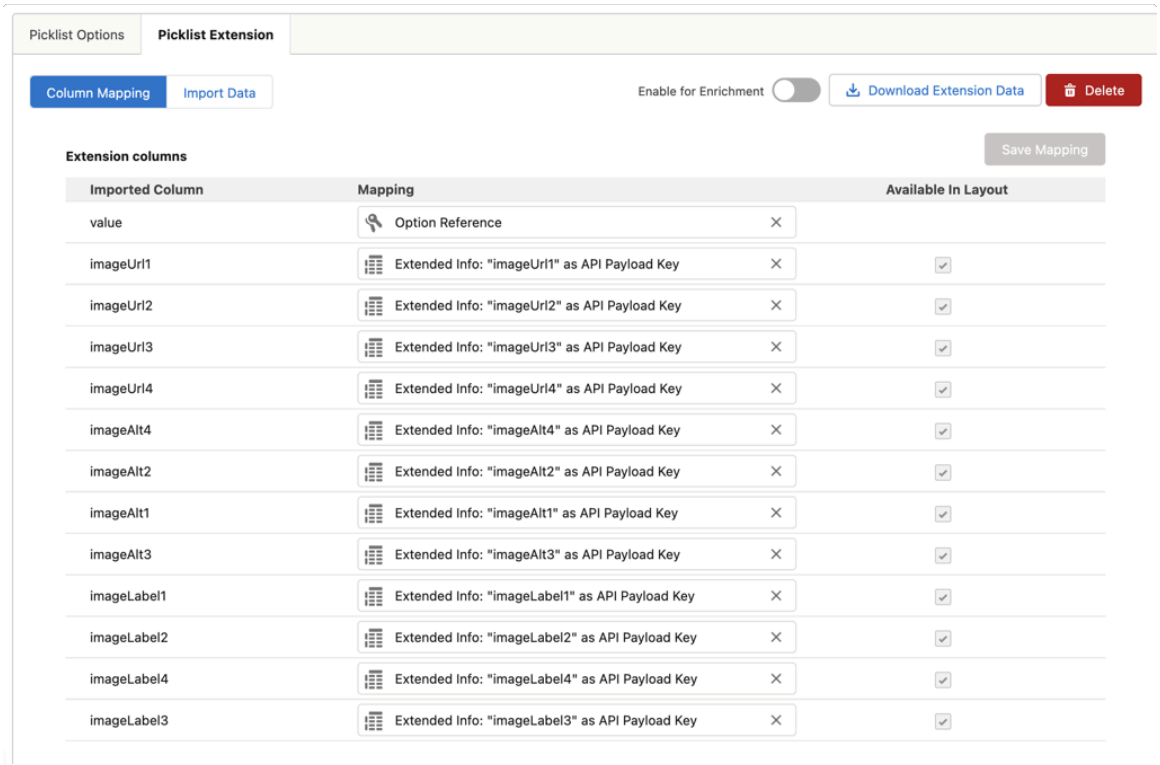
1. Open the picklist field.
2. Click the Picklist Extension tab.
3. Click **Import Data**.
4. Create a CSV with these columns
   - value
   - imageUrl
     - Ensure this is a valid URL for the image to display.
     - Create an imageUrl column for each image to include in the Image Viewer.
   - imageLabel (optional)
   - imageAltText (optional)



| | A | B | C | D | E | F | G | H | I | J | K | L | M |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | value | imageUrl1 | imageUrl2 | imageUrl3 | imageUrl4 | imageAlt1 | imageAlt2 | imageAlt3 | imageAlt4 | imageLabel1 | imageLabel2 | imageLabel3 | imageLabel4 |
| 2 | model x | https://encrypted | https://www.chic | https://tsportline. | https://i0.wp.com | modelXAlt1 | modelXAlt2 | modelXAlt3 | modelXAlt4 | modelXLabel1 | modelXLabel2 | modelXLabel3 | modelXLabel4 |
| 3 | model y | https://senior.cor | https://senior.cor | https://senior.cor | https://senior.cor | modelYAlt1 | | modelYAlt3 | modelYAlt4 | | modelYLabel2 | | modelYLabel4 |
| 4 | model s | https://res.cloudi | https://res.cloudi | https://res.cloudi | | | | | | | | | |
| 5 | model 3 | https://hitachiker | | | | | model3Alt2 | | | | model3Label2 | | |
| 6 | | | | | | | | | | | | | |

5. Import the created CSV.
6. Click **Column Mapping**.
7. For each field added, select the mapping menu and select the column name under the Extension mapping section.

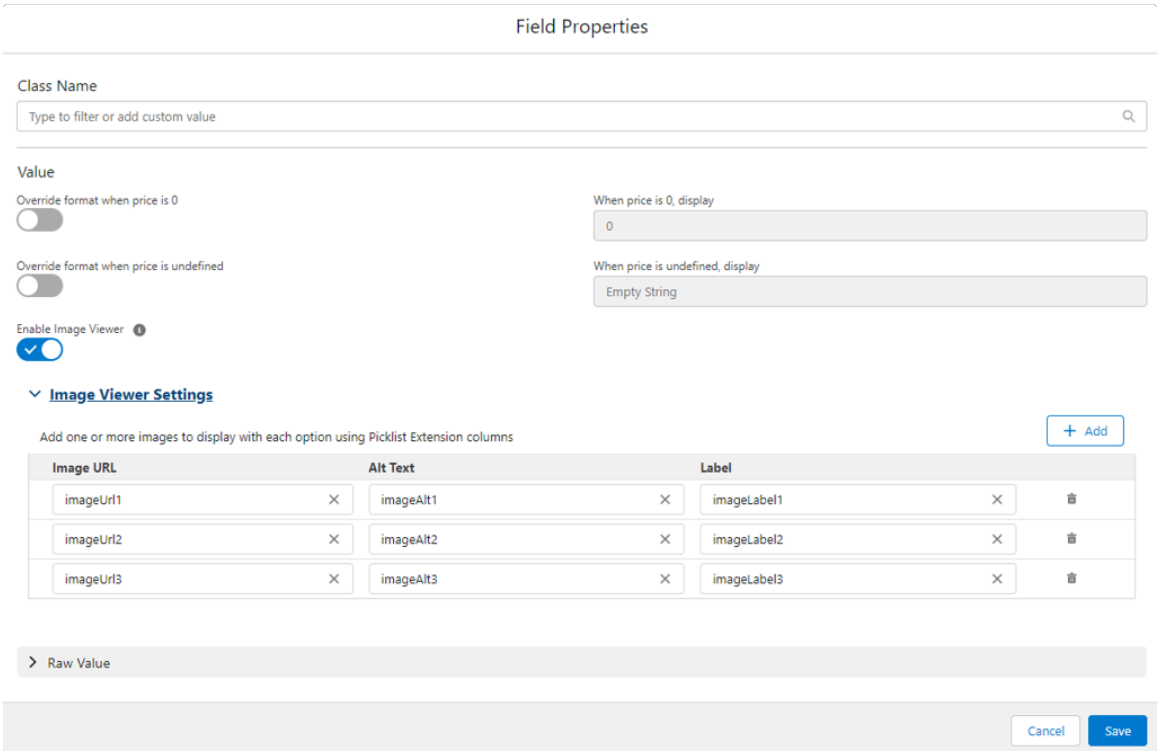
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8. Click **Save Mapping**.
9. Open a layout that includes the product picker field.
10. Hover over the field and click the gear icon.
11. Toggle Enable Image Viewer to On.
12. Expand the Image Viewer Settings section.
13. Select the fields created from the picklist extension data that correspond to Image URL, Alt Text, and Label.

    Alt Text and Label are optional.
14. Click **+ Add** and repeat step 13 for each image that you want to include.

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**15.** Click **Save**, and deploy the blueprint.

## General guidelines

Ensure that the image sizes are the same for all images in a viewer. If they do not match, the thumbnails and featured image will not align properly.

Add images in the order you want them to display. Images will display from the Image Viewer settings from top to bottom. The name of the field does not affect the display order.

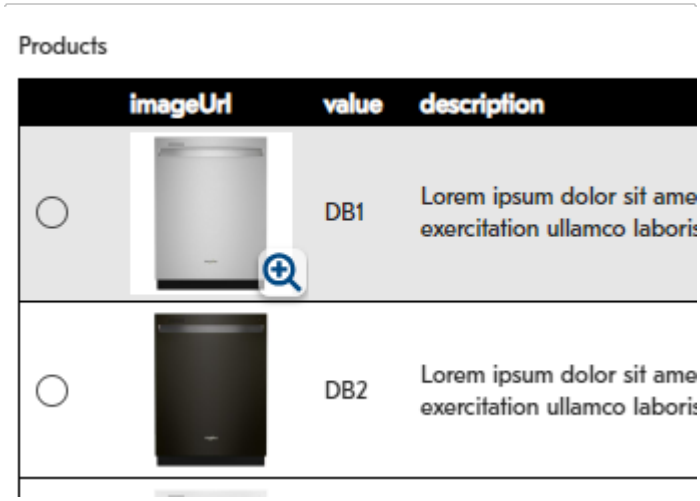
Use images with a high enough resolution to properly fill the window. Low resolution images will be expanded in size to fit the window and will appear pixelated or distorted when selected as the featured image.

For optimal performance, avoid large or high resolution images since that will impact the render time for the image viewer.

## Image Viewer display

On a layout with a field that includes an image view, a user can hover over an image to see the expand icon.

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After clicking the icon, the image view will open in a dialog box.




A user can move between images with the arrow buttons or by clicking the thumbnails below the feature image. This carousel displays any label and alt text if provided. A user can close the dialog box by clicking outside it or by clicking the X icon in the top right.

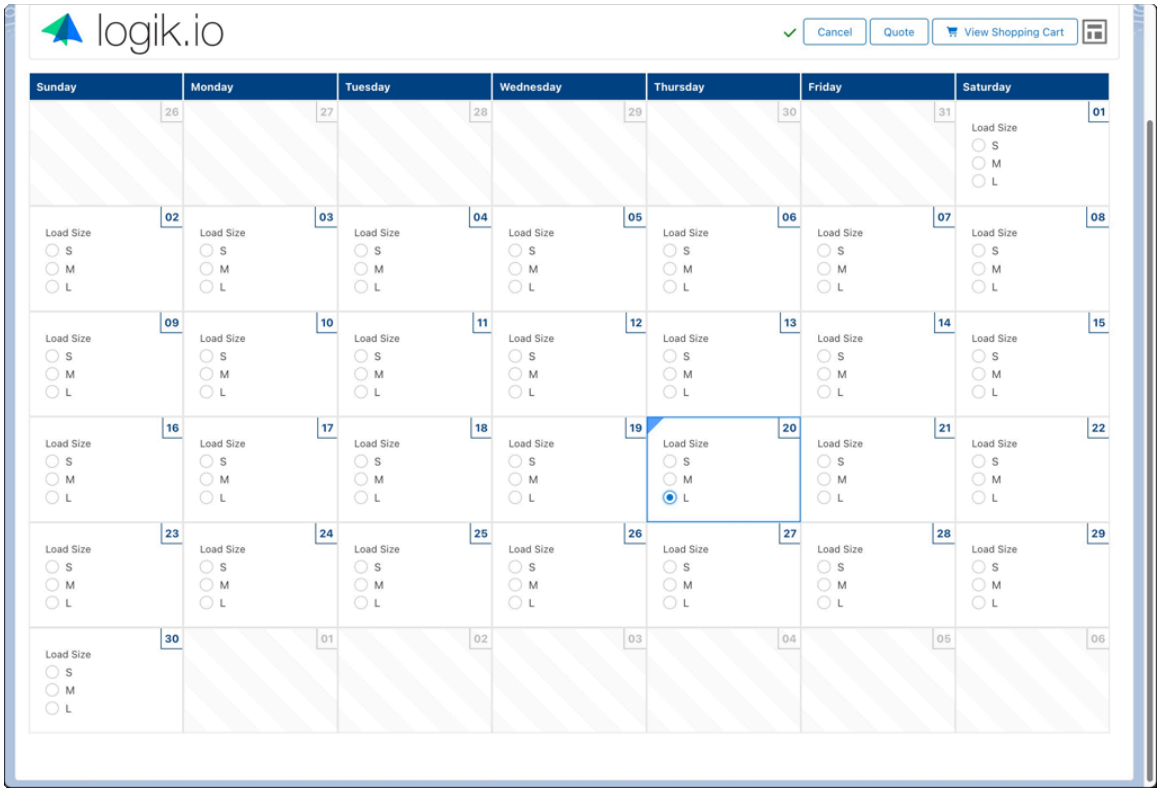
### The calendar display component

Use the calendar display component in CPQ to present time-based configuration options in a monthly view. Configure sets, fields, and selection settings to let users view, select, and manage date-specific records directly in the configuration interface.

CPQ native UI allows the administrator to present a calendar display component to the user to aid in time-based configurations. The calendar displays in the context of a month. The data underlying the calendar display is a set, with each calendar day represented by one record in the set.

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The example below shows a set with 30 records, one for each day, represented as a calendar display component.




Key elements that support this example include a set with the variable name `availableDates`. This set contains the following associated fields:

- `selectedDate` (Boolean): captures whether the user has selected one or more date/records
- `rawDate` (Text): holds the raw date formatted for each set record
- `availableDate` (Text); holds the date in "MM/DD/YYYY" format for each set record. This is used to facilitate the human-readable date on the calendar display
- `loadSize` (Picklist): Options include S, M, and L. This picklist is displayed in each record (each day on the monthly calendar).

  Calendar records (days) can display any number of set-associated fields. The administrator should apply a practical limit to the number of fields defined, based on users' screen sizes and responsiveness provided by the application.

The On Configure/Reconfigure enrichment initializes the set with the appropriate size for the months to be displayed and a JSON element that contains field values for each record. The following is the output of the On Configure enrichment for the raw calendar above:

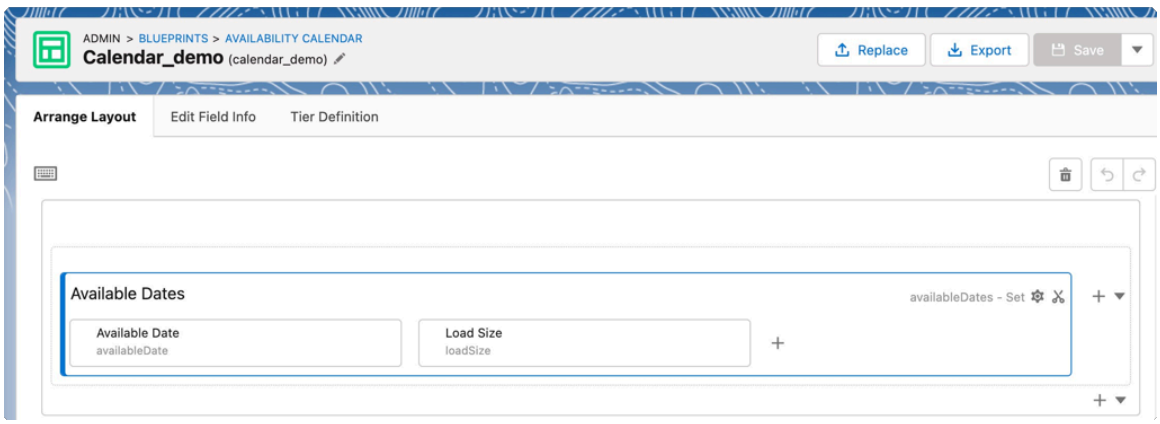
```
{
 "availableDates": {
   "data": [
   {
    "availableDate": { "value": "6/1/2024" },
    "rawDate": {
    "value": "2024-06-01T00:00:00.000Z"
    }
   }, //skipped interior records for brevity
   {
```

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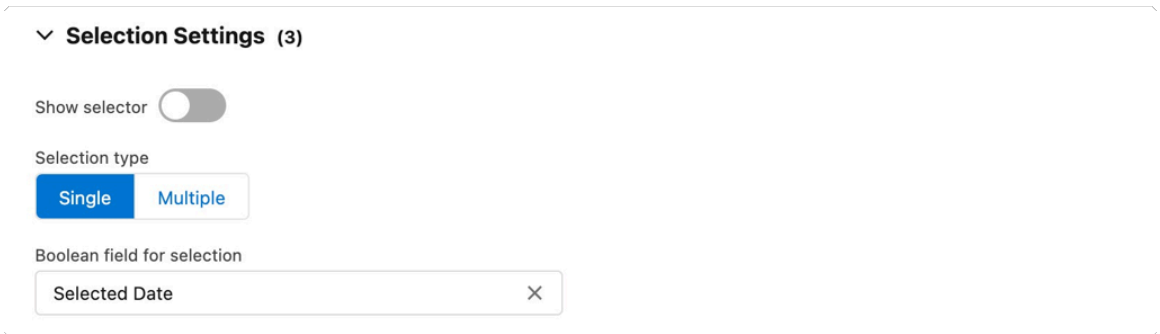
```
    "availableDate": { "value": "6/30/2024" },
    "rawDate": {
    "value": "2024-06-30T00:00:00.000Z"
    }
   }
  ],
  "userEdited": false
 }
}
```

Note that the loadSize field was left out of the set JSON because the administrator did not want to prepopulate the field.

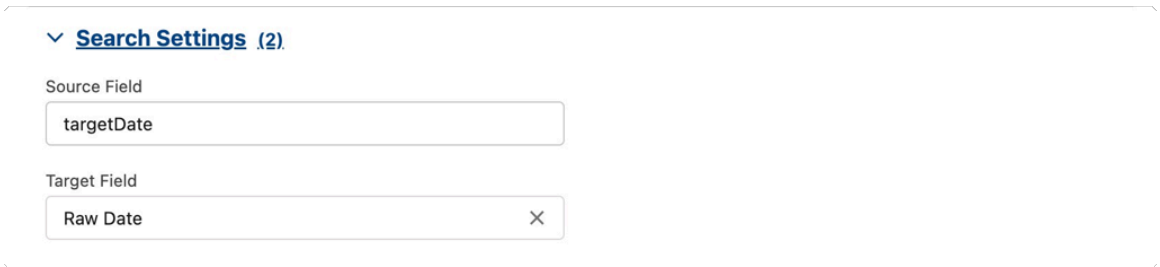
In the blueprint layout, the administrator defines where the set will be displayed and the subfields that will be displayed in each record/calendar day.




In the Set Properties > Selection Settings, the Admin defines whether the user should be allowed to select one or multiple days. The Boolean field for selection (in this case, selectedDate) stores whether a specific set record/calendar day is selected.




The Set Properties > Search Settings help you display the most relevant subset of days for the user when your calendar lets the user select from more than one month. For this purpose, Source Field is the day (record) that the Admin wishes to feature in the monthly calendar set. Target Field is the set-associated field that contains the full range of calendar dates.




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The Set Properties > Raw Value area contains the JSON output by the selections on the page above. However, as "calendar" is not currently selectable as a displayType, the administrator must edit the JSON to define it explicitly.




### Multi-language translation

Implement multi-language translation for end-user interfaces. Enable languages and compile translation files.

CPQ can be set up to display configuration experiences in a user's preferred language. This article describes how to implement translations in CPQ.

## Foundation and scope

CPQ multi-language capability is available on end-user user interfaces (buyside). The administration platform displays English only.

CPQ supports all left-to-right languages, including those with multi-byte character sets (e.g., Japanese, Korean).

**Note:** Right-to-left languages such as Arabic and Hebrew are not currently supported. If your implementation expects to require translation into a right-to-left language, please log a support case and we will follow up with you. To log a support case, use the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

The base language for all CPQ environments is English. As a result, translations of custom strings must be furnished with the corresponding English key. Example: If the administrator enables French and Finnish on an environment, they will need to provide English-to-French and English-to-Finnish translations.

When multi-language is enabled in CPQ, the app will attempt to serve a configuration experience according to the end-user's browser locale setting. If the language defined in the browser locale matches an enabled language in CPQ, the application will attempt to serve the strings in the requested language. However, if a string is not defined for the requested language, the application will display the corresponding English equivalent.

## Terms used in this article

Static strings: Text CPQ displays to the user that is defined by the application. Examples include default button labels, basic error messages, text in confirmation boxes, and hovertext for set controls. Static strings are currently provided in English [en], Finnish [fi], French [fr], German [de], Italian [it], and Spanish [es]. CPQ will translate static strings into additional languages as needed.

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Custom strings: Field labels, field option labels, product name and description, layout tier headings, custom messages and similar strings defined by an administrator are "custom".

Base language: the foundational language in a CPQ environment. Choosing your base language is an important decision, as (1.) all configuration elements—including fields, field options, layout elements, and custom message text—must be defined in the base language; and (2.) all translations of custom strings key off of the base language. A CPQ environment can only have one base language. All environments in your dev stack need to have the same base language, to enable environment-to-environment migration.

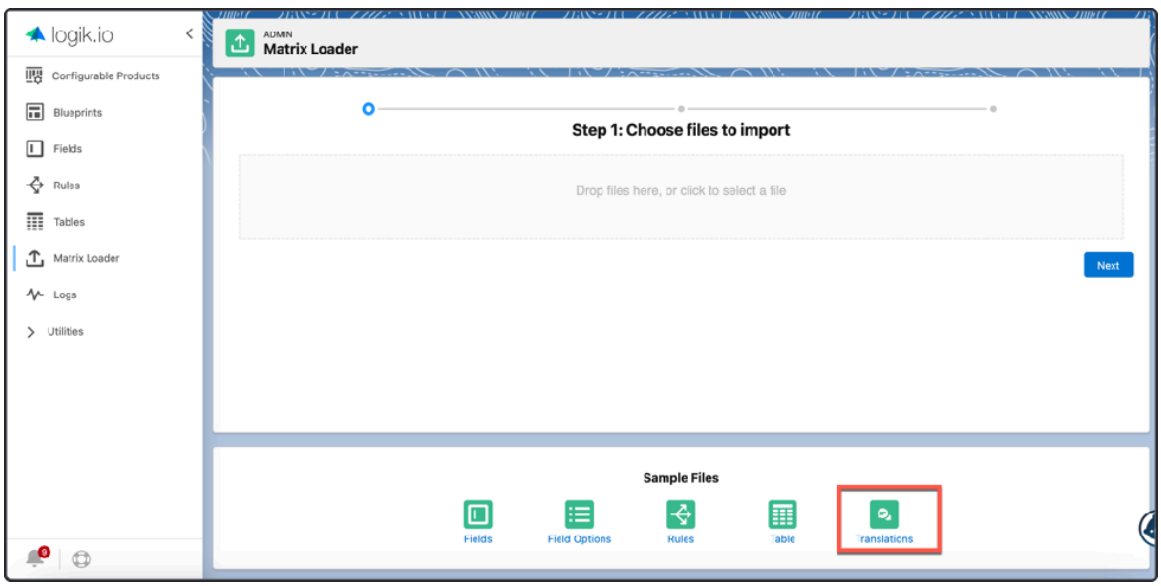
Enabled languages: in addition to the base language, these are the languages you want to support for your end-users coming to CPQ.

## Implementation

1. Log a Support case that describes the languages you intend to translate configuration experiences into. Request that CPQ Support enable these languages on all relevant CPQ environments in your development stack. After the new languages are enabled, continue with step 2.
2. To understand how multi-language translation works in CPQ, we recommend that you try a small-scale proof-of-concept before embarking on a wholesale translation effort.
   - Select a picklist field displayed on the end-user layout. Example: In Blueprint1, we will translate Paint Color [paintColor]. paintColor has label "Paint Color" and options "Blue", "Yellow", "Green".
   - For the purposes of this experiment, assume we enabled Spanish [es] in step #1. You can customize this experiment for one of the languages you enabled in step #1. In a CSV file, define Spanish [es] translations for the field label and the picklist field options:

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | **id** | **sourceText** | **sourceLanguage** | **translatedText** | **translatedLanguage** |
| 2 | | Paint Color | en | Color de la pintura | es |
| 3 | | Blue | en | Azul | es |
| 4 | | Yellow | en | Amarilla | es |

The graphic above is a sample translation upload file. You can find another example on the Matrix Loader page.




3. Save the CSV file and upload via Matrix Loader.

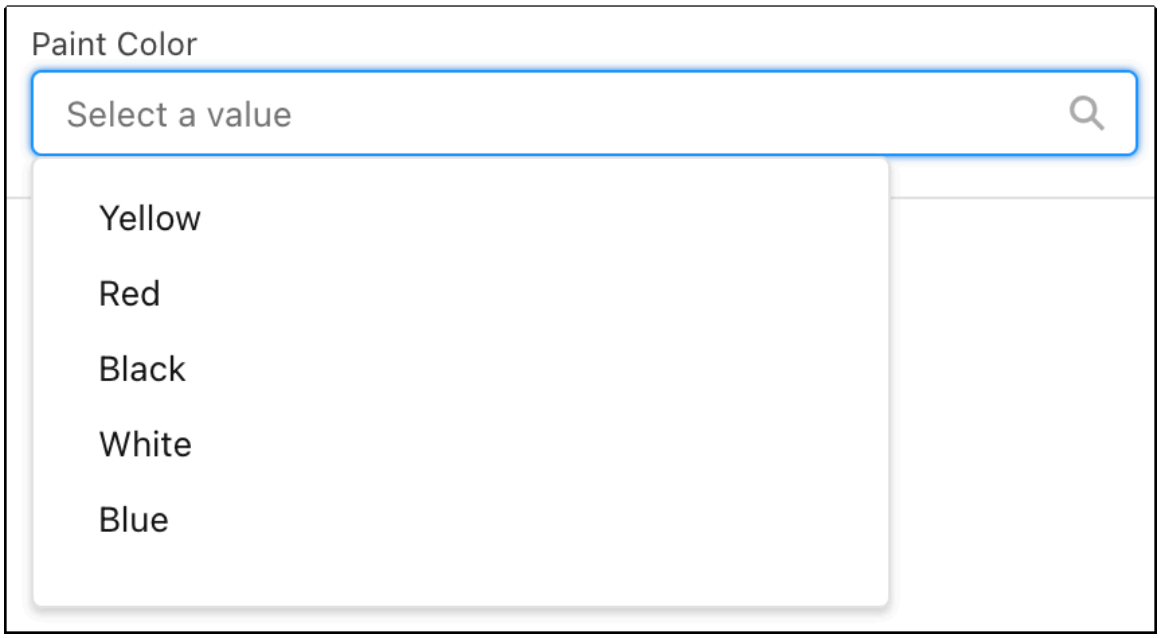
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**Note:** If using a program like Microsoft Excel, you must export in UTF-8 format to support characters with diacritic marks, such as accent, cedilla, circumflex, diaeresis/umlaut, etc.

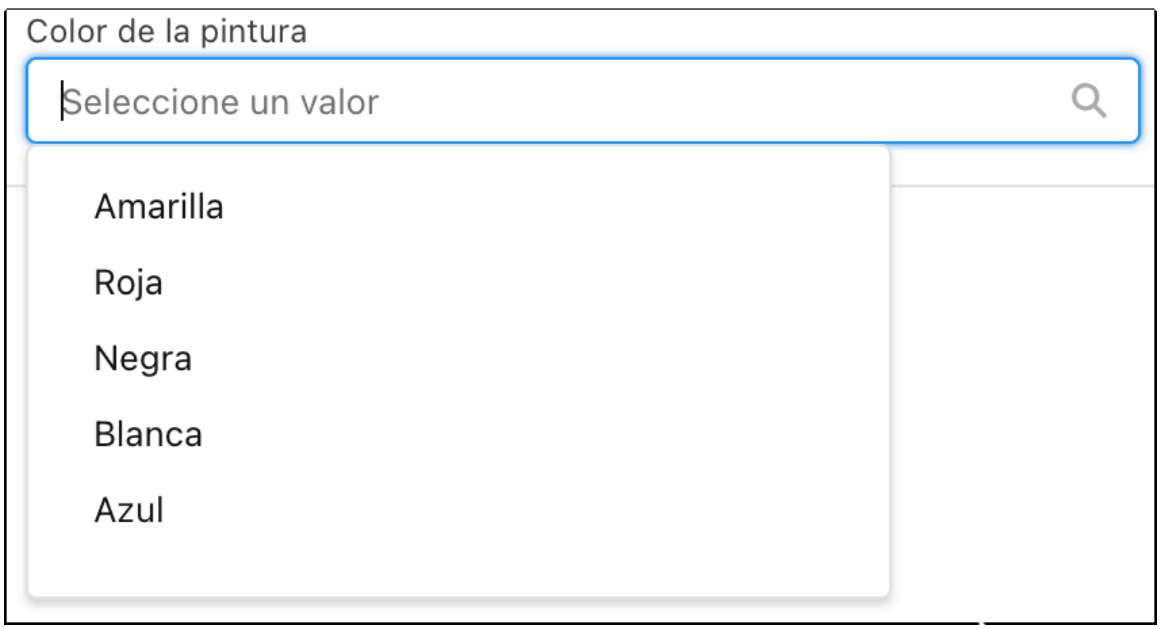
4. Deploy the blueprint.

To test the buyside user interface, we recommend using the Chrome browser with the https://chromewebstore.google.com/detail/locale-switcher/kngfjpghaokedippaapkfihdlmmlafcc?hl=en-US extension installed. This extension allows you to quickly switch the browser locale to test localization. Set Locale Switcher to Spanish [es] and open the Blueprint1 configuration. The paintColor field label and contents should be displayed using the custom translated strings in #2.

The following graphic shows the English version of the picklist on the buyside UI:




The following graphic shows the Spanish version of the picklist on the buyside UI:




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The following experiment demonstrates how various custom strings, including those defined in field options and layouts, are translated, uploaded, and deployed to accomplish an English-to-Spanish translation.

1. Compile a list of custom strings that require translation.
2. Export the following CSV files from CPQ administration:
   - Field Options: every field option label requires translation. In the Field Option CSV file, these are the strings defined in the name column
   - Picklist extensions: for each picklist extension that has Extended Information defined, export the Extension Data CSV file. A translation should be provided for every string in columns B and greater.
   - Product Pickers: strings defined in Determination-type Bulk Actions should be translated into the target language.
   - Rules:
     - When action_type = message, action_value requires translation
     - When action_type = determination and the action affects a text field, many use cases require translation of the string in action_value
   - Layout: Translations are needed for:
     - Tier headings
     - Columnset headings
     - Field labels
     - Help content
     - Product list column headings
3. Build your translation file. The file should be one of the following formats:
   - CSV: SampleTranslationUploadFormat_en_to_es.csv
   - XLIFF: SampleTranslationUploadFormat_en_to_fr.xlf
4. For each string identified in step 1, add an entry to your translation file.
5. Upload your file in the Matrix Loader.
6. Deploy the corresponding blueprints.

## Downloading translated strings

To download the translated strings that are saved in a CPQ environment, open CPQ administration in a browser tab. In another browser tab, open the following URL:

```
https://{{baseUrl}}/a/translations/v1/translations?
fileType={{fileType}}&codes={{codes}
```

where {fileType} is either `csv` or `xml`, and {codes} is a comma-delimited list of the translated strings to retrieve. Use 2-letter language codes such as. 'en' and 'fr'. For example, `&codes=en,fr,de`

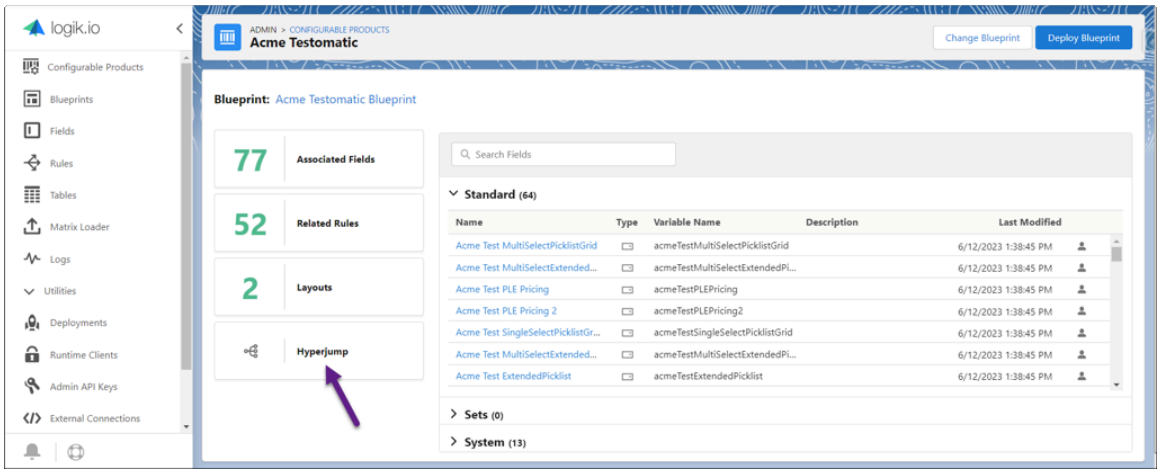
**Note:** Some characters in the rendered translated string may include diacritic marks (accents, etc.), and if the wrong character set is used these will appear as a replacement symbol for unknown character (square with a question mark). To avoid this problem, export CSV files using the UTF-8 format.

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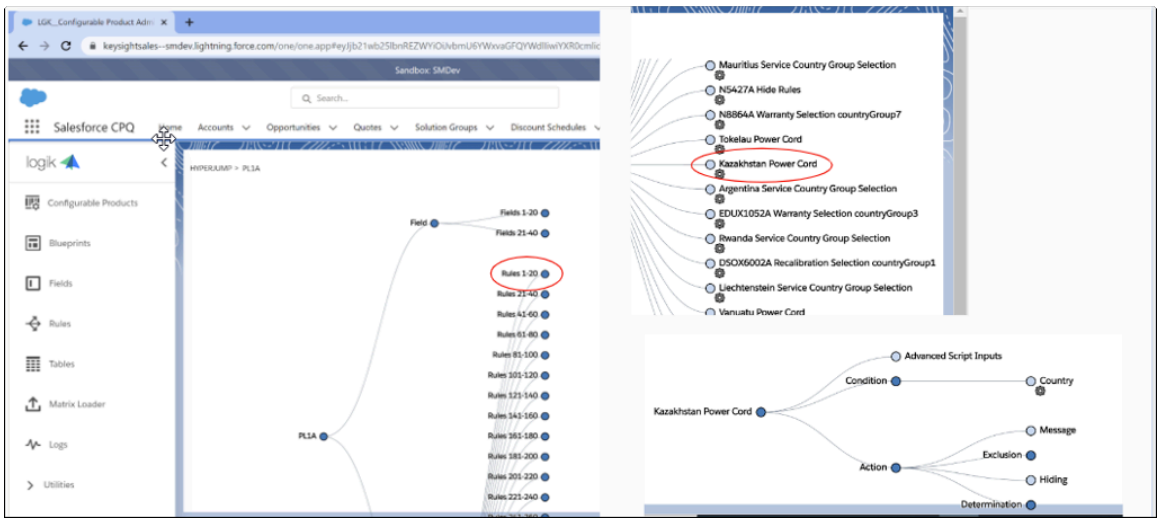
## Hyperjump

Hyperjump shows you a configuration as a graphic diagram.

In a configurable product, you can access Hyperjump, which gives you a graphical view of the configuration.

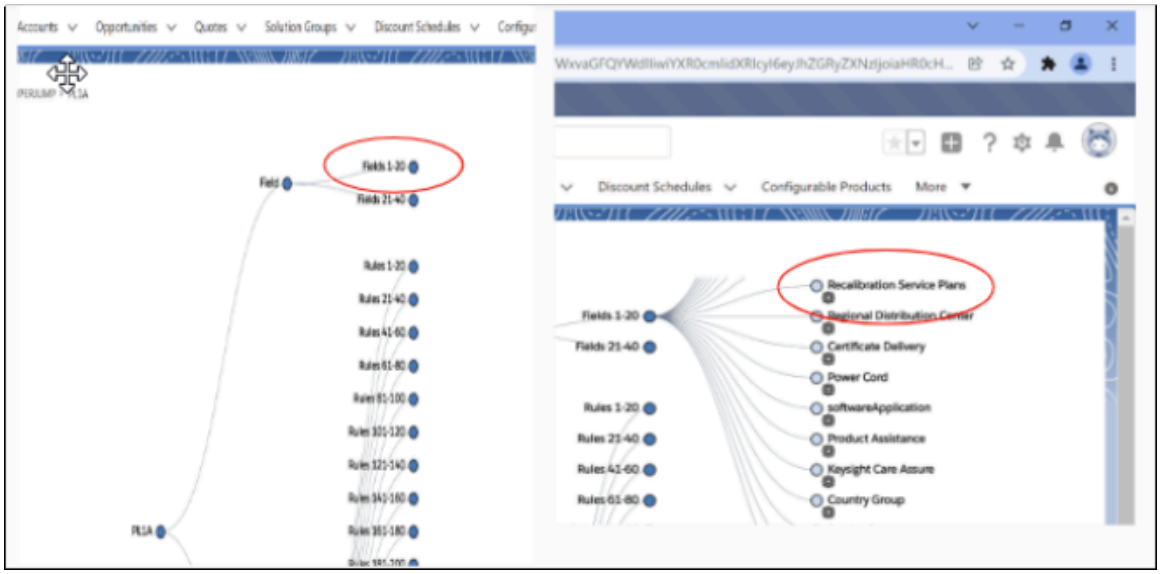



The Hyperjump view enables you to expand individual rules.




It also lets you see field-related rules.

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This view gives you a look at the picklist options along with the conditions and actions that the field is part of.

The following video demonstrates the Hyperjump feature for managing configuration data:

Hyperjump Demo: Visually Manage Configuration Data

### Required permissions for the integration user

The integration user, or refresh token user, must have the following permissions if it does not already have system administrator permissions.

The refresh token user (or integration user) is the user name that CPQ uses for API syncing of Configuration Line Data, Configuration Data, and to populate the caches of Product2, Pricebook, and Pricebook Entries in Salesforce. This sync occurs every 30 minutes for test and demo sites and every 15 minutes for production sites. Although using a system administrator as your refresh token user is the simplest and most common route to take when configuring CPQ, some CPQ customers prefer not to define their refresh token user with system administrator permissions (usually because of a company-wide security policy). The following list shows the necessary permissions for non-admin profiles to be set up as refresh token users when using CPQ with Salesforce CPQ:

- The user must be API enabled
- The LGKConfigurationLineItemc and LGK ConfigurationFieldDatac objects must have Create access
- The user must have permission to read all fields and objects that are referenced in the SOQL queries of Salesforce external connections
- The objects Product2, Pricebook2, and PricebookEntry must have Read/View access, including access to the following fields:

  Product2:

  - Name
  - Id
  - ProductCode
  - Description
  - IsActive

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- Family
- ExternalId
- SBQQ_ExternallyConfigurable_c
- QuantityUnitOfMeasure
- StockkeepingUnit

Pricebook2:

- Id
- Name
- Description
- IsActive
- IsStandard
- CreatedDate
- LastModifiedDate

PricebookEntry:

- Id
- Pricebook2Id
- Product2Id
- UnitPrice
- IsActive
- UseStandardPrice
- ProductCode
- CreatedDate
- LastModifiedDate
- CurrencyIsoCode (if using multicurrency)
- ProductSellingModelId

### Set up environments linked to Salesforce orgs

Step-by-step instructions for setting up CPQ in an environment linked to a Salesforce org.

#### Before you begin

Provide the username of a user in the org who will serve as the first CPQ admin user. This user will need to grant other users access after they have attempted to access the CPQ Admin once and appear in the User Access list of users. For more information, see User access.

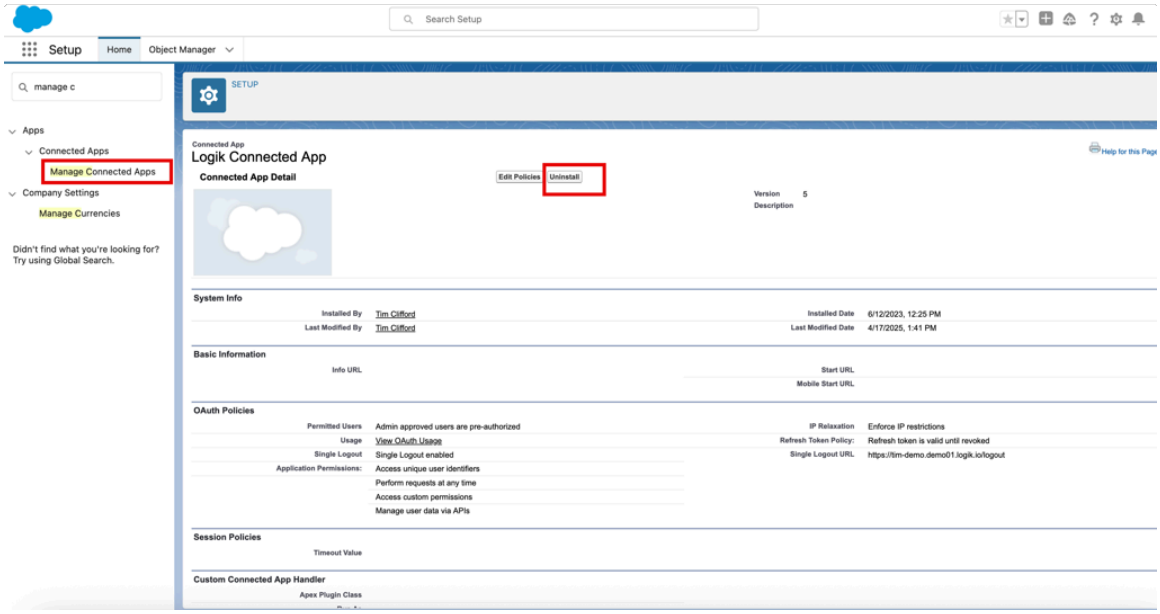
Provide CPQ Support with the following information:

- The Org ID of your org (found in Setup > Company Information)
- the My Domain URL of the org (found in Setup > My Domain)

The CPQ DevOps team will provision the environment. Once ready, Support will confirm with your CPQ custom URL.

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**Note:** If your Salesforce site was refreshed from another previously CPQ connected Salesforce site, uninstall the CPQ connected app before continuing. It holds metadata associated with the CPQ environment connected to the original Salesforce site. To uninstall, navigate to Setup > Manage Connected Apps > **Logik Connected App** > Uninstall.




Role required: Admin

## About this task

If your environment has never had CPQ installed, start at step 1. If you are upgrading existing packages, start at step 7.

## Procedure

1. Navigate to your CPQ custom URL, and click the Settings tab in the navigation menu.
2. Create a Refresh Token user name.
   The user name can be any user#s username, but CPQ recommends a user with a system administrator profile.
3. When prompted in the pop-up window, allow access for the CPQ API User connected app.
   If you are using an integration user that is not a system Admin, the following are the necessary requirements for the integration user (or a permission set associated with that user/profile):
   - The user must be API enabled
   - The user will need Create and Edit access for the following objects:
     - LGK__ConfigurationLineItem__c
     - LGK__ConfigurationFieldData__c
     - SBQQ__QuoteLine__c
   - The user will need Read/View All access to the following objects:
     - Product2
     - Pricebook2
     - PricebookEntry
   - For subscription management, the user with also need Read/View All access to the ProductSellingModel object.

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4. In a new browser, navigate to your CPQ custom URL again and confirm that the Refresh Token user name was updated correctly.
5. Click reset again to obtain a new refreshToken, or navigate to https://<YourLogikURL>/refreshToken.
6. Enter Salesforce setup, and search in the Quick Find box for Connected Apps oAuth Usage.
   a. Find the Logik Connected App and click **Install**.
   b. Click **Allow**.
   c. Edit oAuth policies.
   Permitted users should be set to **Admin approved users are pre-authorized**.
   d. Scroll to Manage Profiles, and link to the system administrator profile or any other profiles that will be using CPQ as an admin.
7. Click the gear icon in the upper right and go into the "Setup" page for your SFDC org.

   If you are upgrading the Logik Base Managed Package from one major version to a newer major version (for example, from 1.x to 2.x), submit a support case. CPQ needs to update the package version for your environment in our database.
8. Navigate to Installed Packages.
   If you are only upgrading your existing CPQ packages, this is the only step you must complete.
   a. Install the Logik Base Managed Package and select **Install for All Users**.
      - If your org logs in through test.salesforce.com or has sandbox in the My Domain URL of the org, click here.
      - If your org logs in through login.salesforce.com, click here.

      The installation key is `Logik.io-2025!`
   b. If using with Salesforce CPQ, ensure that Salesforce CPQ is installed and is version 244.2 or later, install the CPQ Extension for Salesforce CPQ package.
      - If your org logs in through test.salesforce.com or has sandbox in the My Domain URL of the org, click here.
      - If your org logs in through login.salesforce.com, click here.

      The installation key is `Logik.io-2025!`
9. For CPQ usage, navigate to Installed Packages again.
   a. Find Salesforce CPQ and click **Configure**.
   b. In Additional Settings > External Configurator URL, update to `https://<YourLogikURL>/ui/configure`, and click **Save**.
   c. Check the box next to Third Party Configurator, and click **Save**.
10. Add your domain (https://<YourLogikURL>) to the 'Logik.io Admin Custom Settings' object in Salesforce.
    If needed, set a runtime client token to use Logik with the Salesforce Partner Community.
11. Click **Save**.
12. For CPQ usage: Navigate to "App Manager" and find Salesforce CPQ/CPQ/QuoteQuickly.
    This item can have different names depending on your org settings.

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**a.** Open the dropdown menu on the right and click `Edit`.

**b.** In Available Tabs, find “Configuration Line Items” and “Configuration Field Data Sets”, and add them to Selected Tabs.
If desired, adjust the order of Selected Tabs to make them more easily accessible.

**c.** Save.

13. Navigate to “Trusted URLs” and click **New Trusted URL**.
Give the new URL the following settings, and then click **Save**.
    - In the API Name section, give the URL a name, such as "ServiceNow CPQ." (It can be any name so long as you can reference it later.)
    - Add your domain to the URL section. (If you want to make sure this setting retain access after an SFDC refresh, enter `https://*logik.io` to ensure that any logik.io site is trusted.
    - Check `Active`.
    - Set the CSP Context to **All**.
    - In CSP Directives, check the **frame-src (iframe content)** and **img-src (images)** options.
14. In Object Manager, use the Quick Find box to search for the Product object.
Select the option whose API name is Product2.
    **a.** Navigate to Page Layouts and click **Page Layout Assignments**.
    **b.** Find the page layout assigned to system administrator or other profiles needing CPQ Admin access (as determined when setting up Logik Connected App above).
    **c.** Select the page layout assigned to the system administrator.
    **d.** Drag **View Logik.io Setup** and **Logik.io Enabled** to the desired section of the page layout (usually the top).
15. Navigate to Salesforce CPQ to confirm that the new tabs are visible.
16. In the Product tab, confirm that there is a new view called **Logik.io View**.
17. Test by creating or editing a product and checking **Logik.io Enabled** box, checking **Active Box**, and then saving and assigning it a Price Book entry.
    - On the new product’s detail page, follow the Click Here link under **View Logik.io Setup** to ensure access to CPQ Admin.
    - If you receive the error "Cannot get Configurable Product. Product <ProductId> is not available in cache," you may have skipped the refresh token user setup. Create the user and try again.
    - If you are able, grant CPQ a user with the email address of provisioning@logik.io and we can verify the setup once you have completed it.

**Trouble?**

- If you receive the error "Cannot get Configurable Product. Product <ID> is not available in cache" when you try to access a configurable product, you may have skipped step 2 to create a Refresh Token user name. Repeat step 2.
- If you receive an "OAuth Error" with the code OAUTH_APPROVAL_ERROR_GENERIC when you try to access your Logik URL, your user is blocked by recent changes Salesforce has made to connected apps. To resolve the problem, add the following text to your Salesforce My Domain URL, and then click **Allow**:

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- For the Logik Connected App:

```
/identity/app/AppInstallApprovalPage.apexp?app_id=0Ci5e000000
bn6b&app_org_id=00D5e000005AHE7
```

- For the Logik API User Connected App:

```
/identity/app/AppInstallApprovalPage.apexp?app_id=0Ci5e000000
L18c&app_org_id=00D5e000005AHE7
```

You are then able to follow the complete installation instructions.

### Assigning non-Admin user permissions for CPQ in Salesforce

You need to apply certain user permissions in Salesforce in order to use CPQ properly.

To use CPQ, users need access to certain objects and fields in Salesforce. These can be assigned using permission sets or by going to Profiles > Select Desired Profile > Object Settings. Users need read/edit access in the Field Permissions section to the following objects:

For Configuration Attribute:

- Id
- Name
- Target Field Product
- Row Order
- Column Order
- Position (edited)

For Product Feature:

- Id
- Name
- Option Selection Method Configured SKU
- Number
- Min Option Count
- Position (edited)

For Product2:

- Configuration Type
- Has Configuration Attribute Externally Configurable

For QuoteLine:

- Configuration Id
- Committed Configuration Id BomData
- Product
- Incomplete
- DynamicOptionId Quantity

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- ListPrice
- OptionLevel

For Product Option:

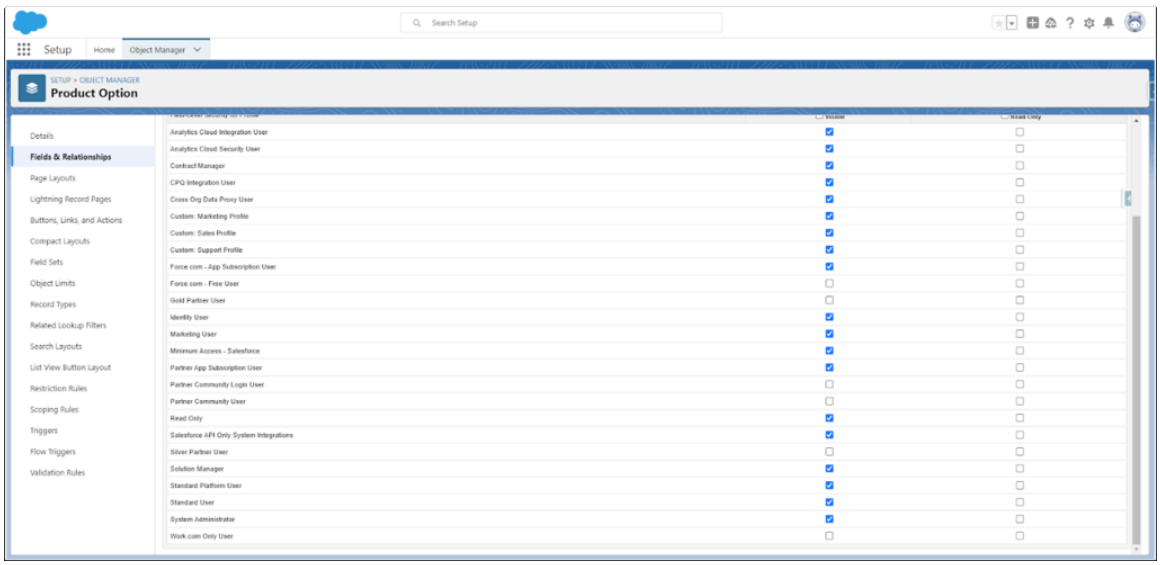
- Configuration Id
- Committed Configuration Id Bom Data

**Note:** Users will also need read/edit access in Object Permissions for the Product Option itself.

For issues specifically with reconfiguration, make sure that the user has the correct field level security for both the “Configuration Id” (CI) AND the “Committed Configuration Id” (CCI) fields from the object from which they are entering the configuration. We store the previous CI in the CCI in case the user cancels from their configuration and needs to revert their changes. These fields are part of the following objects:

- Configuration Line Item Quote Line
- Product Option

To check whether the user has the necessary permissions for these fields, go to Settings > Object Manager > [Object] > Fields & Relationships > [Committed Configuration ID/Configuration ID] > Set Field-Level Security and check whether the "Visible" checkbox is checked for Field-Level Security for Profile of the user.




The full list of objects and fields contained in the CPQ packages can be found by navigating to SFDC Setup and searching for "Installed Packages". "CPQ Managed Package" is used for parts of our SFDC Integration and custom objects, while CPQ Extension for Salesforce CPQ" contains the fields used in the standard user flow.

Selecting one of these packages and clicking "View Components" will show a list of SFDC objects and fields created by that package along with their name, type, and parent object (if any). Specifically, the fields in **ServiceNow CPQ Extension for Salesforce CPQ** are the fields a user will need to have access to in order to properly configure and reconfigure CPQ - enabled products in Salesforce CPQ.

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### Assigning access permissions to Salesforce objects and fields

Configure permissions for non-Admin users in Salesforce to enable configuration and reconfiguration with CPQ.

To configure using CPQ, users need access to certain objects and fields in Salesforce. You can assign permissions by using permission sets or by navigating to Profiles > Select Desired Profile > Object Settings. Make sure that the user also has read or edit access for the product option itself (in the Object Permissions section).

Users must have read or edit access to the following objects. You can assign these permissions in the Field Permissions section.

#### Configuration attribute

- Id
- Name
- Target field
- Product
- Row order
- Column order
- Position (edited)

#### Product feature

- Id
- Name
- Option selection method
- Configured SKU
- Number
- Min option count

#### Product2

- Configuration type
- Has configuration attribute
- Externally configurable

#### QuoteLine

- Configuration Id
- Committed configuration id
- BomData
- Product
- Incomplete
- DynamicOptionId
- Quantity
- ListPrice
- OptionLevel

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## Product option

- Configuration Id
- Committed configuration id
- BomData

## Field level security

When reconfiguring, make sure that the user has the correct field level security for both the configuration ID (CI) and the committed configuration ID (CCI) fields for the object from which they are entering the configuration. CPQ stores the previous CI in the CCI in case the user cancels their configuration and needs to revert the changes. These fields are part of the following objects:

- Configuration line item
- Quote line
- Product option

To check whether the user has the correct permissions for both of these fields, go to Settings > Object Manager >[Object] > Fields & Relationships > [CI or CII] > Set Field-Level Security and confirm that the field-level security for the user's profile is set to Visible.

The full list of objects and fields contained in the CPQ packages can be found by navigating to SFDC Setup and searching for "Installed Packages". "CPQ Managed Package" is used for parts of our SFDC Integration and custom objects, while CPQ Extension for Salesforce CPQ" contains the fields used in the standard user flow.

Selecting one of these packages and clicking **View Components** shows a list of SFDC objects and fields created by the package, along with their name, type, and parent object (if any). Specifically, the fields in "CPQ Extension for Salesforce CPQ" are the fields a user must have access to in order to properly configure and reconfigure CPQ enabled products in Salesforce CPQ.

### Nested bundling in Salesforce CPQ

Enable nested bundling in Salesforce CPQ to support complex product hierarchies and configurations.

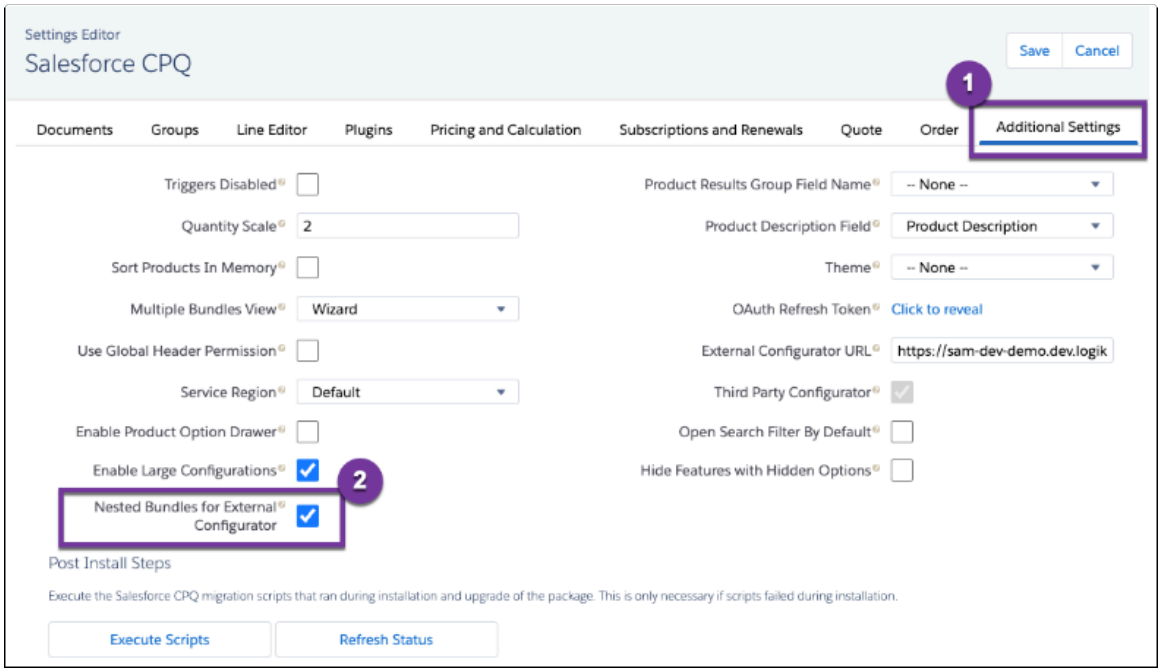
With some additional configuration, CPQ now supports sending back a nested bundle structure from CPQ to Salesforce CPQ. This allows you to take advantage of the BOM hierarchy built in CPQ and have it reflected in the Salesforce CPQ Quote Line Editor (QLE).

## Setup in Salesforce

To enable support for nested bundles, additional setup steps must be completed in the Salesforce CPQ Package settings. These steps require Salesforce CPQ package version 242 (Spring 2023) or later.

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1. Navigate to Setup > Installed Packages > Salesforce CPQ, and then click **Configure**.




2. On the Additional Settings tab, check the box to enable **Nested Bundles for External Configurator**.
3. Click **Save** to save the changes.

Products that may have other products below them in the BOM hierarchy should be marked as CPQ Enabled in the Product2 record in Salesforce. This is the same as setting up configurable products to work with CPQ. The products also need to have a pricebook entry in the pricebook used for the quote if they are going to be created as quote lines.

The following video explains setting up nested bundle structures in CPQ and Salesforce CPQ:

Nested Bundles Demo

## Setup in CPQ

After completing the Salesforce CPQ package setting steps, log a support case to enable nested bundling in your CPQ instance.

**Note:** Create a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

As with any larger change, the recommendation would be to start in a dev or test environment and validate that it is working as expected before enabling it in production.

In CPQ, the BOM hierarchy is defined through the parentProduct and uniqueIdentifier fields on items in the bill of materials. This hierarchy in the product list is reflected in the Salesforce CPQ quote line editor.

## Limitations

Nested bundles from external configurators are limited to four levels, including the topmost parent. This means you can nest products up to three levels deep inside a CPQ configuration.

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**Note:** Trying to add the same product to two dynamic nested bundles via an external configurator in Salesforce CPQ results in an "Attempt to de-reference a null object" error.

For example, suppose Product X is nested inside both the Nested Child 1 dynamic feature and the Nested Child 2 dynamic feature, when both are children of the Parent dynamic feature. This configuration results in the error.

### Granting user access in CPQ

This outline briefly examines how to add or limit users to CPQ.

User management takes different forms, depending upon the implementation scenario.

## CPQ is integrated with Salesforce CPQ

To add users, in Salesforce Admin, go to Setup, go to Manage Connected Apps, and then go to CPQ Connected App.

- In the OAuth Policies section, confirm that Permitted Users input is set to **Admin approved users are pre-authorized**.
- In the Profiles section, click **Manage Profiles**. Select the checkboxes that correspond to the profiles you want to enable, and save.
- To assign specific permission sets access to the CPQ Connected App, click **Manage Permission Sets**. Select the check boxes that correspond to the permission sets to enable, and save.
- New admin users must first access the CPQ Admin. Their admin access can then be toggled on by another admin user in the User Access section of Utilities. For more information, see User access

To limit prevent certain profiles from accessing CPQ Admin, in Salesforce Admin, go to Setup, go to Object Manager, Product, and then Fields & Relationships. Click the **View ServiceNow CPQ Setup (LGK__ViewConfigurationSetup__c)** field, and then click **Set Field-Level Security**.

- Deselect the check boxes for the profiles you do not wish to enter.
- Admin users can also toggle user access in the CPQ Admin, in the User Access section of Utilities. Any sales users can have their admin access toggled off by selecting their name and clicking **Toggle Admin Access** in the upper right. If users have only END_USER assigned to their user, they cannot access the CPQ Admin.

## CPQ is implemented headless (outside of a SFDC org)

When using a custom UI (such as React) that calls CPQ APIs, CPQ leverages your third-party IDP, such as Google or Salesforce. To add administration users, log a support case. Include the name of the IDP and domain your company is using together with the first names, last names, and email addresses of the new users.

**Note:** Create a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

## Additional permissions to check

Assigning non-Admin user permissions for CPQ in Salesforce

What to do if receiving and Insufficient Privileges or blank screen when launching a CPQ configuration

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**Related topics**

CPQ: User Access Control

### Set up user-based or profile-based rules with Salesforce implementation

You can set up a message rule to control access to a field based on the user's role or ID.

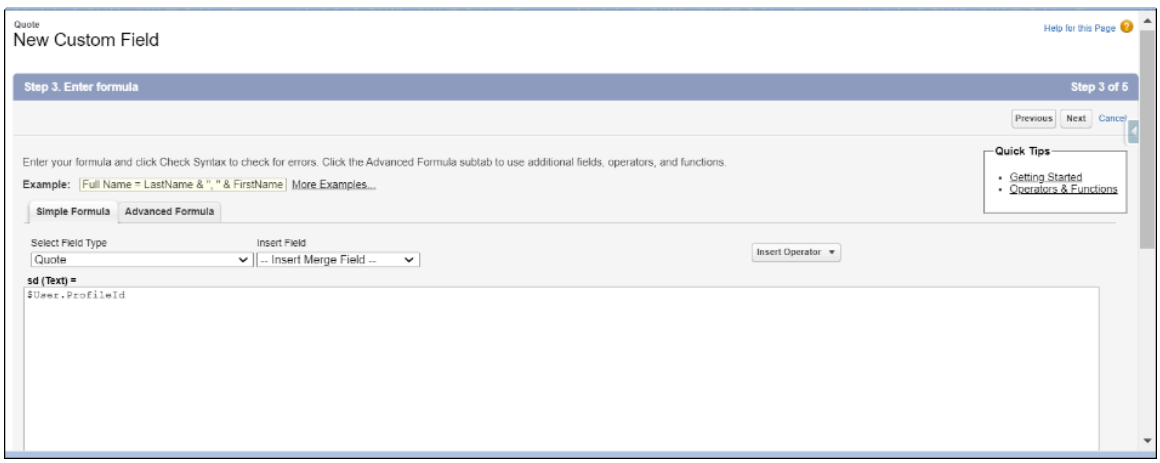
Sometimes, system administrators don't want to allow every sales representative to access a particular field. (For example, perhaps that field should be edited later on in the sales cycle by users with elevated permissions.) In this case, admins might want to lock down certain fields unless the user accessing the configuration is a Solution Manager or System Administrator. Or, maybe you'd want them locked down unless the config is accessed by Jane Doe, your company's VP of Sales. This article walks through how to set up such rules.

## Step 1

First, you'll want to create a new field on your Quote object in SFDC. This field should be of type "Formula," and the Formula Return Type should be "Text." Make sure to append the "LGK" suffix to the end of the field name, as this field is going to be twinned into CPQ.

## Step 2

When prompted to enter the formula, this is where you must make a design decision. If you want the rule to be dependent on profile type (for example, System Administrator), enter `$User.ProfileId` as the formula:




If you want the rule to fire on a specific user ID, replace `$User.ProfileId` with `$User.Id`.

## Step 3

Add the formula field to the ReferencedFields field data set as you normally would to perform Field twinning.

## Step 4

Write the rule in CPQ. For example, if you wanted a rule to fire on the System Admin profile, and the System Admin profile's ID is 00e8c000002qrLx, you might condition your rule like this:

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## Result

In the following screen shots, there are two system administrator users and two rules. One rule is a message rule that fires when a System Administrator accesses a quote, and the other rule fires when Jane Doe accesses the quote. This is the output when a System Admin who is not Jane accesses the configuration:




This is the output when Jane Doe (who is also a System Admin) accesses the configuration:




### Using CPQ and Salesforce CPQ with community users

When partner and community users cannot authenticate in Salesforce, they can use a Runtime Client Token to authenticate with CPQ. Follow these setup steps.

Community sites (also known as Digital Experience sites) require different user types than are normally used in Salesforce platform. Notably, these are for partner or community users that don't have the option to authenticate in Salesforce. Even if the community users have access to the CPQ Connected App, they need to use it through the Digital Experience site, so the login flow (which automatically redirects to Salesforce) won't work in this case.

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These are the steps to use a Runtime Client Token, along with custom Visualforce pages that are included as part of the CPQ Extension package, to authenticate with CPQ instead of the normal login flow.

## Audience

This article is for anyone that needs to use ServiceNow CPQ and Salesforce CPQ with a partner community or in a customer community environment. This page assumes that:

- Basic setup of CPQ and Salesforce is complete.

  **Note:** The Visualforce pages referenced in this page are available only in CPQ Extension Package version 2.3 or later. CPQ Extension Package Version 2.3 itself requires the Base Managed Package version 2.2 or later.

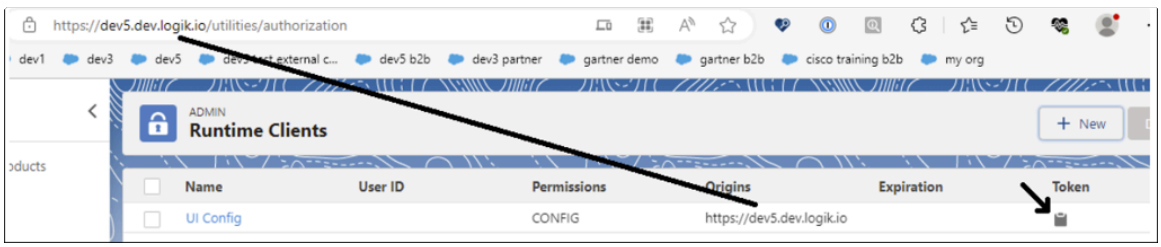
- A Digital Experience site that includes Salesforce CPQ quotes is available.
  - This guide is not necessary if only Salesforce profiles (such as System Administrator, Standard User, and so on) will be using this site instead of Partner or Community users.
  - If a Digital Experience site is not already available, note that at the time of this writing:
    - Salesforce CPQ is not compatible with LWR templates, and Quote objects are only available on Aura.
    - Partner/Customer users must have CPQ permission set licenses assigned to them.
    - Sharing Settings should be enabled to allow access to all the CPQ related objects, such as: Products, Opportunities, Price Books, Quotes, Product Option, Product Feature, and so on.

## CPQ setup

A runtime client is required to authenticate community users. If a runtime client is not already available, follow these steps to create one:

1. In CPQ Admin, go to Utilities > Runtime Clients and click **+ New**.
2. Provide a name, make sure at least Config is selected under "Permissions", and add the CPQ site's URL to Origins.

   The Origin must be exact: it must include https://, and should have one origin with the trailing "/" and one without. On https://dev5.dev.logik.io, there should be an Origin of https://dev5.dev.logik.io and https://dev5.dev.logik.io/.



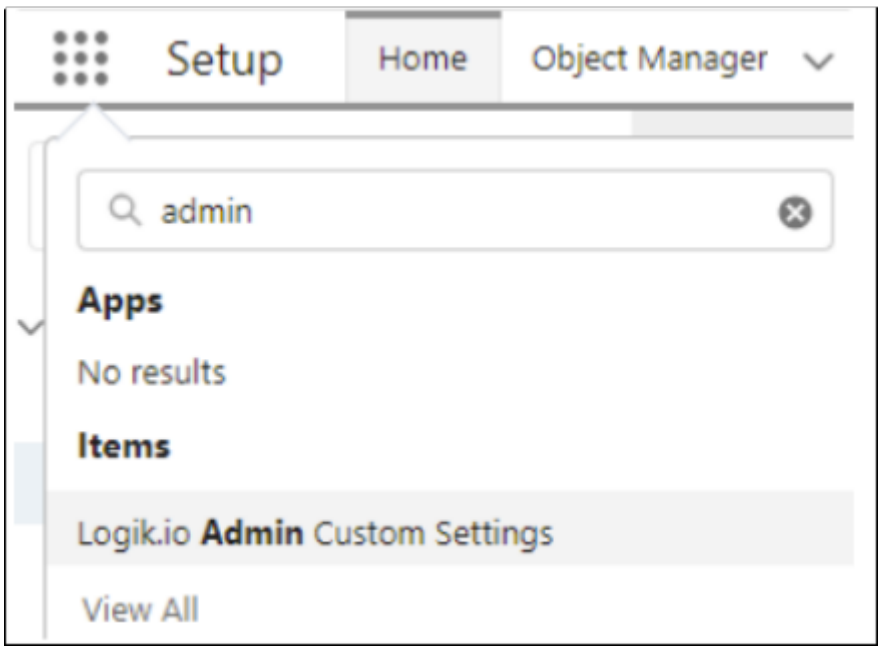

3. Save.
4. Copy the value using the clipboard icon under "Token" image.png.

   You will save this value to Salesforce Settings during Salesforce setup.

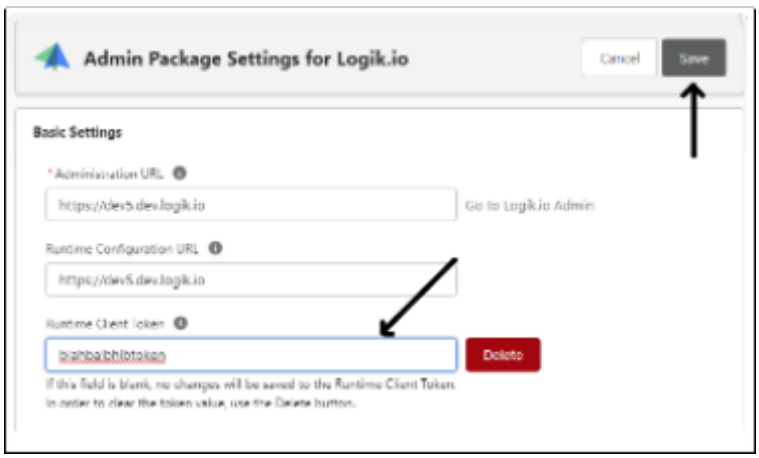
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## Salesforce setup

1. From the Salesforce App Launcher, search for and open the CPQ Admin Custom Settings page.

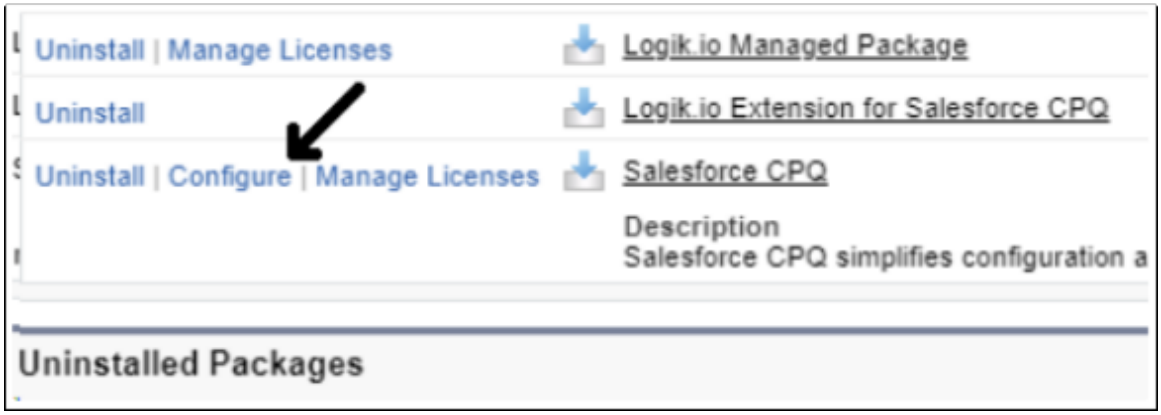



2. Next to the Runtime Client Token, click **Set**, paste the copied token from CPQ Admin, then Save.




3. Go to Security > Session Settings.
4. Under “Clickjack Protection”, select Enable clickjack protection for customer Visualforce pages with standard headers.
5. Under “Trusted Domains for Inline Frames”, add *.force.com. Set IFrameType to VisualforcePages.
6. From Setup home, go to Apps > Packaging > Installed Packages.
7. Next to the Salesforce CPQ package (not the CPQ extension for CPQ), click **Configure**.

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8. Under the Additional Settings tab, set the "External Configurator URL" to /apex/LGK__CpqConfiguration.

   This field may be set to a full URL in CPQ, such https://dev5.dev.logik.io/ui/configure. The new value /apex/LGK _CpqConfiguration is meant to be compatible with both Salesforce and Community users, so it can replace the CPQ URL.

### Free storage space in a Salesforce org

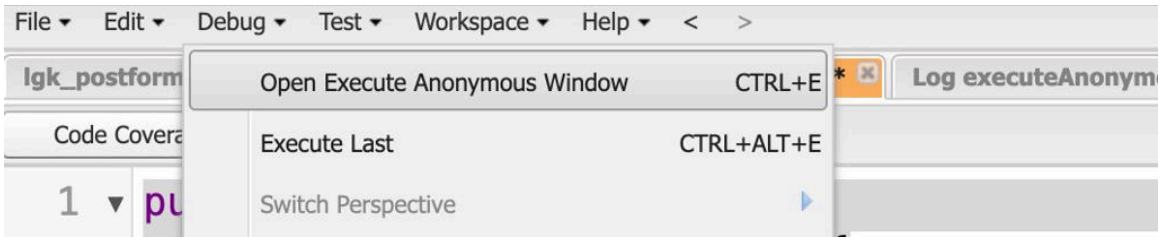
How to clear up space in a Salesforce test environment that is near its storage limit.

Occasionally, administrators work in a Salesforce test environment that is approaching its storage limit. If Salesforce complains that you are over your storage allocation, it's time to free up space.

One option is to remove records from the ConfigurationBOM table. For managed packages v1.0 or greater, remove Configuration Line Item and Configuration Field Data Sets instead.

**Warning:** These steps delete data. Follow them only in non-production environments.

1. Setup cog in SFDC → Developer Console → Debug [Open Execute Anonymous Window]




2. Paste and execute the following:

```
delete [SELECT id FROM LGK__ConfigurationBOM__c];
```

   For CPQ managed packages v1.0 or greater, run this delete instruction against the following objects:

   - LGK__ConfigurationLineItem__c
   - LGK__ConfigurationFieldData__c

   **Note:** Salesforce only allows DML statements such as these to run in batches of 10,000 or fewer records at a time. If the record has more than 10,000 records, modify the query in step 2 with the following, and run the modified query as many times as necessary.

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```
delete [SELECT id FROM LGK__ConfigurationBOM__c LIMIT 10000];
```

3. Use the following script to clear the Trash:

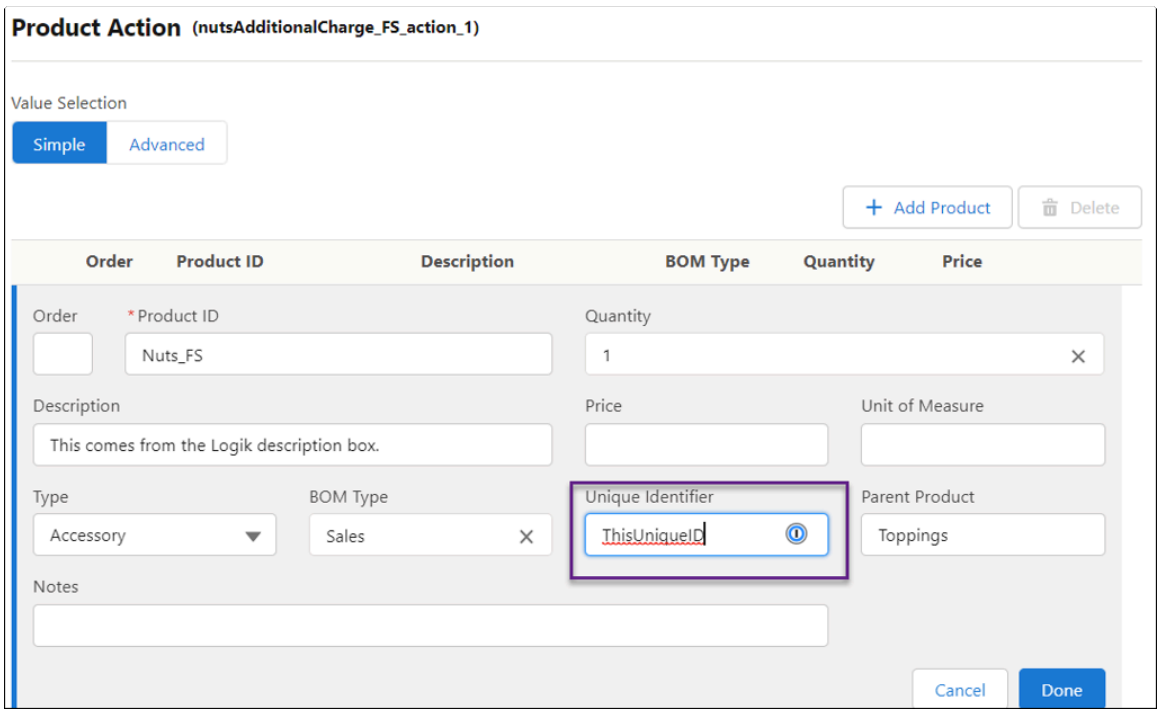
```
List<Id> delCLI = new List<Id>(new Map<Id,SObject>([SELECT Id
 FROM LGK__ConfigurationLineItem__c ORDER BY CreatedDate ASC
 LIMIT 10000]).keySet());
Database.delete(delCLI);
Database.emptyRecycleBin(delCLI);
List<Id> delCFD = new List<Id>(new Map<Id,SObject>([SELECT Id
 FROM LGK__ConfigurationFieldData__c ORDER BY CreatedDate ASC
 LIMIT 10000]).keySet());
Database.delete(delCFD);
Database.emptyRecycleBin(delCFD);
```

Alternately, in Salesforce Admin → 9 dot menu → search Recycle Bin, navigate to Recycle Bin → Empty Org Recycle Bin.

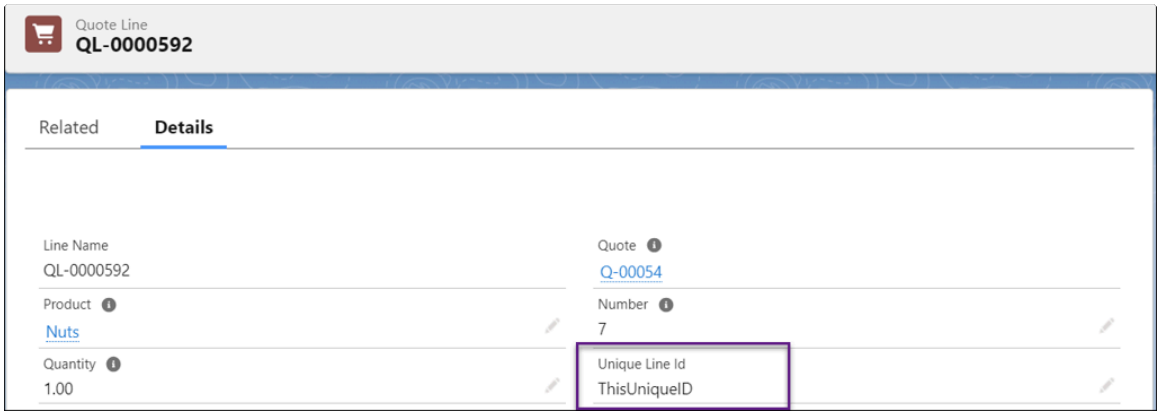
### Quote line unique IDs

You can assign unique IDs to quote lines in Salesforce.

CPQ passes the unique identifier of a product in CPQ back to the Unique Line ID field on the quote line in Salesforce, allowing users to assign unique IDs to specific quote lines in Salesforce. This allows users to reference the Unique Line ID field (LGK_UniqueId_c) after the quote line has been created if a unique identifier was included in the product action in CPQ.




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## Prerequisites

Have the CPQ Extension for CPQ package version 2.2 or later installed on the org.

Add the Unique Line ID field to the quote line page layout through Setup>Object Manager>Quote Line>Page Layouts.

Assign a unique identifier to a product in CPQ using a simple or advanced product action.

## How to use

For simple product actions, assign the product unique identifier in the product action. (See the screenshot above.)

For advanced product actions, assign the ProductList.uniqueIdentifer in your product action script. For example, if using a set, you can leverage the set index in order to assign a unique ID to each product added from the set:

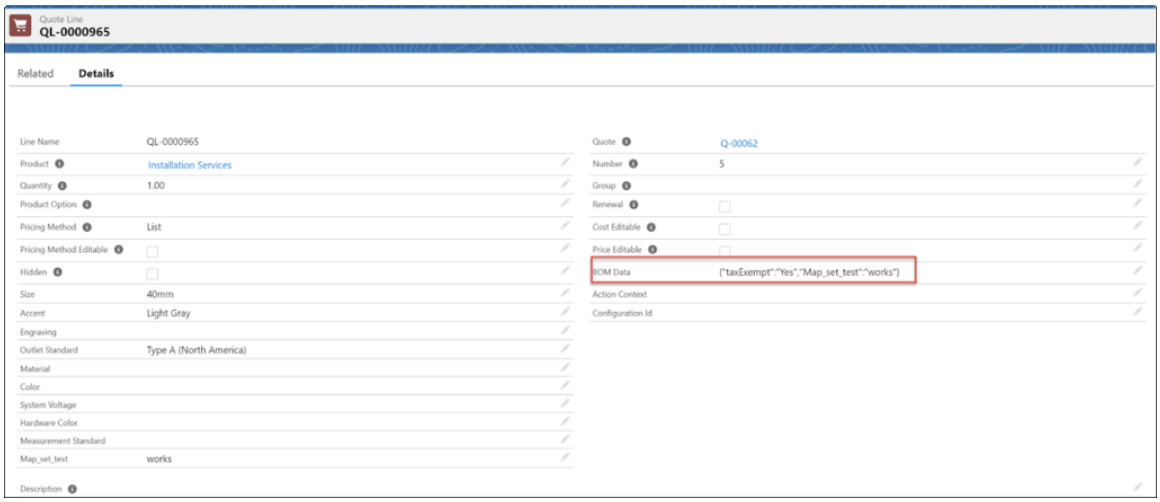
```
ProductList.id ="<yourProductCodeOrId>";
ProductList.uniqueIdentifier = cfg.<yourSetFieldForProduct> +
 set.<yourSetVariableName>.index;
return ProductList;
```

Use cases include ramping deals, such as subscription-based pricing that applies discounts based on the length of the contract. Although the same product, discounts are applied in year 2 or 3 with a unique ID for the same product name. Another use case would be multiple copies of the same product on quote, with different product extended data.

## Use case: Adding extended data to identical product code products in SFDC using flows

Out of the box, the Configuration Line Item to Quote Line flow created by CPQ is set up to write the extended information of each product to its respective quote line in the BOM Data field.

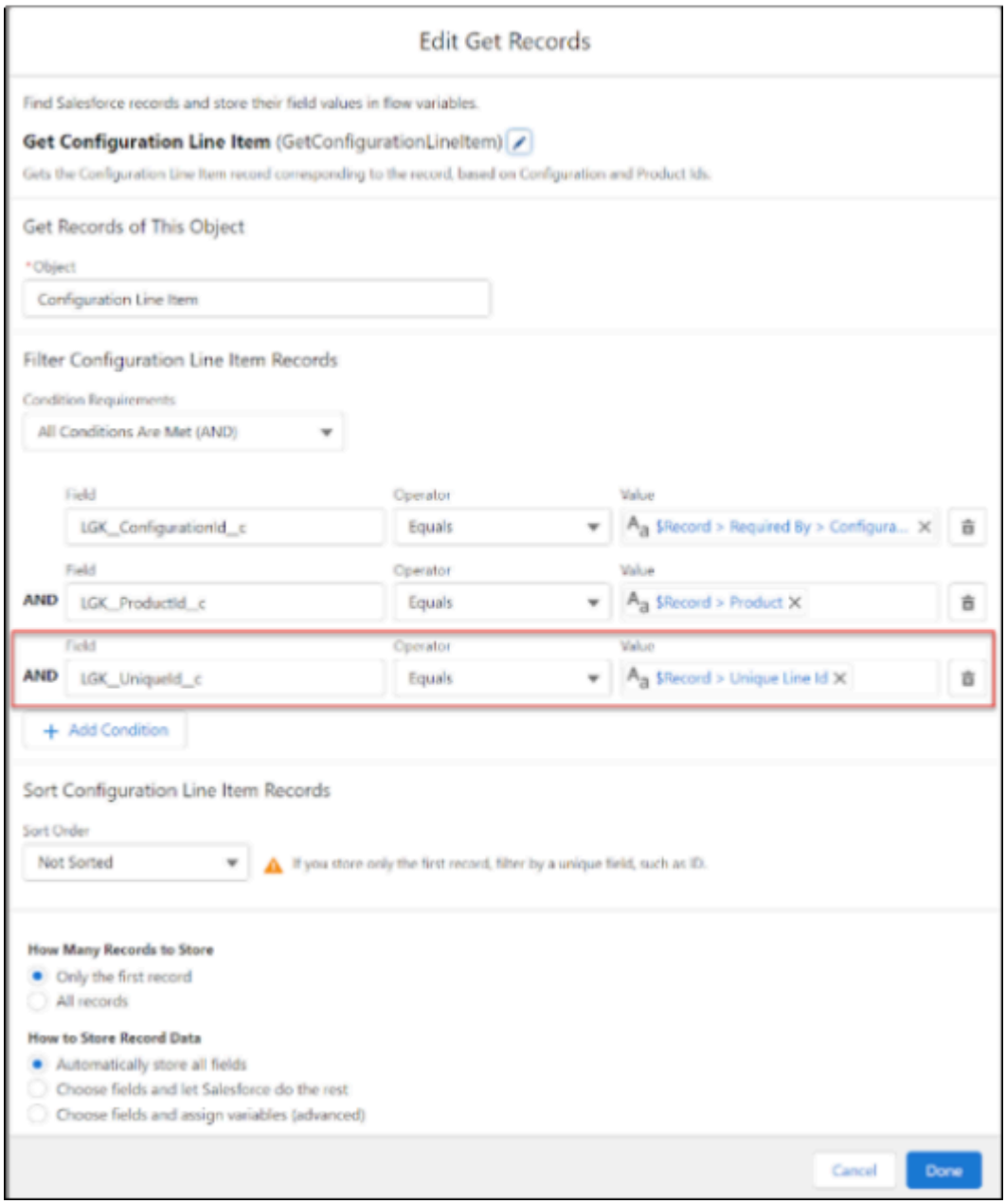
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As configured, the flow checks only whether the configuration ID and the product ID match and return only the first record. This causes the BOM data for the child lines to be identical if the product IDs are identical.

If you are using the unique ID attribute, you can add another condition to the "Get Records" section of the flow that checks for the Configuration Line Item field "LGK_UniqueId_c" being equal to the unique line ID object on the quote line:

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This correctly writes the BOM data to each unique child line with the correct extended information.

### Display a multi-level BOM in CPQ using simple and advanced product actions

Two ways to display a bill of materials that includes hierarchical relationships.

When a bill of materials (BOM) is represented with hierarchy (such as a parent-child relationship), some businesses prefer to display the sum of the prices of the children on the parent line.

For example, when you are building a laptop pricing configurator, you might want to display a parent product, with supplemental products listed as part of a grouped nested menu. Each of these components has an additional price and must be grouped together to arrive at the Total Price of the full BOM.

In the example screenshots below, the Laptop category can be expanded or folded to either display or hide the sub-products in the final price configuration of the laptop.

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Image 1: Multi-BOM of laptop hiding sub-products:

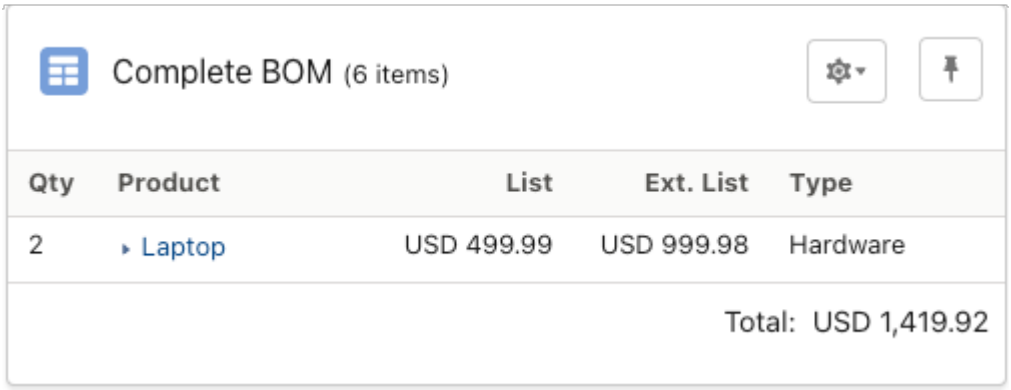
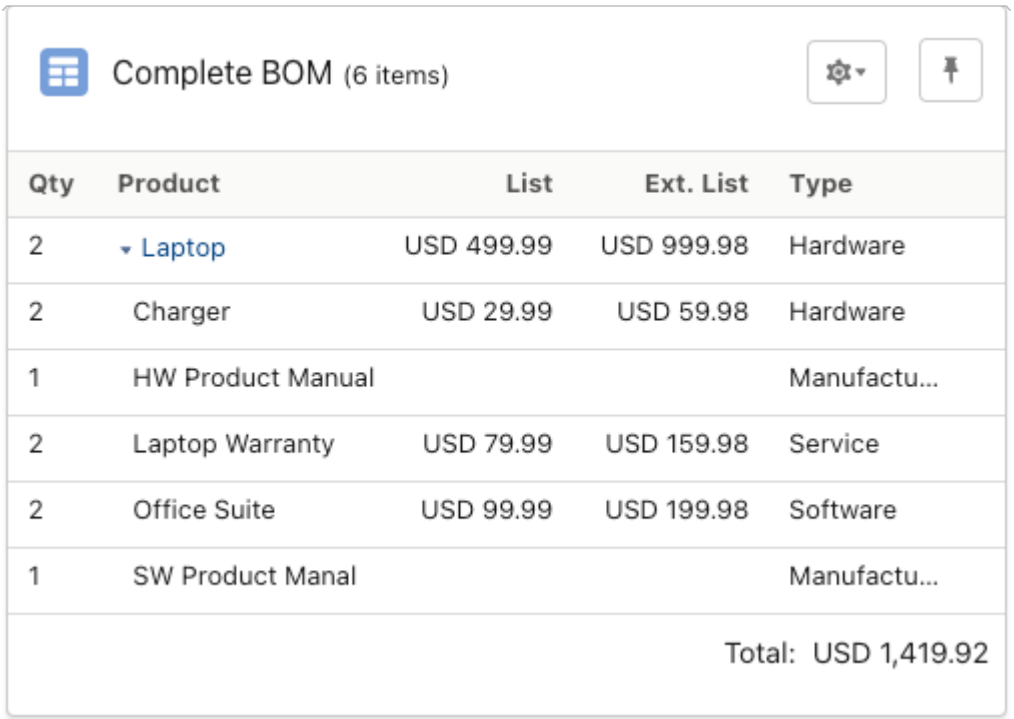


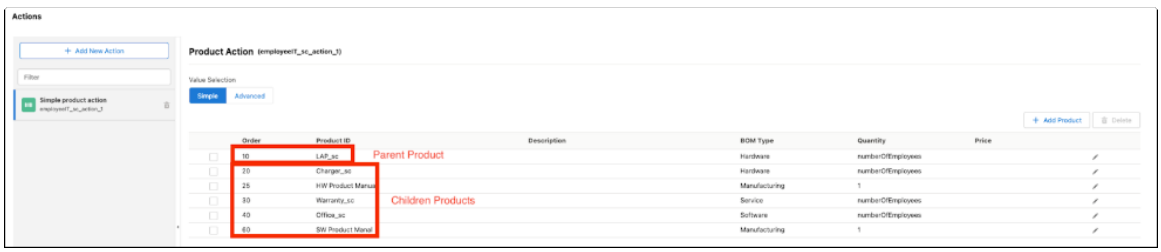

Image 2: Multi-BOM expanded to display all sub-products in the BOM:




## Configuration

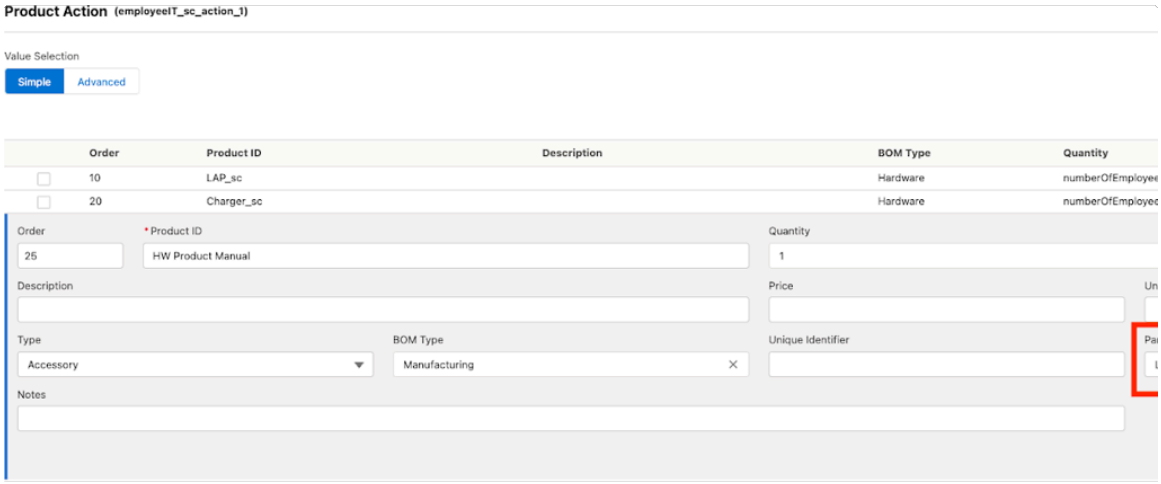
To begin building a bill of materials, navigate to the Rules section of your CPQ interface and build a new rule. In your rule, add a new product action. From here, add the products as you normally would when building a product action.

1. Add a simple product action rule.
2. Add your product list in order, as you would for a basic BOM.



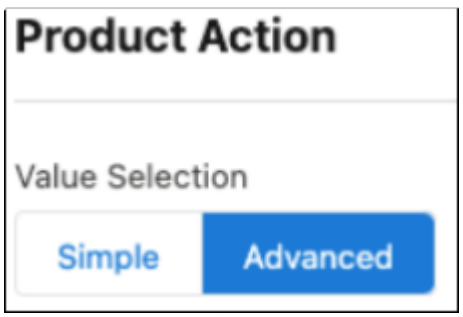

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3. Set a unique identifier for the chosen parent field. This provides the capability to assign a parent ID and create nested products. In the above example, we have set the Laptop product.
4. For each child product, add the unique identifier for the parent product to the Parent Product field. For example, `LAP_sc_parent` is the unique identifier for our Laptop parent product. We would add `LAP_sc_parent` to the Parent Product field for our child products.




## Advanced

When you have many products that require scripted configuration, you can use the CPQ Advanced Function layer to create a multi-BOM. For this, follow the same instructions as above until you begin building your list of products. If you have multiple SKUs and you need the hierarchy to be correct for each SKU on the BOM, use an Advanced Function to better scale your configuration.




1. Instead of choosing a simple product action, select the Advanced option and click **Create Advanced Function**.
2. In the Help bar, you can find a ProductList.parentProduct option on the right of the page. Click **Insert Example** to begin building your script. This lets you dynamically generate a unique identifier field for your parent products by leveraging the Set Index field.



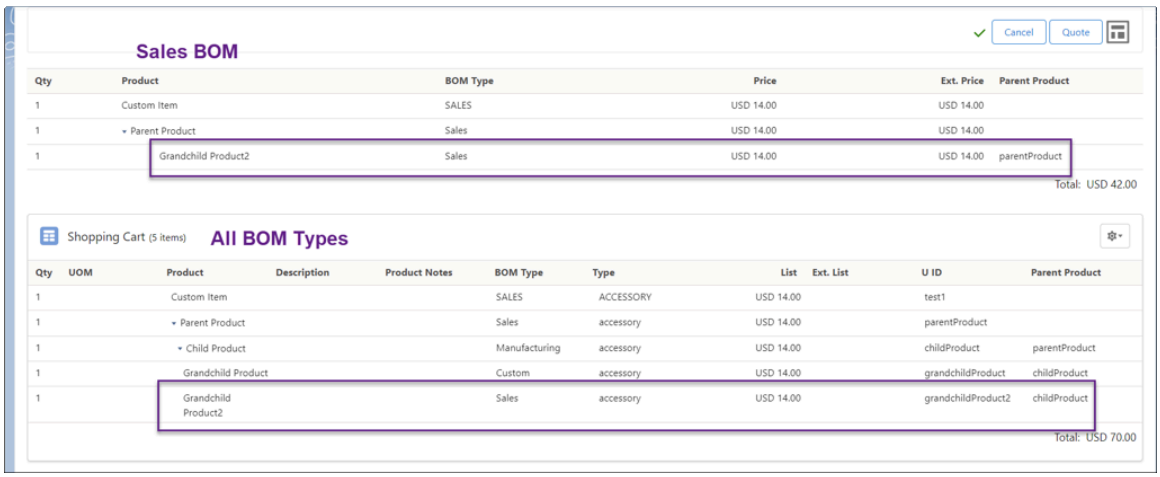

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### How parent/child relationships function when multiple BOMs are displayed

See how product relationships are displayed in a product list that includes more than one bill of materials.

If a parent or child product is not displayed in a BOM because it has a different BOM type than its parent or child product, an effectiveParent propertyis set to determine how to display the hierarchy.

Parent/child product relationships between products with different BOM types will appear in the product list similarly to the example below. Here, the parent of Grandchild Product2 is the child product. Child Product is a manufacturing item, while Grandchild Product2 is a sales item. Because Child Product is not shown in the sales BOM, Parent Product is shown as the parent (becoming the effective parent) of Grandchild Product2.




### Setting a custom target for a message rule action

You can set a layout element as the target of a message action.

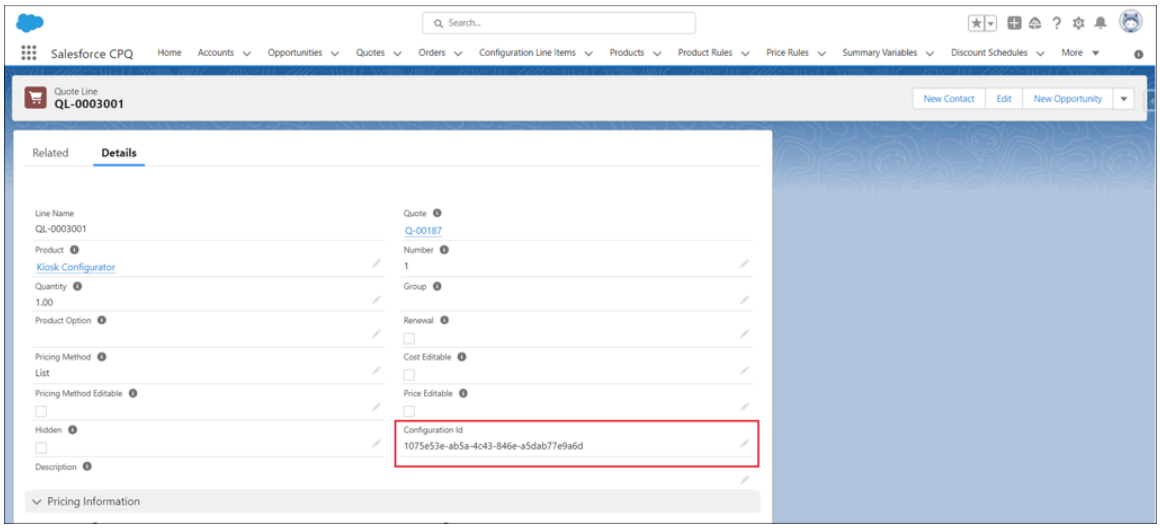
When you set a message action in a rule, you can enter the variable name of a layout element. The message will be displayed in that element.

### Configuration linking overview

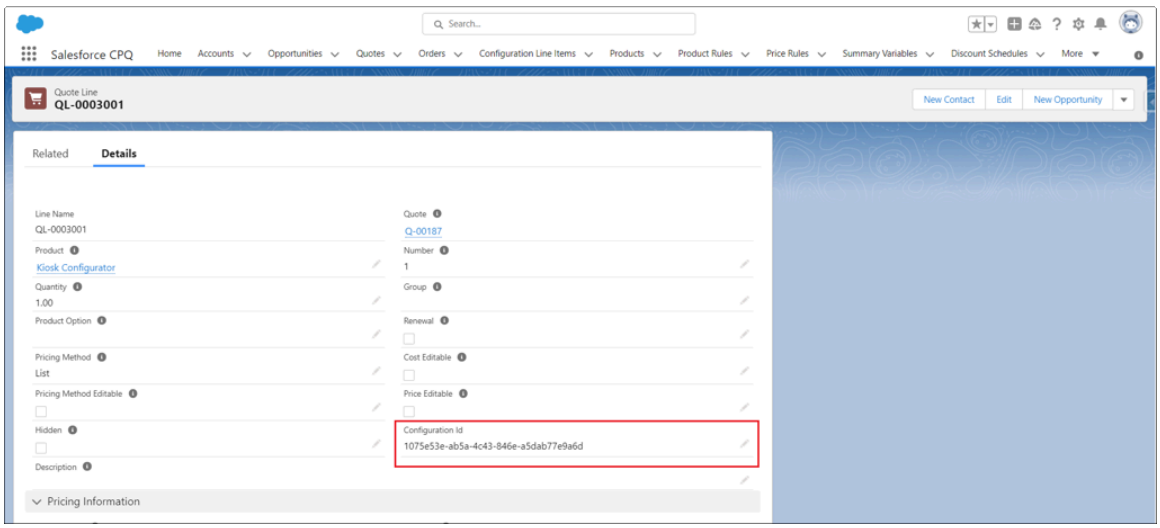
Learn how configuration IDs link Configuration Line Items and quote lines in Salesforce. When a configuration is saved, all related line items share the same configuration ID. The same ID is added to the parent quote line when the quote is saved, allowing admins to easily pull configuration details into quotes or related records.

Whenever a configuration session is saved, a collection of Configuration Line Item objects are created in SFDC that all share the same Configuration Id field.

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When you save the quote, the quote line for the parent level configurable product will have a similar Configuration Id field, which should be populated with the same value.




A Salesforce admin can leverage the fact that these values match to pull information from the Configuration Line Items to the quote (or its associated opportunity/account). For more information about pulling information to the quote line, see:

- Use case: Configuration line item to quote line flow (if your CPQ Extension for Salesforce CPQ Package is version 1.8 or later)
- Integrate configuration data with Quote Calculator (for CPQ Extension Package version 1.7 or earlier)

### Embedding the CPQ UI with the CPQ Web Component

By using the CPQ Web Component, you can embed the CPQ UI in a web page without using an iframe. Because the component's UI is compatible with themes, users can easily edit the look of the UI.

The CPQ Web Component allows a user to embed the CPQ UI directly to a web page without an iframe. The UI of the Web Component is compatible with themes to allow users to easily edit the look of the UI.

To use the Web Component, you must have:

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- A configurable product associated to a deployed blueprint
- A CPQ runtime token that includes the destination URL as the origin Website URL white-listed in the GCP properties

Contextual information on the page (such as a SKU in the page URL) is accessible to the Web Component with minimal customization. The Web Component also:

- Removes the need to use an iframe to embed CPQ UI, avoiding security restrictions and issues inherent to iframes
- Dispatches native HTML events that can be listened for anywhere on a page
- Reduces integration complexity; for example, its Web component orchestrates API calls for UI display and configuration
- Provides greater control over CPQ on your site with access to the HTML directly on the page, more seamlessly integrating with the parent page
- Is compatible with custom themes

## Embedding the CPQ Web Component

The Web Component can be added to any page where you can add HTML. The only required fields to initialize the Web Component are the URL, the runtime token, and the configurable product ID.

## Example

The following sample code includes comments to provide more details on how the Web Component works and provides examples for reference.

It includes minimal code that can be easily added to a container or embed components. A Product ID must be manually entered.

```
<script

 src="https://TENANT.SECTOR.logik.io/ui/wc-build/logik-wc.es.js"
  type="module"
  ></script>
  <logik-ui
  runtime-token="RUNTIME_TOKEN"
  tenant-api-url="TENANT.SECTOR.logik.io"
  product-id="PRODUCT_ID"
  >
  </logik-ui>
```

The following sample code represents a full-page example. It lets the user easily pass multiple parameters and read a product ID from the page.

```
<!DOCTYPE html>
<html lang="en">
  <head>
    <meta charset="UTF-8" />
    <title>Web Component Sandbox</title>
    <script
      type="module"

 src="https://
renderdraw02.demo01.logik.io/ui/wc-build/logik-wc.es.js"
```

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```
    ></script>
  </head>
  <body>
    <logik-ui></logik-ui>

    <script>
      // Type Definitions
      /**
       * @typedef {Object} BomProduct
       * @property {string} id - Product identifier
       * @property {number} price - Unit price of the product
       * @property {number} quantity - Quantity of the product
       * @property {('SALES'|'MANUFACTURING')} bomType - Type of
BOM
       * @property {string} type - Product type (e.g.,
'accessory')
       * @property {number} rollUpPrice - Rolled up price
including child products
       * @property {number} extPrice - Extended price (price *
quantity)
       * @property {number} level - Hierarchy level in the BOM
structure
       * @property {{ selected: boolean, disabled: boolean }}
selection - Selection state
       * @property {number} extList - Extended list price
       * @property {number} list - List price
       * @property {string} displayName - Display name of the
product
       * @property {string|null} parentProduct - ID of parent
product if nested
       */

      /**
       * @typedef {Object} BomData
       * @property {{
       *   products: Array<BomProduct>,
       *   total: number,
       *   totalPages: number,
       *   totalItems: number,
       *   errorMessage: string|null,
       *   incompletePricing: boolean
       * }} newProducts - Updated products in the BOM
       */

      /**
       * @typedef {Object} LogikConfigurationData
       * @property {string} configurationId - The unique
identifier for the configuration
       * @property {string} productId - The product identifier
       * @property {Object} fields - The current state of all
fields in the configuration
       * @property {BomData} [bomData] - Bill of Materials data
(only present in BOM events)
       * @property {Object} [quoteData] - Quote data (only
present in Quote events)
       */
```

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```
      /**
       * @typedef {Object} QuoteData
       * @property {Object} quote - Quote-specific data
       * @property {string} quote.SBQQ__PricebookId__c -
 Pricebook identifier
       * @property {string} quote.LGK__QueriedEditAccess__c -
 Edit access status
       * @property {Object} product - Configured product data
       * @property {string} product.configuredProductId - ID of
 the configured product
       * @property {Object} product.configurationAttributes -
 Configuration attributes
       * @property {string}
 product.configurationAttributes.LGK__Logik_Id__c - Logik
 configuration ID
       * @property {Object}
 product.configurationAttributes.LGK__Configuration_Data__c -
 Configuration data
       * @property {Array}
 product.configurationAttributes.LGK__Configuration_Data__c.it
ems - Configuration items
       * @property {Object} product.optionConfiguration - Option
 configuration data
       * @property {Array} product.optionConfiguration.Dynamic -
 Dynamic option configurations
       */

      // Configuration
      const logikUrl = 'https://renderdraw02.demo01.logik.io';
      const runtimeToken = 'YIFFIOdluM7ULhibRGR2GB_3F2npxSn_Zw';
      const productId = 'O1t8cOOOOORzlKoAAJ';

      const fields = [
        { variableName: 'exampleBooleanField', value: true },
        {
          variableName: 'exampleArrayField',
          value: ['alpha', 'delta', 'beta'],
        },
        { variableName: 'exampleStringField', value: 'left' },
        { variableName: 'exampleNumberField', value: 21 },
      ];

      /**
       * Initializes the Logik UI web component with the
 specified configuration parameters.
       * @param {string} productId - The unique identifier for
 the product. This is a configurable product id in the logik
 Admin
       * @param {string} runtimeToken - The authentication token
 for runtime access. This can be created in the logik Admin
 under Runtime Clients. The token must have include an origin
 matching the url of the page that is hosting the web component.
       * @param {string} tenantApiUrl - This
 should be set to the url of your logik tenant. eg
 https://example.demo01.logik.io
       * @param {string} [assetURL] - Optional URL for asset
 resources. If provided, sets the asset-url attribute. Defaults
```

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```
to the provided tenantApiUrl. You will most likely not need to
set this.
      * @param {Array<{
      *   variableName: string,
      *   value: string | number | boolean | Array<string>
      * }>} [fields] - A list of field values to set in the
initial state of the configuration.
      * @returns {void}
      */
     function initLogikUI(productId, runtimeToken,
tenantApiUrl, assetURL, fields) {
       const logikuiEl = document.querySelector('logik-ui');
       logikuiEl.setAttribute('product-id', productId);
       logikuiEl.setAttribute('runtime-token', runtimeToken);
       logikuiEl.setAttribute('tenant-api-url', tenantApiUrl);
       if (assetURL) {
         logikuiEl.setAttribute('asset-url', assetURL);
       }
       if (fields) {
         logikuiEl.setAttribute('fields',
JSON.stringify(fields));
       }
     }

     // Initialize the component
     initLogikUI(productId, runtimeToken, logikUrl, false,
fields);

     // Event Listeners
     /**
      * Event fired when the user cancels the configuration.
After this event is received,
      * the configuration will be terminated and the logik-ui
component should be unmounted.
      * @event logik-ui:cancel
      * @type {CustomEvent}
      * @property {Object} detail - An empty object indicating
the configuration was cancelled
      */
     window.addEventListener('logik-ui:cancel', function
(event) {
       console.log('Cancel event received', event);
     });

     /**
      * Event fired when the user generates a quote. After this
event is received,
      * the configuration will be terminated and the logik-ui
component should be unmounted.
      * @event logik-ui:quote
      * @type {CustomEvent}
      * @property {Object} detail - The event details
      * @property {QuoteData} detail.data - The quote data
      */
     window.addEventListener('logik-ui:quote', function (event)
{
       console.log('Quote event received', event);
```

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```
      });

      /**
       * Event fired when the BOM changes during configuration
       * @event logik-ui:bom
       * @type {CustomEvent}
       * @property {Object} detail - The event details
       * @property {LogikConfigurationData} detail.data - The
 configuration data with BOM information
       */
      window.addEventListener('logik-ui:bom', function (event) {
        console.log('BOM event received', event);
      });
    </script>
  </body>
</html>
```

### Configure help popups for layouts

Implement buyside help popups in CPQ.

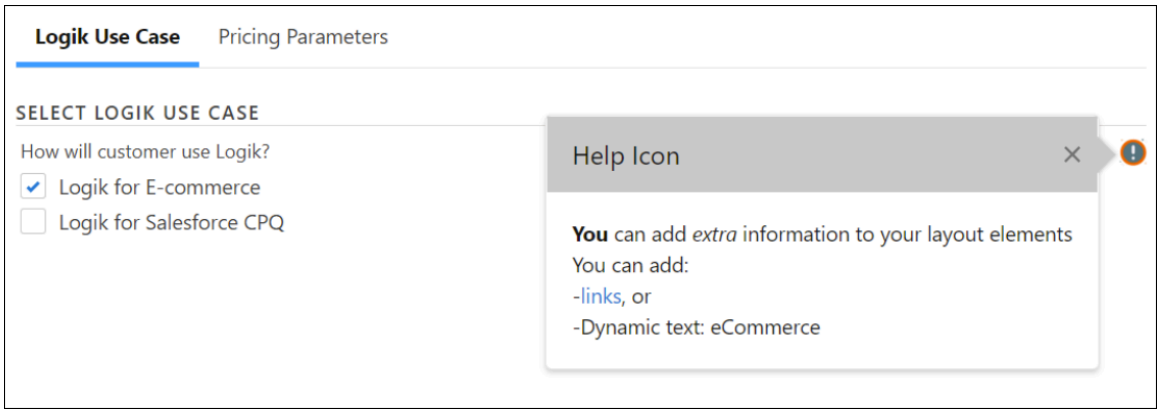
Help popups give the user more information about a field in a layout. They resemble the *tooltip* message display type, but differ in the following ways:

- Tool tips appear only when the condition of a message rule is met, whereas help popups are always present on the layout
- Tool tips display only plain text, whereas help popups can include hyperlinks, lists, italics, bold text, newlines, images, and dynamic text
- Tool tips appear on hover, whereas help popup icons must be clicked to display messages

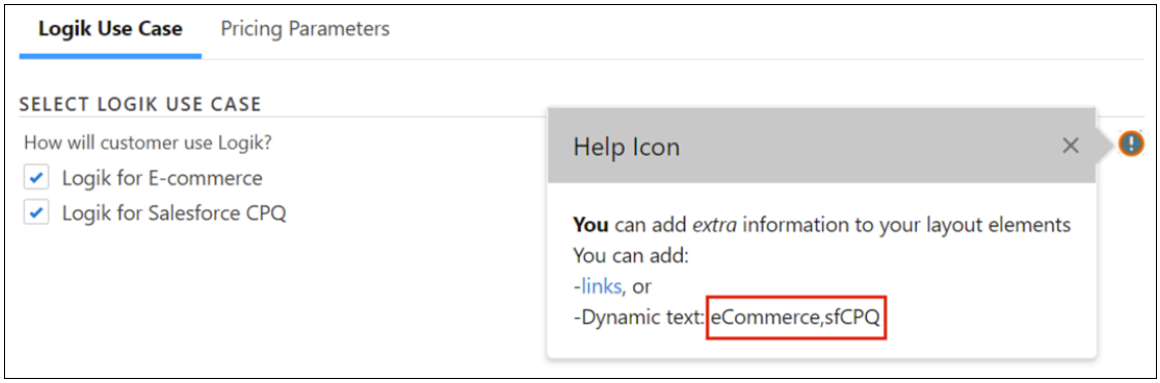
**Note:** To learn how to display a message that appears as the result of a message rule, see Change how messages are displayed to the end user.

## Popup appearance

The image below shows a popup message that appears when the user clicks its help icon. To illustrate dynamic text in a help popup, the second image shows additional text that appears as the result of a selected picklist option.




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To implement a message popup, add a column header called "help" in cell K1 of your CSV layout.

For a tier, columnset, or field, the format for a help popup is as follows:

```
{"content":"<help body>","heading":"<help
 heading>","trigger":{"type":"icon","url":"<image.url>”,“label”:
 “<Label>”}}
```

To assign the popup a button instead of an icon, use "type":"button". The button resembles the following: Help

If you don't specify an image URL, a question mark will appear: ?

If you don't specify a label, the default value is "Help."

## Formatting the popup contents

The following table shows how to control the formatting of the content of a message popup.

### Message popup formatting options

| Formatting option | Syntax | Output | Notes |
|---|---|---|---|
| Bold | Bold text | [text display in bold] | Can use underscores instead of asterisks |
| Italic | `Italic text` | [text displays in italics] | Can use underscore instead of asterisk |
| Unordered list | `Item\r- Item\r-Item` | • Item<br>• Item<br>• Item | |
| Ordered list | `1.Item\r2. Item\r3. Item` | **1.** Item<br>**2.** Item<br>**3.** Item | |
| Newline | `first line\nsecond line` | first line<br>second line | |

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**Message popup formatting options (continued)**

| Formatting option | Syntax | Output | Notes |
|---|---|---|---|
| Link | `[link display text](https://www.google.com)` | [link display text appears as a clickable link] | Javascript will be sanitized |
| Image (GIF) | `![alt text](image url \"title text\")` | | Quotes around the title text must be escaped |
| Dynamic text | `{{ fieldVariableName }}` | | Outputs the value of the selected field in the text |

# Configuring Order Management

Learn how to configure the features and components that you need for customer and service order processing, depending on whether you are a provider or an enterprise customer.

### Related topics

Order management

## Install Order Management

You can install the Order Management application (sn_ind_tmt_orm) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

### Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Order Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

### About this task

The following items are installed with Order Management:

- Roles
- Tables

For more information, see Components installed with Order Management.

### Procedure

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

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

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- Order Management (sn_ind_tmt_orm): Select this app to install the Order Management application.
- Order Management for Telecommunications, Media, and Technology (sn_om_tmt): Select this app if you have a Telecommunications Service Management subscription. This installs the Order Management application, and the Telecommunication Open APIs (sn_tmf_api) for the TM Forum API REST specifications: Product Catalog, Service Catalog, Product Order, Service Order, Product Inventory, and Technical Service Qualification.

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

**Related topics**

Order management

Using Order Management

## Configure order enrichment flows using Decision Tables

Associate enrichment subflows with the product or service specifications by using the Order Enrichment Flow Policy in Decision Tables.

### Before you begin

Role required: process admin

### About this task

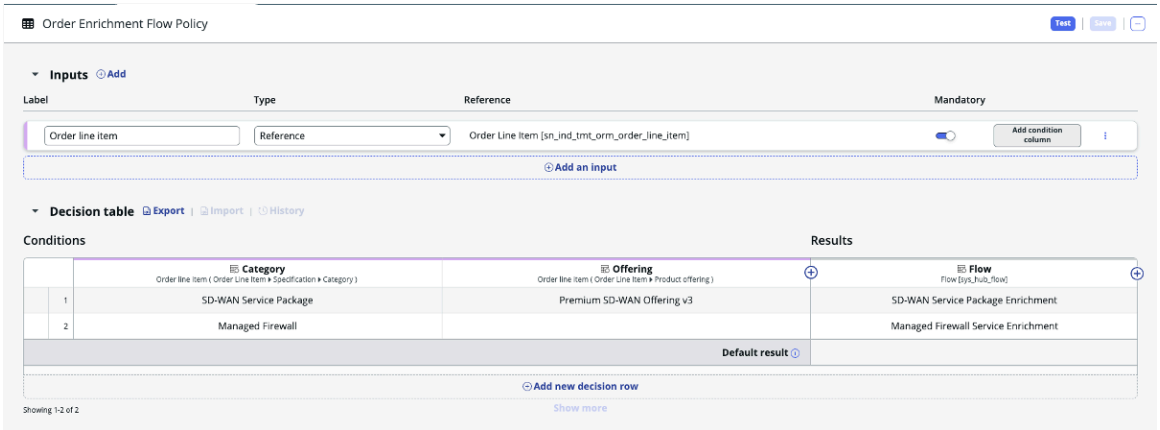
Add rows to the Order Enrichment Flow Policy decision table to specify which products should go through enrichment. Add the product enrichment subflow to a new row in this table with the appropriate conditions. Conditions can be a combination of product specification and offering information.

### Procedure

1. Navigate to **All** > **Decision Builder**.
2. Select the **Order Enrichment Flow Policy** decision table.
3. In the **Specification** column of the conditions section, select the order line item to set a condition.
4. Select the product offering in the **Offering** column.

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**Decision table for order enrichment process**




5. Select **Save**.

### Result

A list of subflows appear in the results section. These sub flows create the enrichment tasks for an order line item during the enrichment process. For more information, see Decision Builder user interface.

### Related topics

Order management

Using Order Management

## Configure the customer order task policy using Decision Tables

Define conditions for automatic generation of order header tasks and top order line item tasks by adding rows to the Customer Order Task Policy in Decision Tables.

### Before you begin

Role required: admin or decision_table_admin

### About this task

The Customer Order Task Policy decision table determines which order header tasks and top order line item tasks are automatically generated, and at which stage of the order life cycle they are triggered. Each row in the table maps a set of conditions to a subflow that creates the task.

Order header task conditions reference order-level parameters, such as account or order action. Top order line item task conditions reference parameters at the order line item level, such as product offering or order line item action.

For header tasks, specify the stage at which the task is generated:

- after order submission
- after order approval
- after order fulfillment

### Procedure

1. Navigate to **All** > **Decision Builder**.
2. Select the **Customer Order Task Policy** decision table.
3. Select **Add new decision row** to add a condition row.

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4. In the conditions section, set the values for the fields that determine when the task is generated.

**Customer Order Task Policy condition fields**

| Field | Description |
|---|---|
| Triggered state | Select the order life cycle stage at which the task is generated: **Submitted**, **Post approval**, or **Post fulfillment**. |
| Order action | Order action that triggers task generation, such as **Add**. |
| Product offering | Product offering associated with the order line item. Applies to top order line item tasks only. |
| Account | Customer account associated with the order. Applies to order header tasks. |

5. In the results section, select the subflow to run when the conditions are met.
The subflow requires the **Create Order Header Task** flow action for order header tasks, or the **Create Top OLI Task** flow action for top order line item tasks.
6. Select **Save**.

### Result
The policy row is saved. When an order matches the configured conditions at the specified triggered state, the associated subflow runs and creates the order header task or top order line item task.

### What to do next
To control whether open order header tasks block order state transitions, set **sn_ind_tmt_orm.block_order_appro_complet_until_tasks_complete** system in **All** > **System Properties**.

#### Related topics
Order management

Using Order Management

## Configure product order fulfillment policy using Decision Tables

Associate fulfillment subflows with the product specifications by using the Product Order Fulfillment Policy in Decision Tables for move order.

### Before you begin
Role required: admin

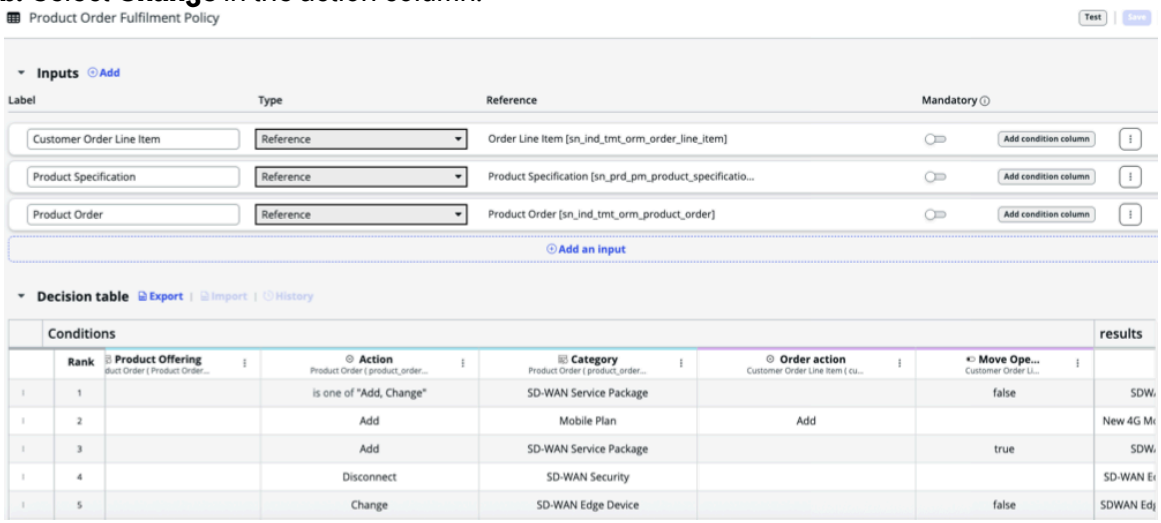
### About this task
Add rows to the Product Order Fulfillment Policy decision table to specify which products should go through fulfillment. Add the product fulfillment subflow to a new row in this table with the appropriate conditions. Conditions can be a combination of action, category, and move operation.

### Procedure
1. Navigate to **All** > **Decision Builder**.
2. Select the **Product Order Fulfillment Policy** decision table.
3. To trigger the subflow configured for move, do the following:

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a. Select **true** in the Move Operation column.

b. Select **Change** in the action column.




4. To trigger separate subflow for change and not move, do the following:

   a. Select **Change** in action column.

   b. Select **false** in the move operation column.

5. Select **Save**.

### Result

A list of subflows appear in the results section. These sub flows create the fulfillment tasks for an order line item during the fulfillment process. For more information, see Decision Builder user interface.

### Related topics

Order management

Using Order Management

## Configure service order fulfillment policy using Decision Tables

Associate fulfillment subflows with the service specifications by using the Service Order Fulfillment Policy in Decision Tables for move order.

### Before you begin

Role required: admin

### About this task

Add rows to the Service Order Fulfillment Policy decision table to specify which products should go through fulfillment. Add the service fulfillment subflow to a new row in this table with the appropriate conditions. Conditions can be a combination of action, category, and move operation.

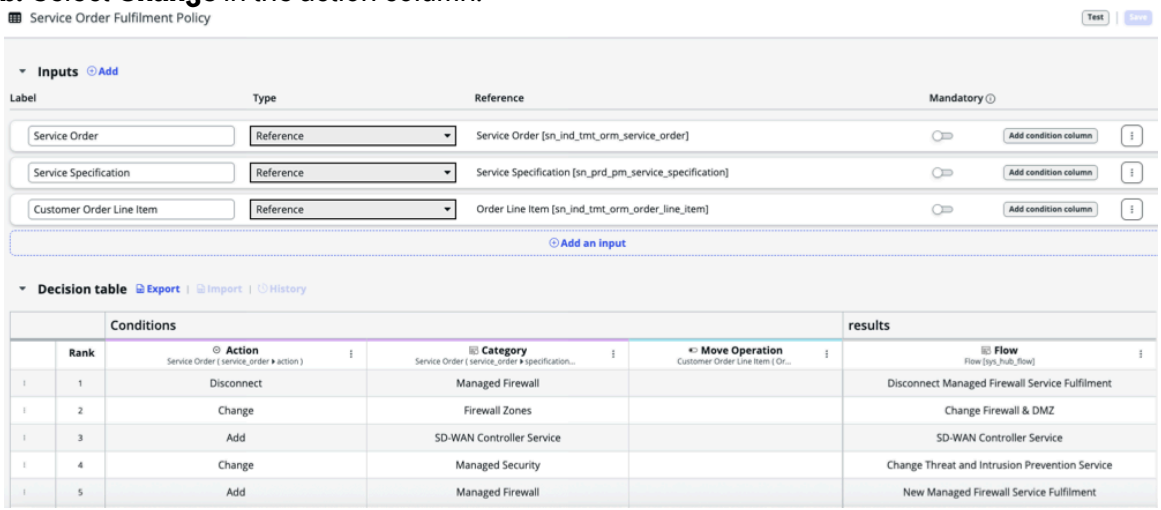
### Procedure

1. Navigate to **All** > **Decision Builder**.
2. Select the **Service Order Fulfillment Policy** decision table.
3. To trigger the subflow configured for move, do the following:

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a. Select **true** in the Move Operation column.

b. Select **Change** in the action column.




4. To trigger the separate subflow for change, do the following:

   a. Select **Change** in action column.

   b. Select **false** in the move operation column.

5. Select **Save**.

### Result

A list of subflows appear in the results section. These sub flows create the fulfillment tasks for an order line item during the fulfillment process. For more information, see Decision Builder user interface.

### Related topics

Order management

Using Order Management

## Configure resource order fulfillment policy using Decision Tables

Associate fulfillment subflows with the resource specifications by using the Resource Order Fulfillment Policy in Decision Tables for move order.

### Before you begin

Role required: admin

### About this task

Add rows to the Resource Order Fulfillment Policy decision table to specify which products should go through fulfillment. Add the resource fulfillment subflow to a new row in this table with the appropriate conditions. Conditions can be a combination of action, category, and move operation.

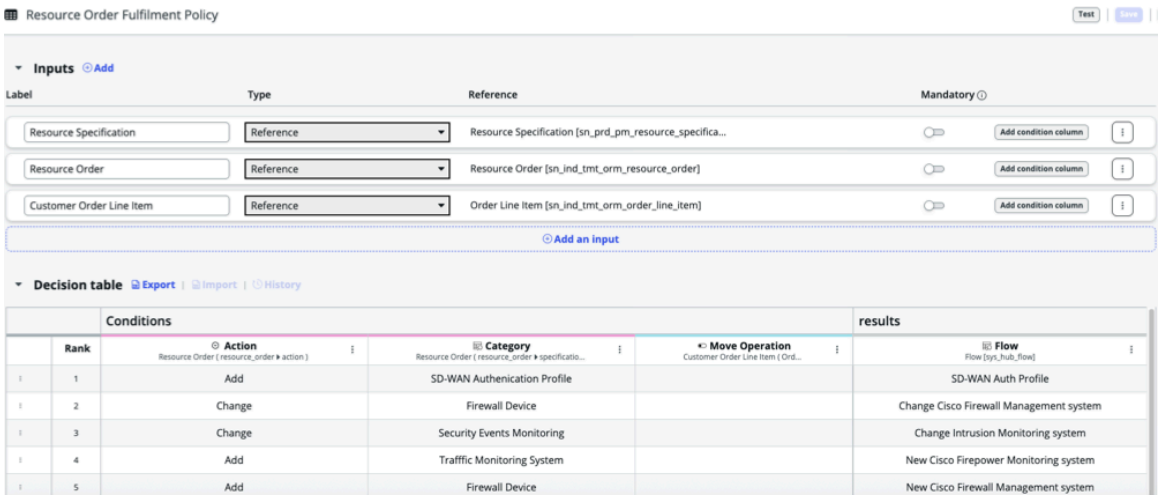
### Procedure

1. Navigate to **All** > **Decision Builder**.
2. Select the **Resource Order Fulfillment Policy** decision table.
3. To trigger the subflow configured for move, do the following:

   a. Select **true** in the Move Operation column.

   b. Select **Change** in the action column.

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4. To trigger the separate subflow for change, do the following:
   a. Select **Change** in action column.
   b. Select **false** in the move operation column.
5. Select **Save**.

### Result

A list of subflows appear in the results section. These sub flows create the fulfillment tasks for an order line item during the fulfillment process. For more information, see Decision Builder user interface.

### Related topics

Order management

Using Order Management

## Configure order fulfillment

Order fulfillment is the process for fulfilling customer orders by using Workflow Studio.

Order fulfillment, also referred as order orchestration, defines how to coordinate the fulfillment of orders.

You can define the order fulfillment processes that you require and then configure them by performing the tasks in the following table.

| Task | Description |
|---|---|
| Configure subflows for order fulfillment | Subflows define the task flow for fulfillment agents to fulfill customer orders. You can copy a subflow from the base system and change your business needs. For more information on configuring subflows, see Building Subflows. |
| Configure decision tables for order fulfillment | Decision tables define the conditions for triggering the order fulfillment subflow. The Order Management for Telecommunications, Media, and Technology application uses the Order fulfillment Policy decision table. For more information on configuring decision tables, see Decision tables. |

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| Task | Description |
| --- | --- |
| Configure order assignment rules to route tasks to agents, based on their skill sets | For more information on assignment rules, see Create an assignment rule. |

**Related topics**

- Order management
- Using Order Management

### Flow actions for fulfillment subflow definition

If you define your own fulfillment subflows in Workflow Studio, you can use the standard flow actions that are available in the ServiceNow AI Platform. Each action deals with different aspects of the fulfillment or inventory maintenance that provides some consistency in retrieving and updating data.

The fulfillment flows in the demo data that was shipped with the ServiceNow AI Platform use the flow actions in the following table.

| Action name | Description |
| --- | --- |
| Create Install Base Item and Installed Product | Flow action to create and manage the installed case items in the order fulfillment subflow.<br><br>The flow action takes the customer order line, configuration item (CI), and sold product as input, and creates the install base item and installed product. |
| Update Configuration Item | Flow action that includes a prescriptive way to update the configuration items order fulfillment subflow.<br><br>The flow action takes the sold product, product model ID, and comments as input, and updates the corresponding configuration item based on the install base Item. |
| Get Child Sold Product | Flow action that includes a prescriptive way to retrieve the sold products that are relevant to a specification in a customer order.<br><br>The flow action takes the specification and the parent sold product as input and retrieves the child sold product from the respective hierarchy. Using this flow action helps the product inventory updates that occur at the end of the fulfillment process. |
| Get Customer Order Characteristic Value | Flow action that takes the customer order line Item and characteristic as input and returns a characteristic value from the customer order line item. If the characteristic is not present in the customer order line item, it returns the default value for the characteristic from the respective order line item offering. |

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**Related topics**

- Flow Designer
- Flows
- Create a flow

### Task plan templates driven order fulfillment

Use the task plan template to define tasks and their dependencies that are needed to orchestrate the fulfillment journey for a product to standardize fulfillment processes across products.

A no-code approach in ServiceNow® that allows you to create task orchestration workflows using task plan templates. It as an alternative to flow designer, giving more options for implementing product configurations.

For more information about Flow actions for fulfillment subflow definition, see Flow actions for fulfillment subflow definition.

When the template is configured for a specification, the domain order creation automatically searches for a matching template, based on the task's specification and action of domain order. When a template match is found, the template is applied to generate the order tasks under the domain order. To learn more about task plan template, see Task plan templates.

**Note:** This task orchestration integration for domain orders is available in Sales and Order Management deployments, whether or not Sales Customer Relationship Management for Telecommunications (SOMT) is installed.

**Important:** Automatic closure of domain orders is currently inactive and will require a custom implementation.

## Benefits of task plan template

It enables non-technical users to do the following:

- Define fulfillment journeys.
- Manage task dependencies for simple task creation without developer involvement.
- Reduce IT dependency.
- Accelerate deployment of new offerings.

## Create a task plan template

You can create a task plan template by following these steps.

| Step | Explanation |
| --- | --- |
| Create a task plan template. | Create the template and set the conditions as to when the template applies.<br>• The template functions as a container or group of template items.<br>• The template identifies a plan to apply the associated template items. |

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| Step | Explanation |
| --- | --- |
| Configure task plan template | To add conditions to a template item that determines when a template item is applicable. |
| Create one or more template items. | Create the template items to include in the task plan template. These items can be tasks, child cases, or child case tasks.<br>• Template items are the tasks or records that are to be created when the template is applied.<br>• Template items can be used to define a hierarchy of parent and child entities of any task type. |
| Create conditions for template items. | Set conditions as needed for each of the template items that identifies when a template item should be created. |
| Task dependencies for task plan templates | It provides controlled sequencing within the generated records from the template items in the Task Plan Template Dependency table. By defining predecessor and successor relationships, the tasks can start at correct time reducing ambiguity for agents. |
| Publish the task plan template. | While in the Draft state, you can make changes to the template, template items, and template item conditions.<br>It allows to publish if the same condition template is not available.<br>Publish the task plan template to apply it to cases and case types.<br>To publish a task plan template, select **Publish** on the Task Plan Template form. |

### Configure the task plan template

Configure the task plan template to add conditions to a template item that determines when a template item is applicable for domain orders.

## Before you begin

Before you add filter condition, make sure that the task template target record is domain order.

Role required: admin

## Procedure

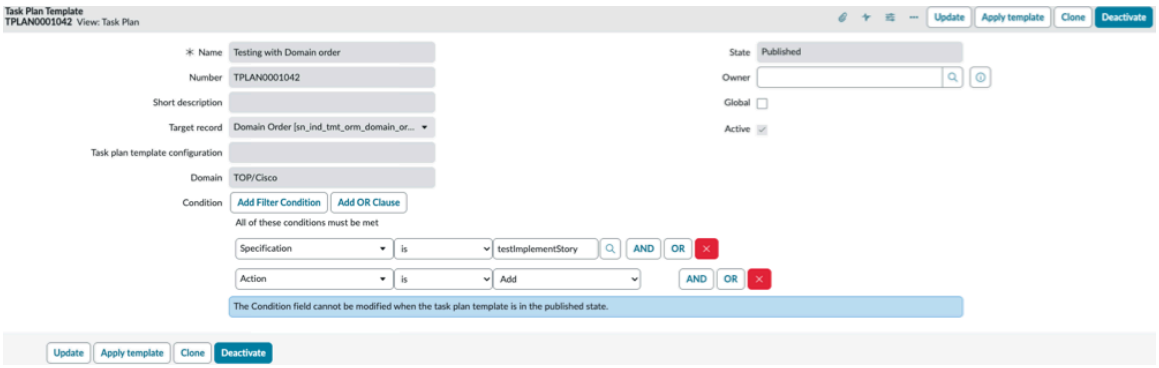
1. Navigate to **All** > **Task Plan Templates** > **All Task Plan Templates**.
2. Open the record.

   Use this field to add the conditions for the template item. Each condition contains a field, operator, and value(s).

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3. Select **Add Filter Condition**.
   - Add these conditions:

| Fields | Conditions |
|---|---|
| Choose Field | Select **Specification**. |
| oper | is |
| Value | Select the specification from the list of records for domain order. |




   - Select **+New condition set** to add a new condition.

     Add these conditions:

| Fields | Conditons |
|---|---|
| Choose Field | Select **Action** from the list. |
| oper | is |
| Value | Select one of these values from the drop-down list:<br>▪ Add<br>▪ Change<br>▪ Disconnect<br>▪ Cancel<br>▪ Suspend<br>▪ Resume |

   - Select **x** to remove a condition.
   - Select **Set** to save the conditions and close the pop-up window.
4. Select **Update**.

### Integrate with Field Service Management

Customer Service Management provides an integration with the Field Service Management application. This integration enables you to view work order and work order task information from a case.

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### Before you begin
Role required: admin

### Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Enter Customer Service with Field Service Management plugin **com.snc.csm_fsm_integration** in the Search field.
3. Click **Install**.
   For more info, see Activate a plugin.

### Result
After the plugin is installed, Field Service Management application is integrated with Customer Service Management.

#### Integrating with Field Service Management

The Customer Service with Field Service Management plugin (com.snc.csm_fsm_integration) provides an integration between the Customer Service Management and Field Service Management applications.

Users can view account and contact information on work orders and work order tasks in the Field Service Management application. Customers and consumers can view case-related work orders from the Customer Service and Consumer Service Portals.

When an agent creates a work order from a customer service case, the work order and task forms include case-related information. This information includes the account and contact details.

When a user views a case from either the Customer or Consumer Service Portals, they can view the details of any work orders and tasks related to the case.

## Product use rights included with this application

If you have purchased a subscription for the Field Service Management (FSM) application, Customer Service Management you can create and view all FSM work orders and appointments. External CSM users can create and view FSM work orders and appointments of their own or related#accounts.

## Changes to the Field Service Management application

In the Field Service Management application, this integration adds the following fields to the Work Order form. These fields are visible in the Case view. To display these fields, right-click the Work Order form header and select **View** > **Case**.

- Account
- Consumer
- Contact
- Asset
- Partner
- Partner Contact

Updating the **Account** field on the Work order form also updates the **Company** field. Updating the **Contact** field on the Work Order form updates the **Caller** field.

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## Changes to the Customer Service Management application

In the Customer Service Management application, this integration adds the **Work Orders** link to the Customer Service Portal and Consumer Service Portal headers. Select this link to view a list of work orders, including the work order number, priority, state, and short description. The work orders displayed in this list on the Customer Service Portal depend on the customer role: customer, customer admin, partner, or partner admin.

Select a work order in this list to display the work order details.

## Known Limitations

There is no synchronization between the Work Order form and the associated Case form. If information changes on the Case form, it does not get updated on the Work Order form.

### Configure customer product data management

Learn how to use the sn_ind_tmt_orm.enable_prod_invt_for_order_management system property to either create sold products or product inventory records after an order is completed and fulfilled.

#### Before you begin

Role required: admin

#### About this task

The following table lists the values that you can set for the sn_ind_tmt_orm.enable_prod_invt_for_order_management system property depending on whether you want to create an entry in the Sold Products [sn_install_base_sold_product] table or Product Inventory [sn_prd_invt_product_inventory] table after an order is fulfilled.

| Value | Description |
|---|---|
| True | Create a record in the Product Inventory [sn_prd_invt_product_inventory] table. This is the default setting. |
| False | Create a record in the Sold Products [sn_install_base_sold_product] table. |

**Note:** You can choose to create either sold products or product inventory records, but not both.

#### Procedure

1. Log in to the ServiceNow instance.
2. Select **All**.
3. Switch the application scope to Order Management.
4. Enter `sys_metadata.list` in the Filter text box.
5. On the Application Files list view, search and select the `sn_ind_tmt_orm.enable_prod_invt_for_order_management` property from the Display name column.
6. On the System Property form, specify a value in the **Value** depending on how you want to create inventory records.
7. Select **Update**.

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**Related topics**

- Creation of sold product and product inventory records
- Managing post-fulfillment order changes
- Product data

## Configuring Jeopardy Management

You can configure Jeopardy Management to monitor tasks in a fulfillment plan and alert managers about the jeopardy levels.

There are several steps to set up Jeopardy Management in Order Management as listed in the following table.

**Jeopardy Management setup**

| Configuration actions | Description |
|---|---|
| Define Jeopardy-enabled fulfillment workflows | Define subflows for product and service specifications using the following Jeoapardy-specific Workflow Studio actions:<br>• Create Order Planned Task<br>• All Place Holder Tasks Created for Domain Order<br>• Set Task Relationships<br>• All Relationships Created for Order Tasks on Domain Order<br>• Set Order Task State<br>All tasks are created in a Draft state. |
| Configure the Order Jeopardy Enablement Policy | Enable Jeopardy Management for product and service using the Order Jeopardy Enablement Policy in Decision Builder.<br>**Note:** Enable Jeopardy Management for all fulfillment flows in an order or specification. |
| #unique_661 | Define service level agreements (SLA) based on request type and specify the proper start and end conditions to monitor order task progression. |
| Configuring Jeopardy Management | Set up decision policy tables to retrieve jeopardy information. Policy tables include:<br>• Configure Order Task Assignment Policy<br>• Configure Order Line Jeopardy Level Calculation Policy<br>• Configure Order Task Jeopardy Level Calculation Policy |
| Set business hours for tasks in Jeopardy Management | Use the *sn_ind_tmt_orm.order_task_schedule* system property to set business hours for tasks. |

## Additional attributes in Jeopardy Management

The following section contains additional information about Jeopardy Management:

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- Is Jeopardy Management domain separated? Yes.
- How does Jeopardy Management interact with domain separation? Tables are domain separated.
- Does Jeopardy Management introduce new roles or access control list (ACL)? Yes, read access for the Task SLA table (task_sla) is granted to the following roles:
  - sn_ind_tmt_orm.service_order_agent
  - sn_ind_tmt_orm.order_fulfilment_agent

## Demo data

If you have a Telecommunications subscription, the following fulfillment subflows are included with the demo data for Order Management for Telecommunications and Media:

- Ethernet Edge Device Fulfillment
- Ethernet Modem Fulfillment
- Change Ethernet Edge Device
- Disconnect Ethernet Edge Device
- Disconnect Ethernet Modem
- Network Interface Profile Fulfillment
- Change Network Interface Profile
- Disconnect Network Interfact Profile
- EVC Configuration Fulfillment
- Disconnect EVC Configuration Service

**Related topics**

Jeopardy Management

Monitoring order jeopardy

### Setting up jeopardy management

Learn about how to set up and configure Jeopardy Management for Order Management.

During design time, fulfillment managers must complete the following Jeopardy Management configuration and setup steps:

- Define Fulfillment Subflows: Creates an Orchestration plan for each specification. Fulfillment managers can use demo data flow actions to ensure that order task relationships are created.
- Define Service Level Agreements (SLA) Definitions: SLA definitions track how much time each order task takes to complete.
- Build Decision Tables: Build decision tables that contain information including order task duration, jeopardy level assignment, and jeopardy enablement.

## Define Fulfillment Subflows

To use Jeopardy Management, fulfillment managers must either reconfigure existing fulfillment subflows or create subflows for each specification.

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- Order tasks are created up front: Subflows that are configured for jeopardy management create order tasks up front and in a Draft state.
- Use Create Order Planned Task flow action: In Decision Builder, use the Create New Order tasks.
- Create task relationships: After all the order tasks are created, fulfillment managers create order task relationships.
- Define fulfillment progress: After all order tasks and task relationships are created, define the fulfillment progress.

## Create SLA Definitions

SLA definitions and SLA Processing flows are linked to tasks in a fulfillment plan and track and report on the time jeopardy-enabled tasks take to complete. See #unique_661 for more information.

- SLA Definitions: Set start condition, pause condition, cancel condition, and reset conditions according to use case.
- SLA Durations: Durations are specified so that tracking can be achieved when task SLA is created.
- SLA Processing flow should be defined: Customer can use demo data flows, which trigger jeopardy level calculation for order tasks at 50%, 75%, 100% task SLA progression.

## Link Jeopardy Management to Product and Service Specifications using Decision Builder

Decision tables are used to link and configure Jeopardy Management to product and service specifications in Order Management.

- Order Line Item Jeopardy Level Calculation: Returns Jeopardy Level for order line item based on delayed percentage of tasks.
- Order Task Jeopardy Level Calculation: Sets a task's jeopardy level based on percentage task completion.
- Order Task Duration Assignment Policy: Defines the order duration and task SLA definition.
- Order Jeopardy Enablement Policy: Defines if a specification has jeopardy enabled.

**Related topics**

Jeopardy Management

Monitoring order jeopardy

### Jeopardy Management use cases

Jeopardy Management use cases help you explore and understand how Jeopardy Management works in different scenarios in Order Management.

## Design-time use cases

Design-time use cases explain some of the scenarios around configuring and setting up Jeopardy Management for Order Management.

**Use case: Configure business logic and workflows**

System admins want to configure and define fulfillment subflows with Jeopardy Management actions and logic.

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Define jeopardy logic using Workflow Studio to links product specifications and a fulfillment workflow.

- Create planned order tasks in Draft state.
- Set task relationships.
- Create placeholder for domain orders.
- Create relationships for order tasks in a domain order.
- Set order task state.
- Configure jeopardy decision tables.

## Run-time use cases

Run-time use cases explain some of the scenarios around running and monitoring Jeopardy Management for Order Management.

**Use Case: Support predictive jeopardy that monitors customer orders**

Fulfillment agents and managers use jeopardy management workflows to monitor the potential risk of an order missing a customer due date.

- Calculate planned task completion dates and estimated dates.
- Monitor order tasks against service level agreements (SLA)s.
- Trigger SLA thresholds for order task and order line items.
- Update jeopardy levels as needed in the order entry forms.
- Roll up planned dates for order tasks that complete.

**Use Case: Support staggered order decomposition and** *Jeopardy Management*

Fulfillment managers and agents expect that when a staggered order decomposition occurs, each occurrence of a staggered order line item causes the Jeopardy Management workflow logic to restart.

- Completed decomposed order line items, the Jeopardy Management workflow restarts when additional planned tasks are added.
- New planned tasks get a task SLA assigned, which is benchmarked for all tasks repeated, and includes the date roll ups.

**Use Case: Support inflight orders and** *Jeopardy Management*

Fulfillment managers and agent want Jeopardy Management to pause orders. When the order revision is approved, the jeopardy monitoring restarts.

- Revision in progress and all tasks are on hold: jeopardy monitoring halts.
- Order revisions approved: task states go from on hold to their previous state and upcoming tasks move to a scheduled state.
- Jeopardy logic recalculates dates: planned dates and estimated or expected dates.
- Dates are benchmarked.
- Date roll up logic run and reflects the new start and end dates for planned and estimated dates.

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**Related topics**

Jeopardy Management

Monitoring order jeopardy

### Define Jeopardy-enabled fulfillment workflows

Create jeopardy-enabled fulfillment workflows using Workflow Studio. The workflows enable Jeopardy Management to track task completion times and manage risk.

## Before you begin

Role required: admin

## About this task

Creating fulfillment flows starts with defining subflows in Workflow Studio using unique actions developed for Jeopardy Management.

The following Workflow Studio actions are used to create Jeopardy Management flows:

- Create Order Planned Task
- All Place Holder Tasks Created for Domain Order
- Set Task Relationships
- All Relationships Created for Order Tasks on Domain Order
- Set Order Task State

## Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
   Workflow Studio opens in a separate window.
2. Select **Subflows** and do one of the following:
   - Search for existing subflows that you want to edit.
   - Start a new flow by selecting **New** > **Subflow**.
3. Give the subflow a name and provide any additional information.
4. Select the **Build subflow** action.
5. Build the Jeopardy Management subflow using the following actions:

### Jeopardy Management flow actions

| Order flow action | Definition |
|---|---|
| Create Order Planned Task | Creates an order task and provides the option to establish task relationship with an existing order task. The Create Order Planned Task action extends planned tasks to Jeopardy Management. |
| All Placeholder Tasks Created for Domain Order | Sets the domain order stage to all order tasks created, so order tasks created by other subflows can have relationships created with current flow order tasks. |
| Set Task Relationship | Sets the relationship between two order tasks by creating a record in the planned_task_rel_planned_task table. The table calculates the order line item runtime and the order task jeopardy calculations. |

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| Order flow action | Definition |
| --- | --- |
| All Relationships Created for Order Tasks on Domain Orders | Introduces the domain order all_relationship_set and sets the field to true in the subflow when all task relationships are established. |
| Set Task Order State | The flow action checks if an order task has a previous state value and uses the previous state to update the order task state during inflight state change.<br><br>The Set the Order Task State action checks to see if an order task has a previous state value and uses the previous state to update the order task state during inflight state changes. |

**Note:** For more information about building subflows, see Building subflows.

6. Test the flow by selecting **Test**.
7. Publish the flow by selecting **Publish**.

### What to do next

Configure the Order Task Duration Assignment Policy.

### Related topics

Jeopardy Management

Monitoring order jeopardy

## Configure the Order Task Duration Assignment Policy

Configure the Order Task Duration Assignment Policy using Workflow Studio. This policy determines how long each task should take to complete, when it should start, and when it's expected to finish, enabling accurate scheduling, resource planning, and timeline visibility across the order life cycle.

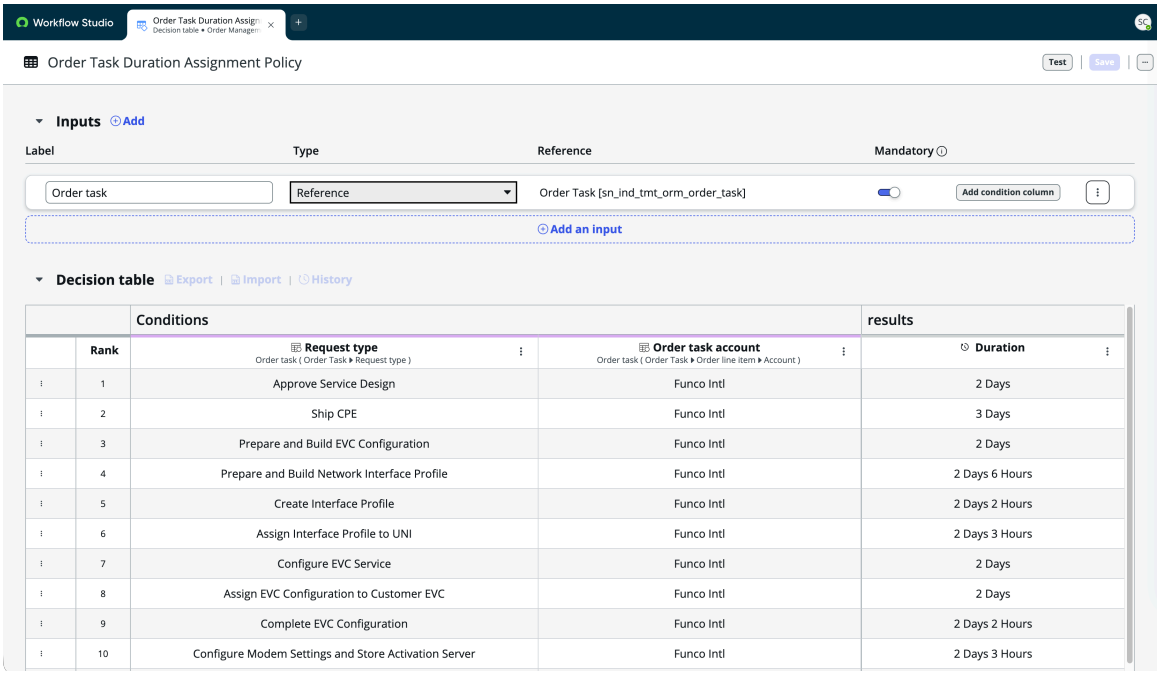
### Before you begin

Role required: admin

### Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select **Order Task Duration Assignment Policy**.

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3. On the Order Task Duration Assignment Policy decision table, fill in the fields.

### Order Task Duration Assignment Policy fields

| Field | Description |
|---|---|
| Request type | Order task for which you want to add a duration time. |
| Order task account | Order task account associated with the task. |
| Duration | Allotted time for this task. For example, 2 Days 6 Hours.<br><br>**Note:** The allotted time for order tasks must be the same as the allotted time in the SLA definition assigned to the order task. |

4. Select **Save**.

## What to do next

The next step is to configure SLA definitions for Jeopardy Management. For more information, see #unique_661.

## Related topics

Jeopardy Management

Monitoring order jeopardy

### Configure the Order Line Jeopardy Level Calculation Policy

Configure the Order Line Jeopardy Level Calculation Policy using Workflow Studio to set the jeopardy risk level for order line items.

## Before you begin

Role required: admin

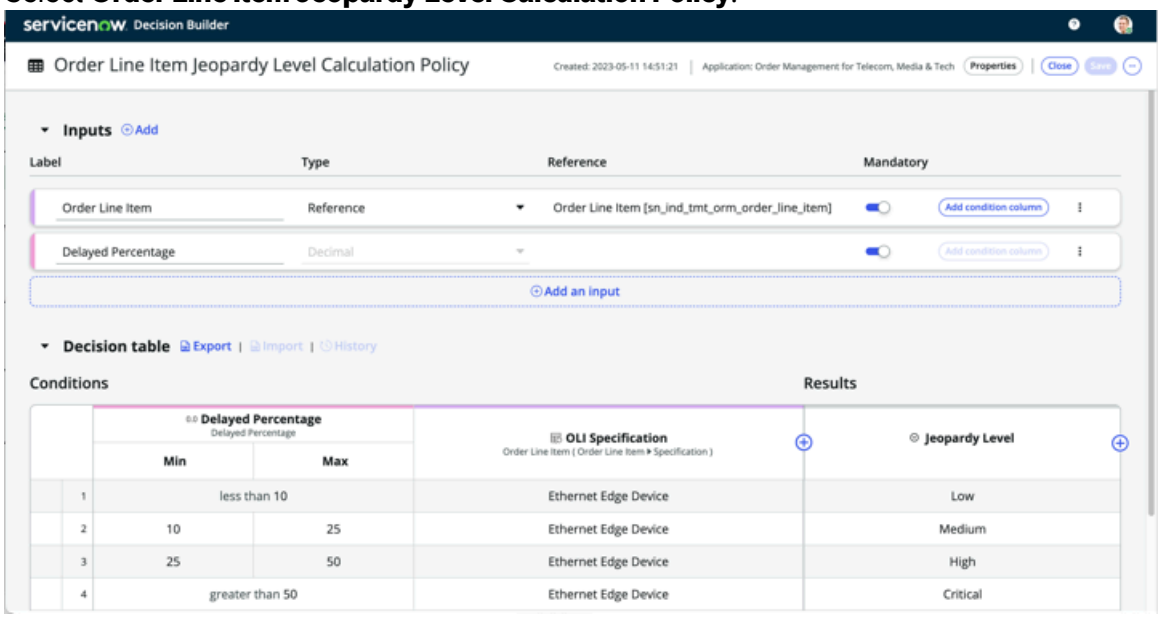
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## About this task

You must provide a time range for each jeopardy level. When the time range is reached, the linked jeopardy alert level is displayed.

## Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select **Order Line Item Jeopardy Level Calculation Policy**.




3. On the Order Line Item Jeopardy Level Calculation Policy decision table, fill in the fields.

### Order Line Item Jeopardy Level Calculation Policy

| Field | Description |
|---|---|
| Delayed Percentage | Set the minimum and maximum delayed percentage for the order line item (OLI). |
| Order Line Items (OLI) Specification | Select the order line item to attach to the **Delayed Percentage**. |
| Jeopardy Level | Set the jeopardy level for the values indicated in the **Delayed Percentage** field. In the example:<br>○ Less than 10% delayed percentage = the lowest jeopardy level.<br>○ 10–25% completion, Jeopardy level moves to a medium alert.<br>For example, if the minimum and maximum values in the **Delayed Percentage** field are 5% and 10% respectively, you can assign that value range a Low Jeopardy Level. |

4. Select **Save**.

## What to do next

Configure the Order Task Jeopardy Level Calculation Policy

## Related topics

Jeopardy Management

Monitoring order jeopardy

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## Configure the Order Task Jeopardy Level Calculation Policy

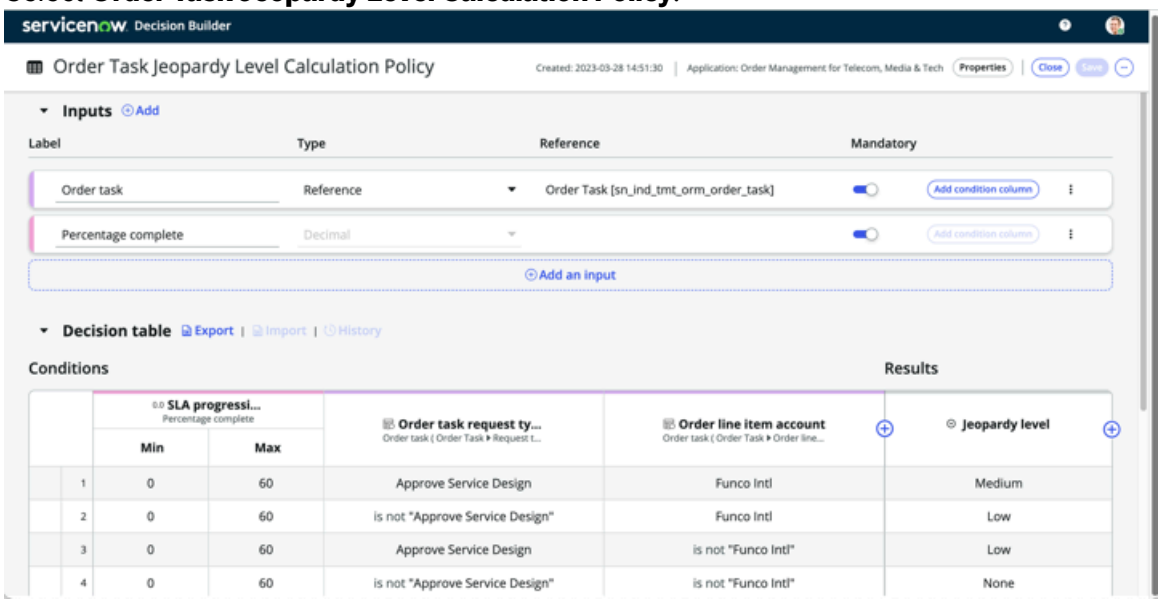
Configure the Order Task Jeopardy Level Calculation Policy using Workflow Studio to set the risk levels for the minimum and maximum Service Level Agreement (SLA) percentage completion for order tasks.

### Before you begin

Role required: admin

### Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select **Order Task Jeopardy Level Calculation Policy**.




3. On the Order Task Jeopardy Level Calculation Policy decision table, fill in the fields.

#### Order Task Jeopardy Level Calculation Policy

| Field | Description |
|---|---|
| SLA progression | Set the minimum and maximum percentage for the order task. |
| Order task request type | Select the order task request type. A request task is part of a jeopardy-enabled workflow. |
| Order line item account | Select the order line item account. The account is linked with the order and order line item. |
| Jeopardy level | Assign the jeopardy level to associate with the SLA progression percentage minimum and maximum values. |

4. Select **Save**.

### What to do next

Configure the Order Jeopardy Enablement Policy

### Related topics

Jeopardy Management

Monitoring order jeopardy

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## Configure the Order Jeopardy Enablement Policy

Add Jeopardy Management workflows to product and service specifications using the Order Jeopardy Enablement Policy in Workflow Studio.

### Before you begin

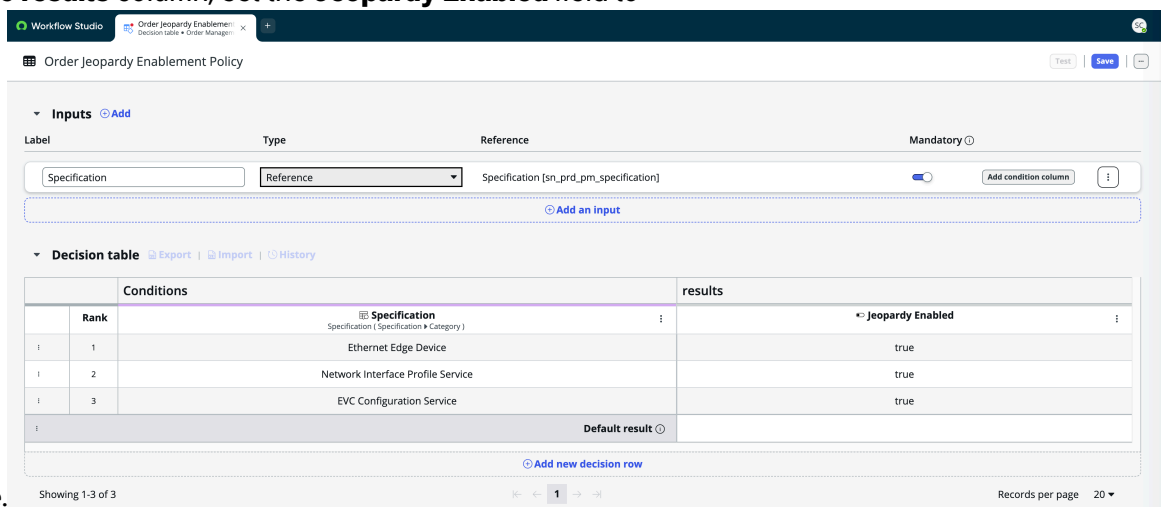
Role required: admin

### About this task

Use Workflow Studio to define which product, service, or resource specification is jeopardy-enabled.

### Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select **Order Jeopardy Enablement Policy**.
3. In the **Specification** column under the **Conditions** section, select a product or service specification to link to Jeopardy Management.
4. In the **results** column, set the **Jeopardy Enabled** field to **True**.




> **Note:** Entries in this decision table are for top-level product or service specifications. In a single order, customers can purchase multiple top-level products or services. However, if any one of the products or services isn't jeopardy-enabled, the entire order is treated as a non-jeopardy-enabled order.

5. Select **Save**.
   The product specification workflow is jeopardy-enabled. Jeopardy logic begins when the specification workflow starts.

### What to do next

After configuring Jeopardy Management, see Monitoring order jeopardy to review different ways to monitor Jeopardy Management.

### Related topics

- Jeopardy Management
- Monitoring order jeopardy

## Set business hours for tasks in Jeopardy Management

Use the sn_ind_tmt_orm.order_task_schedule system property to set business hours for tasks in Jeopardy Management.

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### Before you begin
The application scope must be set to Order Management.

Role required: admin

### Procedure
1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *sn_ind_tmt_orm.order_task_schedule* system property.
3. In the **Value** field, enter `true`.

   **Note:** The default value for the property is set to **False**.

4. Select **Update**.
   Business hours are used for tasks in Jeopardy Management.

#### Related topics
- Jeopardy Management
- Monitoring order jeopardy

## Configuring Fallout Management

As a provider, you can use Fallout Management to identify, investigate, and resolve order processing issues so that orders can continue processing through to completion.

The fallout type is a category that indicates the type of fallout activity. Billing Issue, Inventory Allocation Failure, and Provisioning Failure fallout types are standard in the ServiceNow AI Platform. You can define additional ones, according to the requirements of your enterprise. To learn more about managing order task fallout, see Managing order fallout.

#### Related topics
- Order management
- Managing order fallout

### Create additional fallout types

Define your own enterprise-specific fallout types to identify, resolve, and investigate order processing issues so that they can continue processing through to completion.

### Before you begin
Role required: admin

### About this task
The fallout type is a category that indicates the type of fallout activity. Billing Issue, Inventory Allocation Failure, and Provisioning Failure fallout types are standard in the ServiceNow AI Platform. You can define additional ones, as per the requirements of your enterprise. To learn more about managing order task fallout, see Managing order fallout.

### Procedure
1. Log in to the ServiceNow instance.
2. In the application navigator, enter `sn_fallout_mgmt_fallout_type.list`.
3. Select **New**.
4. In the **Name** field, enter the name of the fallout type.

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5. **Optional:** Add a brief description in the **Description** field.
6. Select **Submit**.

**Related topics**

Order management

Managing order fallout

## Configuring compatibility rules for horizontal relationships

As a provider, you can use compatibility rules to establish horizontal relationships between the specifications of multiple products, services, or resources.

You use a compatibility rule to define a source specification and a target specification and to establish a relationship between them.

The ServiceNow AI Platform provides two types of relationships that you can use to define a compatibility rule:

1. Requires: The source specification requires the defined target specification.
2. Excludes: The source specification excludes the defined target specification.

While you're creating a compatibility rule, you can establish the horizontal relationship either by defining the specifications or by defining the details for the specification characteristics. You can also define the maximum and minimum quantity of the specifications to support and fulfill your customer orders as per the defined decomposition rules.

Before you can capture a new customer order that has a horizontal relationship, you must configure the compatibility rules by defining the source and target specifications.

**Related topics**

Order management

Using Order Management

## Asynchronous order processing for large customer and consumer orders

Asynchronous order processing handles high-volume enterprise and consumer orders without waiting for immediate processing, improving system performance for communications service providers (CSP) using Order Management.

## Overview of asynchronous order processing

CSPs support both enterprise customers and consumers. Enterprise customers typically place large multi-site orders, while consumers place high-volume orders. Asynchronous order processing enables you to create bulk or high-volume orders without waiting for each order to be processed immediately, improving efficiency and system performance.

When you submit an asynchronous order request, the system responds with a `202 Accepted` status and an order ID. This indicates the order is received for processing but not yet created. This differs from synchronous processing, which returns `201 Created` when the order is immediately created.

If you have a Telecommunications Service Management subscription, you can use the Product Order Open API to receive an order in the Order Management application. Order processing goes through three stages:

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- Order validation
- Order ingestion
- Order creation

## How synchronous order processing works

With synchronous order processing, an order is received in the Order Management application through the API. Then, the order records are simultaneously created in a customer order table after the order validation.

As an administrator, you can activate or deactivate the order validation for synchronous order processing by setting the *create_product_order_validation_sync* and *create_service_order_validation_sync* system properties to True (Default) or False in the ServiceNow AI Platform. Synchronous order processing takes longer than asynchronous order processing when it comes to creating a large number of customer order records.

## How asynchronous order processing works

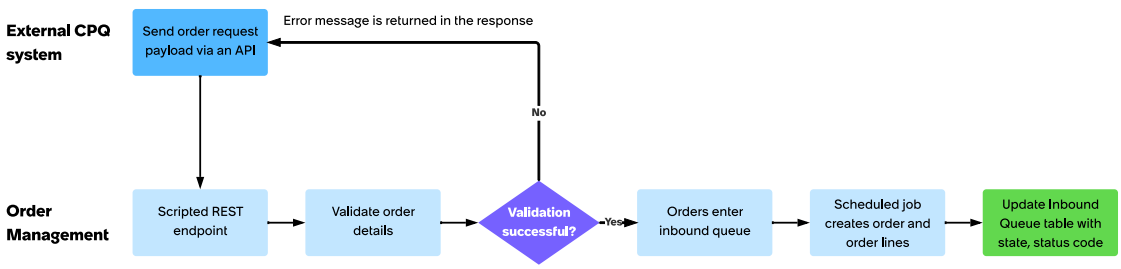
In asynchronous order processing, high-volume orders or large numbers of order payloads are received through the Product Order Open API in the Order Management application from external Configure, Price, and Quote (CPQ) systems.

The order details are first validated and then inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. If validation errors occur, an error message is returned in the response. The actual order creation happens later when a scheduled job processes entries from this queue, allowing for bulk or delayed processing.

This validation is managed by the *create_product_order_validation_async* system property for product orders and the *create_service_order_validation_async* system property for service orders. These properties control the validation in the asynchronous processing of orders before the orders are inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. The default value is set to True.

When the order details are successfully validated, a scheduled job runs to pick up the records from the Inbound Queue [sn_tmt_core_inbound_queue] table and then creates entries in the customer order table as shown in the following diagram.

### Asynchronous order processing workflow




The asynchronous order processing follows these steps:

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1. You must activate the Product Order Open API. The new parameter mode enables the API to process orders synchronously or asynchronously. For more information about the API, see Product Order Open API.
2. After you receive high-volume orders or large numbers of order payloads through the Product Order Open API in asynchronous mode, the system responds with a `202 Accepted` status and an order ID. The order details are validated first and include the product offering, order line items, order specifications, order line item characteristics, and the specification relationship of order line items. For more information on how the validation works, see Validating your orders through asynchronous order processing.
3. After the validation of the order details is complete, an entry for each order with a unique record ID is created in the Inbound Queue [sn_tmt_core_inbound_queue] table. To learn more about how the order entries are created, see Create order entries manually during the asynchronous order processing.
4. When all the orders are captured in the Inbound Queue [sn_tmt_core_inbound_queue] table, a scheduled job runs to create the customer orders for the records in the New state. You can also manually trigger order creation from the Inbound Queue module by selecting the **Create Order** button, bypassing the wait for the automated job. After processing, you can verify the created orders in the customer orders section. To learn how a scheduled job creates orders, see Configure a scheduled job for asynchronous order creation.

**Related topics**

Inbound request states

### Validating your orders through asynchronous order processing

You can validate your orders before the order records are created in the customer order table during asynchronous order processing in the ServiceNow® Order Management application.

You configure two system properties to validate your orders in asynchronous order processing. The *create_product_order_validations_async* system property for product orders and the *create_service_order_validations_async* system property for service orders control the validation in the asynchronous processing of orders before the orders are inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. The default values of these properties are set to True.

By default, when a scheduled job picks up the record from the Inbound Queue [sn_tmt_core_inbound_queue] table, no validation occurs and the order and the order line items are created.

To enable validation through a scheduled job, you can override the *enableValidationViaScheduleJob* property to return true. By default, this method returns false.

The following table lists all the system properties that are required for validation.

#### System properties for validation

| Name | Description |
|---|---|
| sn_ind_tmt_orm.create_product_order_validations_async | Enable or disable the validations before inserting the product order records into the Inbound Queue [sn_tmt_core_inbound_queue] table. |

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**System properties for validation (continued)**

| Name | Description |
|---|---|
| sn_ind_tmt_orm.create_product_order_validations_async | Enable or disable the validations before inserting the product order records into the Customer Order [sn_ind_tmt_orm_order]table. |
| sn_ind_tmt_orm.create_service_order_validations_async | Enable or disable the validations before inserting the service order records into the Inbound Queue [sn_tmt_core_inbound_queue] table. |
| sn_ind_tmt_orm.create_service_order_validations_sync | Enable or disable the validations before inserting the service order records into the Customer Order [sn_ind_tmt_orm_order] table. |
| sn_ind_tmt_orm.glide.mutex.script.maxspins | Maximum number of times for a thread to try to acquire a lock. The default value is 100. |
| sn_ind_tmt_orm.glide.mutex.script.spinwait | Time to wait between lock attempts, in ms. The default value is 100 ms. |
| sn_ind_tmt_orm.limit | Number of records (batch size) to return from the inbound queue [sn_tmt_core_inbound_queue] table for processing. The default value is 100. |
| sn_ind_tmt_orm.schedule.max.runtime | Maximum time up to which the scheduled job runs, in ms. The default value is 900000 ms. |

**Related topics**

Order management

Using Order Management

### Create order entries manually during the asynchronous order processing

Skip the scheduled job and create order entries manually in the Order Management application for asynchronous order requests.

## Before you begin

Role required: Order Integrator [sn_ind_tmt_orm.order_integrator]

## About this task

Before you can create order entries in the customer order table, records are staged in the Inbound Queue [sn_tmt_core_inbound_queue] table. This table helps you to store and manage your order requests during the asynchronous processing of orders.

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Inbound Queue Requests** > **All**.
   The Inbound Queue Requests list view provides the following information.

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| Field | Description |
|---|---|
| Resource | Caller that created the record in the Inbound Queue [sn_tmt_core_inbound_queue] table. |
| Record id | Unique system-generated ID returned as orderID in the HTTP response. |
| State | State of the record in the Inbound Queue [sn_tmt_core_inbound_queue] table.<br>**New**<br>Order records created.<br>**In Progress**<br>Scheduler picks orders and generates a system ID.<br>**Completed**<br>Scheduler successfully created the customer order record from the Inbound Queue table.<br>**Error**<br>Scheduler did not successfully create the customer order record. |
| External ID | External ID of the order from the Configure, Price, and Quote (CPQ) system. |
| Status code | HTTP status codes.<br>○ 201: Target record successfully created.<br>○ 202: Record in the Inbound Queue [sn_tmt_core_inbound_queue] table successfully created.<br>○ 400: Target record not created due to an error. |
| Error message | (Optional) Error message returned for an exception. |
| Payload | Payload received via an API. |
| System ID | Cluster node ID. |
| Reference table | Name of the target table, such as Customer Order. |

4. From the list, select a record to create an order.
5. On the Inbound Queue page, select **Create Order**.
   An order is created in the New state and can be viewed by navigating to **Customer Orders** > **All**.

### What to do next

Approve orders in Order Management

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**Related topics**

Order management

Using Order Management

### Configure a scheduled job for asynchronous order creation

Run a scheduled job in the Order Management application to create a customer order from the Inbound Queue [sn_tmt_core_inbound_queue] table.

**Before you begin**
Role required: admin

**About this task**
The scheduled job runs on all the active nodes of a ServiceNow instance. This schedule job picks up the order records in batches (the batch size that you have set) from the Inbound Queue table. These order records are in the New state.

**Note:** If you can't create an order due to an error, the state of the record in the Inbound Queue table is changed to an error, and an error message is displayed.

An email notification is triggered when the state of a record in the Inbound Queue table changes to an error. The notification is sent to all Order Fulfiller Demo Group users.

You can also use the Create Order UI action on the Inbound Queue table to create orders on demand.

**Procedure**

1. Navigate to **All** > **System Scheduler** > **Scheduled Jobs** > **Today's Scheduled Jobs**.
2. From the Name column, select the **Create records from Inbound Queue table async** scheduled job.
3. On the form, fill in the fields.
   For a description of the field values, see Create records from inbound queue table async form.
4. Select **Update**.

**Result**
Customer order records are created.

**Related topics**

Advanced options for scheduled jobs

## Customize an order summarization skill in ServiceNow Otto for Order Management

Configure the ServiceNow Otto for Order Management application so that your order agent and fulfillment agent can use the generative AI skills in the CRM Workspace and Business Portal.

**Before you begin**

**Note:** Microsoft Azure, Amazon bedrock, Now LLM, Now LLM LTS, and Google Cloud vertex AI are currently the providers for this ServiceNow Otto application's skills.

Role required: admin

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### Procedure

1. Navigate to **All** > *AI Admin Hub* > **AI Skills**.
2. In the **Customer** workflow group, view the skills for the ServiceNow Otto for Order Management under Sales CRM.
3. Copy the order summarization skill for customization.

   a. Make a copy of an active skill by selecting either **Order Summarization (Order Capture)** or **Order Summarization (Order Fulfillment)**.

   **Note:** Only one version of a skill can be active at a time for each skill. If you create and activate a copy of the skill, any previously activated version of the skill is deactivated.

   b. Select the More actions icon ••• for the skill, and create a copy that you can customize by selecting **Make a copy**.

   The copy that you make is listed in the All section.

   c. On the copied skill, select **Activate skill** to open and modify it.
   A guided setup leads you through configuring General details, View order input, Customize prompt output, Define Availability, Define access, select display, and Review and activate of the skill to be customized.

4. In the General details step, fill in the fields.
   a. Enter a name and description for the skill.
   b. Select **Save and continue** to go to the next step.

   **Note:** The **More details on the skills** fields are read-only.

5. Configure the base input table fields and related lists for the different input templates (Product Order Capture or Service Order Capture) for the skill.

   **Note:** The **Choose base table** field is ready-only.

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

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

   a. Select **+New base input field** and configure the base input table fields for each input template (Product Order Capture or Service Order Capture).

   Add multiple base input fields, as necessary.

   The following table lists the base input table fields and descriptions.

#### Base input fields

| Field | Description |
|---|---|
| Base input field | Field in the base input table whose value this skill uses in its response.<br><br>For example, `Number`. |

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| Field | Description |
| --- | --- |
| Field description | Description of the base input field value.<br><br>For example, `Order number`. |

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

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

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

**c.** Configure the additional input data sources by selecting **New data source** for each input template, as needed.

Adding input data source, like the related tables, provides more context to all Now LLM Service in a related list.

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

The selection of the related table fields has a direct impact on the quality of the corresponding prompt header.

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

**6.** Customize the prompt output.

Review and test the default prompt provided. The prompt is fixed and can't be customized directly within this step or from the AI Admin Hub screen.

To customize or create prompts, select **Edit prompt in AI Skill Kit**. You are redirected to the AI Skill Kit, where you can manage prompt configurations for the skill. For more information, see AI Skill Kit.

**a.** For each input template (Product Order Capture or Service Order Capture), select a record in the Test output section and test the prompt response output format by selecting **Run Test**.

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

**7.** Use the Define availability section to define how the skill is available to users.

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

Select **New condition set** to configure additional conditions, as needed.

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

**8.** Specify which users can access the skill in the Define access section.

By selecting specific roles, you're controlling who can use the skill. The roles that you choose will also be available in the **Select display** step.

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Default and Custom roles:

- If no changes are made, the default role sn_ind_tmt_orm.order_agent automatically appears in **User access - Access Control List (ACL)**.
- Apply role restrictions when the skill is invoked by selecting **Roles** and defining which data and resources (for example, tables) the user can access in the **Role restrictions to skill** field.

> **Note:** If you add a role in the **Define Access** step, you must manually select it in the **Select Display** field to make it active.

9. Configure the **In-product desktop** field to display the order summarization for Order Management.

   a. Display Now Assist skills on the forms and workspaces by selecting the **In-product desktop** field.
   For the skills that appear in-product, select the arrow to identify the roles that can use the skill.

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

10. Review and activate the skill.
    Review your choices and select **Activate** to complete the skill customization.
    Select **Summarize** in an order to generate the order summary.

## Configuring the order operations applications

Learn how to configure the order operations applications to help sales and support teams to monitor the sales processes, and manage post-sale support and returns respectively.

Installing and configuring the following applications involve installing the applications from the ServiceNow Store store, assigning roles, and enabling app-specific features that support post-sales processes and operational efficiency. It covers configuring Order Operations Case Management for handling order-related issues, enabling Return Merchandise Authorization (RMA) workflows, and setting up Lead-to-Cash process management to monitor the order life cycle.

1. Order Operations Case Management

   Install and configure the Order Operations Case Management application customer service agents to create cases for multiple customer orders or for specific products in an order.

2. Configuring Lead-to-Cash Process Management

   Install the Lead-to-Cash Process Management application, and set up business object groups and relationships so that sales process managers can create and monitor sales process records.

3. Activate the Return Merchandise Authorization plugin

   Activate the RMA Case Management plugin that enables your sales organization to manage and triage return cases for customer products and services, addressing returns, replacements, and repair use cases.

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**Related topics**

Order operations

Using order operations applications

## Configuring Lead-to-Cash Process Management

Plan and configure your implementation of Lead-to-Cash Process Management.

## Configuration overview

1. Review the dependencies for installing and using Lead-to-Cash Process Management.
   - For sales process managers to be able to create and monitor sales process records through the CRM WorkspaceCustomer Service Management (CSM) must be installed.
   - To be able to monitor opportunities, quotes, or orders in the sales process, you must have Opportunity Management, Quote Management, Order Management installed.
   - Business Object Core (sn_bo_core) is automatically installed as a dependency when you install the Lead-to-Cash Process Management application (app-l2c-cockpit).
2. Install Lead-to-Cash Process Management

   You can install the Lead-to-Cash Process Management application (app-l2c-cockpit) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they aren't already installed. Install Lead-to-Cash Process Management on each of your environments.
3. Assign roles to Lead-to-Cash Process Management users

   Assign roles to your users so that they can access features, capabilities, and data in the Lead-to-Cash Process Management application.
4. Set up business objects for sales process records

   Create business object group and business object types. Define relationships between the business object types, and add them as members under the business object group. This enables the sales process managers to create sales process records using these entities.
5. Customizing the sales process dashboard

   Define the number of levels and tile content on the node map, and determine how tasks are consolidated on the Tasks tab, to enhance clarity and control so sales process managers can focus on relevant data and navigate through complex sales processes effectively.
6. Modifying data retention and table cleanup policy for Lead-to-Cash Process Management

   Access and modify the default data retention and table cleanup policy to modify it to suit your needs.
7. Setting conditions for enabling email access in Lead-to-Cash Process Management

   Sales process managers can compose emails directly from the dashboard for sales entity records that are monitored in a sales process record.

**Related topics**

Lead-to-Cash Process Management

Using Lead-to-Cash Process Management

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### Install Lead-to-Cash Process Management

You can install the Lead-to-Cash Process Management application (app-l2c-cockpit) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

## Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Lead-to-Cash Process Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

## About this task

The following items are installed with Lead-to-Cash Process Management:

- Roles
- Tables
- Properties

For more information, see Components installed with Lead-to-Cash Process Management and Properties installed with Lead-to-Cash Process Management.

## Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Lead-to-Cash Process Management application (app-l2c-cockpit) using the filter criteria and search bar.

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

   A list of the versions available to you is displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

## Result

The Lead-to-Cash Process Management application is installed on your instance. The Business Object Core application is auto-installed as a dependency. For more information, see Components installed with Business Object Core.

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The O2C Objects business object group also becomes available. It contains entities involved in the opportunity-to-cash process, such as opportunity, quote, and order. You can use this group provided you have Opportunity Management, Quote Management, and Order Management apps installed on your ServiceNow instance.

### What to do next

Assign roles to Lead-to-Cash Process Management users so that they can access features and perform tasks using this app. For more information, see Assign roles to Lead-to-Cash Process Management users.

### Related topics

Lead-to-Cash Process Management

Using Lead-to-Cash Process Management

## Assign roles to Lead-to-Cash Process Management users

Assign roles to your users so that they can access features, capabilities, and data in the Lead-to-Cash Process Management application.

### Before you begin

Before you can assign roles to your users and groups, make sure you have created and configured required users and groups.

Role required: admin

### About this task

The following table lists the roles business object writers and sales process managers need to access the tables necessary to perform their respective tasks.

**Required roles for specific job functions**

| User persona | Job function | Role required | Tables accessed |
|---|---|---|---|
| Business object writer | Creates business object groups and defines relationships between the business object types. | Business object writer<br>[sn_bo_core.business_object_writer] | • Business Object Type<br>[sn_bo_core_obj_type]<br>• Business Object Relationship<br>[sn_bo_core_obj_rel]<br>• Business Object Group<br>[sn_bo_core_obj_group]<br>• Business Object Group Members<br>[sn_bo_core_obj_group_members] |
| Sales process manager | Creates sales process records, | Sales process manager<br>[sn_l2c_cockpit.sales_process_manager] | • Sales Process Record<br>[sn_l2c_cockpit_sales_process_record] |

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**Required roles for specific job functions (continued)**

| User persona | Job function | Role required | Tables accessed |
|---|---|---|---|
| | monitors tasks and activities on the hierarchical node map, links and delinks nodes. | | • Business Process Record [sn_bo_core_process_record]<br>• Business Process Resource [sn_bo_core_process_resource]<br>• Business Process Task [sn_bo_core_process_task] |

You can assign roles to users and groups using either guided setup or through the following user administration features:

- Assign a role to a user
- Assign a role to a group

**Related topics**

Creating users

Creating groups

Components installed with Lead-to-Cash Process Management

Components installed with Business Object Core

### Set up business objects for sales process records

Create the business objects necessary for sales process managers to create sales process records using these entities.

## Before you begin

Role required: Business object writer [sn_bo_core.business_object_writer]

## About this task

https://player.vimeo.com/video/1102610152?h=669291cfe1&badge=0&autopause=0&player_id=0&app_id=58479

## Procedure

1. Create business object groups.

   a. Navigate to **All** > **Business Object Core** > **Business Object Group**.

   b. Select **New**.

   c. On the form, fill in the fields.

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**Business Object Group form**

| Field | Description |
|---|---|
| Name | Name for the business object group. |
| Applies to | Workflow or process for which you're creating the business object group. This value should be Sales Process Record [sn_l2c_cockpit_sales_process_record]. |
| Description | A brief description of the business object group. |

2. Create business object types to add as members in the business object group.

   a. Navigate to **All** > **Business Object Core** > **Business Object Types**.

   b. Select **New**.

   c. On the form, fill in the fields.

**Business Object Type form**

| Field | Description |
|---|---|
| Name | Name for the business object type. For example, Opportunity. |
| Table name | Table associated with the business object. For example, if the business object type is Opportunity, you would enter the Opportunity [sn_opty_mgmt_core_opportunity] table. |

   d. Select **Submit**.

3. Define relationships between the object types.

   Relationships define how two object types are related by the source and destination columns on the respective tables and govern the hierarchy of the records displayed on the node map. For example, if you add Opportunity Line and Quote as child entities for the business object type Opportunity, on the node map you would see the related Opportunity Line and Quote records under an Opportunity node.

   You can add more than one child entity under a parent business object type. Ensure that you avoid circular relationships.

   a. Select the business object type you created.

   b. On the Business Object Type page under the Business Object Relationships related list, select **New**.

   c. On the form, fill in the fields.

**Business Object Relationship form**

| Field | Description |
|---|---|
| Source | The parent business object type for which you are creating the relationships. |

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| Field | Description |
|---|---|
| Destination | The child business object type that is related to the parent. |
| Source table name | Table name of the parent business object type. |
| Destination table name | Table name of the child business object type. |
| Source field | (Optional) The column on the source table used for establishing the relationship. |
| Destination field | (Optional) The column on the destination table used for establishing the relationship. |

d. Select **Submit**.

4. Add business object types as members of business object group.
   a. Navigate to **All** > **Business Object Core** > **Business Object Group**.
   b. Under the Business Object Group Members related list, select **New**.
   c. Select the business object type you want to add using the Lookup list icon.
   d. Select **Submit**.

### Result
Business object group and business object types are available in Business process and Business entity lists respectively in the Create new sales process record form in the CRM Workspace.

#### Related topics
Lead-to-Cash Process Management

Using Lead-to-Cash Process Management

## Customizing the sales process dashboard

Customizing the number of levels and tile content on the node map enhances clarity and control so sales process managers can focus on relevant data and navigate more easily through complex sales processes.

#### Related topics
Lead-to-Cash Process Management

Using Lead-to-Cash Process Management

## Customize hierarchical node map levels for Lead-to-Cash Process Management

Customize the number of node levels to display in the Lead-to-Cash Process Management hierarchical node map visualization.

### Before you begin
Role required: admin

### About this task
By default, the Lead-to-Cash Process Management hierarchical node map shows three node levels. Although there is no upper limit on the number of node levels you can display, the node map can display a maximum of 250 nodes at a time.

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### Procedure

1. Select **All** and in the navigation filter, enter `sys_properties.list`.
2. In the **Name** column, search for sn_l2c_cockpit.node_default_levels and select it.
3. If a message appears about the application scope, select **here** to be able to edit the record."
4. In the **Value** field, specify an integer for the number of node levels you want to display on the hierarchical node map.
5. Select **Update**.

#### Related topics

Lead-to-Cash Process Management

Using Lead-to-Cash Process Management

## Customize details displayed on node map tiles using a decision table

Customize the details displayed on the node map tiles in the Lead-to-Cash Process Management using Decision Tables.

### Before you begin

Role required: admin

### About this task

You can add more columns to display additional lines. However, this would require you to make code changes in the UI Builder.

### Procedure

1. Navigate to **All** > **System Definition** > **Decision Tables**.
2. In the **Name** field of the system properties table, search for and select the Business object type configuration decision table.
   You are redirected to the decision table in Workflow Studio.
3. Change the values in the **Field 1** and **Field 2** columns depending on the information you want to display in the node map tile.
4. **Optional:** Change the icon for the tile.
   a. Access the Icon Gallery to obtain the icon name corresponding to the icon you want to use.
   b. Enter the icon name in the **Node Icon** field.
5. **Optional:** Add decision rows for any additional business entities you created.
6. **Optional:** Verify the changes by selecting **Test**.
7. Select **Save**.

#### Related topics

Lead-to-Cash Process Management

Using Lead-to-Cash Process Management

## Customize Tasks tab views using EVAM

Customize the sales entities from which the tasks are displayed, icon and fields that are displayed on each task tile, and create custom options to filter and view consolidated tasks on the sales process dashboard in Lead-to-Cash Process Management using Entity View Action Mapping (EVAM).

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### Before you begin
Role required: admin or evam_admin

### About this task
**Note:** Use SPR task EVAM definition for customizing Tasks tab views. Custom EVAM definitions are not supported.

### Procedure
1. Log in to your ServiceNow instance.
2. Select the Globe icon and set the application scope to Lead-to-Cash Process Management.
3. Navigate to **All** > **Entity View Action Mapper (EVAM)** > **EVAM Definitions**.
4. In the **Name** column, search for and select SPR task.
5. **Optional:** In the **EVAM Datasource M2Ms** tab, add or remove a data source.
   - Create and Link: Define a new data source and then link this data source to your EVAM definition. For more information, see Define a data source.

     **Note:** When specifying a condition to define how the data is filtered from the selected table, select the operator as **is not empty** for the business entity you're adding. For example, **[Quote][is not empty]**.

   - Link Existing: Add a predefined data source to your EVAM definition.
   - Unlink Selected: Unlink a data source you don't want to see on the Tasks tab in the sales process dashboard.
6. Select **Submit**.
7. In the **EVAM View Config Bundle M2Ms** tab, add or remove a configuration bundle.
   - Create and Link: Define a new configuration bundle and then link this bundle to your EVAM definition. For more information, see Defining an EVAM configuration bundle and Defining an EVAM view template.
   - Link Existing: Add a predefined configuration bundle to your EVAM definition.
   - Unlink Selected: Remove the view config bundle for entities you don't want to display.
8. **Optional:** Add more data filter options on the Tasks tab of the sales process dashboard.

   a. In the EVAM Data Filters related list, select **New**.

   b. On the form, fill in the fields.

**EVAM Data Filters form**

| Field | Description |
|---|---|
| Label | Label name of the EVAM data filter. |
| Active | Option to activate the EVAM data filter. |
| Order | Priority for the EVAM view configuration. Lower numbers indicate a higher priority. |

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| Field | Description |
|---|---|
| Application | Application scope of the EVAM view configuration. |
| EVAM Definition | Associate an EVAM definition with the data filter. |

9. Select **Submit**.

**Related topics**

Create an EVAM definition

### Modifying data retention and table cleanup policy for Lead-to-Cash Process Management

Modify the default data retention and table cleanup policy for Lead-to-Cash Process Management to match your organizations requirements.

By default, records are deleted from the Business Process Record [sn_bo_core_process_record] and Sales Process Record [sn_l2c_cockpit_sales_process_record] tables and child records in the Business Process Task [sn_bo_core_process_task] and Business Process Resource [sn_bo_core_process_resource] tables if they meet either of the following conditions:

- In an inactive state and not updated in the past six months
- In an active state but not updated in the past year

You can modify the data retention and table cleanup policy depending on your expected load and volume.

To find out how to modify the data retention and table cleanup frequency for Lead-to-Cash Process Management, see Modify data retention policy for ATF test results.

**Related topics**

Table cleanup

Autoflush form

### Setting conditions for enabling email access in Lead-to-Cash Process Management

Sales process managers must be granted access to compose emails for the sales entity records that are monitored in a sales process record.

Sales process managers can compose and send emails related to a sales process record by default. Enable sales process managers to compose emails for the related sales entities by setting the value of the *email_client* dictionary attribute to *true* and using either of the following methods:

- Grant the sales process manager write access to the child entity. For more information, see Enable the email client for a table.
- Set the value of the *glide.email_client.check_write_access* system property to *false* to override checking whether the user has write access to the child entity.

> **Note:** The *glide.email_client.check_write_access* system property isn't supported on Xanadu and Yokohama Glide versions. If you're using these Glide versions, then you must grant your users write access to the child entity.

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**Related topics**

Email client

View and send emails in Lead-to-Cash Process Management

## Activate the Return Merchandise Authorization plugin

If you have the admin role, you can activate the RMA Case Management plugin (com.sn_csm_rma_case). The plugin enables you to manage and triage return cases for customer products and services, addressing returns, replacements, and repair use cases.

### Before you begin

Install the following plugins or confirm that they exist before activating the RMA Case Management plugin:

**List of plugins to be installed before the RMA Case Management plugin**

| Plugin | Description |
|---|---|
| Lead to Cash Core [com.snc.l2c_core] | Enables you to compose Lead to Cash flow. |
| Customer Install Base Management [com.snc.install_base] | Enables you to capture the current state of the install base and establish the relationship to any downstream entities that may impact their functioning. |
| Case lines and workflows [com.sn_case_line] | Enables a case to hold many line items. The line items are product instances and can be extended for various order to case operations entities. |
| Entitlements Verification [com.sn_ent_verify] | Provides API to verify entitlement and characteristics. |

Role required: admin

### About this task

The following items are installed with RMA Case Management:

- Plugin
- Tables
- Roles

For more information, see Return Merchandise Authorization Case Management.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the RMA Case Management plugin (sn_csm_rma_case) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

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

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

**Related topics**

Return Merchandise Authorization

Using order operations applications

### Return Merchandise Authorization roles

Information about Return Merchandise Authorization (RMA) roles.

**Return Merchandise Authorization roles**

| Roles | Description | Contains roles |
|---|---|---|
| sn_csm_rma_case.csm_rma_case_creator | This role provides granular access to create RMA cases and RMA case Lines. | sn_csm_rma_case.writer |
| sn_csm_rma_case.csm_rma_case_viewer | This role provides granular access to read RMA cases and RMA case Lines. | None |
| sn_csm_rma_case.csm_rma_case_writer | This role provides granular access to edit or update RMA cases and RMA case Lines. | sn_csm_rma_case.viewer |

## RMA AI agentic workflow

Automate and streamline Return Merchandise Authorization (RMA) case handling, reducing manual intervention, improving responsiveness, and ensuring consistent decision-making.

## RMA AI agent Overview

Use the **RMA AI** agentic workflow for:

- **Case creation**: Initiate RMA cases through the business portal or virtual agent by providing product details and return reasons. The agent fetches install base items and validates them automatically.
- **Case processing**: The support assistant performs entitlement and warranty checks, proposes resolutions, and communicates with the customer for approval and next steps.
- **Proactive updates**: The agent provides updates on case status, entitlements information, and case summary ensuring customers are informed throughout the process.
- **Customer interaction**: Customers can interact via chat, select install base items, and specify reasons for return, replacement, or repair. The AI agent guides users through the process and offers recommendations if entitlements are not available.
- **Live agent handoff**: If required, the agent can transfer the case to a live agent for further assistance.
- **Role-based actions**: Both the requester and fulfiller personas will have access to create and process the RMA Case using the RMA AI Assistant.

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To modify the **RMA AI** agentic workflow duplicate it, and adjust the settings according to your requirements. You can activate the agentic workflow template by making triggers active and setting the display settings to include the ServiceNow Otto panel.

**Important:** When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

## RMA AI agents

The following table lists the **RMA** AI agents.

**Important:** In the **Define availability** screen for the AI agent, make sure that the **Status** field is enabled to activate the AI agent.

### RMA AI agents and their roles

| AI agent | AI agent role |
|---|---|
| RMA Assistant | Manages case intake, processing, entitlement verification, customer communication, and proactive follow-ups. |

## Roles required to create a workflow

The roles required to activate and access the workflow are as follows.

### Roles and responsibilities

| Roles | Responsibilities |
|---|---|
| RMA Fulfiller | Interact with RMA AI Agent using NAP panel. |
| User | Interact with RMA AI Agent using ServiceNow Otto for Virtual Agent. |

**Related topics**

Activating the RMA Agentic workflows

### Activating the RMA Agentic workflows

Activate the agentic workflows and triggers to manage cases and provide resolutions.

**Before you begin**
Role required: admin

**Procedure**

1. Navigate to **All** > **AI Agent studio** > **Create and Manage**.
2. Select **RMA AI Agent workflow**.
   The workflow is active by default.
3. In the RMA AI Agentic workflow, select **Define trigger**.
4. Select the agentic workflow trigger in the list.
5. On the Edit trigger form, set **Active** to true.

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**Related topics**

RMA AI agentic workflow

Return Merchandise Authorization case self service

### Return Merchandise Authorization case self service

Return Merchandise Authorization (RMA) case self-service plugin (com.sn_csm_rma_case_ss) enables customers to view and respond to RMA cases directly on the Business Portal, without having to contact support.

Customers creating an RMA case through the RMA AI Agent previously had no way to track that case or respond to a proposed resolution without contacting support. The RMA case self-service plugin (com.sn_csm_rma_case_ss) adds this visibility directly to the Business Portal, so customers can follow up on their own RMA cases and case lines.

With the RMA Case self-service plugin, users can

- View all of their RMA cases in one place on the Business Portal
- Open a case to view its details and its status

The Business Portal displays a tab listing the RMA cases that a customer created through the RMA AI Agent. Selecting a case opens a standard ticket page with case details, such as short description, case number, account, and status. From there, the customer can open the RMA case lines associated with the case.

**Related topics**

View RMA cases on the Business portal

### View RMA cases on the Business portal

Enable customers to view and respond to RMA cases directly on the Business Portal, without having to contact support.

#### Before you begin

Role required: customer, sn_csm_rma_case.csm_rma_case_viewer

#### Procedure

1. Navigate to the Business portal.
2. From the **Requests** menu in the header, select **View submitted requests** > **View cases and tasks**.
3. From the **Categories** list, select **My RMA cases** to view all the cases assigned to you.
4. Open a case to view the short description, status, and other details associated with the case.

**Field descriptions on an RMA case**

| Field | Description |
|---|---|
| Status | Status of the RMA case. |
| Created | Date on which the RMA case was created. |
| Last updated | Date on which the case details were last updated. |

5. Select the RMA case lines related list tab to view the activity details, status, parent case, proposed resolution and more information associated to the case line item.

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**Related topics**

- RMA AI agentic workflow
- Return Merchandise Authorization case self service

## Post-sales engagement

Learn how to configure the Customer Life Cycle Management Workflows application to manage post-sale workflows on sold products.

Installing and configuring the Customer Life Cycle Management Workflows application helps manage ongoing customer relationships and product life cycle activities after an order is completed or fulfilled.

## Configure Partner Relationship Management

Install the PRM (com.snc.partner_relationship_management) application from ServiceNow® Store to enable enterprises to hire partners and improve their sales cycles.

Admins and users with various roles, such as Enterprise partner admin (sn_prm.enterprise_partner_admin), Enterprise partner agent (sn_prm.enterprise_partner_agent), and more must complete the following configuration tasks to set up the Partner Relationship Management application.

**Set up PRM**

*This table describes the configuration tasks required for Partner Relationship Management and their descriptions.*

| Task | Description | Role |
|---|---|---|
| Install Partner Relationship Management | Install the Partner Relationship Management application from ServiceNow Store. | admin |
| Roles and components of Partner Relationship Management | Assign functional roles to different PRM entities. | admin |
| Data model for Partner Relationship Management | Configure and add data to the different tables that are installed with PRM. | • admin<br>• Enterprise Partner admin (sn_prm.enterprise_partner_admin) |

**Related topics**

- Partner Relationship Management
- Using Partner Relationship Management

### Install Partner Relationship Management

Install the Partner Relationship Management plugin (com.snc.partner_relationship_management), along with the demo data and installations that are related to ServiceNow Store applications and plugins.

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### Before you begin

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

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

### About this task

The following items are installed with Partner Relationship Management:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Partner Relationship Management application (com.snc.partner_relationship_management) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Partner Relationship Management.
4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|---|---|
| **If demo data is available and you want to in stall it** | **a.** Select the **Partner Relationship Manage ment** application. If the application is in stalled, it appears in the **Installed** tab.<br>**b.** Select the **Load Demo Data** option in **Quick Actions**.<br>You get a prompt to confirm whether you want to continue with the loading of demo data.<br>**c.** Select **OK**.<br>**Important:** If you don't load the demo data during installation, it's unavailable to load later. |
| **If the Load Demo Data option isn't available but you want demo data** | Load the demo data after installing Partner Re lationship Management. |

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| Demo data install task | Description |
| --- | --- |
| | **a.** Install Partner Relationship Management (com.snc.partner_relationship_management).<br>**b.** Navigate to **All** and in the Filter, type `v_plugin.list`.<br>**c.** In the **System Plugin** list, search for Partner Relationship Management plugin.<br>**d.** In the System **Plugin Partner Relationship Management data model** window, under Related Links, select **Install Demo Data Only**. |

**Result**
You have successfully installed the Partner Relationship Management application.

**Related topics**

Roles and components of Partner Relationship Management

Data model for Partner Relationship Management

## Roles and components of Partner Relationship Management

The Partner Relationship Management application uses roles to manage access, identify users, and establish relationships between enterprises and channel partners.

The PRM plugin (com.snc.partner_relationship_management) comes with a set of functional and granular roles, each with varying levels of access to raise and address queries.

The PRM application provides access and permissions to users part of both the enterprise and the channel partner ecosystem.

## Functional and granular roles

Functional roles help provide authorized related parties access to enterprise and channel partner members. A granular model helps to protect data by granting the required level of access to the relevant enterprise or channel partner entities. With this functionality, each role is associated with a set of privileges or responsibilities that determine users' access to certain information.

You can set granular policies that authorize individuals to do their jobs efficiently and effectively, which helps to improve the customer experience.

## Roles and descriptions

Functional roles are a set of granular roles that are required to perform a function that requires access to multiple entities. The following table lists the functional roles for Partner Relationship Management.

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### Functional roles

*List of functional roles and their descriptions.*

| Role | Description | Contains roles |
|---|---|---|
| Enterprise Partner admin (sn_prm.enterprise_partner_admin) | A user who is an admin for the partner enterprise. | • sn_service_org.writer<br>• sn_prm.channel_partner_writer<br>• sn_prm.partner_program_writer<br>• sn_prm.partner_program_rel_writer<br>• sn_customerservice.csm_workspace_user<br>• sn_seg.segment_mgmt_admin |
| Enterprise Partner Relationship Manager (sn_prm.enterprise_partner_rel_manager) | Contributor who belongs to an enterprise and is responsible for managing cases associated with the partner hierarchy. | • sn_bus_loc.location_relationship_manager<br>• sn_prm.partner_data_viewer<br>• sn_customerservice.csm_workspace_user |
| Enterprise Partner Agent (sn_prm.enterprise_partner_agent) | Fulfiller who belongs to an enterprise and is responsible for fulfilling partner cases. | • sn_customerservice_agent<br>• sn_prm.partner_data_viewer |
| Partner Manager (sn_prm.external_partner_manager) | Contributor who belongs to a partner entity and is responsible for reporting cases associated with their partner hierarchy on the portal. | • sn_customerservice.svc_location_manager_c<br>• sn_prm.partner_data_viewer<br>• sn_prm_dr.partner_deal_reg_manager |
| Partner Associate (sn_prm.external_partner_associate) | Contributor who belongs to a partner entity and is responsible for reporting cases associated with their partners on the portal. | • sn_customerservice.service_organization_co<br>• sn_prm.partner_data_viewer |

The following table lists the granular roles installed with Partner Relationship Management.

### Granular roles

*List of granular roles and their descriptions.*

| Role | Description | Inherited roles |
|---|---|---|
| Channel partner writer (sn_prm.channel_partner_writer) | This role provides granular edit access to the channel partner table. | Partner Data Viewer (sn_prm.partner_data_viewer) |
| Partner Program Writer (sn_prm.partner_program_writer) | This role provides granular edit access to the partner program table. | Partner Data Viewer (sn_prm.partner_data_viewer) |

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**Granular roles**

*List of granular roles and their descriptions.*

**(continued)**

| Role | Description | Inherited roles |
|---|---|---|
| Partner Program Relationship Writer (sn_prm.partner_program_rel_writer) | This role provides granular edit access to the partner program relationship table. | Partner Data Viewer (sn_prm.partner_data_viewer) |
| Partner Data Viewer (sn_prm.partner_data_viewer) | This role provides granular read access to the channel partner, partner program, and partner program relationship tables. | NA |
| Experience (sn_prm.partner_ui) | This role provides granular access to organization staff to ensure a consistent experience across all user interfaces.<br>**Note:** The Experience role needs to be manually inherited into other roles to view the Partner Relationship Management modules on ServiceNow platform, CRM Workspace, and the Partner portal. | NA |
| Program Segment Writer (sn_prm.program_segment writer) | This role provides users with the create, read, and update access to the Program segment mapping (sn_prm_program_segment_mapping) table. | • Partner Data Viewer (sn_prm.partner_data_viewer)<br>• Segment Data Viewer (sn_Seg.segment_mgmt_data_viewer) |

## System properties

Navigate to **All** > **Partner Relationship Management** > **Properties**. The Enterprise Partner admin (sn_prm.enterprise_partner_admin) has the read and write access to the following properties.

- glide.ui.sn_prm_partner_program_activity.fields
- glide.service_portal.resize_text.partner.enable_rem_conversion
- glide.ui.sn_prm_partner_program_relationship_activity.fields
- glide.ui.sn_prm_channel_partner_activity.fields

**Related topics**

Install Partner Relationship Management

Data model for Partner Relationship Management

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### Add responsibilities to PRM roles

A responsibility describes a role or function that supports a user. Use responsibility definitions to create relationships between any two partner entities.

## Before you begin

Role required: sn_prm.enterprise_rel_manager, sn_prm.external_partner_associate, or sn_prm.external_partner_manager

## About this task

Related party configurations define the title of a relationship between an entity and an organization or a user. These configurations also enable linking related party types with responsibility definitions to grant access as needed.

### Related parties and their default responsibilities

*List of role types and their associated default responsibility.*

| Type | Default Responsibility |
|---|---|
| Enterprise Partner Relationship Manager [sn_prm.enterprise_partner_rel_manager] | Location Relationship Manager [sn_bus_loc.location_relationship_manager] |
| External Partner Associate [sn_prm.external_partner_associate] | Location Contributor [sn_customerservice.service_organization_contributor] |
| External Partner Manager [sn_prm.external_partner_manager] | Location Manager Contributor [sn_customerservice.svc_location_manager_contributor] |

**Note:** The default responsibilities are automatically installed with the Business Location plugin (com.snc.business_location).

## Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Channel Partner**.
2. Open a channel partner record and add an external staff member or an enterprise partner relationship manager based on your requirement.

| Task | Description |
|---|---|
| **Register External staff member** | **a.** Select **Register External Partner Staff** from the channel partner record.<br>**b.** Select the **Role Type** you want to associate with your user, whether external partner manager or external partner associate.<br>**c.** Select **Submit**.<br>To learn more about the role type and the member registration fields, see #unique_700. |
| **Register Enterprise Partner Relationship Manager** | **a.** Select **Edit** from the Members related list on the channel partner record to add an en terprise member as a channel partner.<br>**b.** Open the record associated with the user and select **New** from the Service Organiza tion Member Responsibilities related list. |

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| Task | Description |
| --- | --- |
| | **c.** Enter the role name in the **Type** field to assign a responsibility to the role.<br>**d.** Select **Submit**. |

### Result
An external staff member or an enterprise partner relationship manager is registered.

#### Related topics
Partner Relationship Management

Using Partner Relationship Management

## Data model for Partner Relationship Management

The Partner Relationship Management data model provides a framework to map the relationship between channel partners and programs.

Add data in the Channel Partner [sn_prm_channel_partner] and Partner Program [sn_prm_partner_program] tables and create a relationship between the two tables in the Partner Program relationship [sn_prm_partner_program sn_prm_partner_program_relationship] table.

#### Configuration tasks for PRM data model
*List of tasks and descriptions for the Partner Relationship Management tables.*

| Task | Role | Description |
| --- | --- | --- |
| Configure Channel Partner table | • Enterprise admin (sn_prm.enterprise_partner_admin)<br>• Channel partner writer (sn_prm.channel_partner_writer) | Manage information related to channel partners. |
| Configure Partner Program table | • Enterprise admin (sn_prm.enterprise_partner_admin)<br>• Partner program writer (sn_prm.partner_program_writer) | Enable channel partners to participate in structured programs to build customer relationships. |
| Configure Partner Program Relationship table | • Enterprise admin (sn_prm.enterprise_partner_admin)<br>• Partner program relationship writer (sn_prm.partner_program_rel_writer) | Establish a relationship between channel partners and partner programs. |

#### Related topics
Install Partner Relationship Management

Roles and components of Partner Relationship Management

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### Configure Channel Partner table

With the Partner Relationship Management application, you can use the channel partner [sn_prm_channel_partner] table to manage and store information related to channel partners.

#### Before you begin
Role required: sn_prm.enterprise_partner_admin or sn_prm.channel_partner_writer

#### About this task
The channel partner [sn_prm_channel_partner] table is an extension of External Business Location.

#### Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Channel Partner**.
2. Select **New** to open the Channel Partner Registration details form.
3. On the form, fill in the fields.
   To learn more about the fields on the channel partner table and their descriptions, see Channel partner table fields.
4. Select **Submit**.

#### Related topics

Partner Relationship Management

Using Partner Relationship Management

### Configure Partner Program table

With the Partner Relationship Management application, enable channel partners to participate in structured initiatives designed to drive revenue, enhance market reach, and build customer relationships by using the Partner Program [sn_prm_partner_program] table.

#### Before you begin
Role required: sn_prm.partner_program_writer or sn_prm.enterprise_partner_admin

#### About this task
Partner programs define the roles, responsibilities, and benefits for different participants. Some examples of partner programs can be Reseller Program, Managed service provider (MSP) Program, Authorized Training Partner (ATP) Program and so on.

#### Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Partner Programs**.
2. Select **New** to open the partner program record.
3. On the form, fill in the fields.
   To learn more about the fields on the Partner program table and their descriptions, see Partner program table fields.
4. Select **Submit**.

#### Related topics

Partner Relationship Management

Using Partner Relationship Management

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### Configure Partner Program Relationship table

With the Partner Relationship Management application, you can establish a relationship between channel partners and partner programs.

#### Before you begin

Role required: sn_prm.enterprise_partner_admin or sn_prm.partner_program_rel_writer

#### About this task

Associate channel partners to different structured initiatives or programs using the Partner Program Relationship [sn_prm_partner_program_relationship] table.

#### Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Partnerships**.
2. Select **New** to open the partnership record.
3. On the form, fill in the fields.
   To learn more about the fields on the Partner Program Relationship table and their descriptions, see Partner program relationship table fields.
4. Select **Submit**.

#### Related topics

Partner Relationship Management

Using Partner Relationship Management

### Configure Program Segment Mapping

Establish a mapping between a program and a segment on the program segment mapping (sn_prm_program_segment_mapping) table to determine which segment belongs to which partner program.

#### Before you begin

Role required: sn_prm.partner_ui

#### Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Program Segments**.
2. Select **New**.
3. On the form, fill in the fields.

   To learn about the fields on the program segment mapping (sn_prm_program_segment_mapping) table, see Program segment mapping table fields.
4. Select **Submit**.

#### Related topics

Configure Program Segment Criteria

Configure Program Criteria

### Configure Program Segment Criteria

Create records in the program segment criteria (sn_prm_program_segment_criteria) table based on different records on the entity criteria (sn_req_criteria_customer_condition) table and segments.

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### Before you begin
Role required: sn_prm.partner_ui

### Procedure
1. Navigate to **All** > **Partner Relationship Management** > **Program Segments**.
2. Open a program from the list.
3. From the **Program Segment Criteria** related list, select **New**.
4. On the form, fill in the fields.

   To learn more about the fields and descriptions, see Program segment criteria table fields.
5. Select **Submit**.

### Related topics
Configure Program Segment Mapping

Configure Program Criteria

## Configure Program Criteria

Establish a mapping between the partner program (sn_prm_partner_program_relationship) table and the entity criteria (sn_req_criteria_customer_condition) table.

### Before you begin
Role required: sn_prm.partner_program_writer or sn_prm.enterprise_partner_admin

### Procedure
1. Navigate to **All** > **Partner Relationship Management** > **Partner Program**.
2. Open a partner program from the list.
3. Navigate to the **Program Criteria** related list on the partner program form.
4. Select **New**.
5. On the form, fill in the fields.

   To learn about the fields on the program criteria table, see Program criteria table fields.
6. Select **Submit**.

### Related topics
Configure Program Segment Mapping

Configure Program Segment Criteria

# Partner Workspace

Partner admins, agents, and managers can manage partner programs and partnerships on the partner workspace to triage cases and requests from customers.

## Overview of the workspace

Use the CRM Workspace to enable Enterprise Partner admin (sn_prm.enterprise_partner_admin) and Enterprise Partner Manager (sn_prm.enterprise_partner_rel_manager) to access tools required to address customer questions and resolve customer queries.

You can perform the following actions using the workspace.

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### Tasks on the partner workspace

| Task | Description |
|---|---|
| Create Channel Partner record | Create and track channel partner records on workspace to manage and store all information related to the channel partners. |
| View Channel Partner information on partner workspace | View all the details, cases, and other entities associated with a channel partner. |
| Create Partner Programs on the CRM Workspace | Enable channel partners to create Partner Programs on the workspace. |
| Create Partnerships on the CRM Workspace | Establish a relationship between channel partners and partner programs on the workspace. |

**Related topics**

Partner Relationship Management

Using Partner Relationship Management

### Create Channel Partner record

Create and track channel partner records on the partner workspace to manage and store all information related to the channel partners.

## Before you begin

Role required: sn_prm.enterprise_partner_admin

## Procedure

1. Navigate to the *CRM Workspace* and select the list  view.
2. Select **Channel Partners** from the Partner Relationship Management.
3. Select **New**.
4. On the form, fill in the fields.

   To learn more about the fields in the channel partner details section, see Channel partner table fields.

### Business Profile section

| Field | Description |
|---|---|
| Revenue per year | Revenue per year for the channel partner entity. |
| Number of employees | Number of employees in the channel partner entity. |
| Supported Industries | Industries that the channel partner supports. |

5. In the **Channel Partner Company Info** section of the form, fill in the contact details including the **Website**, **Email**, and **Phone** of the channel partner.

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6. In the **Company Address** section of the form, fill in the address of the physical location of the channel partner, such as **Street**, **State**, and more.
7. Select **Save**.

**Related topics**

Partner Relationship Management

Using Partner Relationship Management

### View Channel Partner information on partner workspace

View consolidated channel partner information through the multiple tabs on workspace.

## Before you begin

Role required: sn_prm.enterprise_partner_rel_manager or sn_prm.enterprise_partner_agent

## Procedure

1. Navigate to the *CRM Workspace* and select the list view.
2. Select **Channel Partners** from the Partner Relationship Management module.
3. Open a channel partner record from the list.
   You can view all the information related to cases, child channel partners, sold products, or install base items associated with the channel partner.

   To learn more about the components on the channel partner record, see Channel Partner components on workspace.

**Related topics**

Partner Relationship Management

Using Partner Relationship Management

### Register Partner Staff on workspace

Register a new partner member or transfer existing staff within a partner organization.

## Before you begin

Role required: sn_prm.enterprise_partner_admin

## About this task

The Enterprise Partner Relationship Manager [sn_prm.enterprise_partner_rel_manager] of the channel partner can also register partner staff on the workspace.

## Procedure

1. Navigate to the *CRM Workspace* and select the list view.
2. Select **Channel Partners** from the Partner Relationship Management module.
3. Open a channel partner record from the list and select **Register Partner Staff**.
4. On the form, fill in the fields.

   To learn more about the fields on the Register member form, see #unique_700.

5. Upload a file or document in the **Add attachments** section.

   This is an optional field.

6. Select **Submit**.

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### Related topics

Partner Relationship Management

Using Partner Relationship Management

## Create Partner Programs on the CRM Workspace

Enable channel partners to participate in structured initiatives designed to drive revenue, enhance market reach, and build customer relationships by creating partner programs on the workspace.

### Before you begin

Role required: sn_prm.enterprise_partner_admin

### Procedure

1. Navigate to the *CRM Workspace* and select the list view.
2. Select **Partner Program** from the Partner Relationship Management module.
3. Open a partner program from the list and select **New**.
4. On the form, fill in the fields.

   To learn more about the fields on the Partner Program form, see Partner program table fields.
5. Select **Save**.

### Related topics

Partner Relationship Management

Using Partner Relationship Management

## Create Partnerships on the CRM Workspace

With the Partner Relationship Management application, you can establish a relationship between channel partners and partner programs on the workspace.

### Before you begin

Role required: sn_prm.enterprise_partner_admin

### Procedure

1. Navigate to the *CRM Workspace* and select the list view.
2. Select **Partnerships** from Partner Relationship Management.
3. Select **New**.
4. On the form, fill in the fields.

   To learn more about the fields on the Partnership form, see Partner program relationship table fields.
5. Select **Save**.

### Related topics

Partner Relationship Management

Using Partner Relationship Management

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### Create cases for channel partners

Create customer service cases for channel partners to manage customer queries and offer resolution.

#### Before you begin

Role required: sn_prm.enterprise_partner_rel_manager or sn_prm.enterprise_partner_agent

#### About this task

#### Procedure

1. Navigate to the *CRM Workspace* and select the list view.
2. Select **Cases** from the Partner Relationship Management module.
3. Select **New**.
4. On the form, fill in the fields.

   To learn more about the fields on the case form, see Case form.
5. Select **Save**.

#### Related topics

Partner Relationship Management

Using Partner Relationship Management

### Update deal registration record

Create a deal registration record or perform actions on an existing record in the CRM Workspace, including submitting for approval and managing post-approval actions.

#### Before you begin

Role required: sn_prm_dr.deal_reg_ui, Approver role (sn_adv_appr_mgmt.approval_request_approver).

You must have one of the following roles:

- Deal agents (Enterprise B2B and B2C): Create deals, Preview and submit for approval, manage tasks.
- Enterprise Relationship Managers: Oversee deals under their hierarchy.
- Enterprise Contributors: Manage deals for their channel partners.
- Deal Registration Admin: Configure approval rules, manage all deal records and tasks.
- Internal team members: Work on deal-related tasks (account creation, compliance review, and so on).

#### About this task

After a deal is created on the Partner portal and is in the **Submitted** state, an agent on the *CRM Workspace* can see the same deal. The information in the fields is automatically populated from the Partner portal based on selections made by the deal registration initiator and deal registration manager.

#### Procedure

1. Navigate to the CRM Workspace and select the list view.
2. Select **Deal Registration > Submitted** to see a list of submitted deals.

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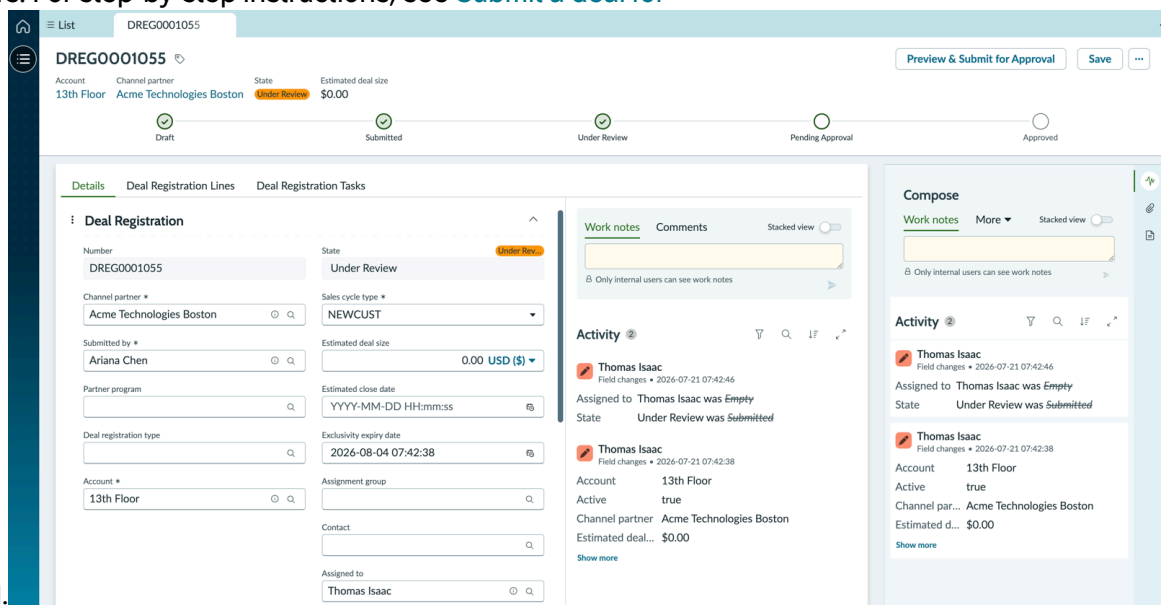
To learn how to create a deal and submit it, see Register a deal on Partner portal. The deal registration form details are auto-filled based on selections made in the Partner portal. The following roles can make these selections: B2B deal registration initiator (sn_prm_dr.partner_b2b_deal_reg_initiator), B2C deal registration initiator (sn_prm_dr.partner_b2c_deal_reg_initiator), deal registration initiator (sn_prm_dr-partner_deal_reg_initiator), and deal registration manager (sn_prm_dr.partner_deal_reg_manager).

3. Open a deal record to view or update the details.
   The deal form displays all populated fields and available actions based on the current deal state.
4. Review the deal information and perform one of the following actions based on your role and the deal state.

   a. To assign a deal to yourself for review, select **Assign to me**.
      This action is available only to agent personas. When you assign a deal to yourself, the state changes to **Under Review**, and you can perform the following actions on the deal:

      - **Reject** — Reject the deal and fill in the Closure notes.
      - **Mark as Duplicate** — Mark the deal as a duplicate of another deal and fill in the Closure notes.
      - **Cancel Deal Registration** — Cancel the deal registration entirely.

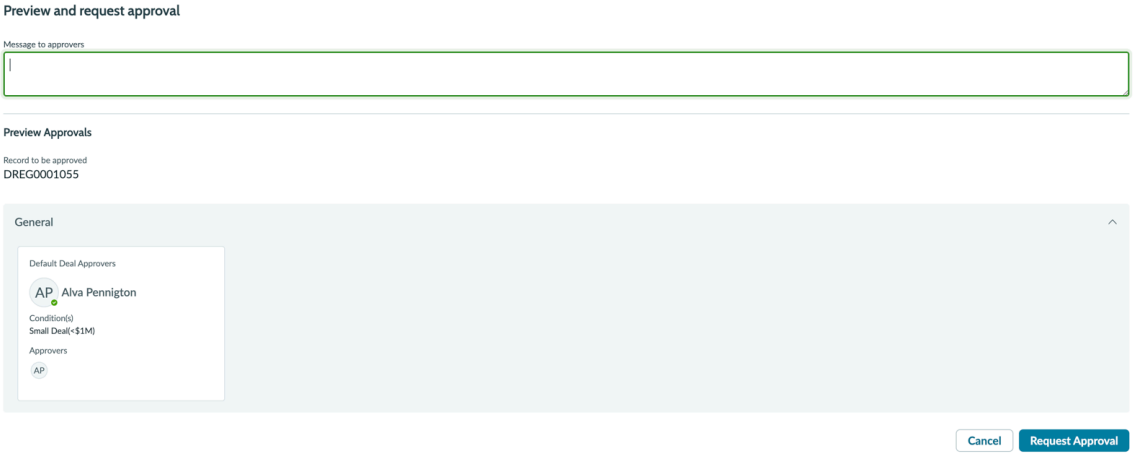
   b. To submit the deal for approval, select **Preview & Submit for Approval**.
      The approval plan comes from your administrator's configuration of approval rules and approval chains. The deal state changes to **Pending Approval**, and the system sends approval requests to designated approvers. For step-by-step instructions, see Submit a deal for approval.




A preview modal opens showing which approvers receive the request and in what order. Review the approval chain to confirm all required approvers are listed in the correct sequence. The approval plan comes from your administrator's configuration of approval rules and approval chains. Select **Request approval** to submit the deal. The first approver in the chain receives a notification. You

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can track which approvers have been notified and which have acted on the request. Sequential approvers receive requests only after the previous step is approved.

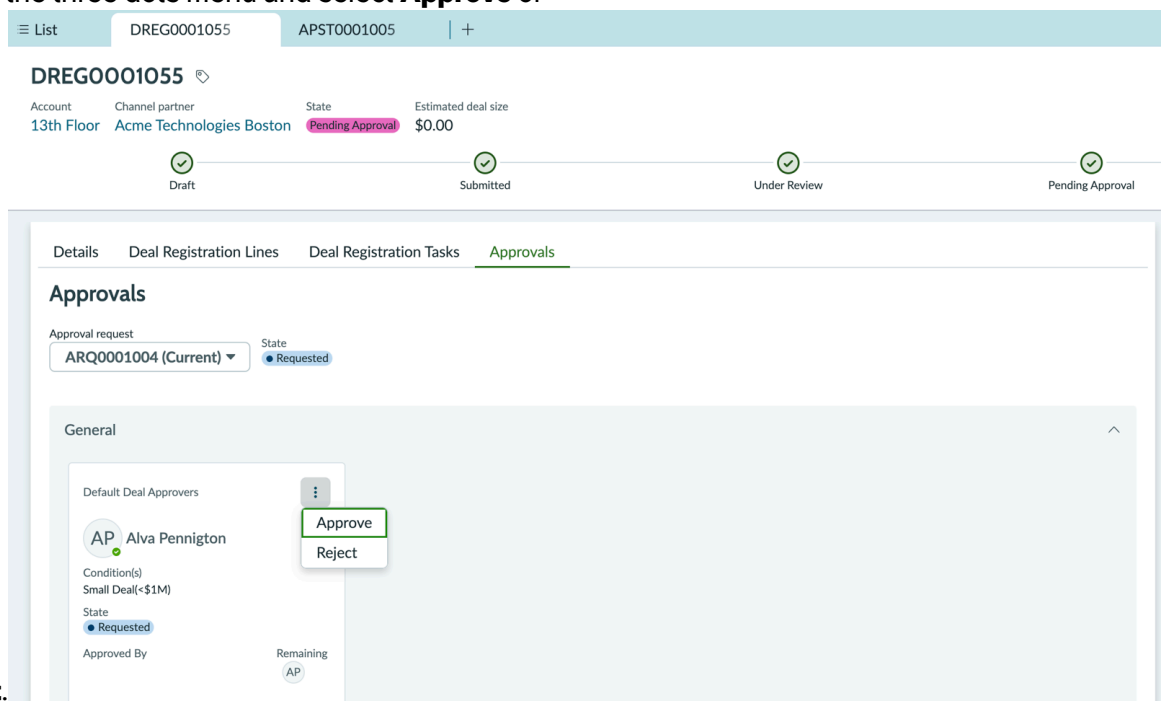



5. Submit the deal registration for approval.
6. If you are an approver, review and approve or reject the deal.

   a. Open the deal record and review all details on the **Details**, **Line Items**, and other tabs. Verify the information is correct before proceeding with your approval decision.

   b. Navigate to the **Approvals** tab on the deal record.
   This tab displays the pending approval request and approval history.

   c. Select the three dots menu and select **Approve** or **Reject**.
   If needed, you can add comments to explain your decision.




If you approved, the next approver in the chain (if any) receives a notification. If you rejected, the deal returns to the submitter. Sequential approval means the next step only begins after your approval. Comments are visible to the requester and other approvers. After all approvers in the chain approve, the deal moves to Approved state. If any approver rejects it, the deal moves to closed state with Rejected closure code.

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After the deal registration is approved, the state changes to **Approved**.

7. After a deal is approved, you can perform one of the following actions on the approved deal.

   a. To cancel the deal registration, select **Cancel Deal Registration**.
   Enter the closure notes to document the reason for cancellation. The closure code updates to **Rejected**. Use this action if the deal is no longer valid or the partner withdrew the registration.

   b. To close the deal, select **Close**.
   Close a deal if there's been no activity for a period of time. The deal state changes to **Closed**, and the closure code updates to **Closed**. Closed deals are archived but remain visible in historical records.

   c. To convert the deal to an opportunity, select **Convert to Opportunity**.
   Convert an approved deal to a CRM opportunity to begin the sales cycle. The deal state changes to **Closed**, and the closure code updates to **Converted**. All line items from the deal registration are automatically transferred to opportunity line items using Primitives.
   The deal registration is successfully converted to an opportunity. You can now manage the opportunity in the standard CRM sales pipeline.

## Result

The deal registration record is updated with the action you performed. Depending on the action:

- Submitted for Approval: The deal moves to **Pending Approval**, and approvers receive notifications to review the deal.
- Approved: The deal state becomes **Approved**, and you can perform post-approval actions.
- Cancelled/Rejected: The deal state becomes **Closed** with a **Rejected** closure code, and the deal is removed from active workflows.
- Converted to Opportunity: The deal is converted to a CRM opportunity, line items are transferred, and the deal workflow completes.

## What to do next

### Approval workflow details

When you submit a deal for approval, the approval workflow evaluates the deal against configured approval rules. The workflow identifies required approvers based on deal attributes and organizational hierarchy, then sends notifications to those approvers. Approvers review the deal in their approval queue and can approve, reject, or request additional information.

For detailed information about the approval workflow, approval states, and approver responsibilities, see Deal Registration approvals.

### Related topics

- Deal Registration approvals
- Submit a deal for approval
- Approval configuration setup
- Register a deal on Partner portal

### Related topics

Register a deal on Partner portal

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## Configure Segment Management

Install the Segment Management application (com.snc.segment_mgmt) from the ServiceNow® Store to manage and group entities into various segments to promote progression.

The Segment Management plugin (com.snc.segment_mgmt) provides a general framework to create and manage segments and segmentation across various domains. Admins and users with various roles must perform the following configuration tasks to set up the segment management application.

**Set up tasks for Segment Management**

*Configuration tasks to use Segment Management*

| Task | Description | Role |
|---|---|---|
| Install Segment Management | Install the Segment Management application (com.snc.segment_mgmt) from ServiceNow® Store. | admin |
| Data model for Segment Management | Add records in the segment (sn_seg_segment) table to create segments for specific customers. | sn_seg.segment_mgmt_admin |
| Roles and components of Segment Management | Set of functional roles to maintain and configure segment data. | admin |

**Related topics**

Configure Segment Management

Install Segment Management

### Install Segment Management

Install the Segment Management plugin (com.snc.segment_mgmt), along with the demo data and installations that are related to ServiceNow® Store applications and plugins.

### 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.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

### About this task

The following items are installed with the Segment Management application (com.snc.segment_mgmt):

- Plugins
- Store applications
- Roles
- Tables

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For more information on viewing components that are installed with an application, see Find components installed with an application.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Segment Management application (com.snc.segment_mgmt) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Segment Management.
4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|---|---|
| **If demo data is available and you want to in stall it** | **a.** Select the **Load Demo Data** option.<br>**b.** Select **Install**.<br>**Important:** If you don't load the demo data during installation, it's unavailable to load later. |
| **If the Load Demo Data option isn't available but you want demo data** | Load the demo data after installing Segment Management.<br>**a.** Install Segment Management (com.snc.segment_mgmt).<br>**b.** Navigate to the **All** and in the Filter, type `v_plugin.list`.<br>**c.** In the **System Plugin** list, search for Segment Management plugin.<br>**d.** In the System **Plugin Segment Management data model** window, under Related Links, select **Install Demo Data Only**. |

### Result

You have successfully installed the Segment Management (com.snc.segment_mgmt) application. You can now set up the data model and configure different roles.

### Related topics

Configure Segment Management

Data model for Segment Management

## Data model for Segment Management

The Segment Management data model provides a framework to map customers to specific segments to track partner progression toward the next tier.

With the segment admin (sn_seg.segment_mgmt_admin) role, you can add data in the segment (sn_seg_segment) table to create and manage multiple segments.

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**Segment table**

*Fields, types, and their description of the segment table*

| Field | Type | Description |
|---|---|---|
| Number | String | Auto-generated number associated with the segment. |
| Name | Translated text | Name of the segment. |
| Description | Translated text | Description of the segment. |
| Active | True/False | Current state of the segment, whether active or not. |
| Order | Number | Order of the segment. |
| Status | Choice<br>• Draft<br>• Approved<br>• Rejected<br>• Retired | Status to manage the life cycle of the segment. |
| Work notes | Journal input | Important information associated with the segment. |
| Domain | Domain ID | Domain to which the segment belongs. |

## Configuration tasks for Segment Management

Perform the following configuration tasks to set up the data model tables to establish an association between segment management and Partner Relationship Management.

- Configure Program Segment Mapping
- Configure Program Segment Criteria
- Configure Program Criteria

**Related topics**

Install Segment Management

Roles and components of Segment Management

### Roles and components of Segment Management

The Segment Management application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between segments and partners.

The Segment Management plugin (com.snc.segment_mgmt) comes with a set of functional roles, each with varying levels of access to segments and records.

## Functional and granular roles

Functional roles help provide authorized partners to maintain data and records in the segment table. A granular model helps to protect data by granting the required level of access to the

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relevant enterprise or channel partner entities. With this functionality, each role is associated with a set of privileges that determine users' access to certain information.

You can assign granular policies that authorize individuals to do their jobs efficiently and effectively, which helps to improve customer experience.

## Roles and descriptions

Functional roles are a set of granular roles that are required to perform a function that requires access to multiple entities. The segment management application uses the segment admin (sn_seg.segment_mgmt_admin) role to configure and maintain segment data in the segment (sn_seg_segment) table. The segment admin (sn_seg.segment_mgmt_admin) contains the following roles.

- Segment writer (sn_Seg.segment_mgmt_writer)
- Segment data viewer (sn_seg.segment_mgmt_data_viewer)

The following table lists the granular roles installed with Segment management.

**Granular roles and descriptions**

*Roles, descriptions, and inherited roles for segment granular roles*

| Role | Description | Inherited roles |
|---|---|---|
| Segment data viewer (sn_seg.segment_mgmt_data_viewer) | This role provides granular read access to segment data. | None |
| Segment writer (sn_seg.segment_mgmt_writer) | This role provides granular read, edit, and write access to segment data. | Segment data viewer (sn_seg.segment_mgmt_data_viewer) |

## System properties

Navigate to **All** > **Partner Relationship Management** > **Properties**.

The Segment admin (sn_seg.segment_mgmt_admin) hasread and write access for the [glide.ui.sn_seg_segment_activity.fields] property.

**Related topics**

Configure Segment Management

Data model for Segment Management

## Deal Registration

Install the Deal Registration Management plugin (com.snc.deal_registration_management) to enable channel partners to identify and manage customer interest in products.

## Key benefits of Deal Registration

The Deal Registration Management application (com.snc.deal_registration_management) offers the following benefits to channel partners:

- Deal registration forms that support multiple models, products, or partner programs.
- Reduced manual follow-up for tracking deal registrations and related information.

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- Flexibility for channel partners to create deal registrations.
- Deal lifecycle tracking through the enterprise CRM system to convert registrations to opportunities.

## Deal lifecycle

A typical deal registration follows this lifecycle:

1. **Draft**: Deal is created but not yet submitted.
2. **Submitted**: Deal is submitted for initial review.
3. **Under Review**: Deal is being evaluated by internal team.
4. **Pending Approval**: Deal is routed through approval workflow.
5. **Approved**: Deal receives all required approvals.
6. **Closed**: Deal work is completed and opportunity is created.
7. **Canceled**: Deal is canceled and no longer active.

## User personas in Deal Registration

Deal registration involves several key personas:

- Deal agents (Enterprise B2B and B2C): Create deals, Preview and submit for approval, and manage tasks.
- Enterprise Relationship Managers: Oversee deals under their hierarchy.
- Enterprise Contributors: Manage deals for their channel partners.
- Deal registration admin: Configure approval rules, manage all deal records and tasks.
- Internal team members: Work on deal-related tasks such as account creation and conformance review.

## Set up Deal Registration

Deal registration provides channel partners exclusive rights to work on a particular deal or customer for a period of time.

Install the Deal Registration Management plugin (com.snc.deal_registration_management). See Install Deal Registration.

Deal registrations and deal registration line items help to manage and track the products that are associated with submitted deal registrations. The Deal Registration Management plugin can promote trust and transparency between enterprises and their partners.

### Set up Deal Registration Management

*Perform the following configuration tasks to set up and use deal registration management.*

| Task | Description | Role |
|---|---|---|
| Install Deal Registration | Install the Deal Registration Management application from ServiceNow® Store. | admin |

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**Set up Deal Registration Management**

*Perform the following configuration tasks to set up and use deal registration management.*

**(continued)**

| Task | Description | Role |
|---|---|---|
| Data model for Deal Registration Management | Add data in the deal registration tables to maintain and track deals and the line items linked to a deal registration.. | Experience (sn_prm_dr.deal_reg_ui) |
| Roles and components of Deal Registration Management | The Deal Registration Management (com.snc.deal_registration_management) application uses roles to provide access to information and identify internal and external users. Roles also maintain data security and establish different types of relationships between segments and partners. | admin |

## Deal Registration approvals

Deal registration approvals provide a configurable workflow to verify that deals are reviewed and approved by the appropriate team members.

Deal registration approvals use the Advanced Approval Management framework to create multi-step, configurable approval chains. This framework lets you define when approvals are required and who must approve at each step.

The approval process has two layers: configuration and runtime. During configuration, an administrator sets up approval configurations, trigger conditions (when approvals are needed), approval rules (who approves), and approval chains (the sequence of approvers). At runtime, users submit deals for approval, and the system routes approval requests to the appropriate approvers based on the configuration.

When you submit a deal for approval, you see a preview showing which approvers receive the request and in what order. After approval by all required approvers, the deal moves to the approved state.

Key approval concepts:

- Approvals are based on trigger conditions, for example, deal size is less than $1 million.
- Approval rules determine who receives approval requests based on deal characteristics.
- Deal agents can submit any deal for approval, not just deals they created.
- Approvers must be explicitly assigned an Approver role to access approval requests.
- Approvals can have multiple steps with sequential or parallel review.

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## Deal Registration tasks

Deal registration tasks provide a centralized way to organize and track all work items associated with a deal.

Key task concepts:

- Tasks can be created whenever a deal is in an active state, excluding **Draft**, **Completed**, or **Canceled**.
- Tasks can be assigned to any internal ServiceNow® user, beyond deal agents.
- Non-deal users automatically receive the Fulfiller role to work on assigned tasks.
- Each deal can have zero to many tasks based on work requirements.
- Tasks are visible in the Partner CRM Workspace but not on the Partner portal.
- When a deal is archived or deleted, all associated tasks are automatically archived or deleted.

### Related topics

Partner Relationship Management

Using Partner Relationship Management

### Install Deal Registration

Install the plugin (com.snc.deal_registration_management), along with the demo data and installations that are related to ServiceNow® Store applications and plugins.

### 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.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

### About this task

The following items are installed with Deal Registration:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Deal Registration Management application (com.snc.deal_registration_management) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

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Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Partner Relationship Management.

4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|---|---|
| **If demo data is available and you want to install it** | **a.** Select the **Load Demo Data** option.<br>**b.** Select **Install**.<br>**Important:** If you don't load the demo data during installation, it's unavailable to load later. |
| **If the Load Demo Data option isn't available but you want demo data** | Load the demo data after installing Deal Registration Management.<br>**a.** Install Deal Registration Management (com.snc.deal_registration_management).<br>**b.** Navigate to the **All** and in the Filter, type `v_plugin.list`.<br>**c.** In the **System Plugin** list, search for Partner Relationship Management plugin.<br>**d.** In the System **Plugin Deal Registration Management Data Model** window, under Related Links, select **Install Demo Data Only**. |

### Result

You have successfully installed the Deal Registration Management (com.snc.deal_registration_management) application.

### Related topics

Partner Relationship Management

Using Partner Relationship Management

## Data model for Deal Registration Management

The deal registration management data model provides a framework for channel partners to establish a consistent and organized engagement model with channel partners.

Add data in the deal registration tables to maintain and track partner submitted deals and the line items linked to a deal registration.

### Configuration tasks for Deal Registration Management

*Perform the following tasks to use the deal registration data model.*

| Task | Role | Description |
|---|---|---|
| Configure Deal Registration table | Experience (sn_prm_dr.deal_reg_ui) | Configure the deal registration (sn_prm_dr_deal_registration) table to track a deal's life cycle |

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**Configuration tasks for Deal Registration Management**
*Perform the following tasks to use the deal registration data model.*

**(continued)**

| Task | Role | Description |
|---|---|---|
| | | through states and workflow stages. |
| Configure Deal Registration Line table | Experience (sn_prm_dr.deal_reg_ui) | Configure the Deal registration line (sn_prm_dr_deal_registration_line) table to manage product level details for a single deal. |
| Configure Deal Registration Type table | Deal registration admin (sn_prm_dr.deal_reg_admin) | Configure the deal registration (sn_prm_dr_deal_registration_type) type table to specify the role or involvement of a channel partner in a deal. |
| Configure Partner Program Deal Type Relationship table | Deal registration admin (sn_prm_dr.deal_reg_admin) | Configure the Partner program deal type relationship (sn_prm_dr_pp_deal_type) table to ensure that deal types are associated to appropriate partner programs. |
| Configure Deal Registration Approval Rules | Deal registration admin (sn_prm_dr.deal_reg_admin) | Use the Advanced Approval Management to define approval rules, approval conditions, and approver sequences for deal registrations. For configuration details, see the Advanced Approval Framework documentation. |

**Related topics**

Roles and components of Deal Registration Management

### Configure Deal Registration table

Configure the deal registration (sn_prm_dr_deal_registration) table to track a deal registration's life cycle through states and workflow stages.

## Before you begin
Role required: sn_prm_dr.deal_reg_ui

## About this task
The deal registration table stores the details of a deal submitted by a partner, including account details, deal size, and related opportunity.

## Procedure

1. Navigate to **All** > **Deal Registration** > **All**.
2. Select **New**.
3. On the form, fill in the fields.

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To learn more about the fields on the form, see Deal registration table fields.

4. Select **Submit**.

**Related topics**

Partner Relationship Management

Using Partner Relationship Management

### Configure Deal Registration Line table

Configure the Deal registration line (sn_prm_dr_deal_registration_line) table to manage product level details for a single deal registration.

**Before you begin**
Role required: sn_prm_dr.deal_reg_ui

**About this task**
The deal registration line table contains line items linked to a deal registration, each referencing a specific product offering.

**Procedure**

1. Navigate to **All** > **Deal Registration** > **All**.
2. Select **New** to create a deal registration.
   To learn how to create a deal registration, see Configure Deal Registration table.
3. Select **Deal Registration Lines** from the related list to create a deal registration line item.
4. Select **New**.

   **Note:** You can create a deal registration line item only if the deal is in the **Draft**, **Submitted**, or **Under Review** states.

5. On the form, fill in the fields.
   To learn about the fields on the form, see Deal registration line table fields.
6. Select **Submit**.

**Related topics**

Partner Relationship Management

Using Partner Relationship Management

### Configure Deal Registration Type table

Configure the deal registration type (sn_prm_dr_deal_registration_type) table to specify the role or involvement of a channel partner in a deal registration.

**Before you begin**
Role required: sn_prm_dr.deal_reg_admin

**About this task**
Configure the deal registration type table to define how a channel partner can be associated with a deal registration or can contribute to the deal registration.

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### Procedure

1. Navigate to **All** > **Deal registration** > **Administration** > **Deal Registration Types**.
2. Select **New** to create a deal registration type.
3. On the form, fill in the fields.
   To learn more about the fields, see Deal registration type table fields.
4. Select **Submit**.

#### Related topics

Partner Relationship Management

Using Partner Relationship Management

### Configure Partner Program Deal Type Relationship table

Configure the Partner program deal type relationship (sn_prm_dr_pp_deal_type) table to ensure that the appropriate deal registration types are associated to the accurate partner programs.

### Before you begin

Role required: sn_prm_dr.deal_reg_admin

### Procedure

1. Navigate to **All** > **Deal registration** > **Administration** > **Deal Registration Types**.
2. Create a deal registration type.
   To learn how to create a deal registration type, see Configure Deal Registration Type table.
3. Select **Program Deal Type Relationships** from the related list.
4. On the form, fill in the fields.
   To learn more about the fields, see Partner program deal type relationship table fields.
5. Select **Submit**.

#### Related topics

Partner Relationship Management

Using Partner Relationship Management

### Deal Registration approvals

Enable deal agents to submit deals for approval through a configurable approval workflow built on the Advanced Approval Management framework.

## Deal approvals overview

Deal registration approvals provide a flexible, configurable workflow to route deals through your organization's approval process. Instead of hard-coded approvers and fixed conditions, you can define custom approval rules based on deal characteristics to ensure that the right approvers review each deal.

Deal approvals help your organization by:

- Verifying that deals meet business criteria before approval
- Routing deals to the appropriate reviewers based on deal characteristics
- Maintaining an audit trail of all approval decisions
- Enabling flexible approval workflows that adapt to business needs

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## How approvals work

The deal approval process follows these steps:

1. Agent creates a deal and submits it for approval from the **Under Review** state.
2. System evaluates whether approval is needed based on configured rules.
3. System identifies approvers based on the triggered approval rule.
4. System sends approval requests to the designated approvers.
5. Deal moves to **Pending Approval** state while awaiting approval.
6. Approvers review the deal and select **Approve** or **Reject**.
7. Deal moves to **Approved** or **Closed (Rejected)** based on the decision.

## Key approval components

The deal registration approval workflow consists of the following components:

### Deal approval components

| Component | Description |
|---|---|
| Approval Rules | Define the conditions and approvers for a deal submission. Each rule specifies when it applies and who should approve. |
| Trigger Conditions | Specify when a deal requires approval, for example, deal size less than $1 million. When a condition is met, its associated approval rule is triggered. |
| Approval Requests | Automatically created when a deal is submitted for approval. Each request tracks the approvers and approval steps. |
| Approval Steps | Sequential stages within an approval request. Each step represents a single approver's decision point. |
| Approvers | Users designated to review and approve or reject deals. Approvers must be manually assigned the Approver role. |
| Approval Reminders | Automatic notifications sent to approvers about pending approval requests based on configured frequency. |

## Deal states and transitions

| State | Description | Transitions To | Available Actions |
|---|---|---|---|
| Draft | Deal has been created but not yet submitted for review or approval | Submitted | Edit deal, Submit, Delete. |
| Submitted | Deal has been submitted for initial review by internal team | Under Review, Canceled | Create tasks, Add work notes, Move to Under Review. |
| Under Review | Deal is being evaluated by the internal team. Submit | Pending Approval, Closed, Canceled | Create tasks, Preview & Submit for approval, Add work notes. |

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| State | Description | Transitions To | Available Actions |
|---|---|---|---|
| | for approval from this state | | |
| Pending Approval | Deal is routed through the approval workflow and is awaiting approver decisions | Approved, Closed (Rejected) | View **Approvals** tab, Create tasks, Add work notes (record is read-only). |
| Approved | Deal has received all required approvals and is cleared to move forward. Record is editable | Closed, Canceled | Create opportunity, Create tasks, Add work notes, Move to Closed or Canceled. |
| Closed | Deal work is completed and opportunity has been created | None | View only (read-only state). |
| Canceled | Deal has been canceled and is no longer active | None | View only (read-only state). |

## Approval personas and roles

Three main personas are involved in the approval workflow based on the Advanced Approval Management.

- Deal agents (Enterprise B2B and B2C): Submit deals for approval. The **Approval Request Writer** role is inherited from the Advanced Approval Framework. Can submit any deal for approval, beyond deals they created.
- Deal registration admin: Configure approval rules, trigger conditions, and approver groups. The **Approval Rule Admin** role is inherited from the Advanced Approval Framework.
- Approvers: Review and approve or reject the submitted deals. Must be manually assigned the **Approver** (sn_adv_appr_mgmt.approval_request_approver) role by the deal registration admin to access approval requests.

### Note:

- Unlike other roles, the approver role must be manually assigned by the admin to each user who approves deals. This is critical—without this role, approvers can't access approval requests.
- Demo approval configuration is not included in this release. You must configure your own approval rules and trigger conditions.
- Deal approval is available in CRM Workspace Partner Workspace, not on the Partner portal.

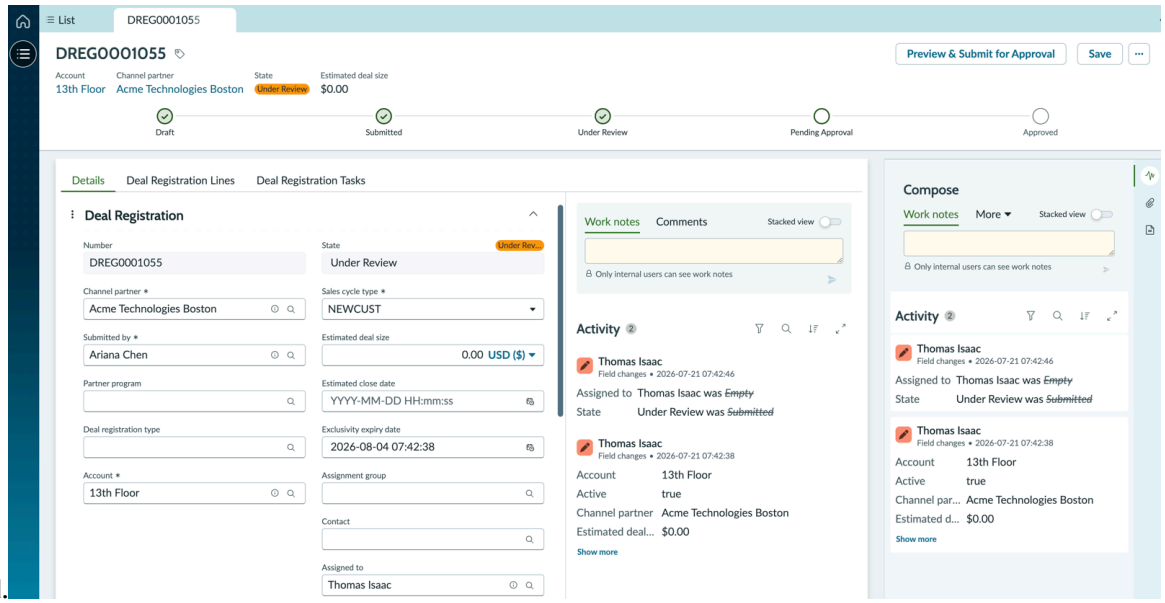
## Deal states during approval

A deal moves through specific states during the approval process:

- Under Review: Deal is created and in initial state. Deal agents can submit for approval from this state.
- Pending Approval: Deal is submitted and is awaiting approver decisions. Deal record is read-only to prevent changes during review.

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- Approved: All approval steps are complete and deal is approved. Deal can move to Closed or be further modified.
- Closed (Rejected): An approver rejected the deal, ending the approval process. Deal can't be re-approved.




## Submit a deal for approval

Submit a deal for approval to route it through your organization's configured approval workflow and identify the approvers.

### Before you begin

Role required: Deal Agent (sn_prm_dr.enterprise_b2b_deal_reg_agent, sn_prm_dr.enterprise_b2c_deal_reg_agent).

### About this task

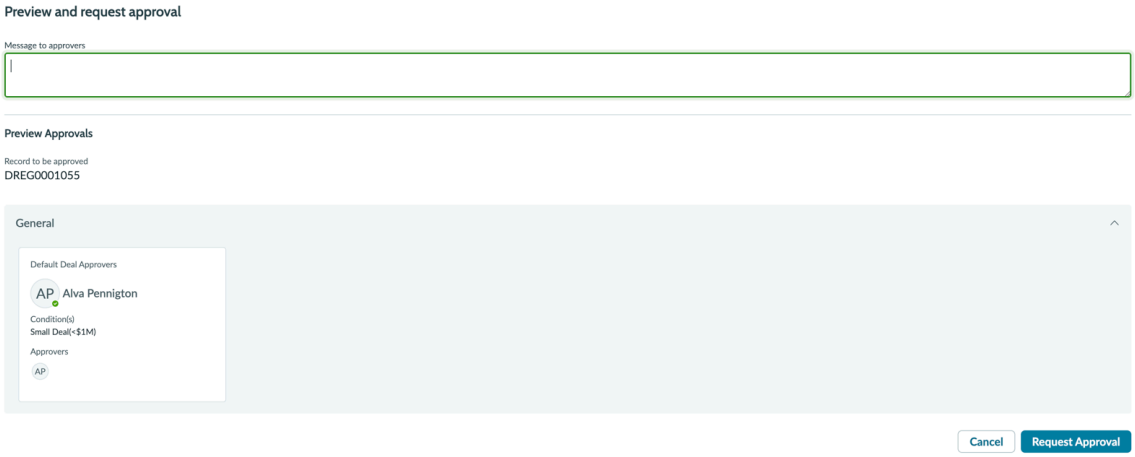
As a deal agent, you can submit any deal for approval to route it through your organization's approval chain. The deal must be in the Under Review state to submit. When you submit a deal, the system checks configured trigger conditions to determine if approval is required and identifies appropriate approvers based on your approval rules.

### Procedure

1. Open the deal record that you want to submit for approval in the CRM Workspace.
2. Scroll to the Approvals section.
   The deal must be in **Under Review** state.
3. In the deal record header, select **Preview & Submit for Approval**.
4. In the preview modal, review the list of potential approvers.

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5. **Optional:** Add a comment or message for the approvers in the **Message to approvers**




field.

6. Select **Request Approval** to submit the deal for approval.
The system validates the deal information and submits it for approval. The deal automatically moves to **Pending Approval** state.The deal record is now locked for editing (read-only). Approvers are notified and review the deal according to your organization's approval workflow.
7. Review the deals that have been submitted for approval by deal agents.
Based on your organization's configured approval rules, you receive approval requests for deals that meet specified trigger conditions. Your role is to evaluate the deal information and decide whether to approve or reject the deal.

> **Note:**
>
> You must have the Approver role (manually assigned by the deal registration admin) to access and process approval requests. If you can't see approval requests, contact your deal registration admin to request the Approver role.

### Result

Your approval decision is recorded in the system. If you approved the deal and it was the final approval step, the deal is now in Approved state and ready for next steps. If you rejected it, the deal is Closed (Rejected) and the approval process ends permanently.

### What to do next

If the approval process includes multiple sequential steps, the next approver receives their approval request. Monitor the deal's approval progress by viewing the Approvals tab. Once all approvals are complete or the deal is rejected, the deal agent receives notification of the final outcome.

For more information, see Deal Registration approvals.

#### Approval configuration setup

Configure deal registration approval rules, trigger conditions, approver groups, and reminders to implement your organization's approval workflow.

## Role Required

Deal Reg Admin (sn_prm_dr.deal_reg_admin), this role inherits the Approval Rule Admin role, who can configure deal registration approvals. For more information on Advanced Approval Management, see Advanced Approval Management.

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## Configuration setup

Deal registration approval configuration uses the standard Advanced Approval Framework application.

1. Create Approval Config: Register the deal entity with the Advanced Approval Framework (performed once per organization).
2. Define Trigger Conditions: Create conditions that determine when approval is needed (for example, deal size less than $1 million).
3. Create Approval Rules: For each trigger condition, define who receives approval requests and in what sequence.
4. Set up Approval Groups (Optional): Define groups of users who can be approvers to simplify rule management.
5. Configure Approvers: Specify which users or user groups are approvers in each approval rule.
6. Set Reminders (Optional): Configure automatic reminders to approvers about pending approval requests.
7. Assign Approver role: Manually assign the Approver role to all users who approve deals.
8. Test the workflow: Create test deals and verify that the approval workflow works as expected.

## Configuration example

Scenario: Your organization requires approval for all deals under $1 million. Approvals should go to the relationship manager for the partner, then to a designated deal reviewer.

Configuration includes:

- Trigger Condition: Deal amount is less than $1,000,000.
- Approval Rule: When trigger is met, send approval requests to relationship managers, then to deal reviewers.
- Approval Group (Optional): Define "Relationship Managers" and "Deal Reviewers" groups to simplify management.
- Approval Steps:
  - Step 1: Relationship manager approval (user must approve).
  - Step 2: Deal reviewer approval (sequential, after step 1 is approved).
- Reminders: Send approvers a daily reminder about pending approvals.
- Approver Role: Manually assign Approver role to all relationship managers and deal reviewers.

**Note:**

Before users can access and work on approval requests, the Deal Registration Admin must manually assign the Approver (sn_adv_appr_mgmt.approval_request_approver) role to each user designated in the approval rules.

## Demo data and templates

You must configure your own approval rules and trigger conditions based on your organization's requirements. Demo data for approval configuration is not included in this release.

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### Deal registration tasks

Create and manage tasks associated with a deal registration to organize work, track progress, and delegate deal-related activities.

## Tasks overview

Deal registration tasks provide a centralized way to manage all work items associated with a deal. By creating tasks and assigning them to team members, you can ensure that all deal-related work is tracked, assigned, and completed in a timely manner.

A deal registration task is linked to a specific deal registration record and appears in the **Deal Registration Tasks** related list on the deal form. You can also view all deal registration tasks in a standalone list view and across multiple deals.

Deal registration tasks help your organization by:

- Organizing and delegating work related to a deal in one centralized location.
- Tracking action items and their completion status.
- Assigning tasks to any internal team member, beyond deal agents.
- Centralizing deal-related work in one system.
- Maintaining a complete audit trail of deal activities and work performed.
- Enabling cross-functional collaboration (operations, finance, sales, and so on) on deals.
- Tracking work progress through the approval and deal completion process.

You can create tasks at any time during the deal lifecycle when the deal is in one of these active states:

- **Submitted**
- **Under Review**
- **Pending Approval**
- **Approved**

Tasks can't be created when a deal is in **Draft**, **Completed**, or **Canceled** state.

## Task states

### Deal registration task states

| State | When to Use | Can Transition To |
|---|---|---|
| **Open** | Default state when a task is first created. Use when a task is assigned but work hasn't started. | In Progress, On Hold, Cancelled |
| **In Progress** | Change to this state when the assigned person begins actively working on the task. | On Hold, Complete, Cancelled |
| **On Hold** | Use when you pause work due to dependencies, waiting for information, approvals, resources, or other blockers. | In Progress, Cancelled |
| **Complete** | Change to this state when the assigned person finishes the task work. | None (final state) |

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**Deal registration task states (continued)**

| State | When to Use | Can Transition To |
|---|---|---|
| **Cancelled** | Use if the task is no longer needed and work isn't complete. This may occur due to scope changes, deal cancellation, or changed business priorities. | None (final state) |

## Task archival and deletion

Deal registration tasks follow cascade archival and deletion rules:

- Archival: When a deal registration is archived, all associated tasks (regardless of state) are automatically archived.
- Deletion: When a deal registration is deleted, all associated tasks are automatically deleted.
- Audit trail: Archived and deleted tasks remain in the system history for audit purposes.
- State-independent: All tasks are archived or deleted regardless of whether they are Open, In Progress, Complete, or Cancelled.

## Task access by role

The following table shows what deal registration tasks each role can access:

**Task access by role**

| Role | Permission Level | Which Tasks They See | What They Can Do |
|---|---|---|---|
| Enterprise Relationship Manager | Read, Create, Update | All tasks associated with deals under their organizational hierarchy | Create tasks, update all tasks, manage team's tasks, view task status |
| Enterprise Contributor | Read, Create, Update | All tasks associated with deals belonging to their channel partner | Create tasks for partner deals, update partner tasks, manage workload |
| B2B Deal Agent | Read, Create, Update | Tasks associated with B2B deals only. Can't see tasks on B2C deals | Create tasks on B2B deals, update B2B tasks |
| B2C Deal Agent | Read, Create, Update | Tasks associated with B2C deals only. Can't see tasks on B2B deals | Create tasks on B2C deals, update B2C tasks |
| Deal Registration admin | Read, Create, Update, Delete | All deal registration tasks across all deals in the system | Full control: create, modify, delete, manage all tasks, view all task history |
| Fulfiller | Read, Update (Limited) | Only tasks assigned to them (automatically assigned when a user is added to task) | View assigned task, update task state, add work notes, see deal-related information |

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## Who can be assigned to tasks

Tasks can be assigned to any internal ServiceNow user, beyond deal agents or people with deal roles. This flexibility allows you to assign tasks to:

- Deal agents and relationship managers (core deal personas)
- Account managers and customer success representatives
- Operations and administrative staff
- Finance, compliance, or legal team members
- Technical implementation or integration team members
- Any other internal ServiceNow personnel involved in deal-related work

Automatic role assignment: When you assign a task to a user, the system automatically grants them the Fulfiller role. This means users don't need pre-existing deal permissions to contribute to deal work.

### Create a deal registration task

Create a task linked to a deal registration to organize work and assign actions to team members.

#### Before you begin

The deal must be in an active state (**Submitted**, **Under Review**, **Pending Approval**, or **Approved**). You must have permission to create tasks on the deal based on your role and the deal's visibility rules.

Tasks can be assigned to any internal ServiceNow user to delegate deal-related work.

Role required: admin.

#### Procedure

1. Open the deal registration record you want to create a task for.
2. Navigate to the **Deal Registration Tasks** related list on the deal form.
3. Select **New** or **Create** to open the task creation form.
   A new deal registration task form opens in a dialog or new form view depending on your system configuration.
4. In the **Deal Registration** field, confirm that the deal is pre-filled correctly.
5. In the **Short Description** field, enter a brief, specific summary of the work required.
6. In the **Assigned To** field, select the user responsible for completing the task.
   You can assign the task to any internal ServiceNow user, including deal agents, relationship managers, account managers, operations staff, finance team members, or anyone otherwise involved in deal work.

   The Fulfiller role is automatically granted by the system, enabling the selected user to work on the task even without deal access.
7. **Optional:** Set the **State** field to reflect the current task status.
8. **Optional:** Set a **Due Date** to specify when the task must be completed.
9. **Optional:** Add initial guidance or context in the **Work Notes** section.
10. Select **Submit** or **Save** to create the task.
    The task is now linked to the deal and assigned to the selected user. The assigned user receives a notification about their new task assignment.

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### Result
The deal registration task is created and added to the deal's **Deal Registration Tasks** related list. The task appears in the assigned user's work items in their workspace and the user receives notification of the assignment.

### What to do next
Monitor the task status from the deal record or from the standalone task list view. Update the task status as work progresses.

## Install Sales Common for Partner Relationship Management

Install the Sales Common for Channel Partners plugin (com.snc.partner_relationship_management_sales_common), along with the demo data and installations that are related to ServiceNow® Store applications and plugins.

### 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.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

### About this task
The Sales Common for Channel Partners plugin acts a parent plugin for all the CRM Core workflows.

The following items are installed with the Sales Common for Channel Partners (com.snc.partner_relationship_management_sales_common) plugin:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

### Procedure
1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Sales Common for Channel Partners application (com.snc.partner_relationship_management_sales_common) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install the Sales Common for Channel Partners application.
4. If you want to install demo data, do one of the following depending on your entitlements.

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| Demo data install task | Description |
| --- | --- |
| **If demo data is available and you want to in stall it** | **a.** Select the **Load Demo Data** option.<br>**b.** Select **Install**.<br>**Important:** If you don't load the demo data during installation, it's unavailable to load later. |
| **If the Load Demo Data option isn't available but you want demo data** | Load the demo data after installing the Sales Common plugin.<br>**a.** Install Sales Common for Channel Partners (com.snc.partner_relationship_manage ment_sales_common) application.<br>**b.** Navigate to the **All** and in the Filter, type `v_plugin.list`.<br>**c.** In the **System Plugin** list, search for the Sales Common plugin.<br>**d.** In the System **Plugin Sales Common for Channel Partners data model** window, un der Related Links, select **Install Demo Data Only**. |

### Result

You have successfully installed the Sales Common for Channel Partners (com.snc.partner_relationship_management_sales_common) application.

### Related topics

Partner Relationship Management

Using Partner Relationship Management

## Components installed with Sales Common for Channel Partners

The Sales Common for Channel Partners plugin (com.snc.partner_relationship_management_sales_common) application uses roles to provide access to information, identify internal and external users, and maintain data security.

The PRM plugin (com.snc.partner_relationship_management) comes with a set of functional and granular roles, each with varying levels of access.

### Functional roles

*List of functional roles and their descriptions installed with the Sales Common application.*

| Role | Description | Contains roles |
| --- | --- | --- |
| sn_prm_sales_partner_b2b_sales_rep | This role is assigned to external channel partner organizational staff to manage the entire sales lead to cash life cycle for B2B customers. | |

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**Functional roles**

*List of functional roles and their descriptions installed with the Sales Common application.*

**(continued)**

| Role | Description | Contains roles |
|---|---|---|
| sn_prm_sales_partner_b2c_sales_rep | This role is assigned to external channel partner organizational staff to manage the entire sales lead to cash life cycle for B2C customers. | |
| sn_prm_sales_partner_sales_manager | This role is assigned to external channel partner organizational staff to manage the entire sales lead to cash life cycle for B2B and B2C customers. | |
| sn_prm_sales_partner_sales_relationship_manager | This role is assigned to enterprise personnel to manage the entire sales lead to cash life cycle for the hierarchy of their channel partners. | |

**Related topics**

Partner Relationship Management

Using Partner Relationship Management

## Install Order Management for Channel Partners

Install the Order Management for Channel Partners plugin (com.snc.partner_relationship_management_orm), along with the demo data and installations that are related to ServiceNow® Store applications and plugins.

### 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.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

### About this task

The Order Management for Channel Partners (com.snc.partner_relationship_management_orm) plugin facilitates management of the entire order life cycle, specifically for indirect sales.

The following items are installed with the Order Management for Channel Partners plugin (com.snc.partner_relationship_management_orm) plugin:

- Plugins
- Store applications

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- Role like the sn_prm_orm.order_partner_ui
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Order Management for Channel Partners (com.snc.partner_relationship_management_orm) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install the Order Management for Channel Partners (com.snc.partner_relationship_management_orm) application.
4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|---|---|
| **If demo data is available and you want to in stall it** | **a.** Select the **Load Demo Data** option.<br>**b.** Select **Install**.<br>**Important:** If you don't load the demo data during installation, it's unavailable to load later. |
| **If the Load Demo Data option isn't available but you want demo data** | Load the demo data after installing the Sales Common plugin.<br>**a.** Install Order Management for Channel Part ners (com.snc.partner_relationship_man agement_orm) application.<br>**b.** Navigate to the **All** and in the Filter, type `v_ plugin.list`.<br>**c.** In the **System Plugin** list, search for the Or der Management for Channel Partners plug in.<br>**d.** In the System **Plugin Order Management for Channel Partners data model** window, under Related Links, select **Install Demo Data Only**. |

### Result

You have successfully installed the Order Management for Channel Partners (com.snc.partner_relationship_management_orm) application.

### Related topics

Partner Relationship Management

Using Partner Relationship Management

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## Install Opportunity Management for Channel Partners

Install the Opportunity Management for Channel Partners plugin (com.snc.partner_relationship_management_oppty) and installations that are related to ServiceNow® Store applications and plugins.

### 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.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

### About this task

The Opportunity Management for Channel Partners plugin (com.snc.partner_relationship_management_oppty) plugin facilitates management of the opportunities for channel partner sales.

The following items are installed with the Opportunity Management for Channel Partners plugin (com.snc.partner_relationship_management_oppty) plugin:

- Plugins
- Store applications
- Role like the sn_prm_opptym.oppty.parnter_ui

For more information on viewing components that are installed with an application, see Find components installed with an application.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Opportunity Management for Channel Partners (com.snc.partner_relationship_management_oppty) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install the Opportunity Management for Channel Partners (com.snc.partner_relationship_management_oppty) application.

4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|---|---|
| **If demo data is available and you want to in stall it** | **a.** Select the **Load Demo Data** option.<br>**b.** Select **Install**.<br>**Important:** If you don't load the demo data during installation, it's unavailable to load later. |
| **If the Load Demo Data option isn't available but you want demo data** | Load the demo data after installing the Sales Common plugin. |

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| Demo data install task | Description |
| --- | --- |
| | **a.** Install Opportunity Management for Channel Partners (com.snc.partner_relationship_management_oppty) application.<br>**b.** Navigate to the **All** and in the Filter, type `v_plugin.list`.<br>**c.** In the **System Plugin** list, search for the Opportunity Management for Channel Partners plugin.<br>**d.** In the System **Plugin Opportunity Management for Channel Partners data model** window, under Related Links, select **Install Demo Data Only**. |

### Result

You have successfully installed the Opportunity Management for Channel Partners (com.snc.partner_relationship_management_oppty) application.

### Related topics

Partner Relationship Management

Using Partner Relationship Management

## Install Quote Management for Channel Partners

Install the Quote Management for Channel Partners plugin (com.snc.partner_relationship_management_qm), along with the demo data and installations that are related to ServiceNow® Store applications and plugins.

### 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.

Depending on your entitlements, you must install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

**Note:** The Quote Self-Service application is installed along with Quote Management for Channel Partners. For more information on Quote Self-Service, see Quote creation via Self-Service for Channel Partners

Role required: admin

### About this task

The Quote Management for Channel Partners (com.snc.partner_relationship_management_qm) plugin facilitates management of the entire quote life cycle, for indirect sales.

The following items are installed with the Quote Management for Channel Partners plugin (com.snc.partner_relationship_management_qm) plugin:

- Plugins
- Store applications
- Role such as the sn_prm_qm.quote_partner_ui

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For more information on viewing components that are installed with an application, see Find components installed with an application.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Quote Management for Channel Partners (com.snc.partner_relationship_management_qm) using the filter criteria and search bar.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install the Quote Management for Channel Partners (com.snc.partner_relationship_management_qm) application.
4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|---|---|
| **If demo data is available and you want to in stall it** | **a.** Select the **Load Demo Data** option.<br>**b.** Select **Install**.<br>**Important:** If you don't load the demo data during installation, it's unavailable to load later. |
| **If the Load Demo Data option isn't available but you want demo data** | Load the demo data after installing the Sales Common plugin.<br>**a.** Install Quote Management for Channel Part ners (com.snc.partner_relationship_man agement_qm) application.<br>**b.** Navigate to the **All** and in the Filter, type `v_plugin.list`.<br>**c.** In the **System Plugin** list, search for the Quote Management for Channel Partners plugin. |

### Result

You have successfully installed the Quote Management for Channel Partners (com.snc.partner_relationship_management_qm) application.

### Related topics

Partner Relationship Management

Using Partner Relationship Management

#### Quote creation via Self-Service for Channel Partners

Quote Self-Service (com.sn_quote_self_service) enables channel partners to create and manage quotes directly in the Partner portal through a guided playbook experience.

## About Quote Self-Service for PRM

Quote Self-Service enables channel partners to create and manage quotes directly in the Partner portalthrough a guided quote creation playbook, catalog browsing, and line item management.

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Quotes and quote line items help channel partners track products associated with submitted quotes, reducing turnaround time and promoting transparency between enterprises and partners.

**Note:** The Quote Self-service application is installed along with Quote Management for Channel Partners.

### Key benefits of Quote creation via Self-Service

The Quote Self-Service application (com.sn_quote_self_service) offers the following benefits to channel partners.

- Guided quote creation playbook in the Partner portal.
- Self-service catalog browsing, product configuration, and quote building reduces quote turnaround time from days to minutes.
- Partners can modify quotes directly in the portal to edit, revise, apply discounts, and download without requesting changes through internal teams.
- Full audit trail and version history for all quote activities promotes trust and transparency in the partner ecosystem.

#### Related topics

Using Partner Relationship Management

## Configuring the Business Portal

Enable B2B customers to self-serve key processes such as order creation, order case management, invoice management, request for quote (RFQ) creation by configuring the Business Portal (sn_b2b_portal).

### Configuration overview

1. Install the following applications and features in the specified order using the Application Manager to set up the Business Portal:
   a. Order Management Portal: sn_ord_mgmt_portal
   b. Product Catalog Management Portal: sn_prd_pm_portal
   c. Customer Service Portal: sn_csm_portal

      **Note:** The Business Portal application (sn_b2b_portal) is automatically installed when you install the Customer Service Portal.

   d. UI Components for Customer Portals: sn_ciwf_ui_cmpnt
   e. Sales Cart plugin: sn_sales_cart
   f. Customer Request for Quote plugin: sn_cust_rfq
2. Enable the Business Portal

   Enable the Business Portal (sn_b2b_portal) so customers can browse products and create orders.
3. Configuring product catalog visibility on the Business Portal

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By default, only users with the sn_customerservice.customer role can view the product catalog on the Business Portal. After setting up your product catalog and pricing, use the CustomerPortalCatalogAccessUtil script include to extend catalog visibility to additional users.

4. Configuring Sales Cart for Business Portal

   Provide easy order creation and checkout processes to your customers through the Sales Cart application.

5. (Optional) Install Customer Request for Quote

   Enable B2B customers to request for quotes (RFQ) from the Business Portal. Installing this application also installs the Request for Quote module in the CRM Workspace, which enables sales agents to generate quotes from the RFQs.

6. (Optional) Install apps for self-service order case management

   Install the applications or features that provide the self-service options that you want to offer customers for managing order and invoice cases on the Business Portal.

## Enable AI-powered workflows on the Business Portal

- Configuring the Manage Order Operations application

  Enable B2B customers to submit order cases using from the Business Portal using chat and voice options.

- Configuring the Manage Invoice Operations application

  Enable B2B customers to submit invoice cases using from the Business Portal using chat and voice options. Billing specialists and agents can use the invoice dispute assist agentic workflow from the CRM Workspace to resolve invoice cases.

### Related topics

Using Business Portal for self-service workflows in Sales CRM

Business Portal reference for Sales Customer Relationship Management

## Enable the Business Portal

Admins can enable the Business Portal (sn_b2b_portal) so customers can browse products and create orders.

### Before you begin

The application scope must be set to Business Portal. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: admin

### About this task

To set up the Business Portal and Sales Customer Relationship Management self-service enhancements, first install the Business Portal plugins, which are available in the app store.

See Configuring the Business Portal for more information.

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### Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. Select **Business Portal**.
3. Clear the **Inactive** box.
4. Select **Save**.
   The Business Portal is enabled.

### What to do next

Customize the Business Portal to match your organization's branding and user experience requirements. For more information, see Setup Business and Consumer Portal.

#### Related topics

- Customer self-service for Sales Customer Relationship Management
- Using Business Portal for self-service workflows in Sales CRM

## Configuring product catalog visibility on the Business Portal

Only authorized customers can view the product catalog on the Business Portal by default. After setting up your product catalog and pricing, use the CustomerPortalCatalogAccessUtil script include to extend catalog visibility to additional users.

When customers access the Business Portal, the product catalog is visible by default to users who have the sn_customerservice.customer role and are registered in the ServiceNow CRM software. This default visibility is controlled by the CustomerPortalCatalogAccessUtil script.

To grant product catalog visibility to other users, use the CustomerPortalCatalogAccessUtil script to extend access to those users.

1. Navigate to **All** > **Activity Subscriptions** > **Administration** > **Script Includes**.
2. In the **Name** column, search for CustomerPortalCatalogAccessUtil.

You must also set up your product catalog and configure pricing to help ensure that the correct products and prices are available to customers on the portal. For more information, see Configuring product offerings and catalogs and Configuring product pricing.

The Business Portal shows catalogs and categories in the display order that the catalog admin configures. Catalogs and categories without a configured order continue to display alphabetically.

#### Related topics

- Customer self-service for Sales Customer Relationship Management
- Using Business Portal for self-service workflows in Sales CRM

## Post-upgrade order migration for the Business Portal

Migrate draft proxy order carts to the new sales cart to avoid having your customers lose products they added to their carts on the Business Portal

### Before you begin

Ensure that the Sales Cart application has been installed. For more information, see Install Sales Cart.

Role required: admin

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### About this task

**Note:** If you have used the Business Portal and are upgrading to the Zurich release, you must run the *Migrate proxy orders to sales cart* scheduled job after installing the Sales Cart application. This job migrates the draft proxy order carts to the new sales cart and prevents your customers from losing products added to their carts on the Business Portal.

The *Migrate proxy orders to sales cart* scheduled job performs the following actions:

- Migrates items from customers' existing cart to the new sales cart
- Creates cart-related records in the Sales Cart tables
- Updates the value of the *sn_sales_cart.show_cart_migration_msg* property to false

Until you run the this job, the following message is displayed to your customers on the Business Portal:

```
A system update cleared your cart. Please contact your
 administrator for help.
```

### Procedure

1. Select **All** > **System Definition** > **Scheduled Jobs**.
2. On the Scheduled Jobs page, enter `Migrate proxy orders to sales cart` in the search field.
3. Select the job.
4. On the Scheduled Script Execution page, select **Execute Now**.

### Related topics

Customer self-service for Sales Customer Relationship Management

Using Business Portal for self-service workflows in Sales CRM

## Configuring Sales Cart for Business Portal

Provide easy order creation and checkout processes to your customers through the Sales Cart application.

Get started by installing the Sales Cart application. For more information, see Install Sales Cart.

Customize Sales Cart to support your organization's branding, data retention, and checkout policies by performing the following tasks:

- Add a logo to the sales cart PDF

  Customize and embed your company logo in sales cart summary PDFs to ensure consistent branding and alignment with corporate identity standards.

- Modifying the data retention and table cleanup policy for the Sales Cart application

  A default data retention and table cleanup policy automatically deletes records from the Sales Cart application based on predefined conditions that match your organization's policies.

- Modify terms and conditions for the sales cart

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Add order checkout terms and conditions in the CartTermsAndCo document template block for your Business Portal.

- Sales Cart integration with external ordering systems

  Learn how the cart enforces states, ownership, and validation when an external ordering system creates and manages carts programmatically.

### Install Sales Cart

You can install the Sales Cart plugin (sn_sales_cart) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

## Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Sales Cart listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

## About this task

The following items are installed with the Sales Cart plugin (sn_sales_cart):

- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Sales Cart.

## Procedure

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

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

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### What to do next

A sample logo is applied to the sales cart PDF by default. To customize and add your logo, see Add a logo to the sales cart PDF.

#### Related topics

Customer self-service for Sales Customer Relationship Management

Using Business Portal for self-service workflows in Sales CRM

## Add a logo to the sales cart PDF

Customize and embed your company logo in sales cart summary PDFs to ensure consistent branding and alignment with corporate identity standards.

### Before you begin

Role required: admin

### Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. In the **Name** search field, enter `db_image` table and select the Images table.
3. On the Tables details page, select **Show List** from the Related Links section.
4. In the **Name** search field, enter `sn_sales_cart.sales_cart_download_logo.png` and select the record.
5. If a message appears about the application scope, select **here** to be able to edit the record.
6. Update the logo by selecting **Update** next to the Image field.
   a. Select **Update** next to the **Image** field.
   b. Select the **Choose File** button and select the image file on your computer that you want to use.
   c. Select **OK**.
7. On the Images page, verify that your logo file uploaded successfully.

   **Note:** You might have to change the application scope again.

8. Select **Update**.

#### Related topics

Customer self-service for Sales Customer Relationship Management

Using Business Portal for self-service workflows in Sales CRM

## Modifying the data retention and table cleanup policy for the Sales Cart application

A default data retention and table cleanup policy automatically deletes records from the Sales Cart application based on predefined conditions. You can modify these conditions to match your organization's policies.

By default, records in the complete state are deleted from the Sales Cart [sn_sales_cart] table if they meet either of the following conditions:

- Records older than six months
- Records that haven't been updated for more than six months

Modify the data retention and table cleanup frequency depending on your expected load and volume. For more information, see Modify data retention policy for ATF test results.

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**Related topics**

Table cleanup

Autoflush form

### Modify terms and conditions for the sales cart

Add order checkout terms and conditions in the CartTermsAndCo document template block for your Business Portal.

## Before you begin

Role required: admin

## About this task

The CartTermsAndCo document template block in the Sales Cart Demo Template and Sales Cart Terms and Conditions Default document templates is used for displaying terms and conditions in the cart summary PDF and while checking out respectively.

## Procedure

1. Navigate to **All** > **Document Templates** > **Document Template Blocks**.
2. Select **CartTermsAndCo**.
3. Select the record from the Document Template Block Contents related list.
4. If a message appears about the application scope, select **here** to be able to edit the record.
5. Add your terms and conditions in the Body section.
6. Select **Update**.

**Related topics**

Document Templates

Create block content in Document Templates

### Sales Cart integration with external ordering systems

External ordering systems can connect to the Sales Cart through the Sales Cart REST API, and can create, retrieve, update, and submit carts without depending on the Business Portal user interface. Carts created externally run the same pricing, validation, and order conversion logic as carts built in the Business Portal, so customers can view and work with them in either system.

## Integration model

An external ordering system is a third-party consumer portal, partner portal, telecommunications self-service portal, or headless ordering application that calls the Sales Cart REST API on behalf of an account contact or consumer. The term describes a category of API client, not a specific certified product or vendor connector.

The external system provides the ordering experience. The ServiceNow instance remains the system of record for the cart and stores the cart header, lines, characteristics, and pricing adjustments in the following tables:

- Sales Cart (sn_sales_cart)
- Sales Cart Line Item (sn_sales_cart_line_item)
- Sales Cart Line Characteristic (sn_sales_cart_line_characteristic)
- Sales Cart Pricing Adjustment (sn_sales_cart_pricing_adjustment)

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Carts created externally use the same records and cart processing as carts created in the Business Portal, so a cart can be viewed and worked with in either channel. This means the instance needs only one cart model: pricing, validation, and order conversion behave the same way whether the cart came from the Business Portal or an external system, so you don't rebuild that behavior for every external channel you connect.

For endpoint paths, parameters, request and response schemas, and error handling, see the Sales Cart REST API reference.

## How the integration works

The following table summarizes what the external ordering system does at each stage, and how Sales Cart responds.

**Integration workflow**

| Stage | External ordering system | Sales Cart |
|---|---|---|
| Identify the customer | Sends either an account and contact, or a consumer. | Authorizes the caller and applies record-level access. |
| Build the cart | Creates a cart, sends product offerings and configurations, or adds lines to an existing Draft cart. | Stores the line hierarchy, validates that offerings exist, and resolves default values. |
| Maintain checkout | Retrieves the cart, updates existing lines, assigns supported line-level billing details, or removes top-level lines. | Enforces Draft-state rules and recalculates pricing unless pricing is suppressed. |
| Submit the order | Calls the submit-order operation when checkout is complete. | Validates top-level configurations, converts the cart to an order, and marks the cart Complete. |

## Access and cart ownership

Requests from an external system are authorized against the access control that protects the Sales Cart REST endpoints. The following roles are permitted to call them:

- sn_customerservice.customer for a caller acting on behalf of an account contact
- sn_customerservice.consumer for a caller acting on behalf of a consumer

A caller without either role can't reach the Sales Cart REST endpoints, regardless of the cart data requested.

If you have configured a CPQ instance, then Sales Cart installs a role hierarchy in which the cart integrator role contains the cart editor role, and the cart editor role contains the cart viewer role. These roles control access to the cart records themselves, separately from the access control on the REST endpoints.

Callers see only the carts their own access permits. When an integrated system retrieves a list of carts, the caller's record-level access is applied to the query, so the response contains only carts that the caller is permitted to read. A filter supplied by the caller narrows that result further, but it can't widen it. For a consumer caller, a query rule narrows that access further to carts opened by the consumer's own user record, so a consumer reaches only their own carts.

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## Cart states and when a cart accepts changes

Draft is the only state in which a cart accepts changes. The following operations require the cart to be in the Draft state:

- Adding line items to an existing cart.
- Updating cart header attributes or line items.
- Deleting the cart or one of its line items.
- Submitting the cart to create an order.

A request against a cart in any other state is rejected and the cart is left unchanged. After a cart is submitted and the order is created, the cart state is set to Complete and the cart no longer accepts changes. A new cart is created for the next order.

## One draft cart per customer

A cart belongs to either an account contact or a consumer, never both. An integrated system provides an account and contact for an account cart, or a consumer for a consumer cart, and retrieving the cart afterward returns the same identity model it was created with.

An account contact or consumer can have only one Draft cart at a time. If a create request finds an existing Draft cart, the response identifies it. Include the draft cart's sysId in the request to add lines instead of creating a duplicate.

## Key values auto-resolved by the Sales Cart

An integrated system doesn't have to supply every cart header value. The Sales Cart derives common header information from the account or consumer data, as described in the following table.

### Sales Cart values and their resolution

| Value | Behavior | Admin action |
|---|---|---|
| Currency | Resolved when omitted. Account carts use account data; consumer carts derive it from the consumer country. | Maintain the source data or provide currency where the API supports it. |
| Price list | Always resolved. Account carts use the default for account, currency, and contact; consumer carts use the default for currency. A caller-supplied price list is replaced. | Update the underlying default price-list or currency data to influence resolution. |
| Shipping and billing address | Resolved when omitted. When shipping location is omitted, addresses come from the account primary address or consumer data. Billing is set to the shipping address. | Maintain a usable address or supply supported address values. |
| State | Defaults to Draft when omitted. | Design the integration around the Draft life cycle. |

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**Note:** Accounts used by the integration need currency, a usable address, and data from which a default price list can be resolved. Missing values can produce incomplete cart or pricing data.

## Line item structure and validation

Sales Cart checks every product offering against the product catalog. If an offering can't be found, the complete request is rejected and the response identifies the invalid offerings so the client can correct and resend them.

Line items form a hierarchy. A configured product creates a top-level line with child lines beneath it. Only top-level lines can be deleted directly, and deleting one also deletes its child lines. A request to delete a child line on its own is rejected. To change a configuration, the integrated system updates the top-level line instead of editing its children.

Adding a line, changing a line, and removing a line are three separate operations. The update operation changes lines that are already in the cart, matching each one by its sys_id, and it applies to line attributes, characteristics, and pricing adjustments. It doesn't add or remove lines. An integrated system that sends a line the cart doesn't already hold has that line ignored rather than created, so adding a line uses the create operation and removing one uses the delete operation. Characteristics are replaced, not merged. When updating a line, include the complete characteristic set. A characteristic omitted from the request is removed from the line.

Price list is resolved by the ServiceNow pricing engine. Pricing is recalculated after cart changes are committed, so the client does not make a separate pricing call. Deleting a line recalculates the header totals. Changing any cart-header value reprices every line, even when the change only corrects an address.

Set skip_pricing to true and send the supported pricing values. Sales Cart saves the supplied values but still resolves currency and price list.

The following table lists the fields that aren't saved to the database when skip_pricing is set to true.

### Fields not saved to the database when pricing is skipped

| Value when pricing is suppressed | Result |
|---|---|
| Cumulative monthly recurring price on a line | Not saved because the pricing engine writes it. |
| Cumulative annual recurring price on a line | Not saved because the pricing engine writes it. |
| Periodicity on a line | Not saved. |
| Monthly, annual, and one-time header totals | Read as zero under the delivered suppressed-pricing behavior. |
| Header total amount | Rolls up from the caller-supplied cumulative net price. |
| Characteristics and pricing adjustments | Saved whether pricing runs or is suppressed. |

**Note:** Use skip_pricing only when the external system owns price and downstream consumers can work with the documented persistence and total behavior.

## Carrying billing account and payment profile to a line item

Keep billing context attached to the product by assigning a billing account and payment profile to each cart line. Line-level storage supports a cart in which different products use different billing accounts, such as one product billed to a personal account and another to a business account.

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**Billing account and payment profile behaviors**

| Field | Behavior |
|---|---|
| Billing account | If the line has an account, the billing account must belong to it. For a consumer cart without a line account, the billing account must belong to that consumer. If neither applies, any active billing account is allowed. |
| Payment profile | The payment profile must belong to the billing account already assigned to the line. Until a billing account is selected, any active payment profile is allowed. Assign the billing account first to maintain consistency. |

The billing account and payment profile are copied when a cart is cloned and carried to the matching order line when the cart is submitted. This preserves the supported billing selection for downstream order processing without manual re-entry.

The cart-line fields appear only when the Billing Account (sn_billing_account) application is installed. They carry to order line items only when Order Management is installed. Without these applications, the remaining cart integration continues to work and the two fields are absent.

## Submitting a cart to create an order

Submit a valid Draft cart to create an order. Before conversion, Sales Cart validates every top-level line against the configuration rules for its product. If a line fails validation, no order is created and the cart stays in the Draft state. Correct the affected lines and submit again. When validation succeeds, the records map as showing in the following table.

**Cart to order mapping**

| Cart record | Order record |
|---|---|
| Cart header | Order header |
| Cart line item | Order line item |
| Cart line characteristic | Order line characteristic |
| Cart pricing adjustment | Order pricing adjustment |

Line-level values, including billing account and payment profile, stay with their line. The sn_l2c_cart_to_order entity mapping governs the conversion. After the order is created, the cart becomes Complete.

**Related topics**

Components installed with Sales Cart

## Install Customer Request for Quote

You can install the Customer Request for Quote application [sn_cust_rfq] if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

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### Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Customer Request for Quote application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

### About this task

The following items are installed with Customer Request for Quote:

- Plugins
- Roles
- Tables

For more information, see Components installed with Customer Request for Quote.

### Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Request for Quote application (sn_cust_rfq) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

### Related topics

Customer self-service for Sales Customer Relationship Management

Using Business Portal for self-service workflows in Sales CRM

## Making self-service order and invoice case management available on the Business Portal

Install the necessary applications based on the self-service order and invoice case management options that you want to offer customers on the Business Portal.

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**Note:** For information about activating the Business Portal itself, see Enable the Business Portal

## Case management applications

The following apps must be installed from the ServiceNow Store to enable your customers to create and view order cases from the Business Portal:

- Order Case Self Service [sn_ord_case_ss]
- Order Case Playbook [sn_ord_case_pb]

These plugins have the following dependencies:

- Customer Service Portal [com.snc.customer_service_portal]
- Order Operations Case Management [sn_order_case]
- Playbooks for Customer Service Management [sn_csm_playbook]

If your customers need to only view order cases in the Business Portal, you don't need to install the Order Case Playbook [sn_ord_case_pb] and Playbooks for Customer Service Management [sn_csm_playbook] plugins.

## Invoice and invoice case management applications

The following apps must be installed from the ServiceNow Store to enable your customers to manage invoices and invoice cases from the Business Portal:

- Invoice Self-Service [sn_invoice_ss]
- Invoice Case Self-Service [sn_invoice_case_ss]
- Invoice Case Playbook [sn_inv_case_pb]

These plugins have the following dependencies:

- Customer Service Portal [com.snc.customer_service_portal]
- Invoice Operations Case Management [sn_csm_invoice]
- Playbooks for Customer Service Management [sn_csm_playbook]

If your customers only need to view invoice cases in the Business Portal, you don’t need to install the Invoice Case Playbook [com.sn_inv_case_pb] and the Playbooks for Customer Service Management [sn_csm_playbook] plugins.

### Related topics

Customer self-service for Sales Customer Relationship Management

Using Business Portal for self-service workflows in Sales CRM

### Install the order case management apps for Business Portal

You can install the order case management applications if you have the admin role.

### Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application .
- Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

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Role required: admin

### About this task

**Note:** Demo data is unavailable with these applications.

### Procedure

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

   The applications for order case management are:

   - Order Case Self Service (sn_ord_case_ss)
   - Order Case Playbook (sn_ord_case_pb)

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

### Related topics

Customer self-service for Sales Customer Relationship Management

Using Business Portal for self-service workflows in Sales CRM

## Install the invoice management apps for Business Portal

You can install the invoice case management applications if you have the admin role.

### Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

### About this task

**Note:** Demo data is unavailable with these applications.

### Procedure

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

   The applications for invoice and invoice case management are:

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- Invoice Self-Service (sn_invoice_ss)
- Invoice Case Self-Service (sn_invoice_case_ss)
- Invoice Case Playbook (sn_invoice_case_pb)

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

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

**Related topics**

View invoices on the Business Portal

Business Portal reference for Sales Customer Relationship Management

## Configuring the Manage Order Operations application

Business-to-business (B2B) customers can submit order cases using ServiceNow Otto Virtual Agent from the Business Portal. Interaction channels include chat and voice options.

Before you can use the AI agents for managing order operations from the Business Portal, perform the following tasks:

1. Enable the manage order operations agent on Business Portal
2. Configure scripted extension points for the manage order operations AI agent
3. Email notifications for order cases

Enable AI voice agent support on your phone channels by installing the ServiceNow Otto Voice [sn_voice_aia] plugin. For more information, see Deploy AI voice agents.

Configure Chat Summarization to enable the AI summarization and recommendation features in Active Chat. For more information, see Configure chat summarization.

### Enable the manage order operations agent on Business Portal

Activate and associate the manage order operations agent on the Business Portal so that your customers can use this AI agent to submit order cases autonomously using ServiceNow Otto.

#### Before you begin

Activate and enable a chat assistant such as ServiceNow Otto in Virtual Agent to use in the Business Portal. For more information, see Assistants overview.

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

Role required: sn_aia.admin

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### Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. On the Manage agentic workflows and AI agents page, select the **AI agents** tab.
3. Select the **Manage order operations** agent to start configuring it.
4. On the Define the specialty page, select **Save and continue**.
5. From the navigation pane, select **Select channels and status**.
6. On the Select channels and status page, set the **Engage via Virtual Agent assistants** option to **Allow**.
7. Specify where this AI agent is discoverable by selecting Virtual Agent from the **Choose chat assistants** field.
   For this use case, select **ServiceNow Otto for Virtual Agent (default)**.
8. **Optional:** Promote the agent to add it to the list of promoted topics.
   a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   b. On the Assistant Designer, select the **AI agents** tab.
   c. Select **Promoted** from the More actions icon ⋮ for the manage order operations agent.

### Result
The chat assistant is activated in the Business Portal.

### What to do next
Customize the subject, content, or formatting of the default email templates for order cases. For more information, see Email notifications for order cases.

#### Related topics

AI Agent Studio overview

Promote or demote LLM conversational subflows, actions, and topics in Assistant Designer

Assistant Designer Asset library

## Configure scripted extension points for the manage order operations AI agent

Configure scripted extension points so that the manage order operations chat assistant can check product availability, validate order exception requests for delivery, quantity, and shipping location, and evaluate quote thresholds against your external inventory, ERP, or pricing systems.

### Before you begin
The application scope must be set to Manage Order Operations. You can change the application scope using the application picker 🌐 in the Unified Navigation bar.

Role required: admin

### About this task
The demo data for the manage order operations agent includes sample implementations of the following scripted extension points.

| Extension point | API name | Purpose |
|---|---|---|
| Order exception check | *sn_ord_ops_aias.orderExceptionCheckEP* | Validate quantity, delivery availability, and shipping |

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| Extension point | API name | Purpose |
|---|---|---|
| | | location for order line items. |
| Threshold check for quote | `sn_ord_ops_aias.ThresholdCheckForQuote` | Determine whether a requested quantity change crosses the configured threshold for quote-side handling. |

To enable real-world functionality such as querying on-hand quantities, delivery dates, location feasibility, and quote thresholds from external Enterprise Resource Planning (ERP) or pricing systems like SAP or Oracle, replace each demo implementation with your custom logic.

### Procedure

1. Log in to the ServiceNow instance.
2. Navigate to **All** > **Scripted Extension Points** > **Scripted Extension Points**.
3. In the **API Name** field, search for a scripted extension point you want to configure.
4. View the sample script included in the demo data by selecting the API name of the extension point.
5. Create your own implementation of the selected extension point by selecting the **Create implementation** related link.
6. On the Script Include form for your chosen extension point, fill in the fields.
   For a description of the Script Include form fields, see Script includes.
7. Edit the function in your extension-point implementation to apply your own logic, using the following function signatures.

   `checkOrderExceptionReq`

   Placeholder function meant to be overridden. Use this placeholder to implement the logic to:

   - Validate the requested quantity for the specified order line items.
   - Confirm delivery availability for the order line items.
   - Validate the requested shipping location for the order line items.

   Input:

```
{
"<selectedLineNumber>": {
"lines": { "<line_sys_id>": { "product_offering":
 <Product offering sys_id of the order line item> } },
"requested_changes": {
"requested_quantity": <New quantity requested by the
 customer>,
"requested_shipping_location": <sys_id of the
 requested shipping location>,
"requested_expected_date": <Requested delivery date in
 yyyy-MM-dd format>
}
}
}
```

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Output:

```
{
"<selectedLineNumber>": {
"canChangeQty": <Boolean; true if the quantity change
 is permitted>,
"approvedQty": <Integer representing the approved
 quantity>,
"isQuantityError": <Boolean; true if the quantity
 check failed>,
"quantityErrorMsg": <Error message string for quantity
 check failures>,
"canChangeLocation": <Boolean; true if the shipping
 location change is permitted>,
"isLocationError": <Boolean; true if the location
 check failed>,
"locationErrorMsg": <Error message string for location
 check failures>,
"canExpedite": <Boolean; true if the requested
 expedition date is achievable>,
"earliestDelivery": <Earliest possible delivery date
 in yyyy-MM-dd format>,
"isDateError": <Boolean; true if the expedition date
 check failed>,
"dateErrorMsg": <Error message string for expedition
 date check failures>
}
}
```

*isAboveQuoteThreshold*

Placeholder function meant to be overridden. Use this placeholder to implement the logic to:

- Compare the requested quantity change against your configured price or quantity threshold.
- Return whether the request requires quote-side handling.

Input:

```
casePayload:
{
"<selectedLineNumber>": {
"lines": { "<line_sys_id>": {
"quantity": <Current quantity on the order line>,
"product_offering": <Product offering sys_id of the
 order line item>
} },
"approved_changes": {
"quantity": <New approved quantity for the line>,
"expected_date": <New approved delivery date in
 yyyy-MM-dd format>,
"location": <sys_id of the approved shipping location>
}
}
}
threshold: <Numeric threshold value
 supplied by the caller, resolved from
```

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```
 sn_ord_ops_aias.OrderExceptionConstants.PRICE_THRESHO
LD>
```

Output:

```
<Boolean; true if any selected line's quantity delta
 exceeds the supplied threshold and the change should
 be routed for quote-side handling, false otherwise>
```

8. Select **Update**.
9. **Optional:** Validate your implementation by requesting order changes from the Business Portal using the ServiceNow Otto Virtual Agent.
   For more information, see Request order changes using ServiceNow Otto Virtual Agent.

**Related topics**

- Using extension points to extend application functionality
- Creating and adding a scripted extension point

### Email notifications for order cases

The manage order operations AI agent sends automated emails to your B2B customers when an order case is opened from a Business Portal chat conversation and when the order case is closed with a successful resolution. The Manage Order Operations application includes two default email templates that you can customize.

The manage order operations AI agent uses default email templates to keep customers informed at key points in the order case life cycle when the customer initiates an order exception request from the chat assistant on the Business Portal.

**Note:** Email notifications aren't sent for order cases that the AI voice agent creates. If your customer creates an order case by using the voice assistant, the order case agent provides the case number over the call.

#### Default email templates for order cases

| Email template name | When the email is sent | What the email includes |
|---|---|---|
| ordercase.opened.for.customer | When the manage order operations AI agent opens a new order case for the customer from a Business Portal chat conversation. | The order case number and a link that the customer can use to view the case on the Business Portal. |
| order.exception.case.closed | When the order case is closed and resolved successfully. | The order case number, the resolution details, and the quote details when a quote was generated for the case. |

To customize the subject, content, or formatting of these default email templates, see Apply a template to an email notification.

The application scope must be set to Manage Order Operations. You can change the application scope using the application picker in the Unified Navigation bar.

**Related topics**

- Email templates

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## Configuring the Manage Invoice Operations application

Business-to-business (B2B) customers can submit invoice cases using ServiceNow Otto Virtual Agent from the Business Portal. Interaction channels include chat and voice options. Billing specialists and agents can use the invoice dispute assist agentic workflow from the CRM Workspace to resolve invoice cases.

Before you can use the AI agents for managing order operations agent in the Business Portal:

- Configure AI-assisted invoice dispute intake on the Business Portal
- Configure the invoice quantity validation extension point
- Configure the invoice dispute resolution extension point
- Make the invoice dispute assist workflow available in the ServiceNow Otto panel

Enable AI voice agent support on your phone channels by installing the ServiceNow Otto Voice [sn_voice_aia] plugin. For more information, see Deploy AI voice agents.

Configure Chat Summarization to enable the AI summarization and recommendation features in Active Chat. For more information, see Configure chat summarization.

### Configure AI-assisted invoice dispute intake on the Business Portal

Activate and associate the invoice dispute intake assistant AI agent on the Business Portal so that your customers can submit invoice cases autonomously using ServiceNow Otto Virtual Agent.

#### Before you begin

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

Activate and enable a chat assistant such as ServiceNow Otto in Virtual Agent to use in the Business Portal. For more information, see Assistants overview.

Role required: sn_aia.admin

#### Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. On the Manage agentic workflows and AI agents page, select the **AI agents** tab.
3. Select the **Invoice Dispute Intake Assistant** agent to start configuring it.
4. On the Define the specialty page, select **Continue**.
5. From the navigation pane, select **Select channels and status**.
6. On the Select channels and status page, set the **Engage via Virtual Agent assistants** option to **Allow**.
7. To specify where this AI agent is discoverable, select Virtual Agent from the **Choose chat assistants** field.
   For this use case, select **ServiceNow Otto for Virtual Agent (default)**.
8. Select **Save and test**.
9. **Optional:** Promote the agent to add it to the list of promoted topics.

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a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.

b. On the Assistant Designer, select the **AI agent** tab.

c. Locate the Invoice Dispute Intake Assistant AI agent and select **Promoted** from the More actions icon ⋮.

### Result
The chat assistant is activated in the Business Portal.

#### Related topics

AI Agent Studio overview

Promote or demote LLM conversational subflows, actions, and topics in Assistant Designer

Assistant Designer Asset library

## Configure the invoice quantity validation extension point

Implement the invoice quantity check extension point to enable the invoice dispute intake assistant AI agent to validate a customer's quantity dispute claim by reconciling it with delivered quantity data from your Enterprise Resource Planning (ERP) or inventory system.

### Before you begin
The application scope must be set to Manage Invoice Operations. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: admin

### About this task
The demo data for the Manage Invoice Operations application includes a sample implementation called *invoiceQuantityCheckDemo* as part of the *sn_inv_ops_aias.invoiceQuantityCheckEP* extension point. To enable real-world validation of quantity disputes against your external ERP system or inventory delivery records, replace the demo implementation with your own custom logic.

The demo implementation also illustrates a fallback pattern. When sold product information is unavailable on an invoice line, the function validates the disputed quantity against the corresponding sales order line quantity instead. You can mirror this pattern in your custom implementation when applicable.

### Procedure

1. Log in to the ServiceNow instance.
2. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
3. Search for the *sn_inv_ops_aias.invoiceQuantityCheckEP* scripted extension point in the **API Name** field.
4. View the sample script included in the demo data by selecting **sn_inv_ops_aias.invoiceQuantityCheckEP**.
5. Create your own implementation of the extension point by selecting the **Create implementation** related link.
6. On the Script Include form, fill in the fields.
   For a description of the Script Include form fields, see Script includes.
7. Override the functions in the script to implement your logic for validating the customer's quantity dispute claim.

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*checkInvoiceQuantityWithInvoiceCase*

Placeholder function meant to be overridden. Use this placeholder to implement the logic to validate quantity disputes across multiple invoice lines associated with an invoice case.

Input:

```
{
    "invoiceNumber": <Invoice number of the customer
 invoice record>,
    "verifiedInvoiceLineDetails": <Array of invoice
 line details>
```

Output:

```
{
“invoiceLineNumber”: <Invoice line number against
 which the dispute was raised>,
“disputedQuantity”: <Disputed quantity claimed by the
 customer, as available in the invoice case line>
}
```

*checkInvoiceQuantity*

Placeholder function meant to be overridden. Use this placeholder to implement the logic to validate a quantity dispute by reconciling the customer's claimed quantity against your ERP or inventory delivery records.

Input:

```
{
    "invoiceNumber": <Invoice number of the customer
 invoice record>,
    "invoiceLineNumber": <Invoice line number of
 the customer invoice line record against which the
 dispute was raised>,
    "userEnteredQty": <Disputed quantity claimed by
 the customer>
}
```

Output:

```
{
    "invoiceLineNumber": <Invoice line number against
 which the dispute was raised>,
    "invoiceQty": <Actual quantity on the invoice line
 record>,
    "deliveredQty": <Integer representing the disputed
 quantity claimed
                      by the customer>,
    "qtyMatch": <Boolean; true if the customer's
 dispute claim is valid, false if the invoiced and
 claimed quantities match>,
    "isError": <Boolean; true if the API call failed,
 false if the API call was successful>,
    "errorMessage": <Error message string to handle
 failure scenarios>
}
```

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8. Select **Update**.
9. **Optional:** Validate your implementation by submitting an invoice dispute from the Business Portal using the ServiceNow Otto Virtual Agent.
   For more information, see Dispute invoice issues using ServiceNow Otto Virtual Agent.

**Related topics**

Using extension points to extend application functionality

Creating and adding a scripted extension point

### Configure the invoice dispute resolution extension point

Implement the invoice case resolution extension point to enable the invoice dispute intake assistant AI agent to resolve a validated quantity dispute by issuing a credit note or placing an order for the disputed quantity.

## Before you begin

The application scope must be set to Manage Invoice Operations. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: admin

## About this task

The demo data for the Manage Invoice Operations application includes a sample implementation called `invoiceCaseResolutionEP` as part of the `sn_inv_ops_aias.invoiceCaseResolutionEP` extension point. To enable real-world resolution of validated invoice disputes, such as issuing credit notes or placing orders through your external systems, replace the demo implementation with your own custom logic.

## Procedure

1. Log in to the ServiceNow instance.
2. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
3. Search for the `sn_inv_ops_aias.invoiceCaseResolutionEP` scripted extension point in the **API Name** field.
4. View the sample script included in the demo data by selecting **sn_inv_ops_aias.invoiceCaseResolutionEP**.
5. Create your own implementation of the extension point by selecting the **Create implementation** related link.
6. On the Script Include form, fill in the fields.
   For a description of the Script Include form fields, see Script includes.
7. Override the `processInvoiceDisputeResolution` function to implement your resolution logic for validated invoice quantity disputes.

   `processInvoiceDisputeResolution`

   Placeholder function meant to be overridden. Use this placeholder to implement the logic to resolve a validated invoice quantity dispute by processing the customer's preferred resolution option, such as issuing a credit note or placing an order for the disputed quantity.

   Input:

```
{
    "invoiceCase": <Invoice case number of the invoice
 case record>,
```

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```
   "resolutionOption": <String value representing the
 resolution option selected by the customer>,
   "conversationSummary": <Optional. String
 containing the summarized transcript of the complete
 conversation.>
}
```

Output:

```
{
   "hasResolved": <Boolean; true if the resolution
 was processed successfully, false if the resolution
 failed>,
   "creditNote": <String containing the generated
 credit note number>,
   "orderNumber": <String containing the generated
 order number>
}
```

8. Select **Update**.
9. **Optional:** Validate your implementation by submitting an invoice dispute from the Business Portal and selecting a resolution option using the ServiceNow Otto Virtual Agent.
   For more information, see Dispute invoice issues using ServiceNow Otto Virtual Agent.

**Related topics**

Using extension points to extend application functionality

Creating and adding a scripted extension point

### Make the invoice dispute assist workflow available in the ServiceNow Otto panel

Configure the invoice dispute assist agentic workflow in AI Agent Studio to make it available to agents in the ServiceNow Otto panel in the CRM Workspace.

#### Before you begin

The application scope must be set to Manage Invoice Operations. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: sn_aia.admin

#### About this task

Agentic workflows that are installed with ServiceNow Otto applications aren't automatically activated. You must activate the invoice dispute assist agentic workflow before it can be used in the ServiceNow Otto panel. After you enable the workflow, you can optionally promote it to make it appear as a suggested topic in the ServiceNow Otto panel for faster access.

#### Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage**.
2. On the Manage agentic workflows and AI agents page, select the **Agentic workflows** tab.
3. Select the **Invoice Dispute Assist** agentic workflow.
4. From the navigation pane, select **Select channels and status**.
   You could leave the settings in the remaining tabs at their default values.
5. On the Select channels and status page, enable the **Engage via ServiceNow Otto panel** option.

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6. Select **Save and test**.
7. **Optional:** Promote the agentic workflow to add it to the list of suggested topics in the ServiceNow Otto panel.
   a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   b. On the Assistant Designer page, select the **Agentic workflows** tab.
   c. Narrow your search by selecting **ServiceNow Otto Panel - Platform (default)** from the **Select assistant** drop-down menu.
   d. Locate the Invoice Dispute Assist agentic workflow and select **Promoted** from the More actions icon ⋮.

   The invoice dispute assist agentic workflow appears as a promoted topic in the ServiceNow Otto panel, making it directly accessible to agents without requiring a search.

### What to do next

Configure Chat Summarization to enable the summarization and recommendation features in Active Chat. For more information, see Configure chat summarization.

#### Related topics

Activate an agentic workflow template

## Enable Contracts and Entitlements on the Business Portal

Admins can enable contracts and entitlements on the Business Portal so customers can view their contracts and entitlements.

### Before you begin

The application scope must be set to Business Portal. You can change the application scope using the application picker in the Unified Navigation bar.

Role required: admin

### Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. Select **Business Portal**.
3. Enable the **Enable Web Embeddables** option.
   The **Select components being embedded** field becomes available.
4. In the **Select components being embedded** field, add **sn-embedx-object-list**.
5. Select **Save**.
   Contracts and entitlements are now enabled on the Business Portal.

### What to do next

Customers can now access and view contracts and entitlements from the Business Portal. For more information, see View contracts on the Business Portal and View entitlements on the Business Portal.

# Configuring agent tools in Sales Customer Relationship Management

The applications in Sales Customer Relationship Management share common features and tools for agents.

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This section describes common features that you can configure for your agents, such as location-based transactions.

**Related topics**

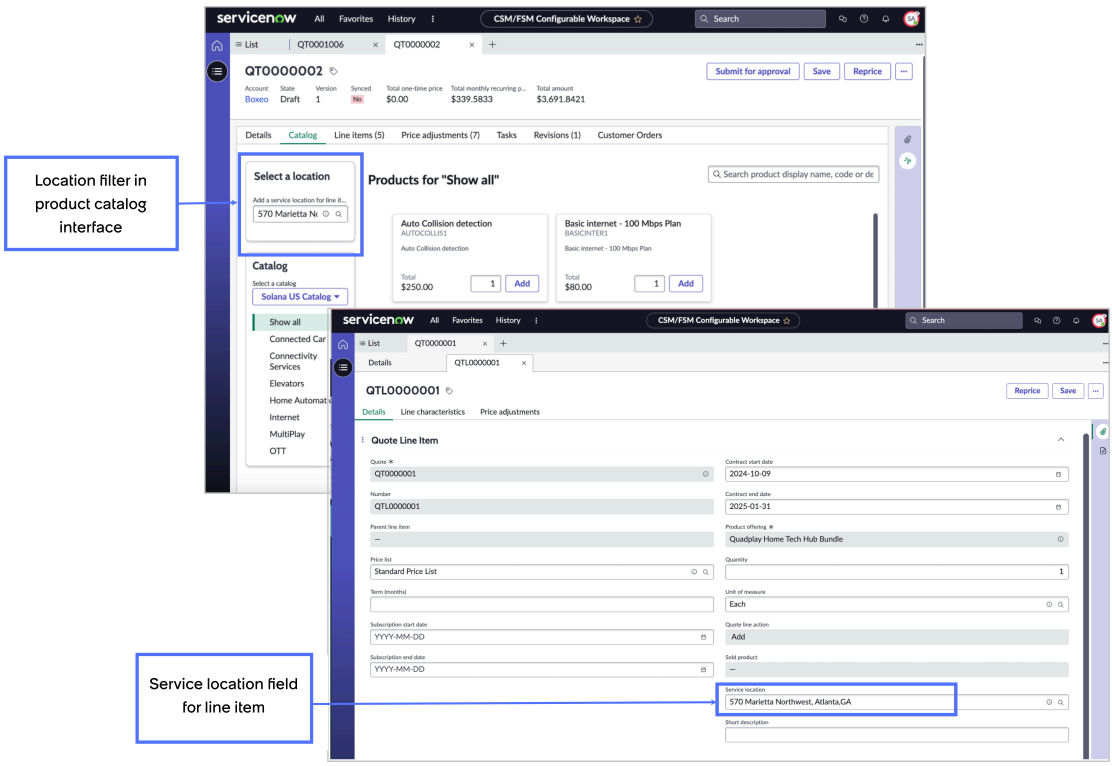
- Order management
- Using Order Management

## Configuring location-based product transactions

In Sales Customer Relationship Management, agents can create opportunities, quotes, and orders tailored to customer location. These transactions are called location-based product transactions.

When the product offerings and services available to customers vary based on location, your agents can use a location filter in the product catalog UI to select a service location and view only the products and services appropriate for that location. Agents can then add the appropriate products to an opportunity, quote, or order. Agents can also copy products and services from one location to another within the same transaction, which eliminates the need to create another opportunity, quote, or order for each location.

### Location filter in the product catalog UI and service location in the line item view for quotes




## How location-based transactions work

### Admin and product catalog admin configuration

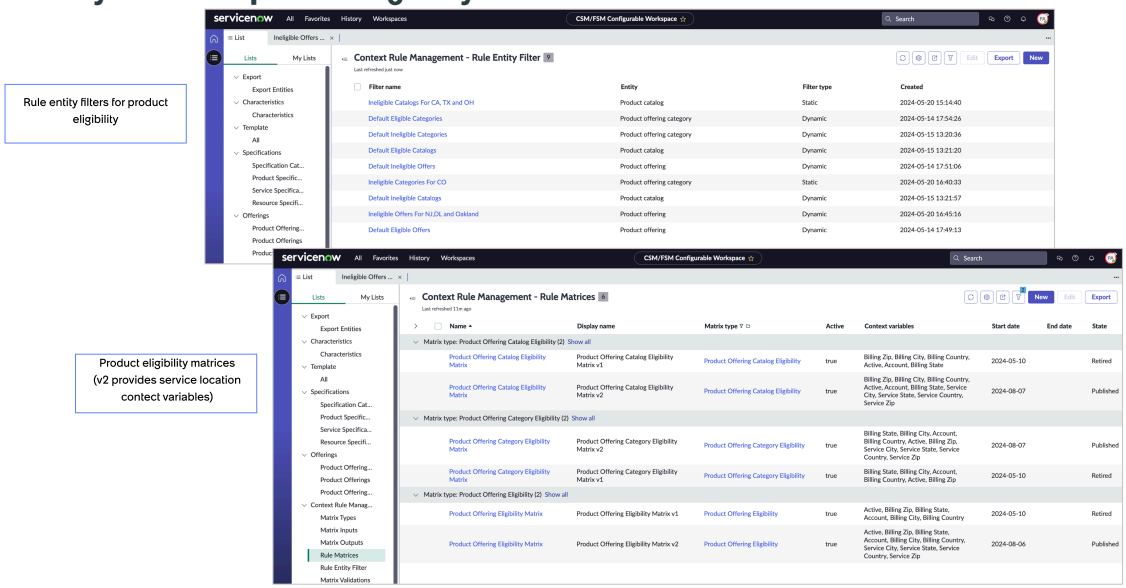
Admins activate location-based transactions by enabling the *sn_sales_common.enable_location_based_transactions* system property.

Product catalog admins use the product eligibility rule entity filters to identify eligible and ineligible product entities (catalogs, categories, and product offerings). They also set up decision rules in product eligibility matrices, to specify the context

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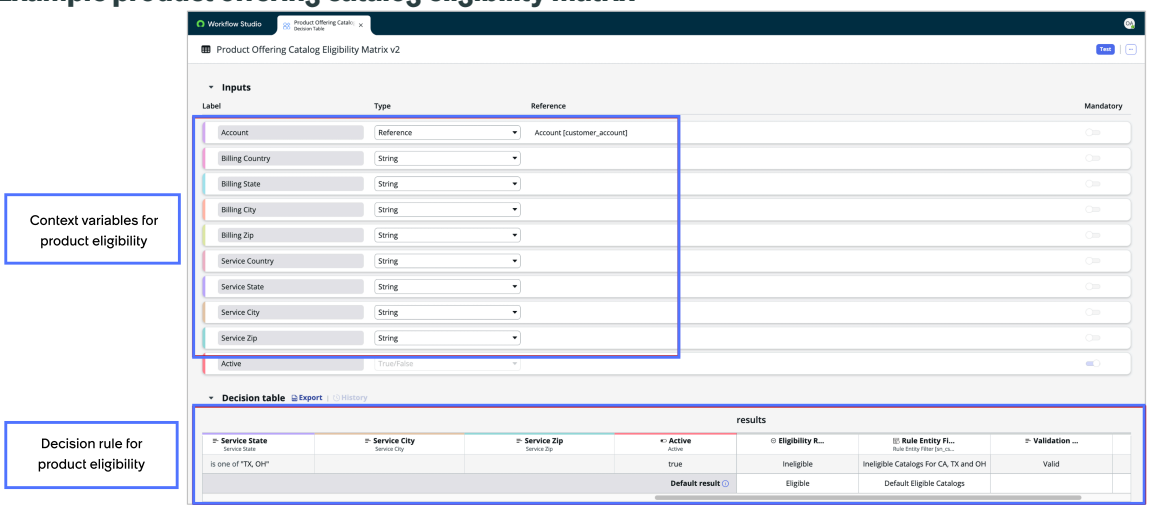
variables, such as billing state or the service location variables (introduced in the November 2024 release), for controlling the display of eligible catalogs, categories, or product offerings.

### Rule entity filters and product eligibility rule matrices




In the following example of the Product Offering Catalog Eligibility matrix, a rule entity filter for ineligible catalogs and the context variable, service state, are used to filter the product catalog displayed.

### Example product offering catalog eligibility matrix



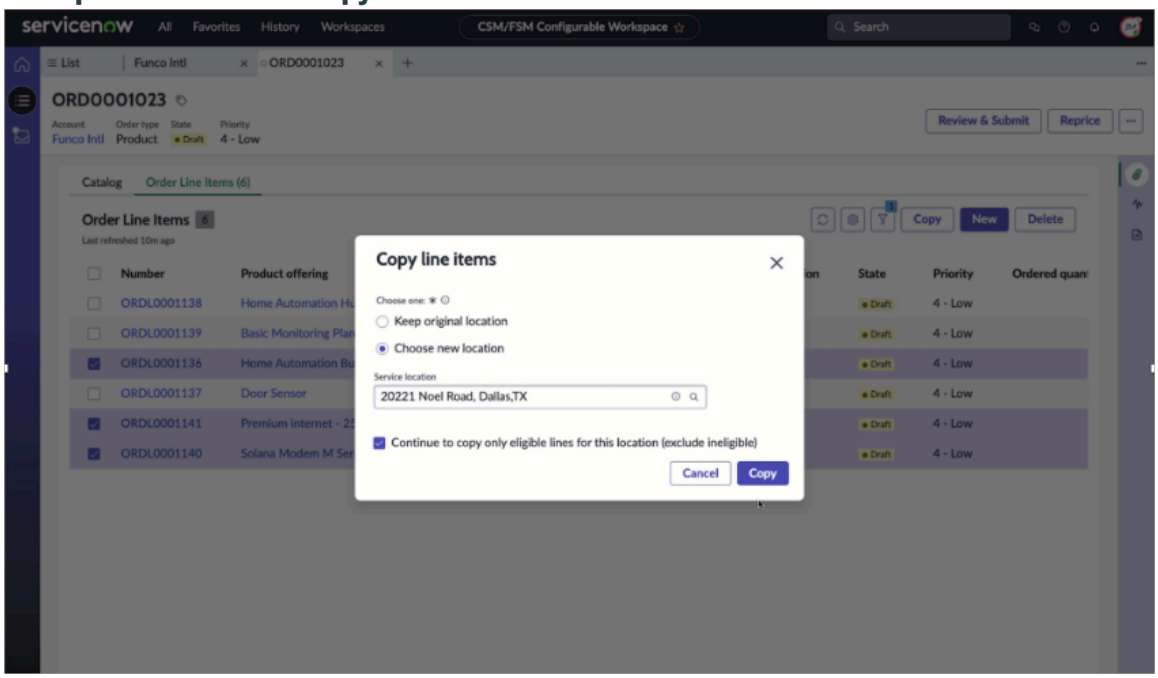

## Agent experience for location-based transactions

When agents specify a service location, the product catalog UI displays the eligible catalog, categories, or offerings for that location, depending on the product eligibility entities configured. When they select a simple or fixed product, the line item is created automatically for the specified location. If they select a configurable product, they use the product configurator to customize the product options. A line item is created automatically when they save the product configuration.

Your agents can then copy line items to another location in the same transaction (opportunity, quote, or order). They can indicate that only eligible line items be copied to the specified location.

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**Example order line item copy**




For details on how agents add products to an opportunity, quote, or order by location, see the following:

- Use location filter to add opportunity line items.
- Copy opportunity line items to a location.
- Filter catalogs by location in a quote.
- Copy locations for quote line items.
- Filter product catalog by location.

## Setting up location-based transactions

Admins and product catalog admins complete the following configuration tasks to set up location-based transactions.

**Location-based transaction configuration tasks**

| Step | Description | Role |
|---|---|---|
| Activate location-based transactions | Enable the *sn_sales_common.enable_location_based_transactions* system property. | Admin |
| Create rule entity filters | Define the rule entity filters that make catalogs, categories, and product offerings either eligible or ineligible for display. | Product catalog admin |
| Define product eligibility rules | Set the product eligibility rules by selecting the context variables, such as the service location context variables, that control the display of product catalog, category, or offerings. | Product catalog admin |

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### Related topics

- Order management
- Using Order Management

### Activate location-based transactions

Turn on location-based transactions for opportunities, quotes, and orders by using the *sn_sales_common.enable_location_based_transactions* system property.

### Before you begin

Role required: admin

### About this task

The *sn_sales_common.enable_location_based_transactions* system property enables your agents to select a customer location and view only the eligible products for that customer location when adding product lines to an opportunity, quote, or order. This feature also enables agents to copy line items to another location within the same transaction (opportunity, quote, or order).

### Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *sn_sales_common.enable_location_based_transactions* system property.
3. In the **Value** field, enter `true`.
4. Select **Update**.
   The location filter is displayed in the product catalog interface. Agents can use the filter to select a location when adding product lines to an opportunity, quote, or order. The catalog displays the eligible product offerings for the location. After adding products from the catalog, agents can then copy selected products (line items) to another location within the same transaction, without having to create another opportunity, quote, or order for a different customer location.

### What to do next

Define the product eligibility rule filters and matrices that control the product offerings displayed by location.

### Related topics

- Order management
- Using Order Management

## Configuring AI capabilities in Sales CRM

Use the AI Admin Hub console to activate the various AI applications and skills that you're entitled to use.

### Installation overview

ServiceNow structures its products and packages in three tiers: Foundation, Advanced, and Prime. Each tier incorporates AI and builds progressively on the previous one with additional AI capabilities, agents, and governance tools. For more information about product tiers, see ServiceNow product tiers.

Before installing the ServiceNow Otto plugins, review the Implementing AI on the ServiceNow AI Platform for best practices and additional resources.

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You must install at least one ServiceNow Otto application before you can configure any skills. Install the following plugins using the Application Manager to enable AI skills and capabilities for Sales CRM:

- ServiceNow Otto for Sales Automation (sn_som_gen_ai)
- ServiceNow Otto for CPQ (sn_som_gen_ai_cpq)
- ServiceNow Otto for Order Management (sn_som_gen_ai_om)

For more information on installing AI plugins, see Install plugins for ServiceNow Otto.

**Note:** In Sales CRM, AI skills aren't automatically enabled after plugin activation. You must enable them from the AI Admin Hub console.

## Configuration tasks

Perform the tasks listed in the following tables to enable the respective AI skill or feature.

### ServiceNow Otto for Sales Automation configuration tasks

| AI feature | Configuration task |
|---|---|
| Nurturing leads using agentic workflow | Nurturing leads using agentic workflow |
| CRM conversational query | CRM conversational query |
| Summarize opportunities | Customize the opportunity summarization skill in ServiceNow Otto for Sales Automation |
| View opportunity scores and insights | Set up ML-based opportunity scoring and insights |
| AI sales activity association | Install AI sales activity association |

### ServiceNow Otto for CPQ configuration tasks

| AI feature | Configuration task |
|---|---|
| Summarize a quote using quote summarization | Customize a quote summarization skill in ServiceNow Otto for Configure, Price, Quote (CPQ) |
| Using Advanced Approval Management AI | Configuring Advanced Approval Management AI |

### ServiceNow Otto for Order Management configuration tasks

| AI feature | Configuration task |
|---|---|
| Summarize an order using Summarization for Order Management | Customize an order summarization skill in ServiceNow Otto for Order Management |
| Manage order operations | Configuring the Manage Order Operations application |
| Manage invoice operations | Configuring the Manage Invoice Operations application |

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### Skills in global domain reuse

By default, all skills exist in the global domain. When you use AI in a domain-separated environment, users are only able to access data in their domain. For example, if a user uses the summarization skill, AI only uses material that exists in the user's domain when generating that summary. Additionally, there is no co-mingling of data for domain-separated instances when using generative AI skills. The data resides only on the instance, and the shared services used for generative AI do not persist any requests (prompts) and responses. For more information, see Domain separation in the AI Admin Hub console. (Note that global domain is not the same as global scope. For more information, see Exploring Next Experience pickers.)

**Related topics**

- AI capabilities in Sales CRM
- Overview tab in AI Admin Hub

## Configure Sales CRM Mobile Application

Activate the Sales CRM Mobile plugin, then use the Now Agent mobile app to log in and access Sales CRM Mobile application.

### Before you begin

Role required: sales_mobile_user

This role is automatically inherited by users with the sales_agent, sales_restricted_agent, lead_agent, or sales_manager role.

### About this task

### Procedure

1. As an admin, activate the Sales CRM Mobile plugin (sn_sales_crm_mob).
   For more information, see Activate a plugin.
2. Depending on your device, go to the Apple App Store or the Google Play Store and download the Now Agent mobile app.
3. Enter your ServiceNow instance credentials.
   For more information, see Add a ServiceNow instance to ServiceNow mobile apps.
   You are logged in the Sales CRM Mobile application.

**Related topics**

- Mobile experience for Sales CRM
- Sales CRM Mobile Application
- Activate ServiceNow Otto plugin on Sales CRM Mobile
- Activate ServiceNow Otto AI Interface

### Activate ServiceNow Otto plugin on Sales CRM Mobile

Activate the plugin and ServiceNow Otto tab required for AI conversational interface on Sales CRM Mobile application.

### Before you begin

Role required: admin

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### Procedure

1. Activate the ServiceNow Otto for Sales Automation plugin (*sn_som_gen_ai*).
   For more information, see Activate a plugin.
2. Navigate to **All** > **sys_sg_button_instance.list**.
   The Function instances page appears.
3. Filter the record by entering **Sales CRM** in the **Name** field.
4. Select the **Sales CRM - Agent Chat Prominent Action** record.
   The Sales CRM - Agent Chat Prominent Action function form is displayed.
5. Select the **Active** option.
6. Select **Update**.
   The Sales CRM - Agent plugin is installed and the ServiceNow Otto is available on the Sales CRM Mobile application.

### Result

Activate the chat launcher to use ServiceNow Otto on the Sales CRM Mobile application.

### Related topics

Configure Sales CRM Mobile Application

Activate ServiceNow Otto AI Interface

Use ServiceNow Otto on Sales CRM Mobile

## Activate ServiceNow Otto AI Interface

After installing the ServiceNow Otto plugin, activate the chat launcher required to enable ServiceNow Otto AI conversational interface on Sales CRM Mobile application.

### Before you begin

Role required: admin

### Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer**.
   The Assistant Designer page appears.
2. Select **Edit** on ServiceNow Otto for Virtual Agent (default) assistant.
   The ServiceNow Otto for Virtual Agent (default) assistant is displayed.
3. Navigate to **Settings** > **Display experience** > **Mobile apps**.
   The Mobile apps section appears.
4. In the Chat launcher function section, select **Add agent chat** from the **Add Chat launcher function** list.
   The Add chat experience dialog box appears.
5. In the Add chat experience dialog box, select **Premium chat**.

   **Note:** **Premium chat** enables you to have the best experience with ServiceNow Otto AI interface.

6. Select **Add**.
   The Agent Chat function is added.
7. Select **Save**.

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8. On the Assistant Designer page, select the **More Actions** icon for ServiceNow Otto for Virtual Agent (default).
9. Select **Activate**.

### Result

The ServiceNow Otto AI interface on Sales CRM Mobile is available for users.

### Related topics

- Configure Sales CRM Mobile Application
- Activate ServiceNow Otto plugin on Sales CRM Mobile
- Use ServiceNow Otto on Sales CRM Mobile

## Using Sales Customer Relationship Management applications

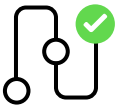
As agents and managers, you use the CRM Workspace to complete various tasks when using the Sales Customer Relationship Management applications.

From the workspace you can access product catalogs to see the product offerings available in your organization and select them for Sales Customer Relationship Management transactions. You use a configurator interface, either the CPQ Configurator or the Configurator to customize configurable products that you add to opportunities, quotes, and orders or to make changes in sold products and product inventory.

**Note:** The CPQ Configurator is available if your organization has implemented the CPQ Integration application. For details on using the CPQ Configurator in Sales Customer Relationship Management workflows, see Configure a customizable product using CPQ Configurator.

| Sales automation | Configure, price, quote | Order management |
| --- | --- | --- |
|  |  |  |
| Win more deals by capturing leads, tracking opportunities, forecasting sales, managing territories and buying groups. | Quote faster and more accurately by configuring products, setting pricing, and creating sales agreements. | Keep orders on track by managing fulfillment, staying ahead of jeopardy, and resolving issues quickly. |

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| | | |
|---|---|---|
| **Order operations**<br><br>Run seamless lead-to-cash processes by managing end-to-end order workflows and handling returns with ease. | **Post-sales engagement**<br><br>Deliver on your promises by managing contracts, tracking entitlements, and driving product life cycle workflows. | **Partner Relationship Management**<br><br>Grow your partner ecosystem by onboarding partners, strengthening relationships, and enabling collaboration. |
| **Lead-to-cash foundation**<br><br>Browse, customize, and add products using the product catalog interface with AI Search. | **Business Portal**<br><br>Empower your customers by letting them place orders, submit RFQs, view quotes, and raise cases on their own. | |

## Using sales automation applications

Learn how to use sales automation applications.

### Using Lead Management

Use the Lead Management to create your lead.

### Lead Management interface

The Lead Management interface contains the following tabs:

**Lead Management tabs**

| Tab | Description |
|---|---|
| Details tab | Add basic information for your lead. |
| Catalog tab | Search for and add product offerings to your lead. |
| Needs tab | Lists the need templates that provide product recommendations for a lead. |
| Tasks tab | Create lead tasks. |
| Appointments tab | Create appointments for your lead. |

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**Lead Management tabs (continued)**

| Tab | Description |
|---|---|
| Line items tab | Add different line items to a lead. |
| Emails tab | Create emails to communicate with the required stakeholders. |

**Related topics**

Configuring Lead Management

Lead Management

### Create a lead

Create a lead in the Lead Management application by entering the details, such as customer name, sales stage, lead type, score, and source.

## Before you begin

Role required: sales_agent

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select **New**.
3. On the form, fill in the fields.

**Create new lead**

| Field | Description |
|---|---|
| First Name | First name of the lead. |
| Last Name | Last name of the lead. |
| Email | Email address of the lead. |
| Mobile Phone | Mobile number of the lead. |
| Business Phone | Business phone number of the lead. |
| Title | Title of the lead. |
| Company | Company name of the lead. |
| Stage | Current stage of the lead in the sales lifecycle. The available options are:<br>○ New<br>○ Contacted<br>○ Nurturing<br>○ Qualified<br>○ Disqualified |
| Lead Source | Channel or origin through which the lead was acquired. The available options are: |

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| Field | Description |
| --- | --- |
| | ○ Inbound Phone<br>○ Inbound Web<br>○ Partner Referral<br>○ 3rd Party Referral<br>○ Employee Referral<br>○ List<br>○ Trade Show<br>○ Pr<br>○ Display Ad<br>○ Billboard<br>○ AI-Suggested<br>○ Other |

4. Select **Create Lead**.
   A message confirms that the lead was created. To continue working on the lead, select the link in the message.
5. Select **Refresh** to see the new lead in the list.

### What to do next
Start adding more information to your lead. To learn more, see Add and view the details of a lead.

#### Related topics
Configuring Lead Management

Lead Management

## Update a lead
Edit or update a lead in Lead Management.

### Before you begin
Role required: sales_agent

### Procedure
1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select an existing lead that is in New or Contacted or Nurturing stage.
   - On the **Leads- All** page, select **Edit** to make changes to lead information and select **Update**.
   - Open the lead record, make the changes and select **Save**.

### What to do next
To learn more, see Using Lead Management.

#### Related topics
Configuring Lead Management

Lead Management

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### Assign a lead

Assign a lead to a sales agent in Lead Management.

#### Before you begin
Role required: sales_agent or sales_manager

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select an existing lead that you're working with.
   - On the **Leads- All** page, select **Assign to**.
   - Open the lead record, select three-dot menu at the top-right corner on the lead header and select **Assign to**.

   To Create a lead, select **New**.

   **Note:**

   Immediately after you create the lead, a message confirms that the lead was created. To continue working on the lead, select the link in the message.
3. On the **Assign leads to** dialogue box, select **Owner** and choose a sales agent.
   You can select the box if you want to reassign all the tasks from the selected leads to this sales agent.
4. Select **Assign**.

#### What to do next
To learn more, see Using Lead Management.

#### Related topics

Configuring Lead Management

Lead Management

### Add and view the details of a lead

Use the Details tab to add more information about your lead.

#### Before you begin
Role required: sales_agent

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select the lead that you're working with.
3. Fill in the information on the Details tab.
   For more information on the description of the field values, see Lead details form.
4. Select **Save**.

#### What to do next
Use the Product Catalog tab to add products to your lead. To learn more, see Add products to a lead.

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### Related topics

Configuring Lead Management

Lead Management

## Add products to a lead

Use the Catalog tab in the Lead Management to add products to your lead.

### Before you begin
Role required: sales_agent

### About this task
You can use the Catalog tab to search for and select product offerings from catalogs and add them to your lead.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and , select the lead that you're working with.
3. Select **Catalog**.
4. Use the following table to learn about the functionality of the **Catalog** tab.

**Catalog tab**

| Element | Description |
|---|---|
| Product catalog hierarchy | This option selects the product catalog. |
| Add button | The **Add** button adds the product to the quote. The **Add** button appears for simple products that don't have any selectable options. |
| Search field | Use the search field to search for a product in the product catalog hierarchy selected. |

5. Select **Add**.
   The product offering is added to the lead as a **Line Item**.

### What to do next
Add line items to a lead.

### Related topics

Configuring Lead Management

Lead Management

## Get product recommendations for leads using needs analysis

Choose a needs template from the product selection guide in the product catalog to get product recommendations for sales leads.

### Before you begin
Role required: sales_agent

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### About this task

A needs template is a questionnaire that you complete to get product recommendations based on input or requirements that you receive from a customer. The product selection guide lists the needs templates available for a particular catalog.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select the lead that you want to work on.

   The product catalog appears on the Catalog tab of the lead.
3. In the Catalog tab, select **Product selection guide** in the catalog hierarchy.
   The needs template cards for the guide appear.
4. In the needs template card that best matches what your customer wants, select **Capture Needs**.
   The questionnaire for the selected template opens.
5. Answer the series of questions.
6. After replying to the last question, review or select the recommendations:
   - To review your responses, select the **Edit** icon. You can change your responses if needed.
   - To view product recommendations, select **Select Recommendations**. The Catalog tab displays the recommended products.
7. Select **Add** in the tile for the product that best matches your customer needs.
   The selected product is added to the lead. The Needs tab displays the needs template that you selected. You can review the needs template and, if needed, change your answers. Different answers might produce different product recommendations.

### Related topics

Create a needs template and set the catalog relationship

Configuring Lead Management

Lead Management

## Add line items to a lead

Create a new product line item for your lead by entering the details, such as product offering and quantity.

### Before you begin

Role required: sales_agent

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **LeadsAll**.
3. Select the lead you want to work with and select the **Line Items** tab.
4. Select **New** to start a new lead line item or select an existing lead line item to make changes.
5. Fill in the fields in the Lead Line Item form.

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### Lead Line Item form

| Field | Description |
|---|---|
| Number | System-generated number of the lead line item. |
| Quantity | Quantity of the lead line item. |
| Product Offering | Product offering bundle for the lead line item. Only those product offerings will be visible that are in Staged, In Test, and Published state. |
| Unit of Measure | Measuring unit of the lead line item. |
| Work Notes | Additional information related to the lead line item. |

6. Select **Save**.
   The Lead Line Item is added to the main lead.

## What to do next

Add lead tasks.

### Related topics

Configuring Lead Management

Lead Management

### Add lead tasks

Create lead tasks to follow-up calls, emails, or meetings with your to progress on the lead.

## Before you begin

Role required: sales_agent

## Procedure

1. Navigate to **List** view and select **Leads - All**.
2. From the **Leads List** window, select the lead you want to work with.
   - On the **Leads- All** page, select **Create task**.
   - Open the lead record, select the **Tasks** tab and select **New** to start a new lead task or select an existing lead task to make changes.

   To Create a lead, select **New**.

   **Note:**

   Immediately after you create the lead, a message confirms that the lead was created. To continue working on the lead, select the link in the message.

3. On the Create New Lead Task form, fill in the fields.
   For a description of the field values, see Create new lead task form.
4. Select **Create Task**.
   This task is added to the lead.

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### What to do next
You can create appointments in your lead tasks. To learn more, see Create an appointment from Opportunity Management.

#### Related topics
- Configuring Lead Management
- Lead Management

## Create appointments for lead tasks

Create appointments with your stakeholders to conduct business discussions for your lead.

### Before you begin
Role required: sales_agent

### About this task
You can create appointments only after creating a lead task. To create a lead task, see Add lead tasks.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Lead** > **All**.
3. Select the lead task you want to work with and select the **Appointments** tab.
4. Select **New** to start a new appointment or select an existing appointment to make changes.
5. Fill in the fields in the Create New Appointment form.
   For description of the field values, see Create new appointment form.
6. Select **Save** to save the appointment and send it later or select **Send activity** to send it now.

#### Related topics
- Configuring Lead Management
- Lead Management

## Manage touchpoints on a lead

View, create, and delete touchpoints associated with a lead from the touchpoints related list.

### Before you begin
The CRM Touchpoints plugin (sn_crm_touchpoint) must be installed.

Role required: sn_crm_touchpoint.admin or sn_crm_touchpoint.touchpoint_writer

### About this task
The **Touchpoints** tab on a lead record displays all touchpoints associated with that lead. You can create new touchpoints or delete existing ones directly from this list.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and open the lead record and select the **Touchpoints** tab.
   The list displays all touchpoints associated with the lead.
3. **Optional:** To create a touchpoint, select **New** in the related list Or select **Create Touchpoint** from the Lead header.

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**Note:**

- The **New** button is available when you have permission to create CRM Touchpoints.
- If the lead is in a Qualified or Disqualified stage, an error message appears when you attempt to save the new touchpoint.

4. **Optional:** To delete one or more touchpoints, select the checkbox next to each touchpoint and then select **Delete**.

**Note:**

- The **Delete** button is available to users with touchpoint_admin permission and is only active when at least one touchpoint is selected.
- A confirmation prompt appears before the deletion completes.

The selected touchpoints are removed from the lead.

### Result

Changes are saved to the lead. The Touchpoints tab reflects the current state of all linked touchpoints.

### Related topics

CRM Touchpoints

Install CRM Touchpoints

Manage touchpoints on an opportunity

Create new CRM touchpoint form

## Create a touchpoint from a lead

Create a touchpoint to log a customer interaction directly from a lead record.

### Before you begin

- The CRM Touchpoints plugin (sn_crm_touchpoint) must be installed.
- The lead must be in a non-closed state. You can't create touchpoints for leads in a Qualified or Disqualified stage.

Role required: sn_crm_touchpoint.admin or sn_crm_touchpoint.touchpoint_writer

### About this task

Touchpoints are interaction records that you associate with a specific lead. When you create a touchpoint from the lead, the system automatically links the touchpoint to that lead and populates customer context from the lead record.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and open the lead record.
3. In the lead header, select **Create** > **Touchpoint**.

**Note:** The **Create** button is only visible when you have permission to create CRM Touchpoints and the lead is in a non-closed state.

4. In the touchpoint form, complete the required fields.

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The following fields are automatically set and can't be edited:

- **Associated entity**: set to Lead
- **Associated record**: set to the lead number
- **Category**: set to Pre-Sales
- **Owner**: set to the user creating the touchpoint
- **Account**: set from the lead account if available, and read-only
- **Contact**: set from the lead contact if available, and read-only

If the lead account or contact changes, the system updates the account and contact on all non-closed touchpoints associated with that lead.

5. Select **Save**.

### Result
The touchpoint is created and linked to the lead. It appears in the **Touchpoints** tab of the lead record.

### What to do next
To view all touchpoints for the lead, select the **Touchpoints** tab.

#### Related topics
CRM Touchpoints

Install CRM Touchpoints

Create new CRM touchpoint form

## Compose emails

Create an email to communicate the product information to your customer as per the business requirements.

### Before you begin
Role required: sales_agent

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select a lead that you want to work with.
3. Select the **Emails** tab.

   **Note:** The **Emails** tab displays both emails linked directly to the lead and emails linked to the lead's touchpoints.

4. Select **Compose Email** to start a new email or select an existing email to view details.
5. Fill in the details in the Email draft form.

#### Lead Email Draft form

| Fields | Descriptions |
|---|---|
| From | Email id of the sender. |

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| Fields | Descriptions |
|---|---|
| To | Email id of the receiver. |
| Subject | Subject of your email. |
| Email message | Body details of your email. |

**Note:** You can create your own email templates and use the pre-filled email templates while creating a new email. To discard your email, select **Discard draft**. To attach any files with your email, select **Attach File**.

6. Select **Send email** to send the email or close the email form to save it in the **Draft Emails** tab.

**Related topics**

Configuring Lead Management

Lead Management

### Schedule a meeting from a lead

Schedule a client meeting directly from a lead record to associate it with the lead.

**Before you begin**

Verify that the Meetings plugin (sn_meeting_mgmt) is activated.

The lead must be in a non-closed state.

Role required: sn_meeting_mgmt.meeting_creator

**About this task**

When you schedule a meeting from a lead, the system automatically associates the meeting with that lead. The meeting then appears in the lead **Meetings** tab.

**Procedure**

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and open the lead record.
3. In the lead header, select **Create** > **Meeting**.
   The **Meeting** option appears only when you have permission to create meetings. The option is hidden when the lead is in a closed state.
4. Complete the meeting form.
   The meeting form includes tabs for occurrences, participants, and summary. The meeting is automatically associated with the lead.
5. Select **Save**.

**Result**

The meeting is created and linked to the lead. It appears in the **Meetings** tab of the lead record and in the **Upcoming meetings** section of the Priority Activity panel.

**What to do next**

To view all meetings for the lead, select the **Meetings** tab.

**Note:** The **Meetings** tab displays both meetings linked directly to the lead and meetings linked to the lead's touchpoints.

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### Related topics

- Schedule a meeting from a touchpoint
- Manage touchpoints on a lead
- Create new meeting form
- Activity Management

## Manage leads using Kanban view

Personalize and manage the leads information that is most relevant to you and your stakeholders using the Kanban view.

### Before you begin

Role required: sales_agent

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All**.
3. Select the **View Kanban** button.

   By default, the leads are grouped by different stages and displayed on the page.

   - To change a lead stage, drag the lead card from one state and drop it into another state.
   - To view the leads by different categories, such as industry, source, and reason, select **Group by:** drop-down menu on the page.
   - You can take various actions for your leads, such as creating a lead task, assigning a lead, and composing an email by selecting the three vertical dots either on a lead card or vertical leads stage header.
   - To create a new lead directly from this page, select **New** button. To learn more, see Create a lead.

### Related topics

- Configuring Lead Management
- Lead Management

## Convert a lead into an opportunity

Convert a lead into an opportunity in Lead Management.

### Before you begin

Role required: sales_agent

### Procedure

1. In the CRM Workspace, select the **List** view.
2. In the **Leads - All** list, select the lead that you're working with.
   - For a business customer, select **Convert lead** > **to an account** and fill in the fields in the form.

#### Convert lead form

| Field | Description |
|---|---|
| Account | Name of your customer account. |

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| Field | Description |
|---|---|
| | ▪ Create new: Select if you want to create a new account.<br>▪ Choose existing: Select if the customer is your existing account. |
| Contact | Name and email of your customer contact.<br>▪ Create new: Select if you want to create a new contact.<br>▪ Choose existing: Select if the contact already exists. |
| Opportunity | Details to create an opportunity. To learn more, see Create an opportunity.<br>▪ Create new: Select if you want to create a new opportunity.<br>▪ Choose existing: Select if you already have an existing opportunity.<br>**Note:** Select the check box if you don't want to create an opportunity for the lead. |

- For a consumer account, select **Convert lead** > **to a consumer** and fill in the fields in the form.

**Convert lead form**

| Field | Description |
|---|---|
| Consumer | Name and email of your consumer.<br>▪ Create new: Select if you want to create a new contact.<br>▪ Choose existing: Select if the contact already exists. |
| Opportunity | Details to create an opportunity. To learn more, see Create an opportunity.<br>▪ Create new: Select if you want to create a new opportunity.<br>▪ Choose existing: Select if you already have an existing opportunity.<br>**Note:** Select the check box if you don't want to create an opportunity for the lead. |

3. Select **Convert Lead**.
   A dialog box appears for the successful conversion of your lead into an opportunity. You can select the new opportunity record that was created.

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### Related topics

Configuring Lead Management

Lead Management

## Disqualify a lead

Disqualify a lead in Lead Management.

### Before you begin
Role required: sales_agent or sales_manager

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select an existing lead that you're working with.
3. Open the lead record, select three-dot menu at the top-right corner on the lead header and select **Disqualify lead**.

   **Note:** You can only disqualify a lead that is in New or Contacted or Nurturing stage.
4. On the **Disqualify lead** dialogue box, select a **Reason**.
5. Select **Disqualify**.

### What to do next
To learn more, see Using Lead Management.

### Related topics

Configuring Lead Management

Lead Management

## Export leads

You can export a quote as a JSON file in Lead Management and provide it to a customer.

### Before you begin
Role required: sales_agent

### About this task
The export lead feature in Lead Management exports a list of all leads. Use the following steps to export leads.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All**.
3. Select the **File Type**:
   - Excel
   - CVS
   - JSON
   - PDF
4. Select the **Delivery Type**:

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- Email - Enter a valid email address.
- Download - Downloads the export to a local drive.

The list of leads is exported according to the parameters set.

**Related topics**

Configuring Lead Management

Lead Management

## Using Customer Engagement Sequences

Empower sales teams to automate and optimize customer engagement at every stage from initial outreach to renewal and expansion. By orchestrating both automated and manual steps, provide timely, relevant, and consistent engagement experience to every prospect and customer.

## Using sequences across the sales life cycle

**Pre-Sales: Attract and nurture**

In the pre-sales phase, sequences help sales development representatives (SDRs) and account executives (AEs) to manage cold prospecting and lead nurturing efficiently. For example, a lead nurturing sequence can guide an SDR through a series of outreach steps such as sending introductory emails, making follow-up calls, and offering recommendations, helping ensure that no lead falls through the cracks. Feature adoption campaigns and user feedback invitations can also be automated to engage prospects early and gather valuable insights.

**Sales: Propose and transact**

During the active sales cycle, sequences automate workflows for opportunity management, proposal delivery, and order confirmation. Agents are prompted by a guided process to conduct discovery calls, send proposals, and confirm orders. With decision-based steps, if a prospect doesn't respond, the workflow adapts, perhaps by scheduling another follow-up or offering a different product. This stage can also include onboarding new customers for a smooth transition from prospect to client.

**Post-Sales: Fulfill, service, renew and expand**

After the sale, sequences support onboarding, proactive customer service, and product adoption. For instance, a sequence might prompt an account manager to schedule a welcome call, share service usage tips, or send outage notifications and updates. Maintenance reminders, upgrade offers, and renewal sequences help keep customers engaged and informed. Sequences can also be configured to recommend upsell or cross-sell opportunities such as suggesting additional products during a renewal conversation or after successful onboarding.

**Sales operations: Analyze and optimize**

Sales operations teams analyze sales metrics such as conversion rates or upsell success across different workflows. They optimize and share the high-performing sequences with other territories, promoting best practices across the organization. For example, if a particular onboarding sequence consistently leads to higher product adoption, it can be rolled out to all sales teams for maximum impact.

## Sample use cases

The following sample use cases provide examples on how you can use Customer Engagement Sequences to support your sales teams:

**Cold prospecting**

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Guide sales reps through structured outreach to new, unqualified prospects.

For example, an agent might be prompted to send an introductory email, follow up with a call, and log responses, so every cold lead receives consistent attention.

**Lead nurturing**

Automate ongoing engagement with leads to build relationships and move them toward qualification.

For example, after initial contact, the agent might be guided to share relevant content, schedule a demo, and send reminder emails, adapting steps based on lead responses.

**Offer recommendations**

Help agents to present tailored product or service recommendations at the right time in the sales process.

For example, during a discovery call, the workflow prompts the agent to suggest complementary products based on the customer's needs and previous purchases.

**Order confirmation**

Provide prompts so every new order is acknowledged and processed efficiently.

For example, once a customer places an order, the agent is prompted to send a confirmation email, verify order details, and initiate fulfillment steps.

**Onboarding**

Guide agents and customers through the onboarding process for new products or services.

For example, after a sale, the agent follows a checklist to schedule a welcome call, share onboarding materials, and confirm the customer's first successful use.

**Product adoption**

Drive ongoing engagement to help customers realize value from their purchase.

For example, the agent is prompted to check in after 30 days, offer training resources, and gather feedback to help the customer use the product most effectively.

**Proactive customer service**

Encourage agents to reach out before issues arise, improving satisfaction and retention.

For example, the workflow schedules periodic check-ins, sends usage tips, and prompts the agent to address potential concerns before the customer contacts support.

**Renewal**

Automate the renewal process, for timely outreach and to maximize retention.

For example, as a contract nears expiration, the agent is prompted to send renewal reminders, discuss new terms, and handle objections, all tracked in the workflow.

**Upsell**

Identify and act on opportunities to expand customer value through additional products or services.

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For example, during a renewal or check-in, the workflow suggests relevant upgrades or add-ons, and prompts the agent to present these offers to the customer.

**Related topics**

Configuring Customer Engagement Sequences

### Create a customer engagement sequence

Drive personalized outreach by creating customer engagement sequences that automate timely, relevant interactions that are ideal for nurturing leads, onboarding clients, or re-engaging inactive customers.

## Before you begin

Check whether features you need to access are supported by reviewing the table in Compatibility information for Customer Engagement Sequences.

Your instance must be integrated with platforms such as Amazon Connect.

Delegated developer roles should be assigned to designated users. For more information, see Grant delegated developer permissions for managing sequences.

You should be familiar with using Workflow Studio and Playbook Experience.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

**Note:** If you're using Customer Engagement Sequences 1.0.0, you need the playbook.admin or pd_author role to create sequences.

## About this task

**Important:**

- Create sequences from the Sequences module in the CRM Workspace, not from Workflow Studio. If you create a playbook of the type Sequence directly in Workflow Studio, the required Setup, Configure sequence activities, and Tear Down stages are not added automatically.
- Setup and Tear Down are predefined stages in the Customer Engagement Sequences playbook. Do not remove these stages or add more activities in these stages. Avoid making any other changes to the Start Sequence and End Sequence activities.

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Sequences** > **All Sequences**.
4. Select **Create New Sequence**.
5. On the Create new Sequence window, specify a name and optionally a description for your sequence.
6. Select **Create**.
   You're redirected to Workflow Studio and a playbook of the type sequence is created with the following predefined stages:
   - Setup
   - Configure sequence activities
   - Tear Down

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7. Select a source table whose records will trigger the sequence.

   a. Select the Edit icon above the Start pill.

   b. Select a table from the **Parent table** drop-down list.
   For example, you might want the sequence to trigger when a record is created or updated in the Lead [sn_lead_mgmt_core_lead] table.

   c. Select **Save and close**.
   The Triggers icon is activated on the left sidebar.

8. Define trigger conditions that initiate a sequence.
   For more information, see Define trigger conditions.

9. **Optional:** Change the priority with which a sequence task is created by navigating to the **Automation** tab of the Start sequence activity properties under the Setup stage.
   When the trigger condition is met, this activity creates a sequence task with a state of Work in progress and a priority of Moderate by default.

   **Note:** Do not remove this stage or add more activities to this stage. Avoid making any other changes to the Start Sequence activity.

10. In the sequence diagram, configure sequence steps in the Configure sequence activities stage.

    Use this stage to configure activities you want to make available to the sales representative as guided sequence steps during runtime. For more information, see Add and configure an activity in a playbook.

    You can add any number of activities to this stage in your sequence. For example, for telesales workflows, you might want to add a schedule call activity. For more information, see Add a schedule call activity to a telesales workflow sequence.

11. **Optional:** Add decision nodes to activate the next stage in the playbook based on the outcome of the previous stage.
    For more information, see Add decision nodes to a sequence.

12. Add a stage for the new branch you created and repeat the steps to add more activities as needed, including the schedule call activity as needed.
    For information about adding new stages, see Add and configure a stage in a playbook.

13. **Optional:** Update the sequence task record by selecting the **Customer Engagement Sequences** > **Update sequence task** activity from the activity picker.
    You can also use the Update sequence task activity to exit early from the sequence. For more information, see Add the Update sequence task activity to a sequence.

14. Review the configuration in the Tear Down stage.
    This predefined stage uses the Update sequence task activity to update the sequence task record when the sales representative completes all the sequence steps in their sequence task. By default, the system updates the state of the sequence task record as complete (indicated by State = 3) in the Customer Engagement Sequence Task [sn_crm_sequence_task] table.

    **Note:** Do not remove this stage or add more activities to this stage. Avoid making any other changes to the End Sequence activity.

15. Verify the sequence by selecting **Test**.

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16. Publish the sequence by selecting **Activate**.
17. **Optional:** View the sequence in the CRM Workspace by selecting the List icon and navigating to **Sequences** > **All Sequences**.

### What to do next

Assign runtime permissions while creating sequences.

### Related topics

- Stages and activities
- Triggers
- Table extension and classes
- Enabling playbook restart

## Define trigger conditions

Define trigger conditions that start a sequence by configuring simple triggers, or combining multiple triggers for initiating workflows from multiple record-based events.

### Before you begin

**Note:** Multi-trigger capability is available only with Playbooks versions 28.1 and higher on the Zurich release. For more information, see Playbooks in Workflow Studio release notes.

Assign delegated developer roles to designated users. For more information, see Grant delegated developer permissions for managing sequences.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

**Note:** If you're using Customer Engagement Sequences 1.0.0, then you need the playbook.admin or pd_author role to create sequences.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you're creating or updating.
5. On the left sidebar, select the Triggers icon .
6. Select an option that indicates when the playbook should run from the to**Add trigger** drop-down list.

   The available options are:

   - When record is created
   - When record is update
   - When record is created or updated
7. In the **Conditions** field, add conditions that must be met to trigger your playbook.

   **Example**
   To trigger the sequence when a new record is created in the Lead [sn_lead_mgmt_core_lead] table, you would set the condition **[State][is][New]**.
   For more information, see Condition builder.

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8. Select **Save and close**.
9. **Optional:** To create a multi-trigger sequence, select **Add triggers** from the Triggers pane and repeat the steps of defining the trigger conditions.

   (Optional) When adding additional triggers, if you select a child table or any other table from the **Trigger table** field, then you must use the data pill picker to select the parent record.

   **Tip:** You can add up to 10 triggers.

### Result
The triggers that you've created appear under the Record based triggers section on the Triggers pane.

### Related topics

Triggers

Add and configure a trigger in a playbook

## Add a schedule call activity to a telesales workflow sequence

Add a schedule call activity in your sequences to support telesales workflows.

### Before you begin
Review feature support information in Compatibility information for Customer Engagement Sequences.

To support the ability for your agents to initiate outbound calls from the sequence task, your instance must be integrated with platforms such as Amazon Connect. The Omnichannel Callback application (sn_omni_callback) must also be installed. For more information, see Install Omnichannel Callback.

Delegated developer roles must be assigned to designated users. For more information, see Grant delegated developer permissions for managing sequences.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

### About this task
You can add the Schedule call activity with other activities in a stage or in its own stage.

### Procedure
1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you're creating or updating.
5. **Optional:** In the sequence diagram, create a stage to add the activity.
   For more information, see Add and configure a stage in a playbook.
6. Within a stage, select the Add icon.
7. Open the activity picker by selecting the Add an activity icon.
8. On the Add activity screen, search for and select **Customer Engagement Sequences** > **Schedule call**.

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**Note:** The options available in the activity picker vary by release. For compatibility information, see Compatibility information for Customer Engagement Sequences.

9. On the Details tab of the Schedule call properties pane, enter a name to appear on the Sequence Steps tab during runtime in the **Label** field.
   For example, you might enter `Call attempt 1`.
10. On the Automation tab, fill in the fields.
    For a description of the field values, see Automation form fields.
11. Select **Save and close**.

### Related topics

Start with delay input properties

Add decision nodes to a sequence

Omnichannel Callback

## Add decision nodes to a sequence

Activate the next stage in the playbook based on the outcome of the previous stage by adding decision nodes while creating or updating a sequence.

### Before you begin

**Note:** Decision-based stages and the demo data are available only starting with Playbook version 28.3 on the Zurich release. The sample Lead nurturing tele-sales sequence available with the demo data shows how to configure a decision-based, telesales sequence with the schedule call activity.

Delegated developer roles must be assigned to designated users. For more information, see Grant delegated developer permissions for managing sequences.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

**Note:** If you're using Customer Engagement Sequences 1.0.0, you need the playbook.admin or pd_author role to create sequences.

### Procedure

1. Navigate to **Workspaces** > *`CRM Workspace`*.
2. Select the List icon.
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you're creating or updating.
5. In the sequence diagram, hover over the object that you want to insert a decision activity next to, and select the icon to add an activity.
6. Select the Add a decision icon.
   A decision is added with two branches and the Decision properties side panel opens for configuration.
7. Under the Details tab, enable the **Start with delay** option to add delay between the two call attempts.

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**Example**
For example, if you want the agent accessing the workflow to wait two days before calling the prospective lead or customer again, you would set Duration type to **Explicit duration** and set **Days** to 2.
For more information, see Start with delay input properties.

8. Under the Branches tab, expand New branch and enter a unique name for the branch in the **Branch label** field.
9. Select **Add Condition**.

**Example**
For example, to execute the branch when the outcome of the previous call attempt was unsuccessful, you would set the condition **[Schedule call > Output > State][is][Cancelled]**.
For more information, see Decision activities.

10. Select **Save and close**.

### What to do next
Add a stage for the new branch you created earlier, and repeat the steps to add more activities as needed. For more information, see Add and configure a stage in a playbook.

### Related topics
Decision stages

## Add the Update sequence task activity to a sequence
Dynamically update the sequence task records based on predefined configuration using the Update sequence task activity while designing customer engagement sequences.

### Before you begin
The delegated developer roles must be assigned to designated users. For more information, see Grant delegated developer permissions for managing sequences.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

**Note:** If you're using Customer Engagement Sequences 1.0.0, then you need the playbook.admin or pd_author role to create sequences.

### About this task
Add the Update sequence task activity with other activities in a stage or in its own stage to update the sequence task record after the previous activity or stage has run. For example, the agent accessing the workflow could skip unnecessary call attempts when a lead is successfully contacted and move directly to the tear down stage after updating the record on the parent table. This example is demonstrated in the sample Lead nurturing tele-sales sequence available with the demo data.

### Procedure
1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you're creating or updating.
5. In the sequence diagram, create a stage to add the activity.
For more information, see Add and configure a stage in a playbook.

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6. Within the stage, select the Add icon .
7. Open the activity picker by selecting the Add an activity icon .
8. On the Add activity screen, search for and select **Customer Engagement Sequences** > **Update sequence task**.
9. On the **Details** tab, enter a name for the activity in the **Label** field.
10. On the **Automation** tab, use the data pill picker to establish a connection between the parent table and columns to the fields listed in the following table.

**Automation tab form**

| Field | Description |
|---|---|
| Record | The record you want to update on the parent table. For example, to update the record on the Lead [sn_lead_mgmt_core_lead] table, you would select **Lead**. |
| Table | This field is automatically set to the name of the parent table. |
| Fields | Field in the parent table you want to update. For example, to mark a lead as contacted, you would select **Stage** from the Fields drop-down list and set its value to 200_contacted. |

11. Select **Save and close**.

### Related topics

Configuring Customer Engagement Sequences

Customer Engagement Sequences

## Assign runtime permissions while creating sequences

Use permission sets to control access to sequence records such as sequence tasks and steps.

### Before you begin

Delegated developer roles must be assigned to designated users. For more information, see Grant delegated developer permissions for managing sequences.

**Note:** Runtime permissions are available only with at least Playbooks version 28.1 on the Zurich release. For more information, see Playbooks in Workflow Studio release notes .

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

**Note:** If you're using Customer Engagement Sequences 1.0.0, you need the playbook.admin or pd_author role to create sequences.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you're creating or updating.
5. On the Workflow Studio page, select **Properties** from the More actions menu icon .

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6. On the Playbook properties window, select **Runtime permissions**.
7. Grant fine-grained access to sequence records by selecting a permission set from the **Add permission set** menu.
   The available permission sets are:
   - Users
   - User groups
   - User criteria
8. Use the data pill picker to establish a connection between a user, user group, or criteria with a column on the parent table.

   **Example**
   To allow agents to view only their own assigned sequence tasks for a sequence based on the Lead table, you would select Parent Record as Lead and then its **Owner** column. For instance, if user Max Blaze is overlooking a lead, only Max Blaze will be able to view the sequence steps and complete activities.
9. Confirm your selection and set the permission by selecting the Add permission set icon.
10. Grant the level of access by selecting View or Manage or both.
11. **Optional:** Add additional permission sets as needed.
12. Select **Save and close**.

**Related topics**

Configuring Customer Engagement Sequences

Customer Engagement Sequences

### Review sequences in Workflow Studio

Review sequences in Workflow Studio so you can suggest optimizations and share high-performing sequences across territories to promote best practices across the organization.

**Before you begin**
Role required: Sequence reader [sn_crm_sequence.reader]

**Procedure**

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to **Sequences** > **All Sequences**.
4. Select a sequence that you want to view.
5. On the Details page, select **Open steps**.
   You're redirected to Workflow Studio where you can view the sequence diagram.

**Related topics**

Configuring Customer Engagement Sequences

Customer Engagement Sequences

### View sequence tasks

View sequence tasks assigned to you from the CRM Workspace.

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### Before you begin
Role required: sequence viewer [sn_crm_sequence.viewer]

### Procedure
1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Sequences** > **My Sequence Tasks**.
4. View your in-progress sequence tasks by selecting **My Active Sequence Tasks**.
   For more information, see My sequence task list view.
5. View the sequence steps for a record by selecting it.

### What to do next
Engage with your prospective customers by following the activities in the sequence steps. For more information, see Complete predefined customer engagement tasks.

#### Related topics
Configuring Customer Engagement Sequences

Customer Engagement Sequences

## Complete predefined customer engagement tasks
Execute predefined sequence steps in your sequence tasks in the CRM Workspace to engage with your prospective customers.

### Before you begin
Role required: Sequence executor [sn_crm_sequence.executor]

### Procedure
1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Sequences** > **My Sequence Tasks**.
4. Select a sequence task record.
5. When the record opens, select the **Sequence Steps** tab.
   The navigation pane lists the activities or steps you need to complete. The activity details and actions are displayed in the work area.
6. **Optional:** View sequence steps in Workflow Studio.
   a. Go to the **Details** tab.
   b. Select the Open record icon ⓘ next to the **Sequence** field and select **Open record**.
   The associated sequence record opens in a new tab.
   c. View the sequence by selecting **Open steps**.
   You're redirected to Workflow Studio where you can view the sequence diagram, including stages and activities.
7. After completing an activity, select an appropriate option to move to the next activity.
   The sequence is marked as Completed when you finish all activities in the sequence task.

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### Related topics

Fulfill a telesales sequence

### Fulfill a telesales sequence

Connect with leads or customers using the click-to-call outbound calling capability in telesales flows.

## Before you begin

Role required: Sequence executor [sn_crm_sequence.executor]

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Sequences** > **My Sequence Tasks**.
4. Select a sequence task record.
5. In the record, select the **Sequence Steps** tab.
6. Review detailed call task information by selecting **Call task details**.
7. Select the Call icon next to the **Callback number** field to start an outbound call.

   **Note:** The Call icon does not appear on the **Callback number** field in Xanadu or in Yokohama if you created the schedule call activity using the Schedule call - Deprecated activity. For compatibility information, see Compatibility information for Customer Engagement Sequences.

8. Complete the activity by setting the following fields.

| Field | Description |
|---|---|
| Reason | Call outcome. The available options are:<br>○ Resolved: The call task was successfully completed and the goal met.<br>○ Timeout: The task expired because it was not accepted or acted upon in the allowed time.<br>○ Max attempts exceeded: Multiple attempts to connect or complete the task failed, reaching the configured limit.<br>○ No show: The customer did not join the scheduled call.<br>○ Cancelled by agent: The assigned agent manually cancelled the task before completion.<br>○ Technical issue: Call task could not proceed due to a system or connectivity problem.<br>○ Other: The task ended for a reason not covered by the predefined categories. |
| State | Status of the call task. The available options are:<br>○ Open: The task has been created but work has not yet started.<br>○ Work in Progress: The task is actively being worked on.<br>○ Closed Complete: The task has finished successfully and all required actions are done. |

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| Field | Description |
|---|---|
| | ○ Closed Abandoned: The task was closed without completion, usually due to irrelevance or inability to proceed.<br>○ Cancelled: The task terminated before completion. |
| Work notes | Optional field for capturing internal work notes. |

9. Select **Save**.
10. On the Sequence Steps tab, select **Mark Complete** to indicate you have finished all activities in the sequence task.

**Related topics**

View sequence tasks

### Customize the Lead nurturing email sequence

Adapt the Lead nurturing email sequence available with the Customer Engagement Sequences app to match your organization's email and call outreach cadence.

## Before you begin

The User Mailbox Integration plugin (com.glide.email.user_mailbox.integration) must be active on your instance so the sequence can detect email replies.

You should be familiar with using Workflow Studio and Playbook Experience.

Role required: sn_crm_sequence.admin, sn_crm_sequence.writer

## About this task

The Lead nurturing email sequence runs against the Lead [sn_lead_mgmt_core_lead] table when a lead is created with an email address, and assigns the resulting sequence task to the lead's owner.

The following table lists the stages included in the Lead nurturing email sequence.

### Lead nurturing email sequence stages

| Stage | Description |
|---|---|
| Setup | Prepares the sequence context for the lead. |
| Email Attempt 1 | Sends an initial outreach email, then waits for a reply before moving to the next stage. |
| Email Attempt 2 | Sends a follow-up email if the lead didn't reply to the first attempt, then waits for a reply. |
| Call Attempt 1 | Creates a call task for an outbound call if the lead hasn't replied to either email, then waits for the call to be resolved. |
| Call Attempt 2 | Creates a call task for a second outbound call if the first call attempt wasn't resolved, then waits for resolution. |

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**Lead nurturing email sequence stages (continued)**

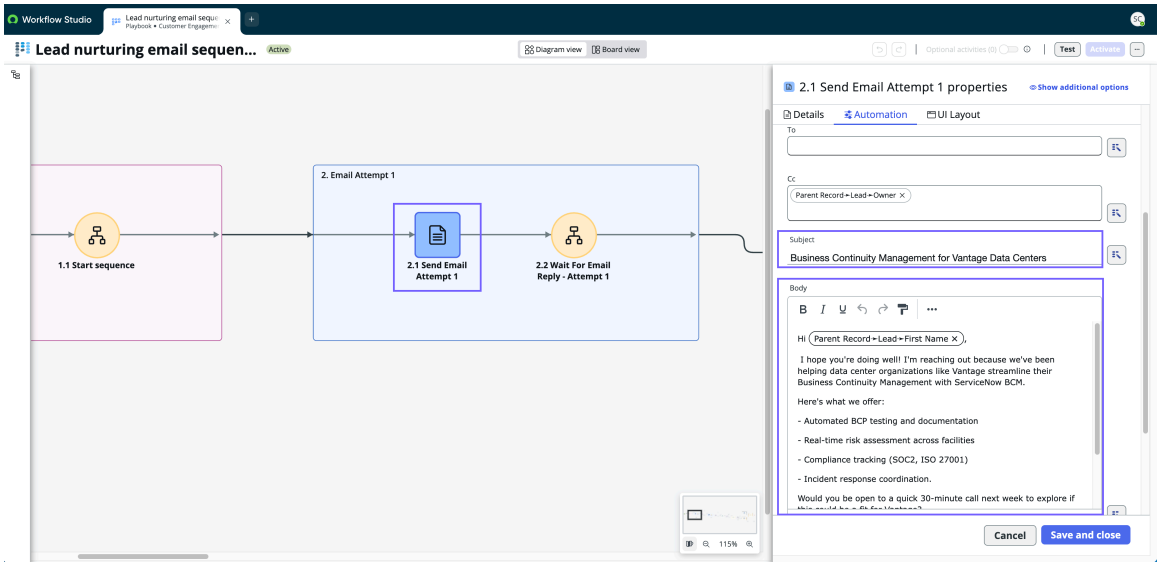
| Stage | Description |
|---|---|
| Tear Down | Closes the sequence run. If the lead replied to an email or a call was resolved, the sequence marks the lead as contacted. If none of the outreach attempts were resolved, the sequence adds an outcome update to the sequence task's work notes. |

**Note:** Do not remove the Setup or Tear Down stages, or change the Start Sequence or End Sequence activities in those stages.

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Sequences** > **All Sequences**.
4. Duplicate the Lead nurturing email sequence.
   a. Select the **Lead nurturing email sequence** record.
   b. Select **Open steps**.
   You're redirected to Workflow Studio, where the sequence diagram opens for editing.
   c. Create a copy of the sample sequence by selecting **Duplicate** from the More actions menu •••.
   d. On the Duplicate playbook, enter a name for your sequence in the **Playbook name** field.
   e. Select **Duplicate**.
   The duplicated sequence diagram opens for editing and it's in the Inactive state.
5. Configure the sequence.
   At this stage, you can add, modify, or remove stages, decision nodes, and activities. For more information, see Create a customer engagement sequence.
6. Customize the email activity.
   a. In the Email Attempt 1 or Email Attempt 2 stage, select the email activity such as **Send Email Attempt 1** to open the activity properties.
   b. On the activity properties panel, select the **Automation** tab.
   c. Modify the subject and the body text of the email.

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**d.** Select **Save and close**.

7. **Optional:** Customize the wait time between the email and call attempts to change how long the sequence waits before moving to the next attempt.
   By default, there's a gap of two days between the email and call attempts.

   **a.** In the Email Attempt or Call Attempt stages, select the wait activity that follows an email or call attempt to open the activity properties.

   **b.** Select **Show additional options** to view all available configuration options.

   **c.** Navigate to **Details** > **Schedule** > **Start with delay**.

   **d.** Set the number of days the sequence should wait between the current and the next attempt in the **Wait for** field.

   **e.** Select **Save and close**.

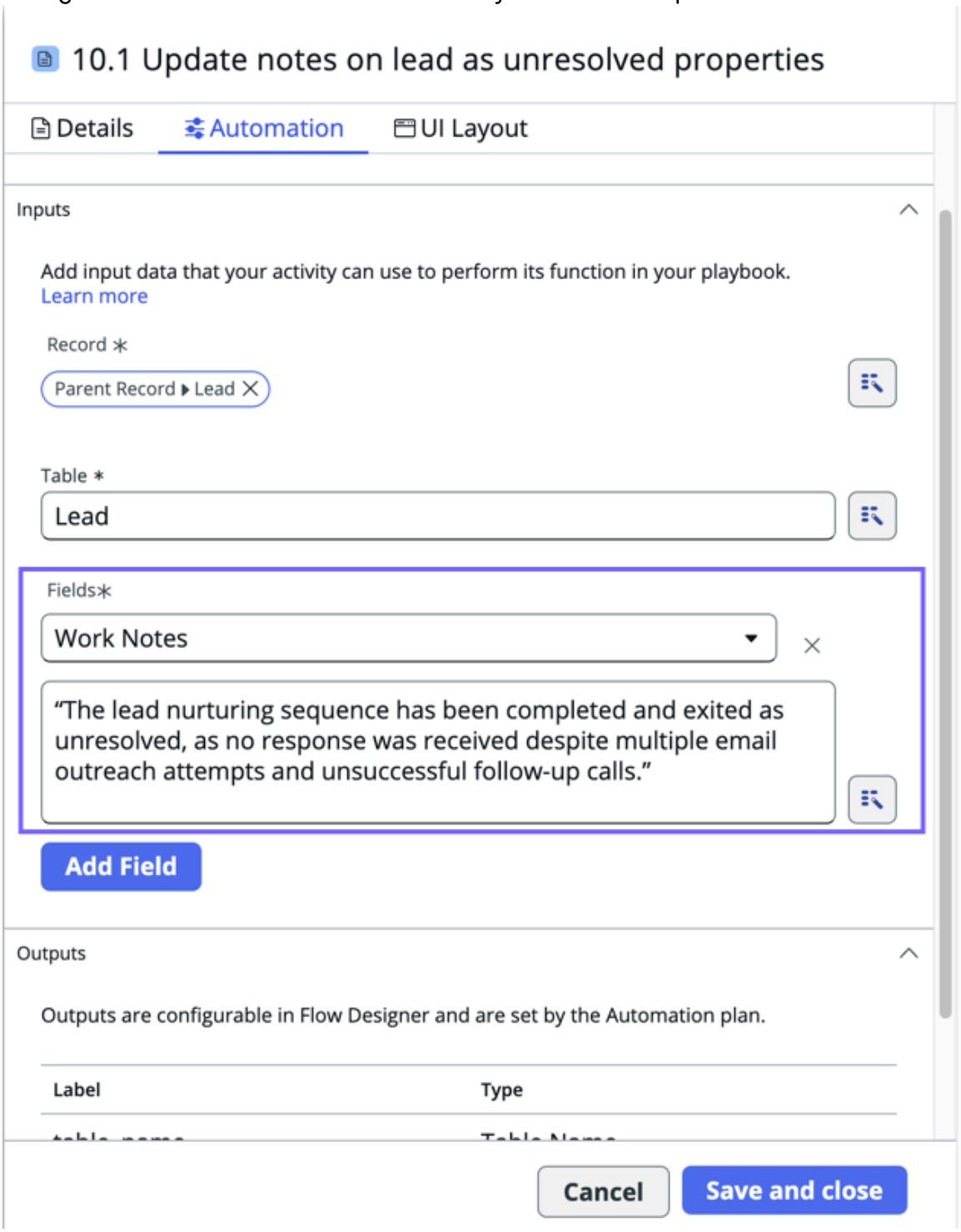
8. Customize what gets updated in the Lead record's Work Notes when the sequence ends.

   **a.** In the Update the Notes on Lead as unresolved stage, select the **Update notes on lead as unresolved** activity.

   **b.** Navigate to the **Inputs** section on the **Automation** tab.

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**c.** Change the text under the **Fields** field to match your business requirements.




9. Verify the sequence by selecting **Test**.
10. Publish the sequence by selecting **Activate**.

**Result**
Your customized version of the Lead nurturing email sequence runs automatically against leads that meet your trigger conditions.

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**Related topics**

- Define trigger conditions
- Add decision nodes to a sequence
- View sequence tasks

## Using Buying Group

Sales teams can track decision-makers, influencers, and evaluators collectively, manage buying decisions that span multiple opportunities or product family, and retain stakeholder context beyond a single sales opportunity.

**Related topics**

- Configuring Buying Group
- Using Opportunity Management
- Using Lead Management
- Using Customer Engagement Sequences

### View buying group engagement metrics

View a buying group engagement metrics to track how individual members and the group as a whole interact across marketing and sales activities, providing a consolidated view of participation, engagement levels, and buying readiness throughout the buying group lifecycle.

### Before you begin

Role required: bg_admin; bg_writer

**Note:**

Engagement metrics are created automatically when Buying Group members are added. They update as members interact through marketing and sales activities and reflect current participation over time.

### Procedure

1. Select the Buying Group record where you want to view buying group engagement metrics.
2. Navigate to **All** > **Buying Group** > **All Buying Groups**.
3. Go to **Buying Group Engagement Metrics** tab and view the listed metrics for each Buying Group member.
4. On the form, view the fields:

**Buying Group Engagement Metrics form**

| Fields | Description |
|---|---|
| Engagement Score | A system#generated score that reflects the level of engagement of the Buying Group member based on signals, events, and activities across marketing and sales interactions. |
| Contact Member | Identifies the Buying Group member (contact) to whom the engagement metrics apply. Metrics are tracked at the individual member level within the context of the Buying Group. |

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| Fields | Description |
| --- | --- |
| Last Engaged Date | The most recent date and time when the Buying Group member interacted through a tracked marketing or sales activity. This indicates how recently the individual participated. |
| Rating | A qualitative classification derived from engagement data that summarizes the member's overall engagement level within the Buying Group:<br>○ Cold: Indicates little to No recent engagement from the member or group. This suggests limited participation in marketing or sales interactions and may signal low awareness, low interest, or disengagement.<br>○ Warm: Indicates some engagement activity, but participation is inconsistent or limited. This suggests early or moderate involvement, with potential need for follow-up or role alignment.<br>○ Hot: Indicates strong and recent engagement. This suggests active participation in the buying process and alignment with the ongoing sales or evaluation motion.<br>○ Super hot: Indicates very high and sustained engagement. This suggests strong involvement, high responsiveness, and a likely influence on decision progress. |

**Related topics**

Configuring Buying Group

Buying Group

## Using Opportunity Management

Use the Opportunity Management application to create and manage opportunities, schedule meetings, and track related activities.

The Opportunity Management interface has tabs that help you create and manage your opportunities.

### Opportunity Management tabs

| Opportunity Management tab | Description |
| --- | --- |
| Details | Add details of the opportunity such as account, sales cycle, and stage information. |
| Catalog | Use the product catalog to add line items to the opportunity. |

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**Opportunity Management tabs (continued)**

| Opportunity Management tab | Description |
|---|---|
| Needs | Add more accurate information about your customer's business requirements to the opportunity. |
| Line Items | Add opportunity line items. |
| Competitors | Add competitors information to your opportunity. |
| Tasks | Create opportunity tasks. |
| Team | Create opportunity team members. |
| Contacts | Create opportunity associated contacts. |
| Emails | Create emails to send to the required stakeholders. |
| Quotes | Create quotes directly from the Opportunity. |
| Meetings | Schedule and view client meetings linked to the opportunity. When you schedule a meeting from an opportunity, the system automatically associates the meeting with that opportunity. The tab also displays meetings linked to the opportunity's touchpoints. |
| Related Channel Partners | Add authorized service organizations or partner entities (for example, referral or influencer partners) linked to a customer opportunity.<br><br>Related channel partners can be:<br>• Authorized organization: Full permissions to access, view, edit, or modify opportunity details<br>• Listed organization: Only for tracking purpose. No permissions to view, access, edit, or delete opportunity details |

### Related topics

Opportunity Management

Configuring Opportunity Management

Opportunity Management reference

## Create an opportunity

Create a new product opportunity in the Opportunity Management application by entering the details, such as account, sales stage, sales cycle type, and deal size.

### Before you begin

Role required: sales_agent

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## Procedure

1. In the CRM Workspace, select the **List** view.
2. In the **Opportunity - All** list, select **New**.
   The **Create new opportunity** dialog box opens.
3. Use the following table to fill in the information.

| Fields | Description |
|---|---|
| **Short Description** | Fill in a short description for the opportunity. |
| **Estimated Deal Size** | Amount of potential opportunity. |
| **Account** | Provide account information. |
| **Consumer** | Select a consumer. |
| **Deal type** | Indicates the type of deal associated with the opportunity:<br>○ Direct: The seller engages directly with the customer, with no intermediary partner in volved.<br>○ Indirect: The seller engages the customer through an intermediary, such as a reseller, service provider, or distributor. |
| **Stage** | Enter a stage of the opportunity. For example: Qualify, Develop, Propose, Negotiate, Closed-Won, or Closed- Lost. |
| **Route to market** | Identifies the exact sales channel used to exe cute the deal:<br>○ Direct<br>○ Reseller<br>○ Service Provider<br>○ Distributor |
| **Sales Cycle Type** | Enter the type of sales cycle during the cre ation of the opportunity. For example: NEW CUST, RENEW, or UPSELL. |
| **Contact** | Fill in the primary contact information associ ated with the opportunity. |
| **Channel partner** | An external organization involved in selling, influencing, or supporting an opportunity as part of an indirect sales. |

4. Select **Save** to save the opportunity and **Close** to return to the main Opportunities window.
5. Select Refresh to see the new opportunity in the list.

## What to do next

Start adding more information to your opportunity. To learn more, see Add and view the details of an opportunity.

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### Related topics

Configuring Opportunity Management

Opportunity Management

## Add and view the details of an opportunity

Use the Details tab to add and view information about your opportunity, including the source and competitor.

### Before you begin
Role required: sales_agent

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All** and select your opportunity.
3. Fill in the information on the Details tab.
   For more information, see Opportunity details form.
4. Select **Save**.

### What to do next
Use the Product Catalog tab to add products to your opportunity.

### Related topics

Configuring Opportunity Management

Opportunity Management

## Get product recommendations for opportunities using needs analysis

Choose a needs template from the product selection guide in the product catalog to get product recommendations for sales opportunities.

### Before you begin
Role required: sales_agent

### About this task
A needs template is a questionnaire that you complete to get product recommendations based on input or requirements that you receive from a customer. The product selection guide lists the needs templates available for a particular catalog.

### Procedure

1. In the CRM Workspace, select the List view.
2. Navigate to **Opportunity** > **All** and select the opportunity that you want to work on.

   The product catalog displays in the Catalog tab of the opportunity.
3. In the Catalog tab, select **Product selection guide** in the catalog hierarchy.
   The needs template cards for the guide are displayed.
4. In the needs template card that best matches what your customer wants, select **Capture Needs**.
   The questionnaire for the selected template opens.
5. Answer the series of questions.
6. After replying to the last question, review or select the recommendations:

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- To review your responses, select the **Edit** icon. You can change your responses if needed.
- To view product recommendations, choose **Select Recommendations**. The Catalog tab displays the recommended products.

7. Choose a recommendation by selecting **Add** in the card for the product that best matches your customer needs.
   The selected product is added to the opportunity. The Needs tab displays the needs template that you selected. You can review the needs template and if needed, change your answers, which might result in different product recommendations.

**Related topics**

Configuring Opportunity Management

Opportunity Management

### Add line items to an opportunity

Create a new product line item for your opportunity by entering the details, such as product offering and quantity.

## Before you begin

Role required: sales_agent

## Procedure

1. In the CRM Workspace, navigate to the **List** view and select **Opportunity - All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and select the **Line Items** tab.
3. Select **New** to start a new opportunity line item or select an existing opportunity line item to make changes.
4. Fill in the fields in the Opportunity Line Item form.

### Opportunity Line Item form

| Fields | Descriptions |
|---|---|
| Number | The system-generated number of the opportunity line item. |
| Opportunity | The system-generated id of your opportunity. |
| Product Offering | The product offering that is selected for the opportunity line item. |
| Short Description | Brief description of the opportunity. |
| Unit of Measure | The measuring unit of the opportunity line item. |
| Quantity | The quantity of the opportunity line item. |
| Existing contract | Contract that is already active or in effect. |
| Parent Line Item | The primary line in a hierarchical structure of line items within an opportunity. |
| Channel partner | The name of the organization selling a product or service. |

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| Fields | Descriptions |
|---|---|
| | You can change the channel partner. Each line items can have different channel partners. |
| Product Specification | Specifies how the product is presented, configured, and fulfilled within a product catalogue. |
| Service location | Service location to which the opportunity line item applies. |
| Unit of Measure | A standard quantity used to express a value. |
| Periodicity | Periodicity is based on the pricing method selected for the product offering.<br>○ If the pricing method is selected 'One time', the periodicity is set to 'None'.<br>○ If the pricing method is selected 'Recurring', the periodicity can be set to 'Monthly' or 'Annually'. |
| Contract start date | Estimated date when the contract becomes effective. |
| Contract end date | Estimated date when the contract expires. |

5. Fill in the fields in the Pricing form.

**Pricing form**

| Fields | Descriptions |
|---|---|
| Price List | Default price list based on the opportunity created. |
| Unit Net Price | Price per unit after adjustments, if any.<br>**Note:** The **Unit Net price** and **Unit List Price** fields have the same values if the opportunity isn't in sync with the quote. |
| One-Time Price | One-Time Price of the product offering included in the opportunity line item. |
| MRR | Monthly recurring revenue (MRR) amount. |
| Cumulative MRR | Cumulative monthly recurring revenue of the opportunity and any child lines.<br>○ If periodicity is monthly, Cumulative MRR = Unit Net Price * Quantity.<br>○ If periodicity is annual, Cumulative MRR = Unit Net Price/12 months * Quantity. |

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| Fields | Descriptions |
|---|---|
| | Customer can change this formula in case of they customize their own values for periodicity.<br><br>This field is populated only if the periodicity of the opportunity is recurring in nature. |
| Cumulative ACV | Total annual contract value (ACV), which is the yearly amount revenue for all products and services from a customer contract.<br><br>Cumulative ACV = Cumulative One-Time Price + Cumulative ARR. |
| Renewal amount | Contract Renewal Amount for the Opportunity Line. |
| Unit List Price | Unit list price of the product offering included in the opportunity line item.<br><br>**Note:** The **Unit Net price** and **Unit List Price** fields have the same values if the opportunity isn't in sync with the quote. |
| Term (months) | Subscription period of the opportunity line item.<br><br>The default term is 12 months only for recurring products. |
| Cumulative One-Time Price | One-time price of the opportunity and opportunity child line items.<br><br>Cumulative One-Time Price = Quantity * Unit Net Price. |
| ARR | Annual recurring revenue (ARR) amount. |
| Cumulative ARR | This field is populated only if the periodicity of the opportunity is recurring in nature.<br><br>Cumulative ARR = Cumulative MRR * 12 |
| Cumulative TCV | Total contract value (TCV), which is the total amount of revenue from a customer contract expected over the lifetime of the contract.<br><br>Cumulative TCV = Cumulative One-Time Price + Term * Cumulative MRR. |
| Upsell/downsell amount | Value representing upsell or downsell in comparison to the renewal amount for the opportunity line. |

6. Enter any related notes in **Work Notes**.

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7. Select **Save**.
   The Opportunity Line Item is added to the main opportunity.

### What to do next
Add a task to your opportunity. To learn more, see Add opportunity tasks.

#### Related topics
- Configuring Opportunity Management
- Opportunity Management

## Manage allocations

Allocate and track sales credit across opportunity team members to recognize individual contributions, improve transparency, and support accurate revenue attribution.

For clear visibility into who contributed to each sale, supporting collaboration, reporting, and forecasting.

#### Related topics
- Configuring Opportunity Management
- Opportunity Management

## View allocations for an opportunity

View allocation details and distributed amounts for an opportunity.

### Before you begin
Role required: sn_opty_mgmt_core.opportunity_allocation_viewer

At least one allocation type must be active. If none are configured, contact your system administrator.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All** and select the opportunity you want to view.
3. Select the **Allocations** tab to view all the allocations for this opportunity.

   The number in brackets displays the total count of active allocations. Each allocation group appears separately with its own set of rows for easy identification:

   - Revenue: Distributes the total opportunity amount across eligible participants for ownership, forecasting, and credit.
   - Overlay: Distributes product or line-level opportunity value for shared credit and forecasting.

   **Note:** You can customize active allocation types as needed.

   When no allocations are associated with this opportunity, the list appears empty.

### Result
The allocations for the opportunity are displayed in a read-only list and grouped by allocation type.

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**Related topics**

Configuring Opportunity Management

Opportunity Management

### Add or edit opportunity allocations

Use the allocations configurator to add new allocation rows, edit existing ones, or split an allocation across multiple contributors.

## Before you begin

Role required: sn_opty_mgmt_core.opportunity_allocation_writer

## About this task

The configurator displays active allocation types in the left pane. Each type shows its current row count, for example, Revenue (2). You can switch between types and make changes to any of them. All changes across all types are saved or discarded together when you select Save or Discard changes.

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All**, open the opportunity record, and select the Allocations tab.
3. Select **Manage Allocations**.
4. In the left pane, select an allocation type - for example, Revenue.
5. Select **Add allocation**.
   A new blank row is added at the bottom of the list. The Effective Date is pre-filled with the opportunity's estimated close date.
6. Fill in the row fields:
   - Team Member: Select the opportunity team member.
   - Territory: Select one among the active sales territory from the active territory model.

     **Note:** When a team member is selected, the territory list includes only territories in which the member is an active territory member.

   - Product Offering Family: High-level product grouped under which the product offering belongs to. Shows the product offering family for products added to opportunity lines.
   - Allocation Percentage: Allocation percentage assigned to the team member for their allocation.
   - Allocation Amount: Monetary value of the allocation.
   - Effective Date: Date on which the allocation becomes effective for crediting. Used for sales forecasting.
   - Reason: Additional notes.

**Note:**

- The percentage and amount fields are interdependent; a change to either value triggers automatic recalculation of the other.
- If the Require full allocation property is enabled, the combined percentages for the allocation type must total 100% before saving.
- When a type is associated with multiple dimensions, all dimensions are mandatory fields in the configurator.

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7. Select any cell in a row to edit and update its value.
8. Select **Save** to commit all changes across all allocation types.

**Note:**

- **Save** and **Discard changes** are only enabled when there are unsaved changes. If you navigate away with unsaved changes, you are prompted to save, discard, or continue editing.
- Select **Delete allocation** to delete the allocation.

The allocation rows are saved. The Allocations tab count updates to reflect the new total.

**Related topics**

Configuring Opportunity Management

Opportunity Management

Configure allocation types

### Split opportunity allocation

Split an allocation row to divide its credit between two contributors while keeping, for example, the same product family and effective date.

**Before you begin**
Role required: sn_opty_mgmt_core.opportunity_allocation_writer

**Procedure**

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All**, open the opportunity record, and select the **Allocations** tab.
3. Select **Manage Allocations**.
4. Select the allocation type that contains the row you want to split.
5. Select **Split allocation** icon on that row.
   A new row is inserted immediately below the original. The grouping/dimensions related fields are copied from the original row. All other fields are blank.
6. Update the Percentage (or Amount) on both the original row and the new row so that together they reflect the intended split — for example, 70% and 30%.

   **Note:** If the Require full allocation property is enabled, the combined percentages for the allocation type must total 100% before saving.

7. Fill in the row fields:
   - Team Member: Select the opportunity team member.
   - Territory: Select one among the active sales territory from the active territory model.

     **Note:** When a team member is selected, the territory list includes only territories in which the member is an active territory member.

   - Allocation Percentage: Allocation percentage assigned to the team member for their allocation.
   - Allocation Amount: Monetary value of the allocation.
   - Reason: Additional notes.

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8. Select **Save**.

   **Note:** Users with the Account Executive role in Sales Territory Membership or Opportunity Team Member have create, split, and update access to Revenue-based allocations. Overlay allocations are read-only for these users.

   The allocation is split into two rows. Both rows are saved and displayed in the Allocations tab under the relevant allocation type.

**Related topics**

- Configuring Opportunity Management
- Opportunity Management

### Manage touchpoints on an opportunity

View, create, and delete touchpoints associated with an opportunity from the touchpoints related list.

## Before you begin

The CRM Touchpoints plugin (sn_crm_touchpoint) must be installed.

Role required: sn_crm_touchpoint.admin or sn_crm_touchpoint.touchpoint_writer

## About this task

The **Touchpoints** tab on an opportunity record displays all touchpoints associated with that opportunity. You can create new touchpoints or delete existing ones directly from this list.

## Procedure

1. In the CRM Workspace, select the **List** view.
2. In the **Opportunity - All** list, open the opportunity record and select the **Touchpoints** tab. The list displays all touchpoints associated with the opportunity.
3. **Optional:** To create a touchpoint, select **New** in the related list or select **Create Touchpoint** from the opportunity header.
4. **Optional:** To delete one or more touchpoints, select the checkbox next to each touchpoint and then select **Delete**.

   **Note:** A confirmation prompt appears before the deletion completes.

   The selected touchpoints are removed from the opportunity.

## Result

Changes are saved to the opportunity. The Touchpoints tab reflects the current state of all linked touchpoints.

**Related topics**

- Schedule a meeting from an opportunity
- Manage touchpoints on a lead
- CRM Touchpoints

### Create a touchpoint from an opportunity

Create a touchpoint to log a customer interaction directly from an opportunity record.

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### Before you begin

- The CRM Touchpoints plugin (sn_crm_touchpoint) must be installed.
- The opportunity must be in a non-closed state. You can't create touchpoints for opportunities in a Closed-Won or Closed-Lost stage.

Role required: sn_crm_touchpoint.admin or sn_crm_touchpoint.touchpoint_writer

### About this task

Touchpoints are interaction records that you associate with a specific opportunity. When you create a touchpoint from the opportunity, the system automatically links the touchpoint to that opportunity and populates customer context from the opportunity record.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. In the **Opportunity - All** list, open the opportunity record.
3. In the opportunity header, select **Create** > **Touchpoint**.

   **Note:** The **Create** button and the Touchpoint option are only visible when you have permission to create CRM Touchpoints. The button is hidden when the opportunity is in a closed state.

4. In the touchpoint form, complete the required fields.

   The following fields are automatically set and can't be edited:

   - **Associated entity**: set to Opportunity
   - **Associated record**: set to the opportunity number
   - **Category**: set to Sales
   - **Owner**: set to the user creating the touchpoint

   If the opportunity is account-based, the system also sets **Account** from the opportunity. The **Contact** field is pre-populated from the opportunity contact if one exists, and remains editable.

5. Select **Save**.

### Result

The touchpoint is created and linked to the opportunity. It appears in the **Touchpoints** tab of the opportunity record.

### What to do next

To view all touchpoints for the opportunity, select the **Touchpoints** tab.

#### Related topics

Create a touchpoint from a lead

Create new CRM touchpoint form

CRM Touchpoints

## Add competitors to an opportunity

Capture competitor details for your opportunity so that you can have winning sales conversations with your customer.

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### Before you begin
Role required: sales_manager

### Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Competitors** tab.
3. Select **New** to start a new opportunity competitor or select an existing opportunity competitor to make changes.
4. Fill in the fields in the Opportunity Competitor form.

**Opportunity Competitor form**

| Fields | Descriptions |
|---|---|
| Opportunity Competitor | |
| Opportunity | The opportunity number starting with the prefix OPTY. |
| Competitor Source | Indicates where the competitor presence originates from in the context of an opportunity and associated product offering. Allowed values:<br>○ Existing: When the competitor represents a currently deployed or incumbent solution at the customer.<br>○ Other: When the competitor is not currently deployed at the customer. |
| Product Offering | The commercial product selected or evaluated on the opportunity. |
| Company | Competitor or incumbent company name. |
| Product Offering Family | Higher-level grouping or BU/family used for forecasting and analysis. |
| Incumbent | Selected if the vendor or solution is currently deployed at the customer and is being replaced, competed with, or evaluated against for this product offering. |
| Notes | |
| Strengths | Strengths of the competitor. |
| Weaknesses | Weaknesses of the competitor. |
| Work Notes | Internal-only notes for product, sales, or design follow-up. |

5. Select **Save**.
   The competitor information is added to the main opportunity.

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**Related topics**

Configuring Opportunity Management

Opportunity Management

### Add opportunity tasks

Create opportunity tasks to capture additional details of your customer's requirements.

## Before you begin

Role required: sales_manager

## Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. Select the opportunity you want to work with and select the **Tasks** tab.
3. Select **New** to start a new opportunity task or select an existing opportunity task to make changes.
4. On the Opportunity Task form, fill in the fields.
   For more information, see Create new opportunity task form.
5. Select **Save**.
   The Opportunity task is added to the main opportunity.

## What to do next

You can create appointments in your opportunity tasks. To learn more, see Create an appointment from Opportunity Management.

**Related topics**

Create a related task from a touchpoint

### Create an appointment from Opportunity Management

Create appointments with the required stakeholders to move the business discussion forward for your opportunity.

## Before you begin

Role required: sales_manager

## About this task

You can create appointments only after creating an opportunity task. To create an opportunity task, see Add opportunity tasks.

## Procedure

1. Navigate to **List** view and select **Opportunity Tasks**.
2. Select the opportunity task you want to work with and select the **Appointments** tab.
3. Select **New** to start a new appointment or select an existing appointment to make changes.
4. On the Create New Appointment form, fill in the fields.
   For more information, see Create new appointment form.
5. Select **Save**.
   The appointment is added to your opportunity task.

**Related topics**

Schedule an appointment from a touchpoint

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### Add a new opportunity team member

Create an opportunity team member for a structured collaboration among multiple users.

## Before you begin

Role required: opportunity_writer

**Note:** Users who aren't assigned the sales_agents or sales_managers roles, might require access to specific opportunities when they're added to an opportunity team. Such users must be assigned the sales_restricted_agent role. The opportunity role assigned to the user then determines the scope and level of access granted for the associated opportunity.

## Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Team** tab.
3. Select **New** to add a new opportunity team member or select an existing opportunity team member to make changes.
4. Fill in the fields in the Opportunity Team Member form.

### Opportunity Team Member form

| Fields | Descriptions |
|---|---|
| Opportunity | The opportunity number. |
| Member | Name of the member. |
| Opportunity Role | Role of the team member. Following member roles (Related party types) and responsibility are shipped by default:<br>○ Account Executive<br>○ Solution Sales Executive<br>○ Price Band Approver<br>However, more roles can be configured. Depending on the responsibility, access to the opportunity is provided to the opportunity team members. For more information, see Create related party configurations. |
| Primary | Identify one primary member for a given role. |
| Notes | Enter work notes for reference. |

5. Select **Save**.
   The Opportunity Team Member information is added to the main opportunity.

## Related topics

Configuring Opportunity Management

Opportunity Management

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### Add an opportunity associated contact

Create opportunity for associated contacts to identify each contact's role when multiple stakeholders are involved.

## Before you begin

Role required: opportunity_writer

## Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Contacts** tab.
3. Select **New** to associate a contact from Account hierarchy or select an existing contact to make changes.

   **Note:**

   Applicable only for Account-based opportunities and not consumer-based opportunities.

4. Fill in the fields in the Opportunity Associated Contact form.

**Opportunity Associated Contact form**

| Fields | Descriptions |
|---|---|
| Opportunity | The opportunity number. |
| Contact | Name of the customer contact. |
| Opportunity Role | Role assigned to an opportunity associated contact. Following contact roles (Related party types) are shipped by default:<br>○ Business user<br>○ Decision maker<br>○ Economic buyer<br>○ Evaluator<br>○ Executive sponsor<br>○ Influence<br>However, more roles can be configured. |
| Account | Account of the contact. |
| Primary | Primary opportunity role. |
| Notes | Enter work notes for reference. |

5. Select **Save**.
   The Opportunity Associated Contact information is added to the main opportunity.

## Related topics

Configuring Opportunity Management

Opportunity Management

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### Compose emails

Create an email to communicate to your customer the product information that meets their business requirements or the product demo as required by your customer.

## Before you begin

Role required: sales_agent

## Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Emails** tab.

   **Note:** The **Meetings** tab displays both meetings linked directly to the opportunity and meetings linked to the opportunity's touchpoints.

3. Select **Compose Email** button from the top right corner to start a new email or select an existing email to make changes.
4. Fill in the fields in the Email Draft form.

**Opportunity Email Draft form**

| Fields | Descriptions |
|---|---|
| From | Email id of the sender. |
| To | Email id of the receiver. |
| Subject | Subject of your email. |
| Email message | Body details of your email. |

**Note:** You can create your own email templates and use the pre-filled email templates while creating a new email. To attach any files with your email, select **Attach File**.

5. Select **Send email** to send the email or close the email form to save it in the **Draft Emails** tab.

## Related topics

Configuring Opportunity Management

Opportunity Management

### Schedule a meeting from an opportunity

Schedule a client meeting directly from an opportunity record to associate it with the opportunity.

## Before you begin

- The Meetings plugin (sn_meeting_mgmt) must be installed. This plugin is installed automatically as a dependency of the Opportunity Management data model plugin.
- The opportunity must be in a non-closed state.

Role required: sn_meeting_mgmt.meeting_creator

## About this task

When you schedule a meeting from an opportunity, the system automatically associates the meeting with that opportunity. The meeting then appears in the opportunity **Meetings** tab.

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### Procedure

1. In the CRM Workspace, select the **List** view.
2. In the **Opportunity - All** list, open the opportunity record.
3. In the opportunity header, select **Create** > **Meeting**.
   The **Meeting** option is only visible when you have permission to create meetings. It is hidden when the opportunity is in a closed state.
4. Complete the meeting form.

   **Note:**

   The meeting is automatically associated with the opportunity, no manual linking is required.

5. Select **Save**.

### Result
The meeting is created and linked to the opportunity. It appears in the **Meetings** tab of the opportunity record.

### What to do next
To view all meetings for the opportunity, select the **Meetings** tab.

**Note:** The **Meetings** tab displays both meetings linked directly to the opportunity and meetings linked to the opportunity's touchpoints.

#### Related topics

Using Opportunity Management

Manage touchpoints on an opportunity

Compose emails

Add opportunity tasks

Collaborate with stakeholders by using the sidebar

## Use guided selling on an opportunity

Track stage exit criteria, complete playbook activities, and manage deal-related actions on an opportunity to advance deals through the sales cycle.

### Before you begin
Guided selling activities must be configured in a playbook for the opportunity stages in your sales cycle. For more information, see Configure guided selling activities in a playbook.

Role required: sn_opty_mgmt_core.sales_agent

### About this task
The opportunity **Overview** tab displays the Action Center and playbook activities for the current stage. The Action Center consolidates tasks, meetings, touchpoints, and stage guidance in one panel and updates in real time as you complete actions. You must complete all activities for the current stage before you can advance the opportunity to the next stage.

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**Note:** With sn_opty_mgmt_core.opportunity_stage_guidance_override role, the users can bypass the stage validations and can move the Opportunity stage forward without completing the mandatory activities configured in the stage.

The sn_opty_mgmt_core.opportunity_admin role can move the stage of Opportunity forward bypassing all validations.

### Procedure

1. In the CRM Workspace, navigate to **Opportunity** > **All** and select the opportunity to open.
2. Select the **Overview** tab.

   The Action Center panel displays the playbook activities for the current stage. Each activity shows its completion status.

   - When the opportunity has no records to display in the Action Center, an empty state appears with an action to create an opportunity task.
   - The created task is added to the **All** and **Tasks** filters without a page refresh.
   - The **Stage guidance** filter is hidden when no playbook is active or when all playbook activities are complete.
3. Review the activities in the Action Center and complete each required action.

   Depending on the activity type, you may need to:

   - Complete a task linked to the opportunity.
   - Update a required field on the opportunity record.
   - Add a related record such as a contact or team member.
   - Answer a questionnaire or acknowledge an instruction.
   - Complete a quote task associated with the primary quote for the opportunity. The quote task card displays the related quote record as a link that opens the quote in a new workspace tab.

   The Action Center updates in real time as you complete each action.
4. Select a playbook activity card in the Action Center to view guidance for the current stage. The inline compact playbook view opens within the **Overview** tab. You can review general guidelines and recommended actions for the stage without leaving the opportunity workspace.
5. Advance the opportunity to the next stage by updating the **Stage** field on the opportunity record.

   If any activities are incomplete, the system doesn't allow the stage change and highlights the outstanding actions in the Action Center.

   If your admin enabled closed stage reason enforcement, you must complete the following fields before you can change the stage:

   - For Closed Won stage: **Win reason** and **Outcome notes**
   - For Closed Lost stage: **Loss reason**, **Lost to**, and **Outcome notes**

   If a required field is empty, the system prevents the stage change and displays a message that names the mandatory field and the target stage.

### Result

The opportunity advances to the next stage. The Action Center refreshes to display the playbook activities for the new stage.

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### Related topics

- Guided selling on opportunities
- Configure guided selling activities in a playbook
- Opportunity Management

## View an existing opportunity

View an existing opportunity to make changes, such as updating its status or additional details.

### Before you begin

Role required: sales_agent

### Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
   - All- shows all the opportunities in the instance.
   - Opportunity Tasks- shows your opportunity tasks.
2. Select the opportunity that you're working with.
3. Make updates to the opportunity as needed.
4. Select **Save**.

### Related topics

- Configuring Opportunity Management
- Opportunity Management

## Summarize an opportunity using ServiceNow Otto for Sales Automation

Generate an AI-powered summary of an opportunity in the CRM Workspace to get an immediate view of key details, customer needs, recent activity, and risks without reviewing multiple records.

### Before you begin

The opportunity summarization skill must be active before you can generate summaries. For more information, see Customize the opportunity summarization skill in ServiceNow Otto for Sales Automation.

Role required: sn_sfa.sales_rep, sn_sfa.sales_manager

### About this task

Opportunity summary tile provides a synthesized summary of emails, meetings, touchpoints, work notes, and line items in a concise deal overview. Use opportunity summary to:

- Understand the current state of a deal at a glance, without opening multiple records.
- Surface the top customer needs and pain points identified across recent emails and meetings, with inline source attribution.
- Review the most recent and upcoming activity on an opportunity in a single view.
- Share deal context quickly by copying the summary or pushing it to work notes.
- Keep summaries current by refreshing on demand to reflect the latest opportunity data.

### Procedure

1. In the CRM Workspace, open the opportunity to summarize.
2. Select the **Overview** tab.

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The Opportunity Snapshot panel appears and displays the AI-generated summary. The summary loads automatically when the page opens. Generating and displaying the summary may take several seconds.

3. **Optional:** To generate a new summary, select **Summarize** in the Opportunity Snapshot panel. Use this option after significant updates to the opportunity, such as new emails, meetings, or changes to line items.
4. **Optional:** After reviewing the summary, take any of the following actions.

| Option | Procedure |
|---|---|
| **Expand or collapse the summary** | Select the expand icon or the collapse icon to show more or fewer summary de tails. |
| **Provide feedback on the summary** | Select the helpful icon if the summary was useful, or the not helpful icon if it was not. This feedback helps improve the AI model for future summaries. |
| **Copy the summary** | Select the copy to clipboard icon to copy the summary text for use in another context, such as an email or a note. |
| **View summary details** | Select the more info icon to check details about how the summary was generated. |

5. Review the summary on the Opportunity summary card.
   An at-a-glance summary of key deal information includes:
   - Deal size and scope (number of users, contract value)
   - Most recent meeting with the Champion (title and recency)
   - Most recent activity (for example, a check-in email) and when it occurred

### Result
The Opportunity snapshot card displays a structured summary with up to four sections: opportunity overview, customer needs and pain points, recent and upcoming activity, and risks detected from activity. Sections without data are not displayed.

## Track opportunities using Kanban view

Personalize and manage the opportunities information that is most relevant to you and your stakeholders using the Kanban view.

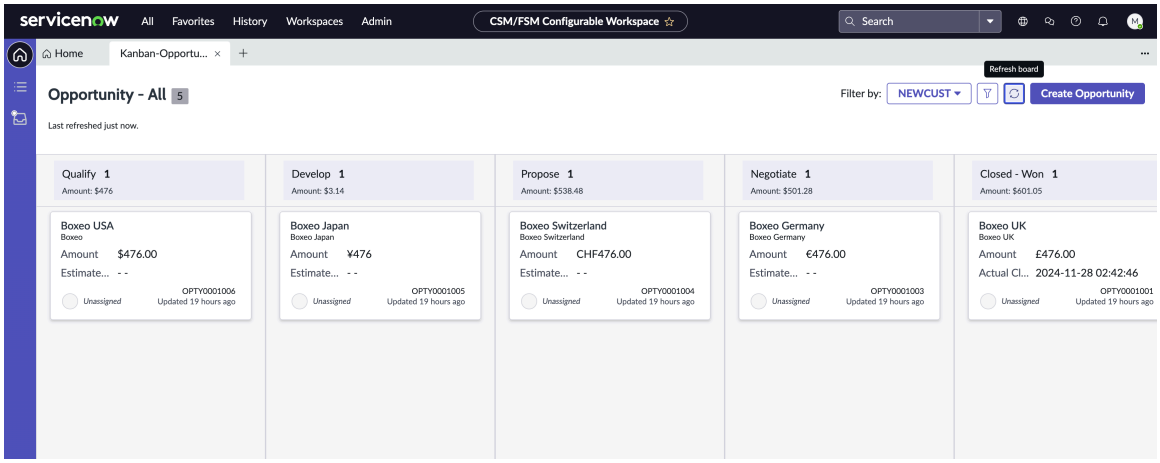
### Before you begin
Role required: sales_agent

### About this task
A Kanban view is a visual representation of the data that enables you to drag and drop the data records according to the business flow. The Kanban view feature in Opportunity Management provides the following benefits:

- Viewing the opportunities of all stages and filtering them on the basis of sales cycle types.
- Updating the state of an opportunity by navigating them in between different stages.
- Viewing the auto-calculated rollup amount (in the base currency) on the sub-header for all opportunities in Kanban lane.

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The Kanban view as part of Opportunity Management in Sales Customer Relationship Management.




## Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
2. Select the **View Kanban** button.
   - To change an opportunity state, drag the opportunity card from one state and drop it into another state.
   - To view the opportunities of different sales type, use the Filter by option on the page.
   - To create a new opportunity directly from this page, select the **Create Opportunity** button. To learn more, see Create an opportunity.

### Related topics

Configuring Opportunity Management

Opportunity Management

## Export opportunities

You can export an opportunity as a JSON file in Opportunity Management and provide it to a customer. The export opportunity feature in Opportunity Management exports a list of all opportunities.

### Before you begin

Role required: sales_agent

### Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
2. Select the **Export** button.
3. Select the **File Type**:
   - Excel
   - CVS
   - JSON
   - PDF
4. Select the **Delivery Type**:

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- Email - Enter a valid email address.
- Download - Downloads the export to a local drive.

The list of opportunities is exported according to the parameters set.

**Related topics**

Configuring Opportunity Management

Opportunity Management

### Create a quote from an opportunity

Create a quote directly from an opportunity as a sales agent or with integrated roles.

#### Before you begin

Ensure that you have captured and provided all the information for your opportunity, such as opportunity details, line items, competitors information and other details.

Role required: sales_agent

#### Procedure

1. Navigate to the **Workspaces** > *CRM Workspace*.
2. From the **List** view, select **Opportunity - All**.
3. Select the desired opportunity.
4. Select **Create Quote** to create a new quote from the selected opportunity.
   If users with integrated roles create quotes then the channel partners and the related channel partners are copied to the newly created quotes. All the created quotes can be viewed on the **Quotes** tab. For details about integrated roles, see Integration with Sales Customer Relationship Management.

**Related topics**

Configuring Opportunity Management

Opportunity Management

### Create a quote from an opportunity line item

Create a quote from the selected line items in an opportunity record.

#### Before you begin

Role required: sales_agent

#### Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Line Items** tab.
3. Select one or more line items and select **Create new quote** to create a quote from the selected line items.
   A dialogue box appears that indicates the creation of new quote. Select the new quote record to view it. Or you can also navigate to the Quotes tab to view the new quote record.

#### What to do next

To learn more about using the Quote Management workspace, see Using Quote Management.

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**Related topics**

- Configuring Opportunity Management
- Opportunity Management

### Sync quote and opportunity

Sync quote information from the quote record to an opportunity record. This keeps the quote data consistent and accurate across both the records and enables sales agents to track revenue from opportunities accurately.

## Establish a sync between quote and opportunity

As a sales agent, you can establish the sync between quote and opportunity records and ensure that a defined set of fields between opportunity-quote and opportunity line items-quote line items remain synchronized.

When a quote is created through an opportunity, the **Source Opportunity** field on the quote record is automatically populated with the details of the opportunity through which the quote is created. To create a quote through an opportunity, see Create a quote.

When a quote is created with child line items, the revenue metrics and prices for the quote are automatically calculated. To learn more about the revenue metrics and how they're calculated, see Subscription revenue metrics.

When the quote record is synchronized with the opportunity record, the prices and revenue metrics are also synced and are consistent across both forms.

The **Synced** banner on the **Details** tab on the opportunity record displays whether the quote is in sync with its opportunity. To automatically sync the first quote with its source opportunity, set the autoEnableSyncFirstQuote system property to **true**.

To learn more about establishing a sync between quote and opportunity and automatically enable sync, see Sync a quote with an opportunity.

You can create a new version of a quote from a quote record to establish a sync between the new revised quote with the initial opportunity.

**Note:** The new version of the quote is in sync with the opportunity only if the previous version was also in sync.

View the new quote revisions from the **Revisions** tab on the quote record.

On the quote record, mark the **State** as **Accepted** or **Completed** to move the synced opportunity to **Closed-won**.

## Map quote and opportunity header fields and line items

As a sales agent, you can only edit and make changes on the fields on an opportunity record that aren't in sync with a quote.

The following is a list of default field mappings between opportunity line items with quote line items and opportunity header with quote header fields. To learn more about the fields and their descriptions, see Subscription revenue metrics.

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### Default synced fields between opportunity header and quote header

| Opportunity header | Quote header |
|---|---|
| Term (months) | Term (months) |
| Total one-time price | Total one-time price |
| Total MRR | Total Monthly Recurring price |
| Total ARR | Total Annual Recurring price |
| Amount | Total Amount |
| Primary Quote | Quote id ref |
| Currency | Currency |
| Price list | Price list |

### Default synced fields between opportunity line-item and quote line-item fields

| Opportunity Line items | Quote Line items |
|---|---|
| Term (months) | Term (months) |
| Cumulative one-time price | Cumulative one-time price |
| Cumulative MRR | Cumulative Monthly Recurring price |
| Cumulative ARR | Cumulative Annual Recurring price |
| Cumulative TCV | Cumulative Net price |
| Product offering | Product Offering |
| Price list | Price list |
| Unit of measure | Unit of measure |
| Unit list price | Unit list price |
| Quantity | Quantity |
| Periodicity | Periodicity |
| Unit net price | Unit net price |

**Note:** When an opportunity and quote header, and an opportunity line item and quote line item are in sync with each other, the addition and deletion of line items on the opportunity record is disabled. All the synced fields on the opportunity and opportunity line item record becomes read only.

**Related topics**

Configuring Opportunity Management

Opportunity Management

### Collaborate with stakeholders by using the sidebar

Initiate a discussion with internal and external stakeholders, such as sales agents, solution consultants, and subject matter experts using sidebar integration with Microsoft Teams.

**Before you begin**

Role required: sales_agent or sales_manager

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Before using the sidebar integration, you must first complete configuring the sidebar integration with your opportunity. To learn more, see Configuring Sidebar.

### Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with.
3. Select **Discuss** on the opportunity header.
4. On the form, fill in the fields.

| Field | Description |
|---|---|
| **Record number** | Number of the opportunity record. |
| **Subject** | Description about the opportunity. |
| **Add participants** | Name of the other users that you want to add to the opportunity discussion. |
| **Include a brief message for participants** | Additional information that you want to add for your users. |

5. Select **Start discussion**.
   A Microsoft Teams chat is created for your collaboration.

### What to do next

Make your collaboration more effective by sharing emojis, messages, and attachments.

### Related topics

Configuring Opportunity Management

Opportunity Management

#### Location-based transactions for Opportunity Management

Agents can create opportunities and support product configurations and services for different locations.

Agents can use the location filter in the product catalog to select a particular customer location. The catalog only displays the products associated with that location. This enables the agents to add appropriate product lines to an opportunity. Agents can also copy products and services from one location to the other within a single transaction. This eliminates the need to create multiple opportunity line items for each location. To learn more about copying locations, see Copy opportunity line items to a location.

## Using location-based transactions

To use the location filter in Opportunity Management, complete the following steps.

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**Note:** As an agent, you can use the location feature if the location-based transactions property is enabled by your admin and eligibility rule filters and product eligibility rules have been configured by your product catalog admin.

### Using location-based transactions

| Step | Description | Role |
|---|---|---|
| Use location filter to add opportunity line items | Use the **Service location** filter in the **Catalog** tab to add opportunity line items to a location. | Agent |
| Copy opportunity line items to a location | Copy existing line items to another location in the opportunity based on the eligibility rules set up by your product catalog admin<br><br>The copy line items modal is displayed when selecting **Copy** on the line items related list. If the system property is false, all the line items are copied. | Agent |

### Related topics

Configuring Opportunity Management

Opportunity Management

### Use location filter to add opportunity line items

Use the **Service location** filter in the product catalog to add products (line items) to a location.

## Before you begin

Role required: sales_agent

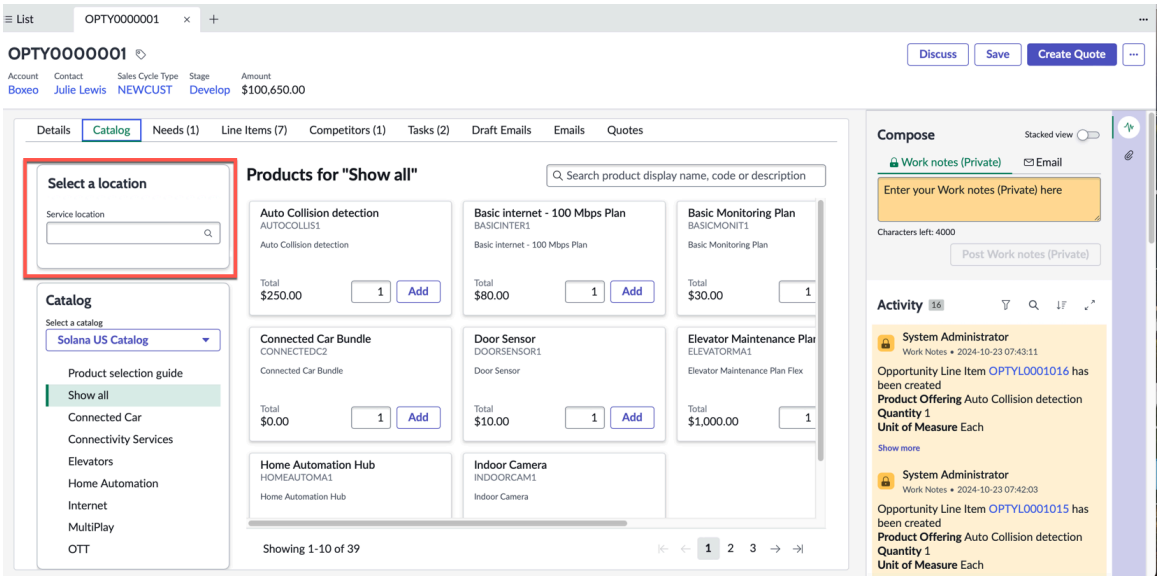
## About this task

You can add opportunity lines by location if the location-based transactions property is enabled by your admin and eligibility rule filters and product eligibility rules have been configured by your product catalog admin for location-based transactions.

## Procedure

1. Navigate to the **List** view and select **Opportunity-All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and navigate to the **Catalog** tab.
3. In the **Select a location** filter, pick a location to which you want to add the line items.
   After you select a location, only the opportunity line items that are eligible for the selected location are displayed.

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4. Select **Add** to create an opportunity line item.
5. Navigate to the **Line Items** tab to view the details of the newly added opportunity line item.

### Related topics

Configuring Opportunity Management

Opportunity Management

## Copy opportunity line items to a location

Duplicate existing line items to another location using **Copy** on the Line items tab.

### Before you begin

Role required: sales_agent

### Procedure

1. Navigate to the **List** view and select **Opportunity-All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and select the **Line Items** tab.
3. Select one or more opportunity line items that you want to copy to another location.
4. Select **Copy**.
5. In the **Copy line items** dialog box, choose one of the options.

| Option | Description |
|---|---|
| **Keep original location** | New line items for the selected opportuni ty are created and the source location is re tained. |
| **Choose new location** | This copies the line items to a new location.<br><br>In the **Service location** filter, select the new location that you want the line items to be copied to. |

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**Note:** Select the **Continue to copy only eligible lines for this location (exclude ineligible)** option in the **Copy line items** dialog box.

This selection copies the eligible line items to your preferred location and skips the line items that aren't eligible. If this option isn't selected, no opportunity line items are copied.

6. Select **Copy**.

### Related topics

Configuring Opportunity Management

Opportunity Management

## View opportunity scores and insights

Review AI-generated win probability scores and contextual insights for an opportunity to assess deal health without opening individual activity, contact, or deal records. Use this to prioritize pipeline opportunities and identify risks.

### Before you begin

Opportunity scoring jobs must be activated and the ML model must be trained on the existing data before sales agents can view AI-generated scores and insights. For more information, see Set up ML-based opportunity scoring and insights.

Role required: sales_agent

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Opportunity** > **All**.
4. Select an opportunity record for which you want to view insights.
5. Select the **Overview** tab.
6. Review the AI Win Probability score and insights information available on the Scores and Insights card.

   Opportunity scoring rates each open opportunity from 0 to 100 based on the patterns that a machine learning model finds in your closed deals. The score comes with plain-language insights that explain the factors behind it. Each score also maps to a rating that helps sellers triage their pipeline at a glance.

#### Score ranges and ratings

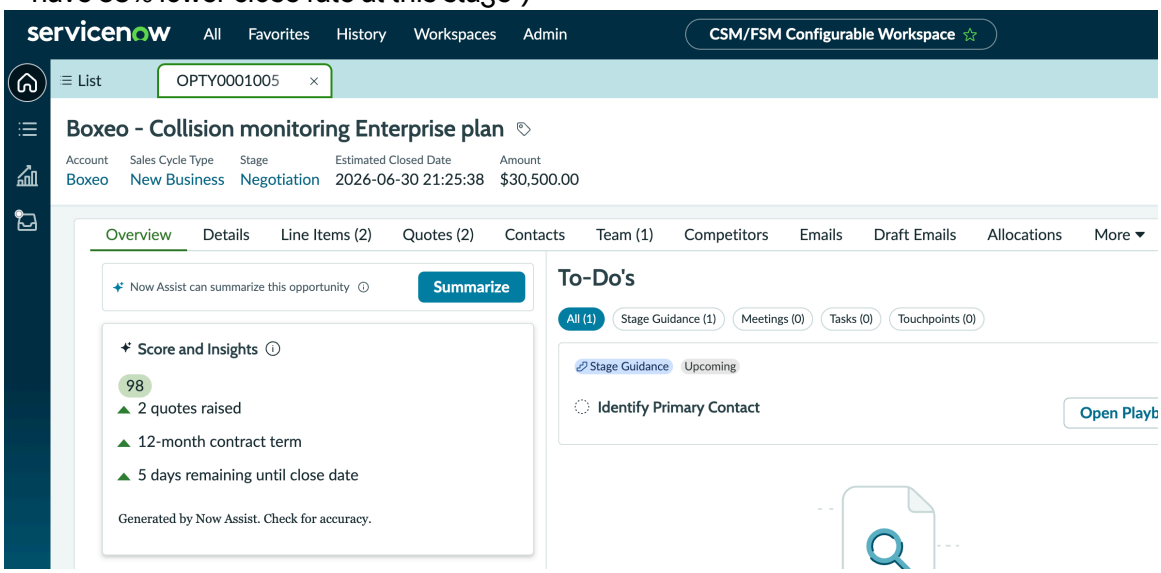
| AI Win Probability | Rating |
|---|---|
| 75 to 100 | Healthy |
| 50 to 74 | On Track |
| 25 to 49 | At Risk |
| 0 to 24 | Critical |

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- AI Win Probability: A read-only score from 0 to 100 that the ML model calculates for each opportunity, representing the likelihood that the opportunity will close.
- Rating: A qualitative label derived from the AI Win Probability score that indicates the health of the opportunity at a glance. The **Rating** field is present on the Details tab. It updates automatically when the score changes and can be manually overridden by a sales representative.

The Scores and Insights card also provides contextual, plain-language observations derived from opportunity signals, such as:

- Competitor activity detected in recent meetings
- Champion engagement patterns (for example, being unresponsive, canceling demos)
- Benchmarks against similar deals (for example, "Opportunities with similar stall patterns have 35% lower close rate at this stage")




7. Review the AI Win Probability and Score Reasons fields in the Activity stream.
   Score Reasons captures the plain-language rationale for each score computation. The system overwrites the previous rationale each time the model recalculates the score. This field is not shown on the opportunity form by default.

### Related topics

Summarize an opportunity using ServiceNow Otto for Sales Automation

## Manage opportunity records using an AI interface

Retrieve, create, and update opportunity records and related CRM data from ServiceNow Otto and an MCP client using plain language.

### Before you begin

Role required: admin

### About this task

All changes go through the same server-side business rules, validation scripts, and access controls that apply on the standard form. Every create or update action requires explicit confirmation before the agent commits.

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## Procedure

1. Use ServiceNow Otto or connect through your MCP client.
   For information on how to connect to an MCP server from an MCP client, refer Connecting to an MCP server from an MCP client
2. Type a natural language prompt for the operation you want to perform.

| Operation | What to type |
| --- | --- |
| Retrieve | Examples by data type:<br>**Pipeline**<br>"Show me all my open opportunities" or "What's my pipeline split by stage?"<br>**Product catalog**<br>"Search the product catalog for enterprise storage solutions" or "What products are available in the networking category?"<br>**Opportunity detail**<br>"I'm getting on a call with <company name> — fetch the open opportunity details."<br>**Opportunity lines**<br>"Show me all line items on the <company name> opportunity" or "Fetch the products being sold in OPTY100001."<br>**Tasks — today**<br>"What tasks do I have today including overdue?"<br>**Tasks — overdue**<br>"Show me all my overdue tasks."<br>**Tasks — by opportunity**<br>"Show me all open tasks for the <company name> opportunity."<br>**Touchpoints**<br>"Show me all touchpoints logged against <company name> in the last month."<br>**Touchpoint — notes**<br>"Fetch my last touchpoint for the <company name> opportunity" or "Show me the description of the discovery call touchpoint on OPTY100001."<br>**Contacts**<br>"Fetch all the stakeholders for this opportunity" or "Who are my contacts at <company name>?"<br>**Competitors** |

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| Operation | What to type |
| --- | --- |
| | "Fetch all competitors for the <company name> opportunity" or "Who are the competitors on OPTY100001?"<br>**Accounts**<br>"Show me all accounts I own." |
| Update | Examples by field or entity:<br>**Opportunity lines**<br>"Update the quantity of the Pro License on the <company name> deal to five."<br>**Stage**<br>"Move the <company name> Q3 deal to Proposal/Price Quote" or "Move OPTY100001 to the next stage."<br>**Forecast category**<br>"Change the forecast category on the <company name> deal to Commit."<br>**Close date**<br>"Push the close date for <company name> to end of next month." Relative expressions such as "Q3 end" or "next Friday" are supported. Close dates can't be set in the past.<br>**Deal size**<br>"Set OPTY100001 amount to 350K." Formatted inputs such as $350,000 and 0.35M are supported.<br>**Work notes**<br>"Add a note to <company name>: 'Budget confirmed, decision in 30 days.'" Notes are appended and never overwritten.<br>**Custom or default fields**<br>"Set next steps on <company name>: 'Send revised proposal by Friday'" or "Update loss reasons on OPTY100001."<br>**Multi-field (up to five fields)**<br>"Update <company name>: stage to Negotiation, close date to June 30, forecast to Commit."<br>**Owner**<br>"Reassign the <company name> deal to Alex Johnson."<br>**Contact role**<br>"Change Alex Smith's role on <company name> from Influencer to Decision Maker."<br>**Competitor details** |

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| Operation | What to type |
| --- | --- |
| | "Mark Salesforce as the incumbent on the <company name> opportunity" or "Set Oracle's incumbent status to false on OPTY100001."<br><br>"Update the product family for Salesforce on the <company name> deal to Sales Cloud."<br><br>"Set the product offering for Oracle on OPTY100001 to Fusion CRM."<br><br>**Task — close**<br><br>"Mark my <company name> follow-up task as complete."<br><br>**Task — notes**<br><br>"Add a note to my <company name> call task: 'Left voicemail, retry Thursday.'"<br><br>**Task — reassign**<br><br>"Reassign my <company name> follow-up task to Alex Johnson."<br><br>**Touchpoint — complete**<br><br>"Mark my <company name> touchpoint from yesterday as completed."<br><br>**Touchpoint — outcome**<br><br>"Set the outcome of my last <company name> call to Positive."<br><br>**Touchpoint — notes**<br><br>"Update the notes on the last <company name> call: 'Champion requested a revised proposal.'"<br><br>**Contact fields**<br><br>"Update Alex Smith's mobile to +1-555-0199" or "Change Alex Smith's title to Chief Procurement Officer." |
| Create | Examples by record type:<br><br>**Opportunity**<br><br>"Create a new opportunity for <company name>, $200K, closing in June." The account must already exist; if it's not found, the agent asks you to clarify.<br><br>**Opportunity lines**<br><br>"Add the Enterprise Storage 10TB product to the <company name> opportunity" or "Add two units of the Pro License to OPTY100001."<br><br>**Opportunity competitor** |

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| Operation | What to type |
| --- | --- |
| | "Add Salesforce as a competitor on the <company name> deal" or "Add Oracle to the competitor list for OPTY100001 with product family CRM."<br><br>**Note:** The agent prevents duplicate competitor entries on the same opportunity.<br><br>**Opportunity contact with role**<br><br>"Add Jane Smith as the economic buyer on <company name>." If the contact doesn't exist, the agent asks whether to create one.<br><br>**Opportunity task**<br><br>"Create a follow-up task on <company name> for next Monday." Relative due dates such as "next Thursday" are supported. The task is assigned to you by default.<br><br>**Touchpoint — call or meeting**<br><br>"Log a 30-minute discovery call with Jane Smith at <company name> today."<br><br>**Touchpoint — notes**<br><br>"Add a note to my <company name> touchpoint from yesterday: 'Budget confirmed, decision expected in 30 days."<br><br>**Contact**<br><br>"Create a contact: John Doe, VP Sales at <company name>, john@abcd.com." |

3. **Optional:** Provide any additional information the agent asks for.

**Note:**

- For create operations, the agent asks for missing mandatory fields one at a time.
- For update operations, it resolves ambiguous record references by asking you to select from a list.
- Field-type validations run before any change is committed; if a value is invalid, the agent returns an error and suggests a correction.

4. For create and update operations: review the confirmation card and confirm to commit.

**Note:** The confirmation card shows what will change before anything is saved. For update operations, it shows the old and new value for each field. Retrieve operations return results directly without a confirmation step.

The agent performs the operation and returns the result. For create operations, it returns the record name and a link. If you don't have the required access, the agent returns a permission denied message.

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**Related topics**

- CRM conversational query
- AI capabilities in Sales CRM

## Using Sales Forecasting

Sales Forecasting uses the current opportunities in the system to predict future opportunity amounts. The Opportunity Management application contains the list of opportunities created for the customers and each of these opportunities are in different stages of the sales cycles.

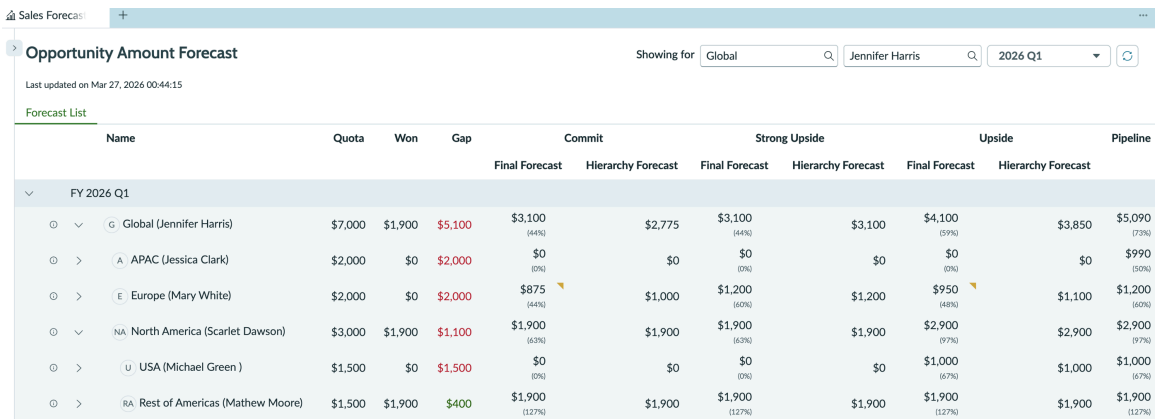
Once an opportunity is created, the Forecast Category field displays Pipeline by default. The sales agent working on that opportunity updates this field once the sales process starts. When the agents update the forecast category, the dashboard keeps displaying the latest data. The forecast scheduler keeps updating the data on the Sales Forecast dashboard. After the users, groups and opportunity data are added, along with selection of category, select Update Forecast on the Sales Forecast dashboard to view the latest forecast information.

## Viewing the Sales Forecast dashboard

You can view the Sales Forecast dashboard to see the current sales status and targets achieved for your teams. Only Forecast Admin, Forecast Analyst, and the owner of the highest group can see the data and sales forecast for all the groups and the team. Other personas such as agents and managers can only view the sales forecast and related information for their own hierarchy or territory below them.

## Using the Sales Forecast dashboard

To access the Sales Forecast dashboard, navigate to *`CRM Workspace`* and select the **Sales Forecast** view. Select the refresh icon  to see the latest sales forecast data. Select **Update Forecast** on the dashboard to fetch the data to generate the latest forecast information. The Active Forecasts list on the side panel displays the forecast models configured for your Sales Forecasting dashboard. Select the forecast model that you want to view. You can view forecasts with one hierarchy or two hierarchies.




| Name | Quota | Won | Gap | Commit | | Strong Upside | | Upside | | Pipeline |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Final Forecast | Hierarchy Forecast | Final Forecast | Hierarchy Forecast | Final Forecast | Hierarchy Forecast | |
| FY 2026 Q1 | | | | | | | | | | |
| Global (Jennifer Harris) | $7,000 | $1,900 | $5,100 | $3,100 (44%) | $2,775 | $3,100 (44%) | $3,100 | $4,100 (59%) | $3,850 | $5,090 (73%) |
| APAC (Jessica Clark) | $2,000 | $0 | $2,000 | $0 (0%) | $0 | $0 (0%) | $0 | $0 (0%) | $0 | $990 (50%) |
| Europe (Mary White) | $2,000 | $0 | $2,000 | $875 (44%) | $1,000 | $1,200 (60%) | $1,200 | $950 (48%) | $1,100 | $1,200 (60%) |
| North America (Scarlet Dawson) | $3,000 | $1,900 | $1,100 | $1,900 (63%) | $1,900 | $1,900 (63%) | $1,900 | $2,900 (97%) | $2,900 | $2,900 (97%) |
| USA (Michael Green ) | $1,500 | $0 | $1,500 | $0 (0%) | $0 | $0 (0%) | $0 | $1,000 (67%) | $1,000 | $1,000 (67%) |
| Rest of Americas (Mathew Moore) | $1,500 | $1,900 | $400 | $1,900 (127%) | $1,900 | $1,900 (127%) | $1,900 | $1,900 (127%) | $1,900 | $1,900 (127%) |

Select the options from these three filters to view the data for your group or manager for a selected time-period.

- Group: Select the group for which you want to view the forecast, the manager of the group is automatically updated in the third filter.
- Manager: Select the manager to see the field.
- Period: Select the period (quarter) for which you want to view the forecast.

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For the above screenshot, the forecast data is being shown for the Global region. The owner of the forecast is Jennifer Harris. The forecast period selected is FY 2026 Q1. Global has a total quota of $7,000 assigned to it. Gap is the difference between the Quota and Won sales. For Global, the gap is $5,100, meaning they must achieve an additional $5,100 to meet the quota. As the owner of this group, Jennifer Harris can track the quota achieved for each team and specific agent if required.

Commit, Strong Upside, Upside, and Pipeline represent different stages of certainty in the sales pipeline, helping to estimate the likelihood of achieving the overall target. As a manager, you can expand and see the total amount of opportunity in each stage for your team and agents. You can see the roll-up amount for all the agents under that manager. Each category displays two values under Final Forecast and Hierarchy Forecast. Hierarchy Forecast displays the amount generated by the total opportunities in the system. Final Forecast displays the adjusted value of the forecast that is manually done by the manager or sales agent. Agents can adjust the value of the forecast in any category based on their judgment and predictions for a more accurate forecast.

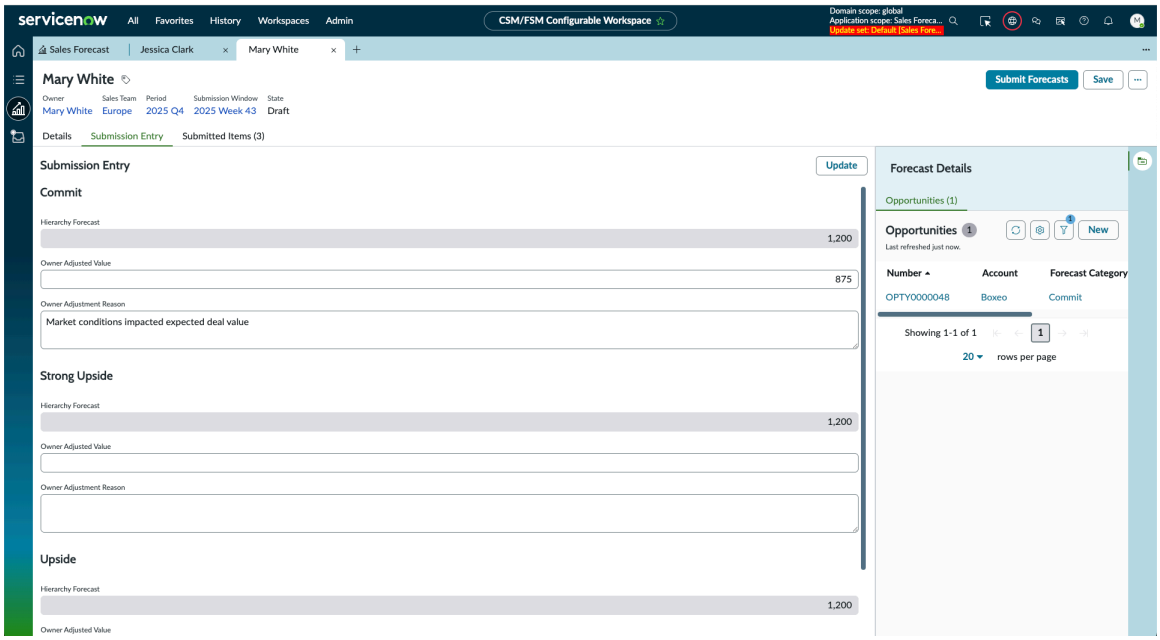
The Rest of American group with the owner as Mathew Moore in FY 2026 Q1 displays that the team's quota has been set at $1,500. The agent working under the owner is Charlotte Turner who has already closed (Won column) $1,900 in sales. You can select the "i" icon for an agent and view all the opportunities for that agent and the total value in each forecast category.

Under Active Forecasts, you can view other forecast models that have a primary and a secondary hierarchy, such as territory and product family or sales team and product family. This dashboard enables forecast owners to view and manage forecasts drill down by two dimensions, for example, territory hierarchy and product family for a given period. Users can filter the forecast by territory, product family, the forecast owner, and the period. The **Update Forecast** button triggers a manual recalculation of rollup values. Each row represents a territory–product family pairing, such as Global – Workflows. The expand/collapse icons can be drilled into to reveal further sub-territories. Sales managers can review their committed forecast hierarchy numbers at each level and override values where their judgment differs at their hierarchy level. For more info, see Submitting a forecast. The product family dimension lets them see which product lines are driving or lagging behind their overall target numbers. If you select the **Base** option on the Forecast model, a forecast record is created for each forecast source. For more info, see Configure Forecast Model. These forecast records are visible on the dashboard below the sales agents to whom they are assigned. Sales agents can review and adjusts the value of the forecast records assigned to them.

As a sales agent, you can view the status of each opportunity that you own. As the sale progresses, you can update the Forecast Category field of the opportunity and the new data is updated on the dashboard. You can adjust a forecast value and the adjustment propagates up both the primary (territory) hierarchy and the secondary (product family) hierarchy, so all related rollup records reflect the change automatically. You can view the total amount in each sales stage and track the status of the quota target assigned to you. Select **Submit Forecast** to view the Submission Entry tab.

**Note:** Submit Forecast is available only if you select **Submission Required** in the Forecast model. For more info, Sales Forecasting terminology.

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The Submission Entry tab displays the cumulative value of all the opportunities for each category for that agent. The agent can adjust the value of the forecast for any category depending on the latest insights. For any of the categories, enter the adjusted value of the forecast in **Owner Adjusted Value** field. Enter a reason for the adjusted forecast value in the **Owner Adjustment Reason** field. Select **Update** to save the adjusted forecast values. Select **Submit Forecast** to finalize the forecast values. After submitting these forecast values, they cannot be changed.

### Related topics

- Configure Sales Forecasting
- Sales Forecasting

## Create forecast adjustment

Modify system-generated forecast values based on your judgment and prediction. Sales agents can adjust their individual forecasts and managers can modify team forecasts to align with overall targets. Sales managers can override team-level adjustments and the system automatically recalculates the roll-ups to reflect the updated forecast values.

### Before you begin

Role required: sn_sales_forecast.adjustment_writer

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **My lists > Sales Forecast > Forecast**.
4. Select the forecast header record to view your forecast items.
5. Select **Forecast Items** on the Details tab to view all the forecast items.
6. Select the forecast item that you want to adjust.
   The Details tab for that forecast item is displayed.
7. Select the **Forecast Adjustment** tab.
8. In the **Adjusted Value** field, enter the new forecast value that is different from Hierarchy Forecast value.

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9. Enter a description for the adjusted value in the **Reason** field.
10. Select **Save**.
    On your forecast item, the Owner Adjustment field displays the adjusted forecast value and the Hierarchy Forecast value displays the original forecast value.

**Related topics**

Configure Sales Forecasting

Sales Forecasting

### Submitting a forecast

Sales agents and managers can finalize and submit forecasts in defined periods to ensure accurate projections. Agents can adjust forecast values, lock them, and submit the forecasts in the specified time frame.

**Before you begin**
Role required: sn_sales_forecast.submission_writer

**Procedure**

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **My lists > Sales Forecast > My Forecast Submissions**.
4. Select **New**.
   The Create New Submitted Forecast page is displayed.
5. From the **Forecast** list, select the forecast record that you want to submit.
6. Check the values in the following fields that are automatically populated:
   - Owner
   - Sales Team
   - Period
   - Currency
   - State
7. From the **Submission Window** list, select the time period for which you want to submit the forecast.
8. Select **Save**.
   The Submission Entry page for that forecast is displayed.
9. Select **Submit Forecast** to submit your forecast.
   The forecast has been submitted and the state changes to Completed. The forecast values have been locked and cannot be changed. If your forecast model allows resubmission, you can reopen the submitted forecast and modify values within the current submission window. For more info, see Configure Forecast Model.

**Related topics**

Configure Sales Forecasting

Sales Forecasting

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### Reopening and resubmitting a forecast

Adjust the values of a submitted forecast by reopening it and resubmitting the updated forecast within the current submission window.

#### Before you begin

Role required: sn_sales_forecast.submission_writer

#### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **My lists > Sales Forecast > My Forecast Submissions**.
4. Open the submitted forecast that you want to modify.
5. On the Submission Entry page, select **Reopen Submission**.
   **Reopen Submission** is available only when the submission belongs to the current submission window, even if its state is Completed. You can't reopen a submission from a submission window that has already passed.
6. On the Reopen Submission dialog box, select **Reopen**.
   You can reopen the submitted forecast only if your forecast model allows resubmission of a submitted forecast. For more info, see Configure Forecast Model.
7. Update the values that you want to modify.
8. Select **Submit Forecast** to resubmit the forecast.
   The forecast is resubmitted and the state changes back to Completed.

#### Related topics

Submitting a forecast

Configure Forecast Model

Using Sales Forecasting

### Customizing Sales Forecast dashboard

Customize the columns that are displayed on your Sales Forecast dashboard and set your preferred column order to match your workflow.

#### Before you begin

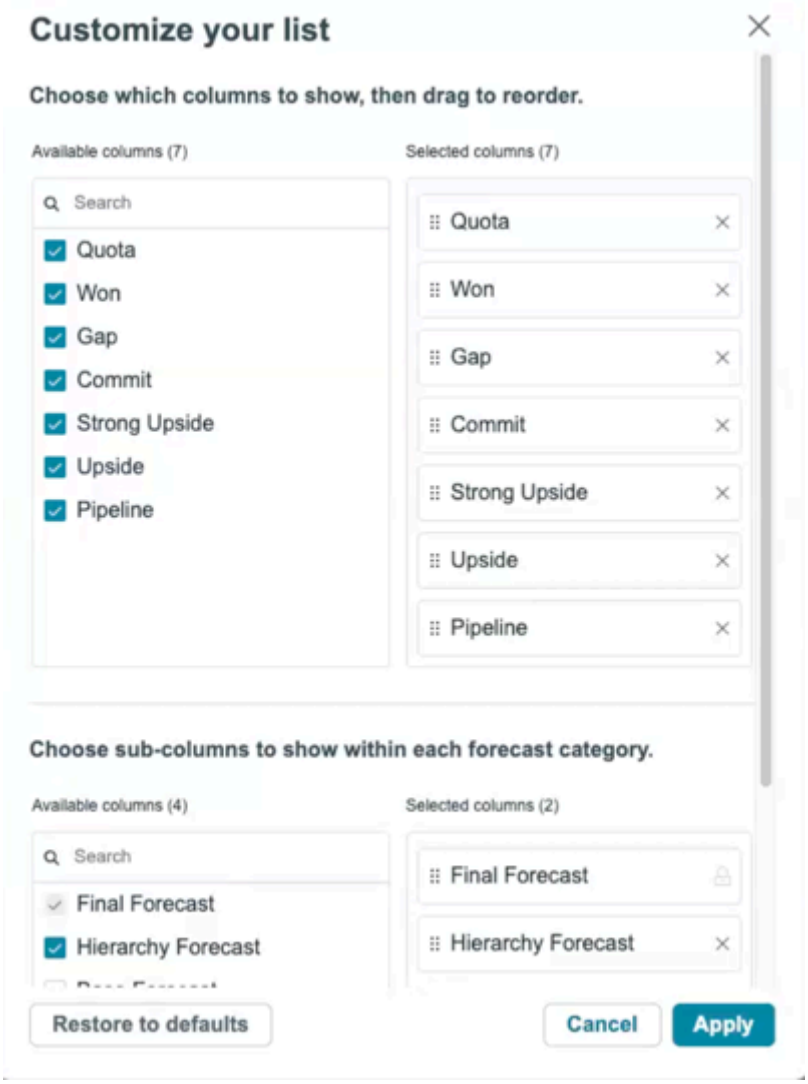
Role required: sn_sales_forecast.forecast_viewer

#### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Select the **Sales Forecast** view.
4. Select the Customize your list icon on the dashboard toolbar.
   The Customize your list dialog box opens. The dialog box has two sections. Top-level section includes column names, such as Quota, Won, Gap, Commit, Strong Upside, Upside, and Pipeline. The bottom section contains sub-columns that apply within every forecast category, such as Final Forecast, Hierarchy Forecast, Base Forecast, and Last Submitted Forecast.

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**Customize your list dialog box**




5. In the top section, under Available columns, select the option for each column that you want to display and clear the check box for any column that you want to hide.
6. Under Selected columns, drag and drop the columns to set the order in which they appear on the dashboard.
7. In the bottom section, select the sub-column options that you want to display within every forecast category.
   A sub-column that you select is added under every adjustable forecast category on the dashboard. Clearing a sub-column removes it from all the adjustable categories. Final Forecast and Hierarchy Forecast are selected by default. Final Forecast cannot be cleared.
8. Drag and drop the selected sub-columns to set the order in which they appear within each category.
9. **Optional:** To reset all selections and display the default dashboard view, select **Restore to Defaults**.
10. Select **Apply** to save your changes.
    The dashboard displays your selected columns in the order that you set and saves it for your forecast model.

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**Related topics**

- Using Sales Forecasting
- Configure Sales Forecasting
- Sales Forecasting terminology

## Using Sales Territory Management

Sales Territory Management is a strategic framework for organizing and managing CRM entities such as Accounts, Consumers, Leads, and Opportunities. To assign territories, you can run **Run Assignment** to automatically distribute CRM entities, or manually update the primary territory.

**Related topics**

- Configuring Sales Territory Management
- Components installed with Sales Territory Management

### Assigning a territory on account

You can update the primary territory on an account in which Sales Territory Management has been implemented.

#### Before you begin

Role required: sales territory admin (or a user with sales territory override role)

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Customer** > **Accounts** and select the account you want to update the territory.
3. On the Details tab, update the **Sales Ownership** > **Primary Sales Territory** field with the other available territories.

   **Note:** The territories are automatically assigned to the account by the assignment algorithm. For more info, see Run Assignments.

4. Select **Save**.

**Related topics**

- Configuring Sales Territory Management
- Sales Territory Management

### Assigning a territory on opportunity

You can update the primary territory on opportunity in which Sales Territory Management has been implemented.

#### Before you begin

Role required: sales territory admin (or a user with sales territory override role)

**Note:** If an account is set with a territory, any Opportunity created from that account will inherit the territory as well. User with sales territory override role can override it.

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All** and select the opportunity you want to update the territory.

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3. On the Details tab, update the **Territory** field with the other available territories.
4. Select **Save**.

**Related topics**

Configuring Sales Territory Management

Sales Territory Management

### Assigning a territory on lead

You can update the primary territory on a lead in which Sales Territory Management has been implemented.

**Before you begin**
Role required: sales territory admin (or a user with sales territory override role)

**Procedure**

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select the lead you want to update the territory.
3. On the Details tab, update the **Territory** field with the other available territories.
4. Select **Save**.

**Related topics**

Configuring Sales Territory Management

Sales Territory Management

### Assign a territory on consumer

You can update the primary territory on a consumer in which Sales Territory Management has been implemented.

**Before you begin**
Role required: sales territory admin (or a user with sales territory override role)

**Procedure**

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Customer** > **Consumers** and select the consumer you want to update the territory.
3. On the Details tab, update the **Sales Ownership** > **Primary Sales Territory** field with the other available territories.
4. Select **Save**.

**Related topics**

Configuring Sales Territory Management

Sales Territory Management

## Using Activity Management

Activity Management enables you to log and track every customer interaction across the sales cycle. Touchpoints provide a method to record meetings, calls, appointments, and emails. You can use the Microsoft Outlook add-in to associate emails and create CRM records without leaving your inbox.

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**Build a complete interaction history**

Every team member can inherit full context as a deal progresses. Log calls and emails as touchpoints from the first prospect interaction, and capture structured details such as agenda, stakeholders, discussion notes, and outcomes as the deal advances. Account executives, solution consultants, and customer success managers can view the complete engagement timeline before picking up where the previous team member left off.

**Coordinate stakeholders and keep deals on track**

Teams can align on next steps and maintain a clear engagement timeline without relying on disconnected calendars or email threads. Schedule meetings and appointments directly from touchpoint records to bring the right stakeholders together. Create tasks linked to a CRM entity at any point in the deal to assign and track action items such as sending a proposal, following up on a demo, or completing a legal review.

**Document outcomes for post-sale handoffs**

Post-sale teams can start onboarding with full engagement context rather than piecing together what was agreed. When a deal closes, capture the outcome directly in the touchpoint record to document what was discussed and decided, providing a complete engagement history for customer success and service handoffs.

**Capture email interactions without leaving Outlook**

CRM data stays current without requiring agents to switch between applications. If your team works in Microsoft Outlook, use the ServiceNow CRM for Outlook add-in to associate inbound emails and create new leads and contacts directly from your inbox.

**Auto-associate sales emails**

An agentic AI workflow analyzes inbound emails, identifies sales intent, and finds an existing CRM record to associate the email, all as a background process, reducing manual effort. Sales representatives use the ServiceNow CRM for Outlook add-in only when an email they expected to be linked is not auto-associated or when they want to create a record.

**Related topics**

Configuring Activity Management

Activity Management

### Create a CRM touchpoint

Create a CRM touchpoint to log and track customer interactions across the sales cycle. Link touchpoints to accounts, contacts, and associated records to maintain a complete interaction history and support timely follow-ups.

## Before you begin

Role required: sn_crm_touchpoint.touchpoint_writer

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Touchpoints** > **All Touchpoints**.
4. Select **New**.

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5. On the Create New CRM Touchpoint form, fill in the fields.
   For a description of the field values, see Create new CRM touchpoint form.
6. Select **Save**.

### What to do next

After creating a CRM touchpoint, you can plan and track the following pre-engagement activities from the touchpoint record:

- Schedule a meeting with the customer or internal stakeholders to align on discovery goals or next steps. For more information, see Schedule a meeting from a touchpoint.
- Schedule a call to follow up on commitments made during a previous interaction or to prepare for upcoming customer engagement. For more information, see Schedule a call from a touchpoint.
- Compose and send an email to share information, confirm meeting details, or follow up after a call. For more information, see Send an email from a touchpoint.
- Create a related task to capture preparation work such as researching customer background, identifying stakeholders, or tracking commitments before closing the touchpoint. For more information, see Create a related task from a touchpoint.

### Related topics

Configuring Activity Management

Activity Management

## Schedule a meeting from a touchpoint

Schedule meetings with leads, opportunities, and accounts directly from the touchpoint record. Align internal and external stakeholders, avoid scheduling conflicts, and build a timeline view of customer interactions for risk analysis and planning future actions.

### Before you begin

Role required: sn_crm_touchpoint.touchpoint_writer, sn_meeting_mgmt.meeting_creator

### About this task

Schedule meetings directly from a touchpoint record to coordinate customer-facing and internal engagements without switching tools. Meetings are linked to the originating touchpoint, preserving the full context of the customer interaction and making the scheduled engagement visible to everyone on the account team. After the meeting, share a summary with the customer as an email and capture post-meeting observations and follow-up actions using internal notes. Use this when you need to align stakeholders, conduct discovery sessions, or plan recurring check-ins as part of a structured customer engagement.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Touchpoints** > **All Touchpoints**.
   To view your touchpoints, select **My Touchpoints**.
4. Open a touchpoint record that you want to work with.
5. Navigate to the **Meetings** tab.
6. Select **New**.
7. On the Create New Meeting form, fill in the fields.

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For a description of the field values, see Create new meeting form.

8. **Optional:** Add attachments to your meeting.
   - Drag a file on to the Attachments pane.
   - Select **Select file** to browse and attach a file.

   The maximum file size that you can upload is 1024 MB.
9. Select **Save**.

### Result

The meeting is scheduled and an invite with the agenda is sent to all invitees. You can view saved meetings from the touchpoint's Meetings tab.

#### Related topics

Configuring Activity Management

Activity Management

## Schedule a call from a touchpoint

Plan and track customer calls to organize and manage follow-ups and outreach and maintain a complete interaction history.

### Before you begin

The Omnichannel Callback for Customer Service Management (com.sn_omnichannel_callback) application must be installed with CRM Touchpoints to enable the click-to-call feature so agents can call customers from the touchpoint record.

Role required: sn_crm_touchpoint.touchpoint_writer

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Touchpoints** > **All Touchpoints**.
4. Open the touchpoint record.
5. Navigate to the **Scheduled calls** tab.
6. Select **New**.
7. On the Create New Callback form, fill in the fields.
   For a description of the field values, see Create new callback form.
8. Select **Save**.

### Result

The call is scheduled and can be tracked from the touchpoint's **Scheduled calls** tab.

#### Related topics

Configuring Activity Management

Activity Management

Install Omnichannel Callback for Customer Service Management

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### Send an email from a touchpoint

Send emails to customers and stakeholders directly from a touchpoint record without having to leave the workspace. Emails are stored in the CRM system so other agents, managers, and customer success managers have full context about interactions with the customer or account.

## Before you begin

The User Mailbox Integration plugin (com.glide.email.user_mailbox.integration) must be installed on your ServiceNow instance to enable agents to send emails from the touchpoint record. For setup instructions, see Personal corporate mailbox.

Role required: sn_crm_touchpoint.touchpoint_writer

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to **Touchpoints** > **All Touchpoints**.
4. Open the touchpoint record you want to work with.
5. Select **Compose Email**.
6. Draft the email message in the New Email Draft form.
   a. In the **To** field, enter the recipient's email address.
   b. In the **CC** or **BCC** fields, enter the name of recipients.
   c. Review the text in the **Subject** field and change it if necessary.
   d. Either compose an original email in the body field or use a template if templates are available.
      - If templates are available and you want to use a template, select a template from the Email templates pane.
      - Compose an original email in the text field.

        Toolbar options are available to format the text.
   e. **Optional:** Add attachments to your email by selecting the Attach file icon and selecting the file.
7. Either save the email as a draft or send it right away.
   - To save the email as a draft to send later, close the form.

     The draft is automatically saved and accessible from the **Draft Emails** tab.
   - To send the email right away, select **Send email**.

     The email is sent to the recipients and can be viewed from the touchpoint's **Emails** tab.

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### Related topics

Configuring Activity Management

Activity Management

## Create a related task from a touchpoint

Create tasks directly from a touchpoint record to assign follow-up actions such as researching customer backgrounds, track post-interaction commitments, and coordinate stakeholders without having to leave the touchpoint workspace. Tasks are automatically linked to the touchpoint so all related activity stays connected.

### Before you begin

Role required: sn_crm_touchpoint.touchpoint_writer

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Touchpoints** > **All Touchpoints**.
4. Open the touchpoint record you want to work with.
5. Navigate to the tab related to the entity type.
   For example, if Opportunity is the associated entity, then the name of the tab would be Opportunity Tasks. However, if the associated entity is Account or Contact, then the tab name is Task.
6. Select **New**.
7. On the create new task form, fill in the fields.
   For more information about the form fields for the CRM entities, refer to the corresponding topic.

| CRM entity | Form field descriptions |
|---|---|
| **Lead** | Create new lead task form |
| **Opportunity** | Create new opportunity task form |

8. Select **Save**.

### Result

A task record is created against the CRM entity and touchpoint record. You can view the corresponding task from the respective module. For example, to view opportunity task, navigate to **Opportunity** > **Opportunity Tasks** list menu. You can also access it from the **Opportunity Tasks** tab from the touchpoint record.

### Related topics

Add opportunity tasks

Add lead tasks

## Schedule an appointment from a touchpoint

Schedule appointments with customers and stakeholders directly from a touchpoint record to coordinate in-person or virtual engagements and keep the entire account team informed.

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### Before you begin

You can create appointments only after creating a lead or opportunity task. For information on how to create an opportunity task from the Touchpoints module, see Create a related task from a touchpoint. Alternatively, you can create an opportunity task from the Opportunity module in the CRM Workspace. For details, see Add opportunity tasks and Add lead tasks.

Role required: sn_crm_touchpoint.touchpoint_writer

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Touchpoints** > **All Touchpoints**.
4. Open the touchpoint record to update.
5. Navigate to the tab related to the entity type.
   For example, if Opportunity is the associated entity, then the name of the tab would be Opportunity Tasks.
6. Select a task record.
7. Navigate to the **Appointments** tab.
8. Select **New**.
9. On the Create New Appointment form, fill in the fields.
   For more information about the form fields for the CRM entities, refer to the corresponding topic.

| CRM entity | Form field descriptions |
|---|---|
| **Lead** | Create new appointment form |
| **Opportunity** | Create new appointment form |

10. Select **Save**.

### Result

The appointment is scheduled and can be viewed from the touchpoint record's **Appointments** tab.

#### Related topics

Configuring Activity Management

Activity Management

## Associate an email with an existing CRM record

Link an email to an existing lead, account, contact, or opportunity record directly from Microsoft Outlook. Associating emails with CRM records helps maintain a complete engagement history without having to switch between applications.

### Before you begin

Write permission on the underlying CRM entity table is required to view the corresponding tab in the ServiceNow CRM for Outlook Add-in and to create or associate records on that tab. For example, to associate an email with a LEAD record, you must have write permission on the Lead [sn_lead_mgmt_core_lead] table.

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Your administrator can grant you this write permission in either of these ways: directly through table ACLs, or through the responsibility framework. The responsibility framework grants you access to specific records based on your role and your membership. For more information, see Create a responsibility definition.

Role required: sn_crm_outlook.crm_outlook_user

### About this task

If your admin has configured the AI sales activity association app, then emails with sales intent will be automatically associated with existing CRM entity. Use these steps to manually associate any email in your inbox or sent folder that has not been auto-associated by the agentic AI workflow.

**Note:** If an email belongs to a thread where you've already associated one message, the ServiceNow CRM for Outlook add-in shows the matched CRM record directly when you launch it. You don't need to search for the record or select **Associate** again. You can skip straight to the optional steps to add details or open the record in CRM.

### Procedure

1. Open an email in Microsoft Outlook.
2. Load the Microsoft Outlook add-in by selecting **ServiceNow CRM for Outlook** from the Microsoft Outlook ribbon.
3. If a sign-in form appears, enter your credentials and select **Log in**.
4. Select a tab for the record type you want to search.
   - **Leads**
   - **Account**
   - **Contacts**
   - **More** > **Opportunities**
5. **Optional:** In the **Filters** field, set filters to narrow results.

   (Optional) The CRM Outlook Add-in extracts the sender's name and email domain or the first recipient's name and domain, for sent emails, and matches them against the following fields per entity:

   - Leads and opportunities: first name, last name, and email domain
   - Accounts and contacts: email domain only

   Records matching any of these fields appear in the corresponding tab. The first two recipient addresses are considered for matching.

   **Example**
   For example, to find a lead by email address, you would set the condition **[Email] [is] [**<email address to search for>**]**.
6. In the **Search** field, enter the search information such as a name or email address.

   If no records match your search or filter criteria, the add-in displays the following message: `No match found. Your search and filter criteria returned no results. Modify your search, clear filters, or create a new record.`

   To create a new record, see Create a CRM record from Microsoft Outlook.

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7. Locate the record you want to associate and select **Associate**.
   If the email is part of a thread you've already associated, the matched record card appears automatically. You don't need to perform this step.
   The email is linked to the CRM record. The association appears in the record's activity history in ServiceNow CRM.
8. **Optional:** Enter additional information for your selected CRM entity, and select **Save**.

| CRM entity | Form field descriptions |
|---|---|
| **Lead** | Lead form in the ServiceNow CRM for Outlook add-in |
| **Opportunity** | Opportunity form in the ServiceNow CRM for Outlook add-in |
| **Account** | Account form in the ServiceNow CRM for Out look add-in |
| **Contact** | Contact form in the ServiceNow CRM for Out look add-in |

9. **Optional:** View the associated record in the CRM by selecting **Open**.
   You're redirected to the entity record in the CRM Workspace.

### Result
The email is associated with the CRM record, and the engagement is logged for future reference.

### What to do next
You can view the associated emails from the respective entity record's Emails tab. For more information, see Track emails linked from Microsoft Outlook.

#### Related topics
Configuring Activity Management

Activity Management

## Track emails linked from Microsoft Outlook

View emails that have been linked to CRM records using the Microsoft Outlook directly from the CRM Workspace.

### Before you begin
Email promotion must be configured before you can view the associated emails on the Emails tab of the Lead, Opportunity, Accounts, or Contacts record. For more information, see Configure email promotion rules for Activity Management.

The User Mailbox Integration plugin (com.glide.email.user_mailbox.integration) must be installed on your ServiceNow instance to enable agents to send emails from the touchpoint record. For setup instructions, see Personal corporate mailbox.

Role required: sn_crm_outlook.crm_outlook_user

### Procedure
1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to CRM entity with which you associated the email.

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To view emails associated with a Lead, you'd navigate to **Leads** > **All** and select a LEAD record.

4. Open the CRM entity record that you want to work with.
5. Navigate to the **Emails** tab.
6. View email by selecting a timestamp link from the Created column.

### Related topics

Configuring Activity Management

Activity Management

## Create a CRM record from Microsoft Outlook

Create a new lead or contact record and associate an email with it directly from Microsoft Outlook, enabling you to capture new prospects without having to leave your email inbox.

### Before you begin

Write permission on the underlying CRM entity table is required to view the corresponding tab in the ServiceNow CRM for Outlook Add-in and to create or associate records on that tab. For example, to associate an email with a LEAD record, you must have write permission on the Lead [sn_lead_mgmt_core_lead] table.

Your admin can grant you this write permission in either of these ways: directly through table ACLs, or through the responsibility framework. The responsibility framework grants you access to specific records based on your role and your membership. For more information, see Create a responsibility definition.

Role required: sn_crm_outlook.crm_outlook_user

### Procedure

1. Open an email in Microsoft Outlook.
2. Load the Microsoft Outlook add-in by selecting **ServiceNow CRM for Outlook** from the Microsoft Outlook ribbon.
3. If a sign-in form appears, enter your credentials and select **Log in**.
4. Select a record type from the **Create new** drop-down menu.

| Record type | Description |
|---|---|
| **Lead** | New lead record for a potential customer who has shown interest but is not yet qualified. For a description of the field values, see Lead form in the ServiceNow CRM for Outlook add-in. |
| **Contact** | New contact record for an individual associated with an existing or new account. For a description of the field values, see Contact form in the ServiceNow CRM for Outlook add-in. |

When you create a Lead or Contact from a sent email, the form populates with the first recipient's first name, last name, and domain. For received emails, the form is populated with the sender's details.

5. Complete the required fields and any optional fields relevant to your workflow.
6. Select **Create and associate**.

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### Result
The CRM record is created and the email association is logged, enabling you to continue engagement tracking from either Microsoft Outlook or CRM Workspace.

### What to do next
You can view the associated emails from the respective entity record's Emails tab. For more information, see Track emails linked from Microsoft Outlook.

### Related topics
- Configuring Activity Management
- Activity Management

# Using configure, price, quote applications

Learn how to use configure, price, quote applications.

## Using the CPQ Configurator

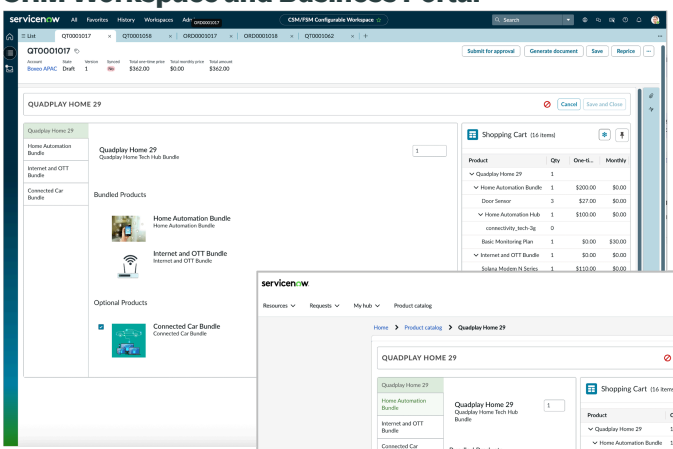
Agents and customers use the Configurator to customize configurable products in Sales Customer Relationship Management transactions such as opportunities, quotes, and orders.

## CPQ Configurator overview

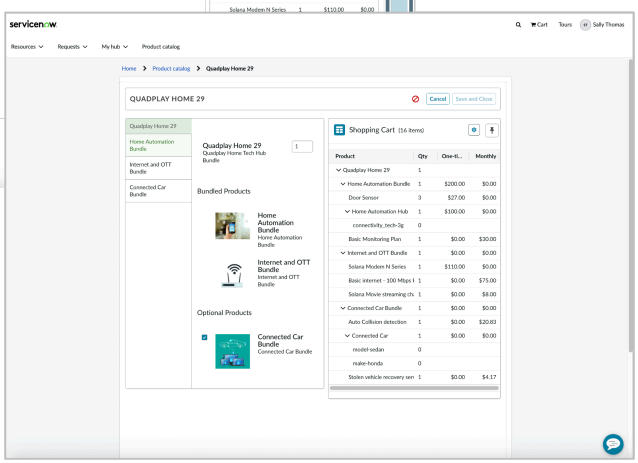
With the Configurator, agents and customers can configure offerings dynamically based on customer needs or product attributes, without having extensive knowledge of product structures and hierarchies. Agents use the configurator in the CRM Workspace, while customers use the configurator in the Business Portal for self-service transactions.

### CPQ Configurator in CRM Workspace and Business Portal

CSM Configurable Workspace



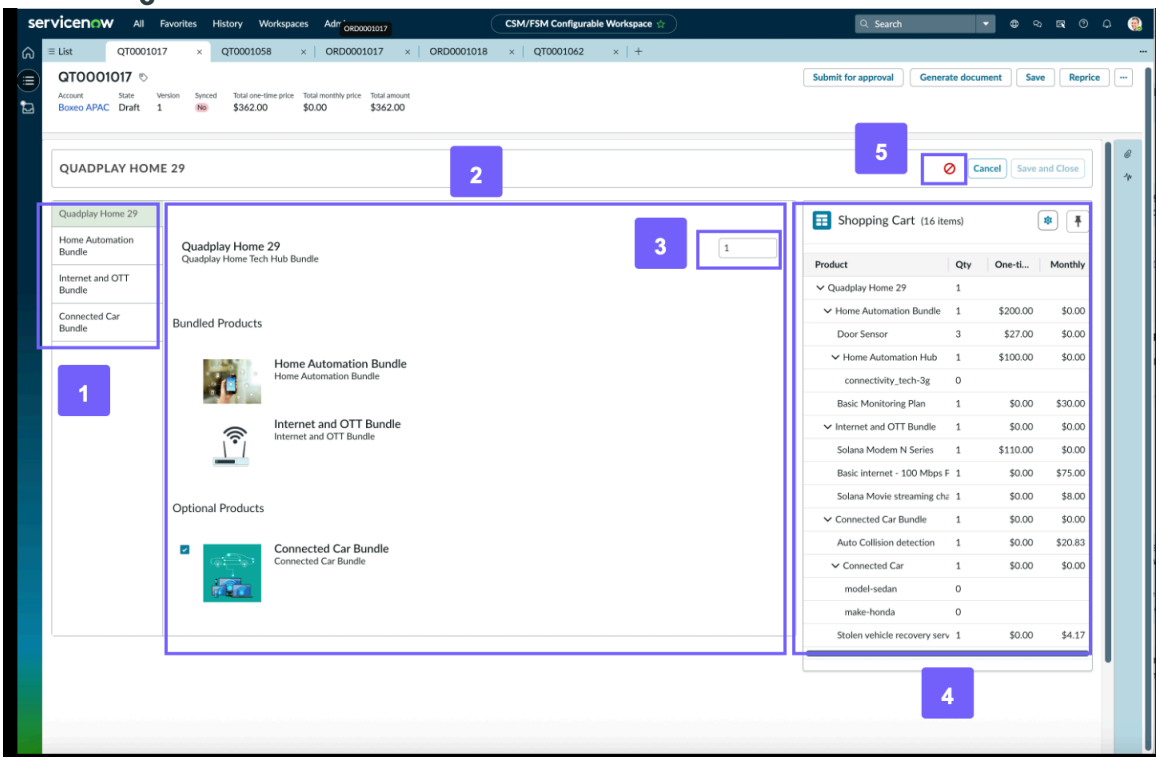

Business Portal




When adding products to Sales Customer Relationship Management transactions, agents and customers select a customizable product offering from the product catalog, which automatically launches the configurator. The configurator displays the available features and options that can be selected for the product.

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## CPQ Configurator interface




The CPQ Configurator interface has the following features:

### CPQ Configurator features

| Feature | Description |
|---|---|
| 1. Products in the bundle | Products that comprise the bundle. Select a product in the bundle to view the features and options available. |
| 2. Option selections | Section that displays the available product attributes and features, such as characteristics and characteristic options for the product. This section can include text fields for entering relevant product information. |
| 3. Quantity | Option for entering the number of products needed. |
| 4. Shopping cart | List that reflects the current selections made and their associated pricing.<br>• As you select options, the pricing is calculated and displayed automatically.<br>• Use the Gear icon to move the shopping cart component to different locations in the layout (left, right, bottom). |

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**CPQ Configurator features (continued)**

| Feature | Description |
| --- | --- |
| | **Note:** The default location for the shopping cart is below the option selections section. In this example, the shopping cart was moved so that it appears in the right pane.<br>• Use the Pin icon to dock the shopping cart in a particular location (left pane, right pane, or below the options selection section). |
| 5. Completion icons | Icons that indicate the state of the configuration:<br>• Checkmark ✓ icon: Indicates that the required entries and option selections are complete.<br>• Attention ⊘ icon: Indicates that a required entry must be made. Select the icon for a description of the option or entry to be completed. To locate the required entry, review the selections for all the products in the bundle. The required entry is identified by an alert ⚠ icon and message. |

**Related topics**

Add customizable products using CPQ Configurator

### Add customizable products using CPQ Configurator

Use the Configurator to add configurable products to a Sales Customer Relationship Management transaction, for example an opportunity or quote.

## Before you begin

Role required: sales agent, order agent, customer

## Procedure

1. Create a transaction, such as an opportunity or a quote, in the CRM Workspace.
   a. Navigate to **Workspaces** > *CRM Workspace*, and select the List icon ☰.
   b. Navigate to the module for the transaction, for example **Quotes** > **All**, and select **New** to create the transaction.
   c. When the transaction is created, select **Add line items** to create a line item. The tabs (related lists) open for the transaction.
2. Select the Catalog tab to open the product catalog interface, then select the appropriate catalog.
3. In the card for the product offering to be configured, select **Customize**.

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The CPQ Configurator opens.

4. Select a product in the bundle and in the Options selection section, choose the product option.
   - As you select options and enter quantity items, review the shopping cart to see the associated pricing for your selections.
   - Review the completion icons.
     - An attention icon ⃠: Indicates that a required option or entry must be completed. Select the icon to see which item must be completed. To find the required entry, review the options for all the products in the bundle. The required entry is identified by the Alert icon ⚠ and message.
     - A check mark icon ✓: Indicates that all required options and entries for the configurable offering have been completed.
5. When you complete your selections, select **Save and Close**.
   The configurable product is added as a line item to the transaction.

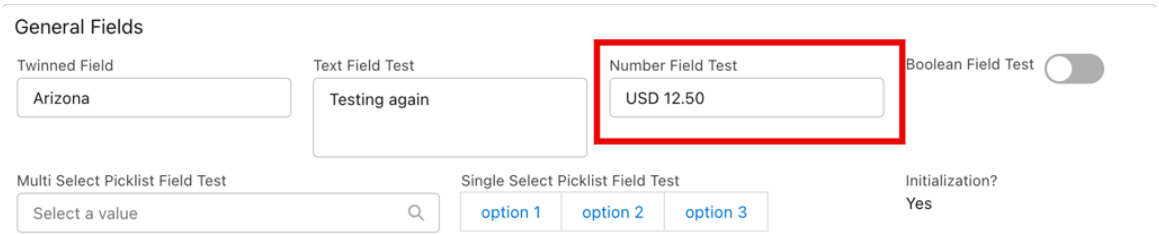
## Using CPQ

Use ServiceNow CPQ to configure complex products, apply dynamic rules, and generate accurate quotes with speed and precision. You can understand how the CPQ experience works end-to-end—from guided configuration and real-time pricing to document generation and seamless integration with the rules engine.

## Setting the number format of an editable field

Learn how to create a user-editable field that maintains a specified format.

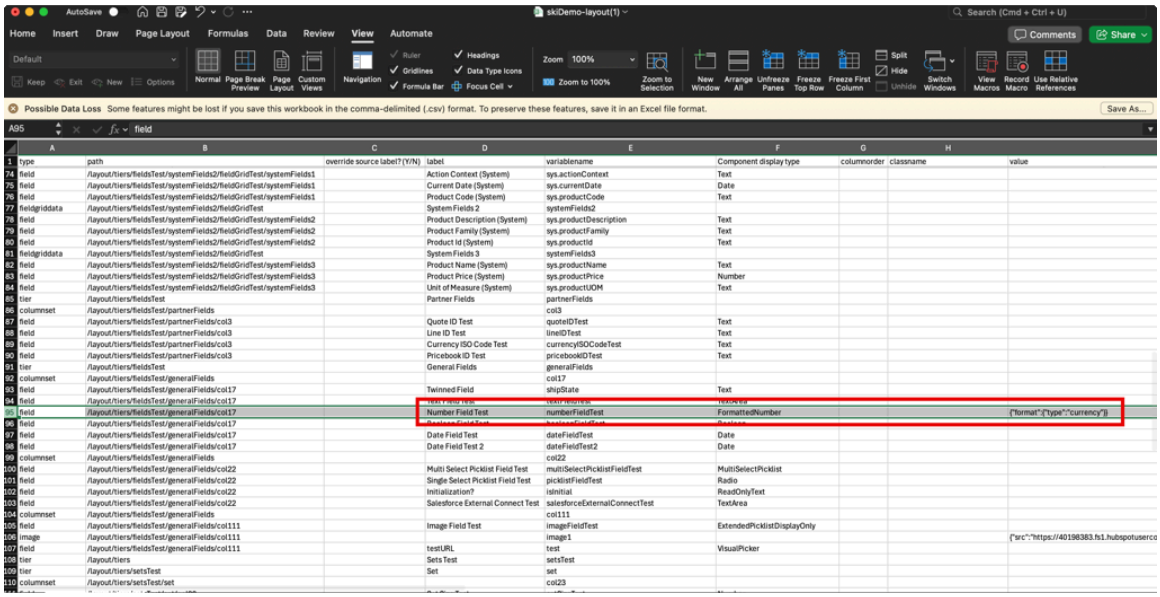
If an Admin wants to display a number field to an end user in a certain format, but also allow users to edit that field, a solution is to set the display type of the field to be a formatted number.



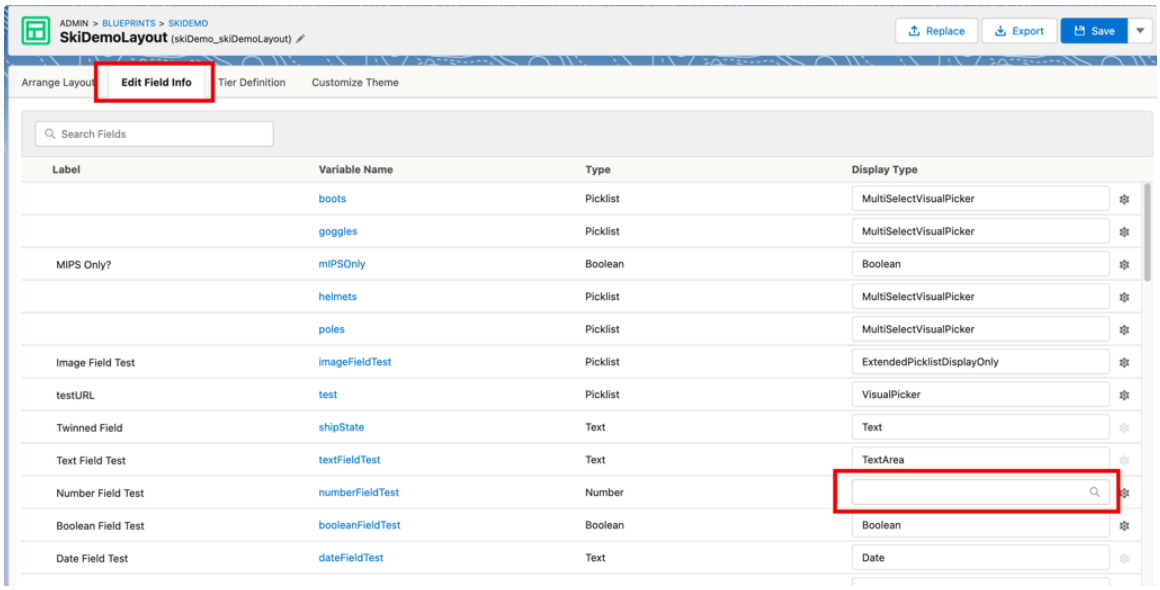

Currently, the only way to use number formatting on editable fields is to set this component display type from in the layout CSV itself. Once exported and opened with your preferred CSV editor (excel in this example) you can add the following to your field's row:

- `FormattedNumber` to column F `(Component display type)`
- `format: {...}` to column I `(value)`

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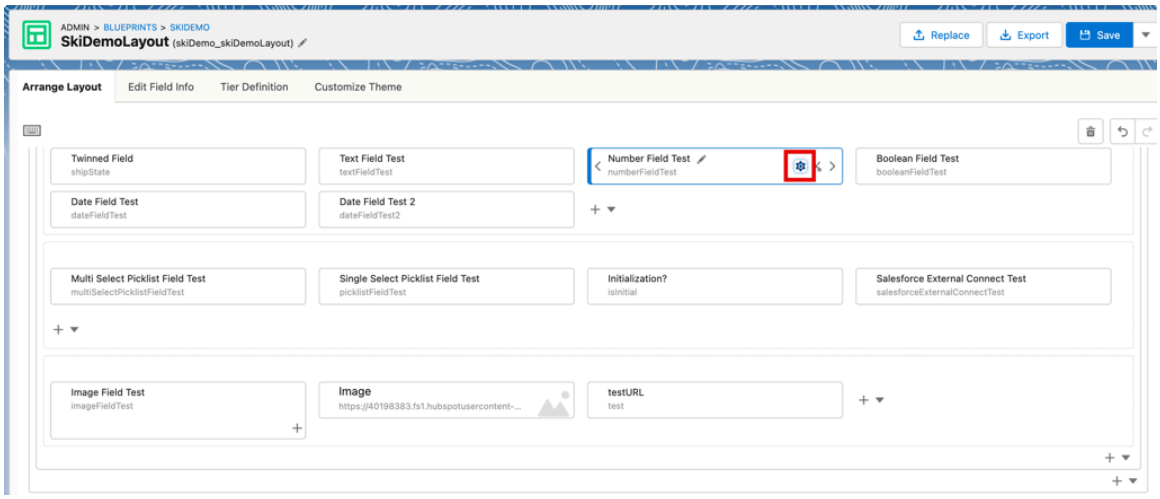


Once this is saved, you can drag this layout CSV into the layout editor window, and it will replace the current layout. You can check that this change was done from both the Edit Field Info tab of the layout editor, where the display type will be blank:




And from the Arrange Layout Tab, where the field properties of your number field will have your inputted format in the Raw Value section:

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After saving and deploying the Blueprint, you should get a similar result to the screenshot at the top of this page. Other formatting options are listed below:

```
{
 "format": {
  "type": "currency" | "percent" | "unit" | "decimal",
  "precision": 2, // Any positive integer
  "unit": Unit, // List of standard JS units, i18n supported
  "customUnit": string, // Any unit to append to the end of the
 value, untranslated
  "displayZeroPriceAs": string,
  "displayNullPriceAs": string
 }
}
```

Percent formatting automatically multiplies by 100. So a field value of 0.1 will display as 10% .

You can show only a percent sign with no math using `type: unit, unit: percent`.

To view a list of supported units, see ECMAScript® 2026 Internationalization API Specification.

You can use customUnit for units not in this list.

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### Launch a solution

Launch a configurable product to start a solution session. The product you launch becomes the solution root.

## Before you begin

The configurable product you want to launch is available in the quoting application.

Role required: none

## Procedure

1. In your quoting application, locate the configurable product that you want to configure.
2. Launch the product in the same way you launch any configurable product.

## Result

The configuration session opens with the product you launched as the solution root. As you interact with the configuration, child configurations are added automatically when their conditions are met. The solution navigation sidebar appears when the first child configuration is added.

## What to do next

After launching a solution:

- To trigger a configurable product action and add a child configuration, see Add configurable products to a solution .
- To move between configurations once child configurations are added, see Navigate within a solution.

### Related topics

Solution configurations

Solution navigation and layout

Create a configurable product action

### Add configurable products to a solution

Trigger a configurable product action in a session to add a child configuration to the solution.

## Before you begin

You are in an active configuration session for a solution-enabled product. For more information, see Launch a solution.

Role required: none

## Procedure

1. In the active configuration session, interact with the fields or selections that trigger a configurable product action rule.
2. Verify that the solution navigation sidebar updates to include the new child configuration.

## Result

A child configuration is created for the configurable product defined in the triggered action. The child configuration uses the blueprint specified in that action. Any field mappings defined for the action are applied when the child configuration is created.

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### Trouble?

If the child configuration does not appear in the solution navigation sidebar, verify that the configurable product has a deployed blueprint associated with it.

### What to do next

After adding a configurable product:

- To move to the new child configuration and complete its configuration, see Navigate within a solution.
- To remove a child configuration that is no longer needed, see Remove a configurable product from a solution.

### Related topics

Create a configurable product action

Define field mappings for a solution configuration

Solution configuration limits

## Navigate within a solution

Use the solution navigation sidebar to move between configurations in a solution session.

### Before you begin

You are in an active solution session with at least one child configuration. For more information, see Add configurable products to a solution.

Role required: none

### Procedure

1. In the solution navigation sidebar, review the list of configurable products in the current session.
2. Select the configurable product you want to navigate to.
   The selected configuration becomes the active view.

### Result

You can also navigate to a configuration by selecting its configurable product entry in the solution BOM.

### What to do next

After navigating to a configuration:

- To review all products added across the session, see View the solution bill of materials.
- To remove a child configuration that is no longer needed, return to the parent configuration and change the triggering condition. See Remove a configurable product from a solution.

### Related topics

Navigate within a solution

Bill of Materials in solution configuration

Create a configurable product action

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### Remove a configurable product from a solution

Remove a child configuration from a solution by changing the condition of its configurable product action to false.

#### Before you begin

You are in an active solution session with at least one child configuration.

Role required: none

#### Procedure

1. Navigate to the parent configuration that contains the configurable product action you want to deactivate.
   For steps on navigating between configurations, see Navigate within a solution.
2. Change the field values or selections so that the condition for the configurable product action evaluates to false.
3. Verify that the child configuration no longer appears in the solution navigation sidebar.

#### Result

The child configuration is removed from the session, along with all field values, products, and any nested child configurations within it. Removing a child configuration is permanent within the session. All changes made in that configuration — including nested children — are discarded.

#### What to do next

After removing a child configuration:

- To confirm that the products from that configuration are no longer in the BOM, see View the solution bill of materials.
- To add a different child configuration in its place, trigger the appropriate configurable product action. See Add configurable products to a solution.

#### Related topics

Navigate within a solution

View the solution bill of materials

### View the solution bill of materials

View the solution bill of materials to see all products added across every configuration in the session.

#### Before you begin

You are in an active solution session.

Role required: none

#### Procedure

1. In the solution navigation sidebar, select **View Full Solution**.
   The solution BOM displays all products added across every configuration, including child and grandchild configurations. Products from child configurations are nested under the configurable product that represents that configuration in the BOM.
2. Review the complete product list.

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3. To see products scoped to a specific configuration and its children only, navigate to that configuration in the sidebar and review the tier-level product list, if one has been added by the admin.
   For steps on navigating between configurations, see Navigate within a solution.

### What to do next

After reviewing the solution BOM:

- To remove a child configuration whose products are no longer needed, see Remove a configurable product from a solution.
- To continue configuring individual components, return to the navigation sidebar. See Navigate within a solution.

#### Related topics

Navigate within a solution

Bill of Materials in solution configuration

### Document generation

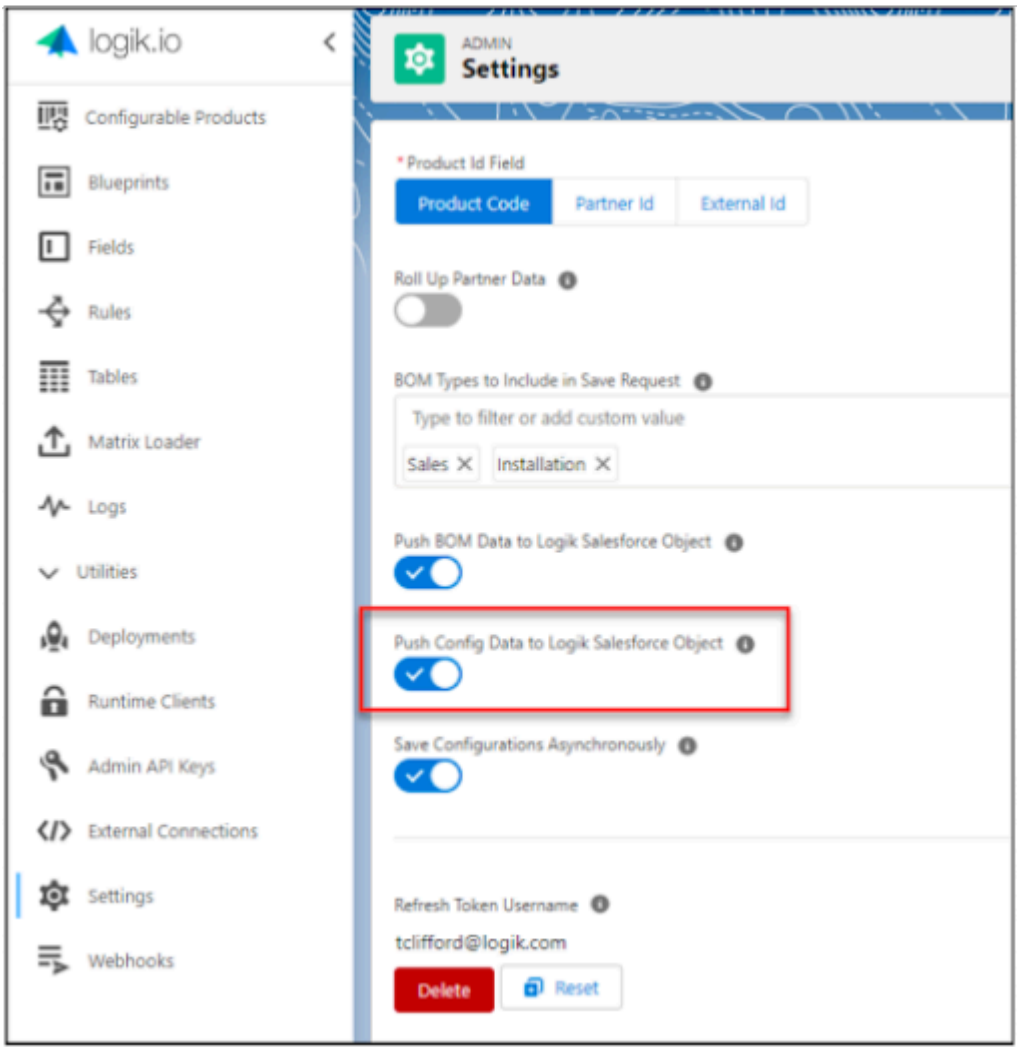
You can use third-party document generation software to output configuration data by pushing information from CPQ to Salesforce.

Document generation allows you to create professionally formatted documents using a library of customizable templates. Document generation software directly interfaces with your CRM and associated tools and packages (such as CPQ and Billing tools) to output relevant data. For example, you can send a customer a quote document with billing and shipping details, product and pricing information, and so on. These documents can then be submitted to their intended recipient, sometimes with the option for electronic signatures.

## Prerequisites

CPQ does not directly interface with any document generation tools; however, CPQ configuration information can be pushed to Salesforce and used in documents from there. This can be accomplished by enabling **Push Config Data to ServiceNow CPQ Salesforce Object** in the Admin Settings if you have not done so already; this will create the Configuration Field Data and Configuration Line Items objects in Salesforce and generate records containing CPQ configuration data.

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## Using the Salesforce CPQ document generator

In order to display CPQ configuration data in out-of-the-box Salesforce CPQ quote documents, you must first map the data from your Configuration Line Items' extended info to custom fields on their associated quote lines. This can be accomplished by using the configuration line item to quote line" flow that is included with CPQ. For more information, see Use case: Configuration line item to quote line flow

Once these fields are populating on your quote lines, they can be used as line columns to be displayed in your CPQ line items template content. These fields can also be utilized in other CPQ quote template fields, such as the group and subgroup fields, to further customize your quote documents.

## Using a third-party document generator

Third-party document generators include Conga Composer, DocuSign Gen, PDF Butler, and others. Most third-party document generation tools let you use merge fields to pull data directly from any Salesforce object, including the Configuration Field Data and Configuration Line Items objects. This means you can use your document generator's merge fields to display CPQ configuration data in your quote documents directly from those objects instead of mapping all of your data to fields on the Quote Line object. This provides additional layers of flexibility. For example, CPQ configuration data can be displayed in separate tables or used for grouping or organizing your data.

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### Use cases

View a list of example use cases for CPQ.

### Use case: Embed CPQ UI in an HTML page

Learn how to embed the CPQ user interface in an HTML iFrame.

This article provides an outline for how an admin can display the CPQ UI in an iframe in any HTML page. Briefly, the recipe consists of:

- the data that the host application will pass to the host HTML page, as JSON
- the host HTML page
- the Content Security Policy [CSP] settings, adjusted on the CPQ server

## Configuration initialization JSON data format

To initialize the configuration, pass basic field data to the page. Here are the parameters that you can pass, represented in pretty JSON format:

```
{
  "runtimeToken": "...",
 "quote": {
  "SBQQ__PricebookId__c": "...",
  "LGK__QueriedEditAccess__c": "Active",
  "LGK__FlightPath__c": "None"
 },
 "product": {
  "configuredProductId": "...",
  "configurationAttributes": {
   "Logik__Id__c": null
  },
  "optionConfigurations": {
   "Dynamic": []
  }
 },
 "layoutVarName": "someLayoutVarName"
}
```

Replace the ellipses in the above JSON with the appropriate values from the CPQ environment, pricebook, and product ID.

Sometimes, you may want to display a default layout that is not ordered first in the list of Blueprint layouts. To designate a starting layout with which the CPQ configuration page loads, pass `"layoutVarName":"<variable name of the layout to show by default>"` in the topmost level of the JSON above.

## The host HTML page

You will need to host the parent application. For security reasons, this application/host HTML page cannot be localhost. The following sample HTML is a proxy for the host page in which you intend to embed the CPQ UI. The page imports the easyXDM JavaScript library, which facilitates communication with the CPQ UI. Then, easyXDM parses the JSON input, transposes it, and passes the data to the CPQ page as a remote procedure call.

To process data passed from the CPQ UI and leverage it on this HTML page, review the values written to the browser console in the blue-colored console.log line of JavaScript below. Advanced admins can leverage this data by adding more JavaScript in this area.

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Replace the `<BASE_LOGIK_URL>` placeholder with the base URL of the CPQ environment.

```
<!DOCTYPE html>
<html lang="en">
 <head>
  <meta charset="utf-8" />
  <meta name="viewport" content="width=device-width,
 initial-scale=1" />
  <meta name="theme-color" content="#000000" />
  <meta name="description" content="Logik Configuration
 Wrapper" />
  <title>Logik Wrapper</title>
  <style>
   iframe {
    width:100%;
    height:92vh;
   }
  </style>
  <script type="text/javascript"
 src="assets/js/easyXDM/2.5.0/easyXDM.min.js"
  ssorigin="anonymous"></script>
  <!-- easyXDM and Lightning for VF for passing config data
 to/from Salesforce CPQ -->
  <script type="text/javascript">
  var rpc = new easyXDM.Rpc({
   remote: "<BASE_LOGIK_URL>/ui/configure",
   container: "root"
  }, {
  // method defined in CPQ
   remote: {
    postMessage: {}
   },
  local: {
   postMessage: function (message) {
    console.log("External Config JSON Received from iframe");
    configObj = JSON.parse(message);
    console.log(configObj);
    }
   }
  });
  var cfgData =
 {"runtimeToken":"<PLACEHOLDER>","quote":{"SBQQ__PricebookId__c"
:"<PLACEHOLDER"},"LGK_QueriedEditAccess__c":"<PLACEHOLDER>","LGK
__FlightPath__c":"<PLACEHOLDER>"},"product":{"configuredProductI
d":"<PLACEHOLDER>","configurationAttributes":{"LGK__LOGIK_Id__c"
:""},"optionConfigurations":{"Dynamic":[]}},"layoutVarName":"<PL
ACEHOLDER>"};
  console.log(JSON.stringify(cfgData));
  rpc.postMessage(JSON.stringify(cfgData));
  </script>
 </head>
 <body>
  <div id="root"></div>
 </body>
</html>
```

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## Content security policy settings

To embed the CPQ application in an iframe, you must configure it to allow the host application's domain. Log a case with CPQ support, describe your intent to embed CPQ UI in an HTML page, and request that your CPQ server CSP settings be configured to accommodate the parent application's domain URL.

**Note:** To create a support case, use the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ (Logik.ai) Customers.

## The EasyXDM library

To learn more about the easyXDM library, see easy XDM.net.

### Use case: Embed CPQ UI in a Salesforce VisualForce page

Learn how to embed the CPQ user interface in a Salesforce VisualForce page.

This article outlines how to display the CPQ user interface on a Salesforce VisualForce page, such as Salesforce B2B Commerce.

## Prerequisite

This example requires the easyXDM library to be loaded into Salesforce [SFDC]. Navigation: SFDC → Setup → Static Resources → New. Upload the https://drive.google.com/file/d/1T0TqffMjlZcEjFke__Re23NdZ_1gWkaJ/view file. For the purposes of thisexample, set the resource name to 'XDMFile1'.

You must also set up your runtime client in the CPQ Admin to have the origins for both your Salesforce domain as well as your envrionment's custom CPQ URL

## Configuration initialization data format

To initialize the configuration, basic field data needs to be passed to the page. Here are the parameters that can be passed, represented in pretty JSON format:

```
{
 "runtimeToken": "...",
 "quote": {
  "SBQQ__PricebookId__c": "...",
  "LGK__QueriedEditAccess__c": "Active",
  "LGK__FlightPath__c": "None"
 },
 "product": {
  "configuredProductId": "...",
  "configurationAttributes": {
   "LGK__Logik_Id__c": null
  },
  "optionConfigurations": {
   "Dynamic": []
  }
 },
 "layoutVarName": "someLayoutVarName"
}
```

Replace the ellipses in the above JSON with the appropriate values from your CPQ environment, pricebook, and productID.

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**Note:** The script is case-sensitive. Make sure that the capitalization exactly matches the script. For example, if your script contains `"LGK__Logik_Id__c": Null` (with a capital N) instead of `"LGK__Logik_Id__c": null`, it could result in a 403 `Forbidden—you don't have permission to access this resource` error.

### Display the default layout

Sometimes, you may want to display a specific default layout that is not ordered first in the list of Blueprint layouts. To designate a specific starting layout with the CPQ configuration page loads, pass "layoutVarName":"<variable name of the layout to show by default>" in the topmost level of the JSON above.

### The host VisualForce page

The following sample VisualForce code is a proxy for the host page in which you intend to embed the CPQ UI. Key components:

- The page imports the easyXDM Javascript library, which facilitates communication with the CPQ UI.
- easyXDM parses the JSON input, transposes it, and passes the data to the CPQ page as a remote procedure call.

Sample VisualForce page:

```
<apex:page>
 <head>
  <apex:includeScript value="{!$Resource.XDMFile1}"/>
  <meta charset="utf-8" />
  <meta name="viewport" content="width=device-width,
 initial-scale=1" />
  <meta name="theme-color" content="#000000" />
  <meta
   name="description"
   content="Logik Configuration Wrapper"
  />
  <title>Logik Wrapper</title>
  <style>
   iframe {
    width:100%;
    height:92vh;
   }
  </style>
  <script type="text/javascript" src="{!$Resource.XDMFile1}"
 crossorigin="anonymous">
  </script>
  <!-- easyXDM and Lightning for VF for passing config data
 to/from Salesforce CPQ -->
  <script type="text/javascript">
   var rpc = new easyXDM.Rpc({
    remote: "<BASE_LOGIK_URL>/ui/configure",
    container: "root"
   }, {
   // method defined in Logik
   remote: {
    postMessage: {}
   },
```

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```
   local: {
    postMessage: function (message) {
     console.log("External Config JSON Received from iframe");
     configObj = JSON.parse(message);
     console.log(configObj);

     }
    }
  });

  var cfgData =
 {"runtimeToken":"<PLACEHOLDER>","quote":{"SBQQ__PricebookId__c
":"
<PLACEHOLDER>","LGK__QueriedEditAccess__c":"<PLACEHOLDER>","LGK_
_FlightPath__c":"
<PLACEHOLDER>"},
"product":{"configuredProductId":"<PLACEHOLDER>","configurationA
ttributes":
{"LGK__LOGIK_Id__c":""},
"optionConfigurations":{"Dynamic":[]}},"layoutVarName":"<PLACEHO
LDER>"};

   console.log(JSON.stringify(cfgData));
   rpc.postMessage(JSON.stringify(cfgData));
  </script>
 </head>
 <body>
  <div id="root"></div>
 </body>
</apex:page>
```

Replace the highlighted <BASE_CPQ_URL> placeholder in the above VisualForce with the base URL of your CPQ environment.

**Note:** If you named the easyXDM library something other than XDMFile1, update the two occurrences of XDMFile1 above with the name you used for the easyXDM static resource.

Depending on what you want to do, you must also associate an action for the "Quote" button. Insert the action after the console.log(configObj) line.

Examples:

`//window.close();` // if you want to close the whole browser page

`//window.location = 'whereeveryouwanttoredirectto';` // if you want to redirect to another page

## The EasyXDM library

To learn more about the easyXDM library used in this topic, see easy XDM.net.

### Use case: Embed CPQ UI in a Lightning Web Component

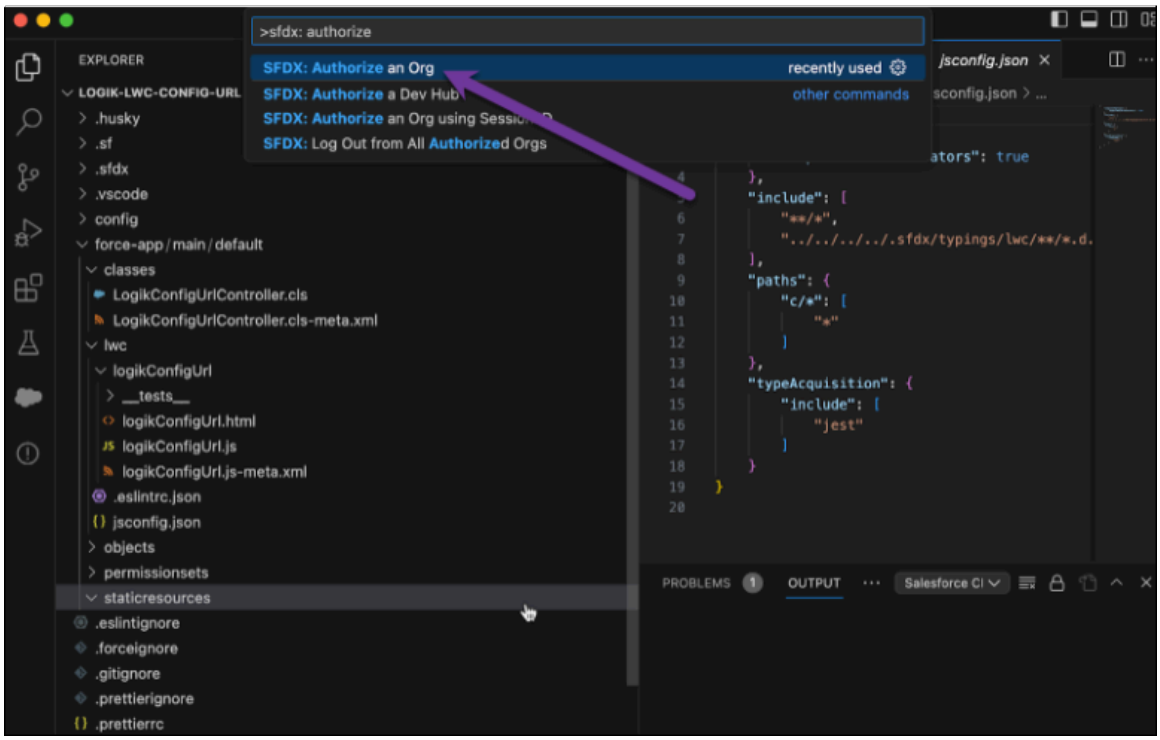
Learn how to embed CPQ in a LWC in a Salesforce org.

You can embed CPQ in a Lightning Web Component (LWC) in a Salesforce org. This eliminates the need to directly navigate to CPQ through a particular product or the CPQ custom URL.

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## Steps for Embedding

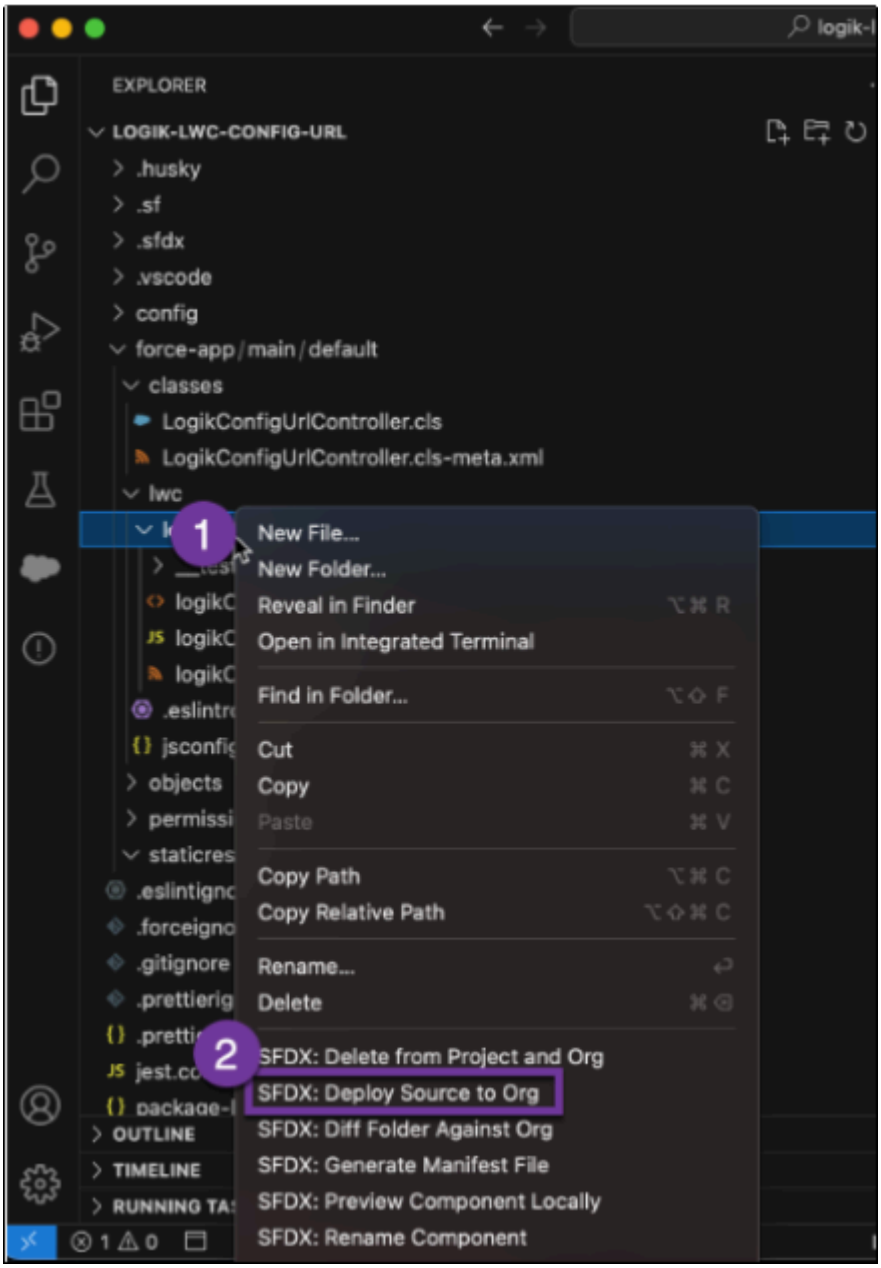
1. Download the base LWC package here, and unzip.
2. Within an integrated development environment (IDE—in this example, VSCode), or on the command line:
   a. Connect to your Salesforce org using the Salesforce CLI or Salesforce Extensions for the IDE.




   b. Open the folder and publish to org using Salesforce CLI or the extensions in your IDE. In VSCode, this means right- clicking the folder in the VSCode explorer and clicking Deploy Source to Org.

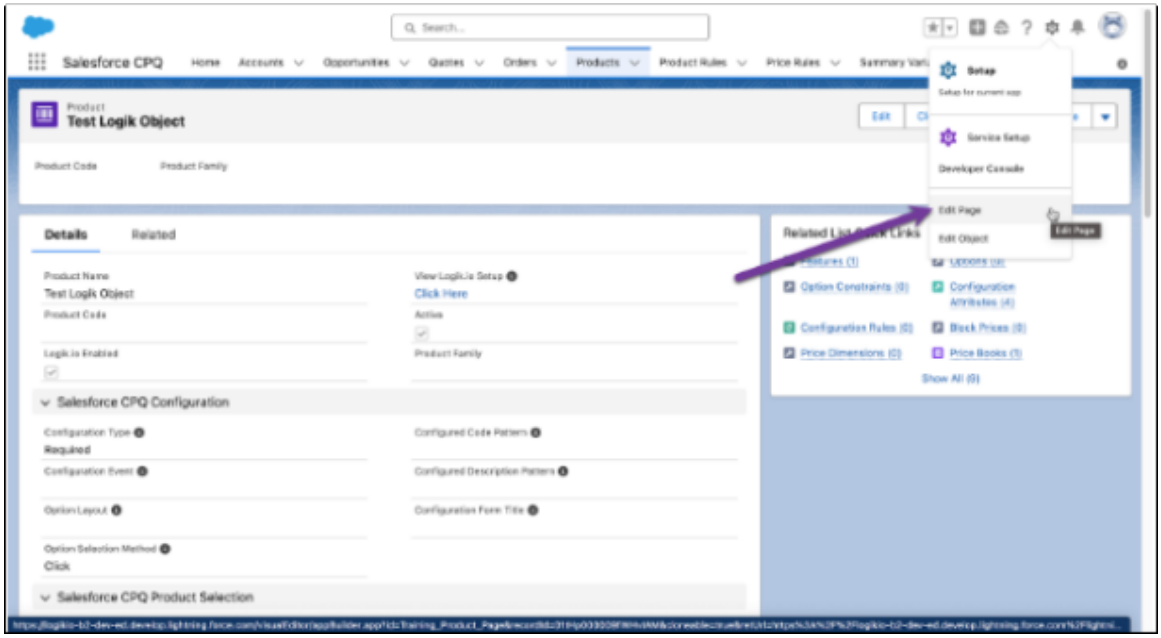
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**Note:** To complete this step, you must be connected to the org.

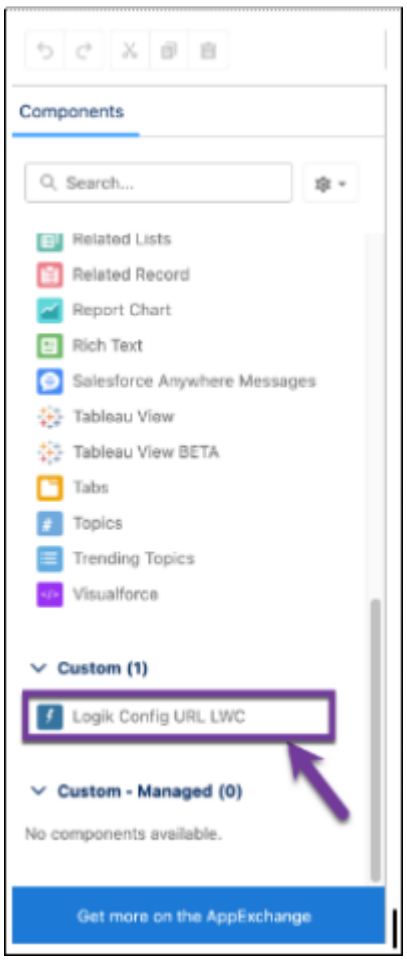



3. Go into the Salesforce page where you want to embed CPQ.
4. On the Setup menu, click Edit Page.

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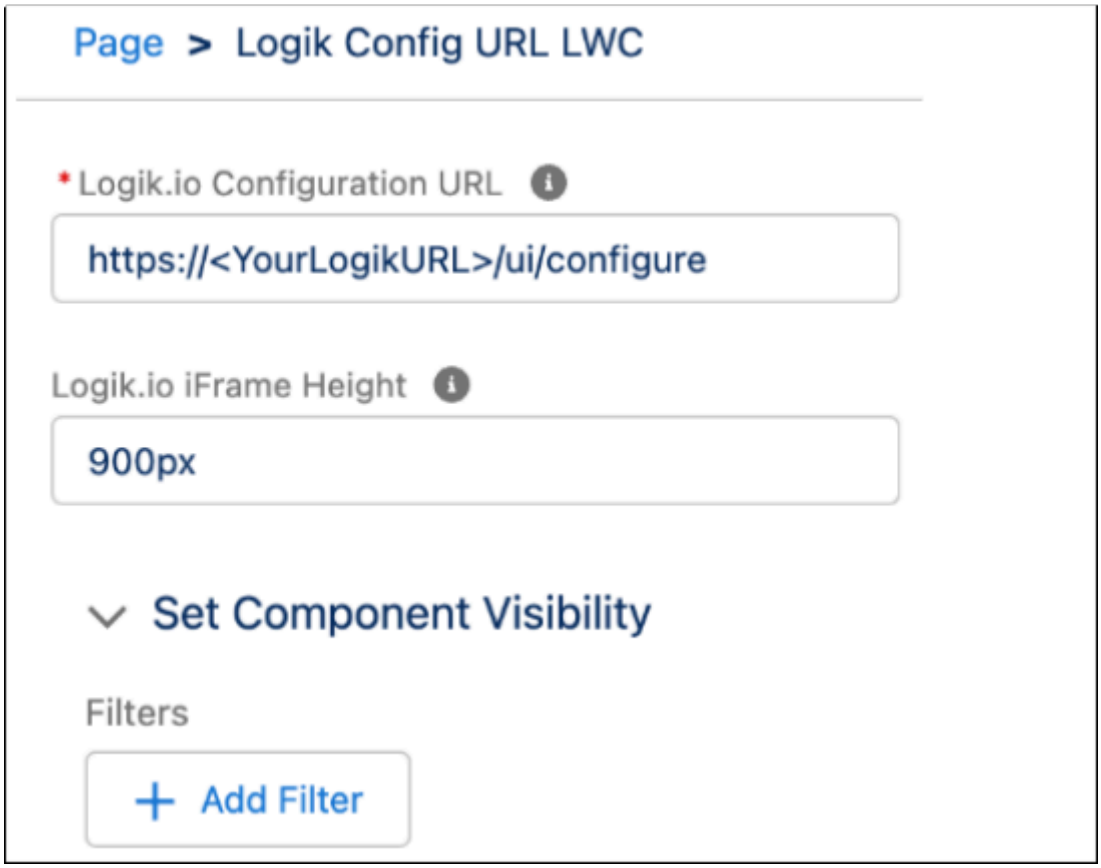



5. Drag the CPQ LWC from the menu at the bottom left into the page layout where you want to embed CPQ.




6. Add the configuration URL.

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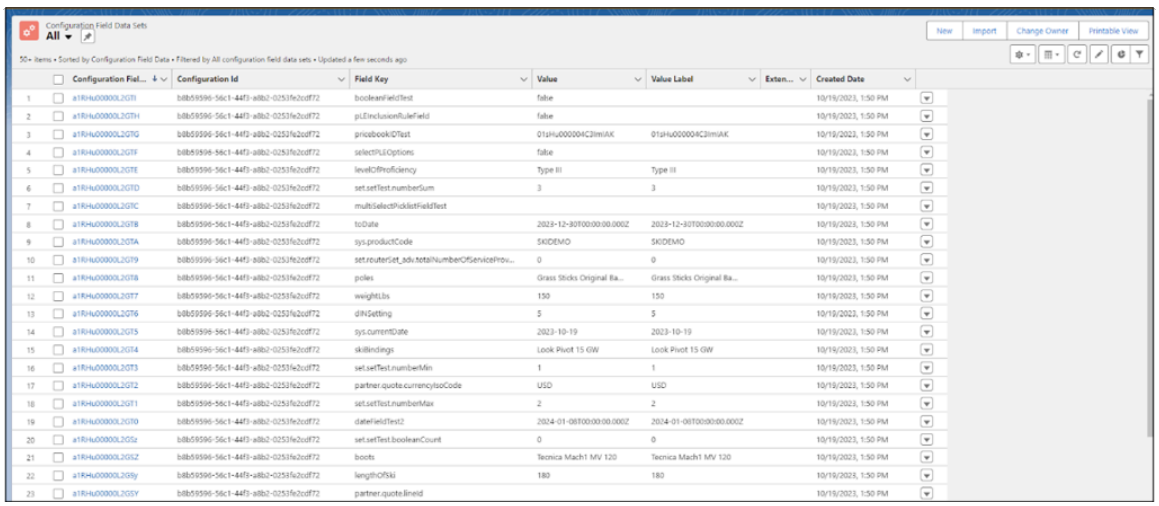



If you are passing the configuration URL as a parameter, include a Runtime Token in the URL (for example, `?rt=xxxxxxxxxxxx`)

### Use case: Populate display names and quote lines in Configuration Field Data Set objects

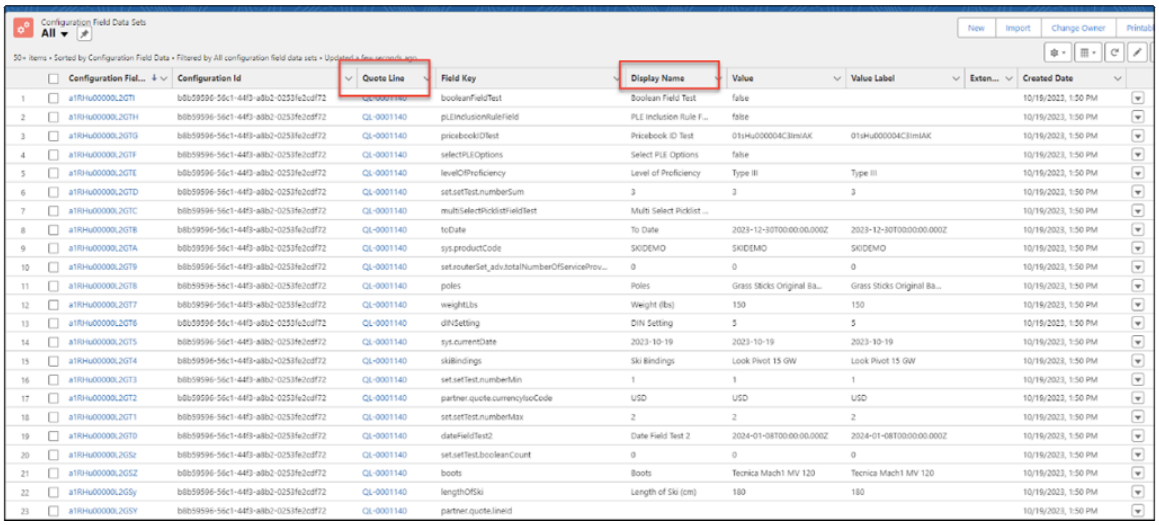
Learn how to set up custom objects and Apex triggers in SFDC to populate the display names of CPQ fields.

As part of the CPQ Managed Package, the functionality of the Configuration Field Data Set object in SFDC is to return the Configuration ID of the configuration, every field variable name used by the blueprint, the value of that field, and the label of that value after every save from the CPQ configurator:



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However, there might be some extra necessities about the configuration in CPQ outside of these fields created by the Managed Package that an organization needs for downstream processes. For instance, we might want to populate the display names of the CPQ fields, or easily jump to the Quote Line of the associated Configuration Field Data objects for an easy connection to the BOM.

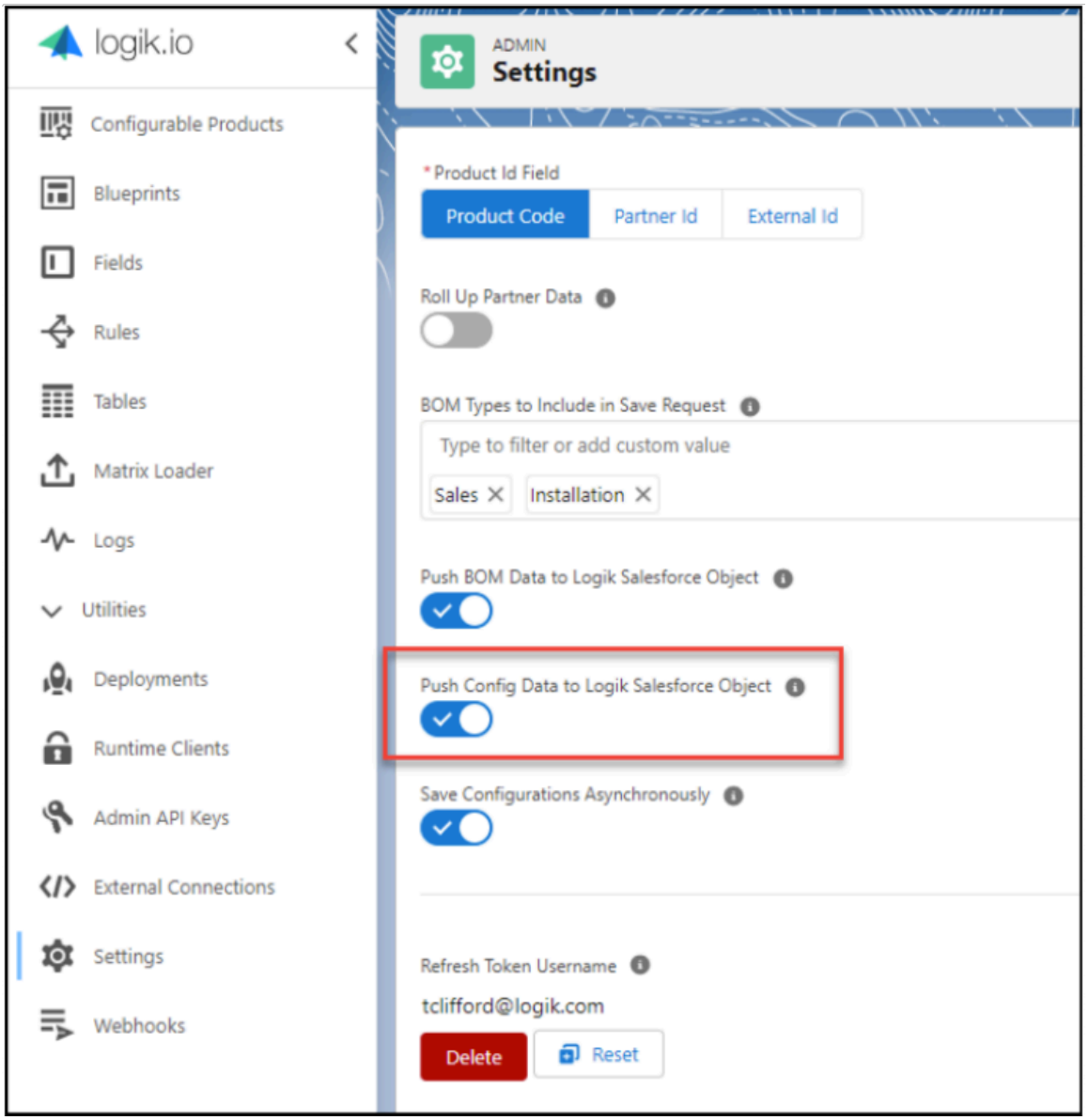



With a little setup of custom objects and Apex Triggers in SFDC, these fields can automatically be populated after every configuration is saved.

## Prerequisites

Enable “Push Config Data to CPQ Salesforce Object” in the Admin Settings if you have not done so already. This will start creating the Configuration Field Data Sets objects in SFDC.

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**Note:** The creation of these Configuration Field Data Sets will occur every time a configuration is saved from CPQ, even if the quote itself is not saved. This can lead to a lot of data being created in your Salesforce org. If you do not have a use case for pulling every field used by the Blueprint into SFDC, it is best to keep this setting disabled and rely on the Extended Information property in the BOM Data.

## Populate the display name

1. In SFDC Setup, navigate to the Object Manager.
2. Create a new custom object called “LGK Label” with the following attributes:
   - Record Name: CPQ Label
   - Data Type: Auto Number
   - Display Format: LGKLB-{0000}
   - Allow Search: Checked
   - Launch New Custom Tab Wizard after saving this custom object: Checked

   Leave the rest of the values as default and click **Save**.
3. On the New Custom Object Tab page, click the Tab Style field and select any style.

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4. Click **Next**, click **Next** again, and then click **Save**.
5. Click **Fields & Relationships** on LGK Label, and then click **New**. Create a new field with the following attributes:
   - Data Type: TextArea
   - Field Label: label
   - Field Name: label

   Click **Next**, click **Next** again, and then click **Save**.
6. Click New. Create a new field with the following attributes:
   - Data Type: TextArea
   - Field Label: variablename
   - Field Name: variablename

   Click **Next**, click **Next** again, and then click **Save**.

This new LGK Label object will be where we will host the Field Variable Name and Field Label Name in SFDC. The labels will not automatically be imported. They also must be manually updated/imported every so often with changes and additions to the Fields in CPQ Admin. We will go over methods of bulk import later in this guide.

1. In Object Manager, search "Configuration Field Data".
2. Click **Fields & Relationships**, and then click **New**. Create a new field with the following attributes:
   - Data Type: TextArea
   - Field Label: Display name
   - Field Name: Display_Name

   Click **Next**, click **Next** again, and then click **Save**.
3. Click **Triggers**, and then click **New**.
4. Paste the following code into the Apex code block:

```
trigger UpdateConfigurationLabels on
 LGK__ConfigurationFieldData__c (before insert) {
 // Step 1: Collect FieldKeys from records to be inserted
 Set<String> fieldKeys = new Set<String>();
 for(LGK__ConfigurationFieldData__c confData : Trigger.new) {
  fieldKeys.add(confData.LGK__FieldKey__c);
 }

 // Step 2: Query LGK_Label__c based on collected FieldKeys
 Map<String, LGK_Label__c> labelMap = new Map<String,
 LGK_Label__c>();
 for(LGK_Label__c label : [SELECT label__c, variablename__c
 FROM LGK_Label__c WHERE variablename__c IN :fieldKeys]) {
  labelMap.put(label.variablename__c, label);
 }

 // Step 3: Loop through records to be inserted and update
 Display_Name__c
 for(LGK__ConfigurationFieldData__c confData : Trigger.new) {
  LGK_Label__c matchedLabel =
 labelMap.get(confData.LGK__FieldKey__c);
  if(matchedLabel != null) {
```

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```
  confData.Display_Name__c = matchedLabel.label__c;
 } else if(confData.LGK__ValueLabel__c != null) {
  confData.Display_Name__c = confData.LGK__ValueLabel__c;
 }
}
```

The framework is complete. Add the new Display Name field to the Configuration Field Data Set layout. All that's left is to import the field label names into the LGK Labels objects. Depending on how you use CPQ Fields, there are three methods of accomplishing this.

**Field label import methods**

*Ways to import field label names into the LGK Labels objects*

| | |
|---|---|
| Manual CPQ Label Creation<br><br>**1.** Create a new CPQ Label Object from the LGK Labels tab<br>**2.** Enter the "variablename" to exactly match the CPQ variable name<br>**3.** Enter the "label" to be any label you wish | Pros:<br><br>• Good if you have a low number of fields for which you need the display name<br>• Allows you to customize the field label names to be different than how they appear in the CPQ Admin and the Layout<br><br>Con: Can be a tedious process for a large number of fields |
| Bulk Import from exporting all CPQ fields<br><br>**1.** From the CPQ Admin Field's Tab, click **Export**<br>**2.** Open the CSV file and delete all data besides columns "B" and "C"<br>**3.** Rename the headers to "label" and "variablename," and save<br>**4.** In SFDC, go to the LGK Label tab and click **Import**<br>**5.** Select "LGK Labels"<br>**6.** Select "Add new records"<br>**7.** Select your saved CSV file<br>**8.** Upload | Pros:<br><br>• Good for a large number of fields<br>• Global fields used across Blueprints will be labeled consistently in SFDC<br><br>Cons:<br><br>• Set field label names, partner fields, and system fields are not imported by this method, so the display name will default to the value of the field<br>• These fields can be manually added as LGK Label objects using the manual label creation method |
| Bulk Import from exporting the Blueprint Layout<br><br>**1.** From the CPQ Blueprint you'd like to use, go to your Layout, and click **Export**<br>**2.** Open the CSV<br>**3.** Filter column "A" by "field" | Pros:<br><br>• Good for a large number of fields<br>• Populates the display name in the layout for all fields, including set fields,system fields, and partner fields<br><br>Cons: |

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**Field label import methods**

*Ways to import field label names into the LGK Labels objects*

**(continued)**

| | |
|---|---|
| **4.** Delete all data except columns “A”, “D”, and “E”<br>**5.** Copy column “D” and “E” to a new CSV, renaming any field’s labels you’d like<br>**6.** In SFDC, go to the LGK Label tab and click **Import**<br>**7.** Select “LGK Labels”<br>**8.** Select “Add new records”<br>**9.** Select your saved CSV file<br>**10.** Upload | • Only fields that are used in the layout will populate the display name. Fields that are only associated with the Blueprint will still create Configuration Field Data Set objects whose labels will be null<br>• Fields that are used in multiple Blueprints will only populate the display name field with the first field label imported this way |

If there are any fields that you’d like to show a different display name than what you have imported, you can easily edit the Label object to whatever label you wish and it will begin populating the Configuration Field Data Sets that way after the update.

## Populate the quote line

1. In SFDC Setup, Navigate to the Object Manager.
2. Search “Configuration Field Data”.
3. Click **Fields & Relationships**, and then click **New**. Create a new field with the following attributes:
   - Data Type: Lookup Relationship
   - Related to: Quote Line
   - Field Label: Quote Line
   - Field Name: Quote_Line

   Click **Next**, click **Next** again, and then click **Save**.
4. In Object Manager, search "Quote Line".
5. Click **Triggers**, and then click **New**.
6. Paste the following code into the Apex code block:

```
trigger PopulateConfigFieldData on SBQQ__QuoteLine__c (after
 insert, after update) {
 // Step 1: Collect the Configuration Ids from the new Quote
 Lines
 Set<String> configIds = new Set<String>();
 Map<String, Id> quoteLineMap = new Map<String, Id>(); //
 Mapping Configuration UUID to Quote Line Id

 for (SBQQ__QuoteLine__c ql : Trigger.new) {
  if (String.isNotBlank(ql.LGK__ConfigurationId__c)) {
   configIds.add(ql.LGK__ConfigurationId__c);
   quoteLineMap.put(ql.LGK__ConfigurationId__c, ql.Id); //
 Storing Quote Line Id
```

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```
 }
}

if (configIds.isEmpty()) {
 return;
}

// Step 2: Query the Configuration Field Data records
List<LGK__ConfigurationFieldData__c> confFieldsToUpdate
= [SELECT Id,LGK__ConfigurationId__c FROM
LGK__ConfigurationFieldData__c WHERE LGK__ConfigurationId__c
IN:configIds];

// Step 3: Update the Field Data records
for (LGK__ConfigurationFieldData__c cf : confFieldsToUpdate) {
 Id quoteLineId =
quoteLineMap.get(cf.LGK__ConfigurationId__c);
 if (quoteLineId != null) {
  cf.Quote_Line__c = quoteLineId; // Assigning the Quote Line
Id
 }
}

update confFieldsToUpdate;
```

Now, every time a Quote is saved in SFDC, the Quote Line of the Parent Configurable Product will populate into the Configuration Field Data Set. Remember to add this custom field to the Configuration Field Data Sets layout to see it in the tab.

**Note:** Configuration Field Data Sets are created immediately after you click **Save** in the CPQ Configurator. When you enter the Quote Line Editor, the Quote Line field will not be populated because it hasn#t been created or updated yet. Only once you save from the Editor will the quote line appear in the field.

### Use case: Pairing set repeaters and visualization components

Learn how to configure an experience where the user must answer the same questions several times so that the user is presented with a rendering of the currently configured solution.

This topic demonstrates how a ThreeKit visualization component can be paired with a set repeater.

On occasion, you may design a configuration experience in which you want the user to answer the same battery of questions several times. (These input fields would be part of a set.) If you decide to show the user one set record at a time by using a set repeater, CPQ also enables you to present the user with a rendering of the solution the user is currently configuring.

Sample layout CSV

For more information, see this video:

Visualization & Set Repeater

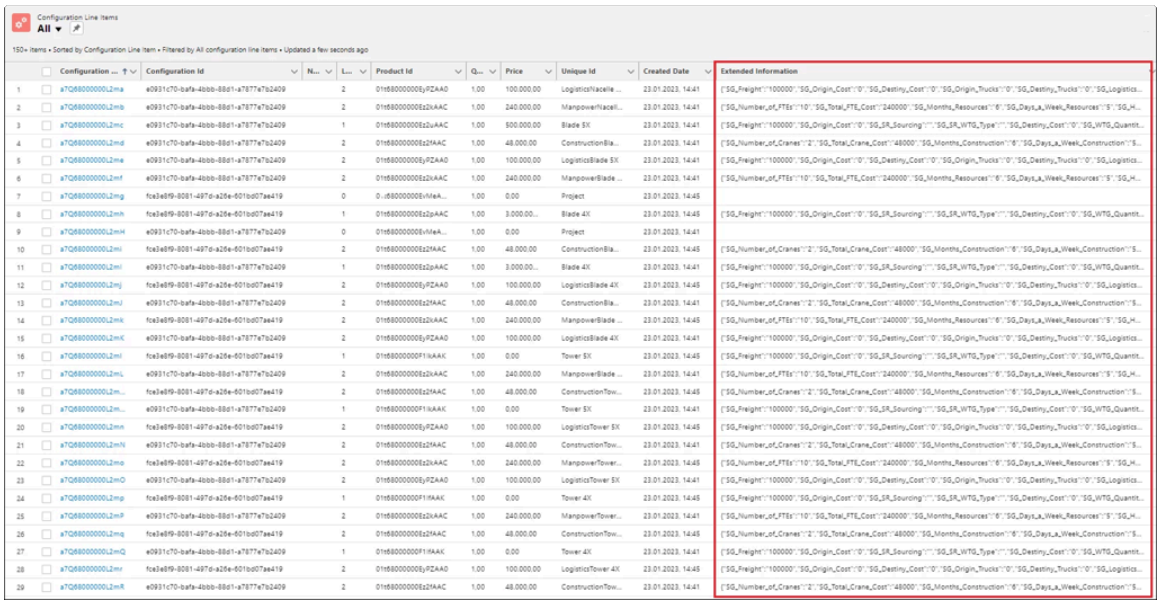
### Use case: Configuration line item to quote line flow

By making a few adjustments to a flow template includes with the CPQ Extension package version 1.8 or later, you can parse the extended information from a configuration and map it to custom fields without using a QCP script.

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**Note:** This article applies to the CPQ Extension for Salesforce CPQ package version 1.8 or later. If your CPQ CPQ package is version 1.7 or earlier, see Integrate configuration data with Quote Calculator.

By default, if you add any extended info to a line item (using ProductList.extended), it will be added as a JSON to the corresponding configuration line item object created as the following:



Before this flow was created, the only way to parse the individual keys and map them to custom fields on the configuration line items or their corresponding Quote Lines was to write a QCP script to do so. This guide will show you how to achieve the same result by making a few adjustments to a flow template included with our CPQ Extension package starting versions 1.8 or later.

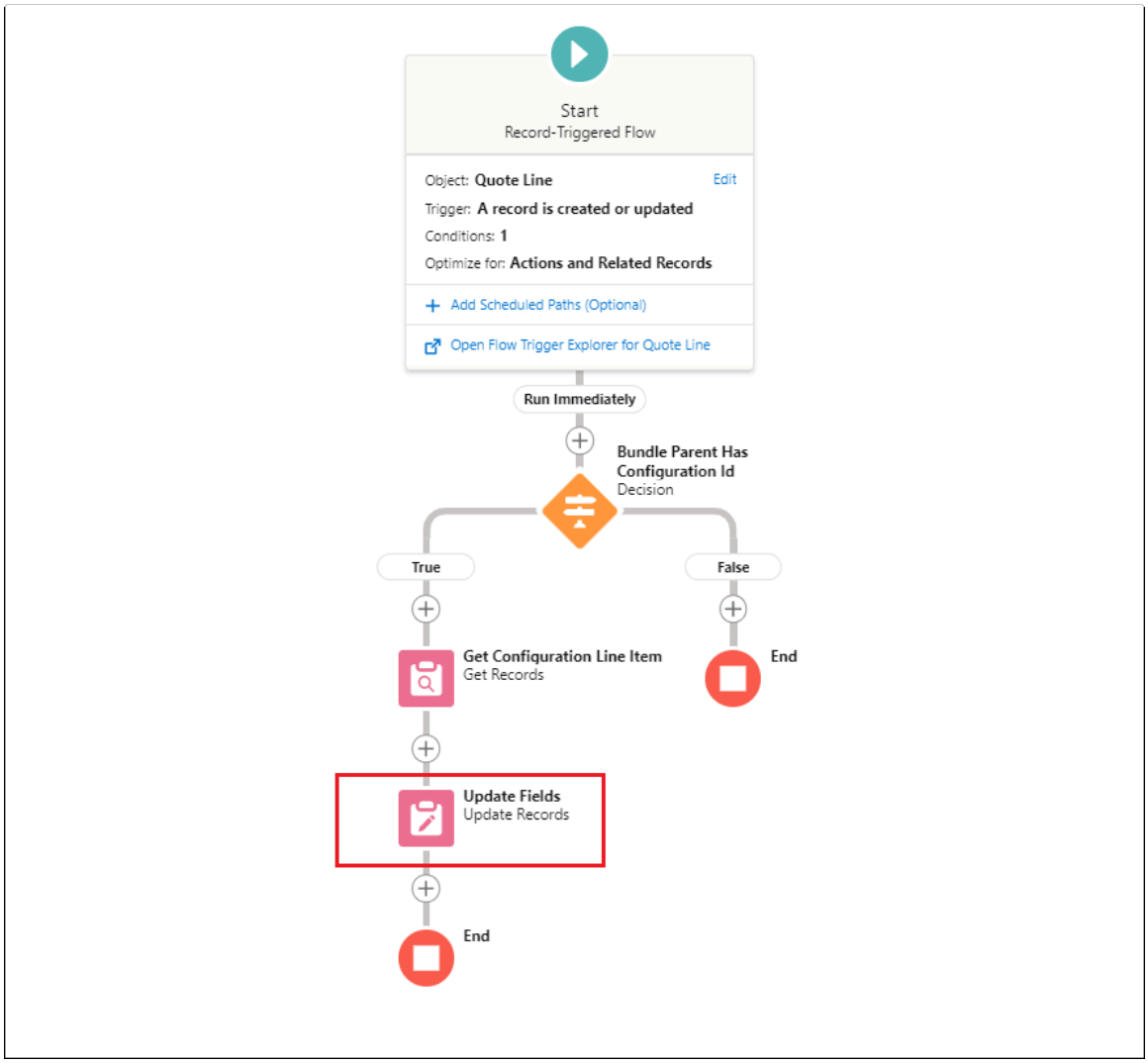
Let's take the case of the first custom field in the screenshot above. A product is added using an advanced product rule and the freight information is entered as extended info, for this example we will be using SG_Freight so adjust as necessary for your extended info name:

```
ProductList.extended = {};
ProductList.extended.SG_Freight = cfg.sRFreight;
```

You must create a SG_Freight_c field on the configuration line item and Quote Line objects (if you just enter "SG_Freight," SFDC will automatically add the _c). It is recommended to do so with the Schema Builder since it's much faster. If you do choose to add them through the Object Manager, make sure to check the Field Accessibility settings for the created fields so that the flows are able to modify them. Be sure to set the field-level security on the custom field to be visible for any profile that will be using them.

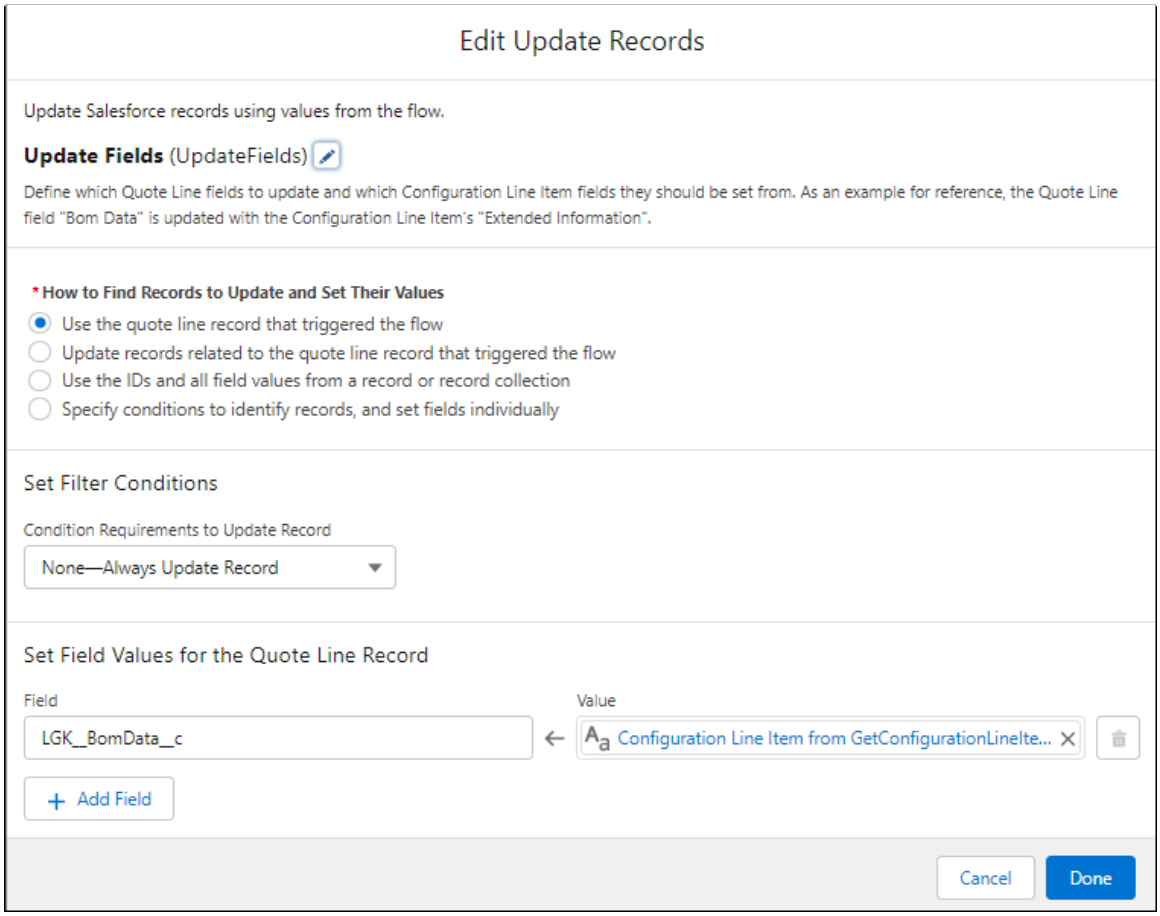
Next, in SFDC, go to Setup > Process Automation > Flows. Look for the "Configuration Line Item to Quote Line" flow and click it. It should look like this:

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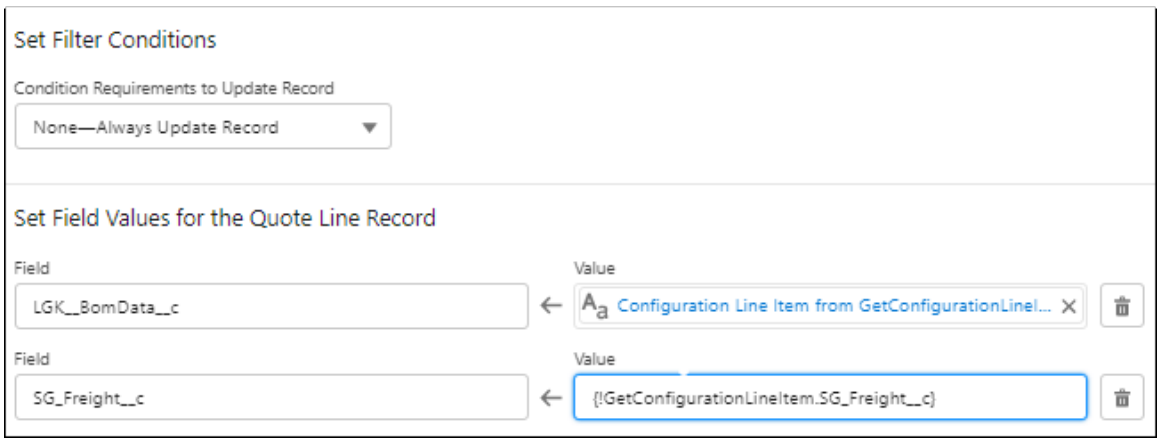



Select the Update Fields flow element and click `Edit Element`. This will open a popup window:

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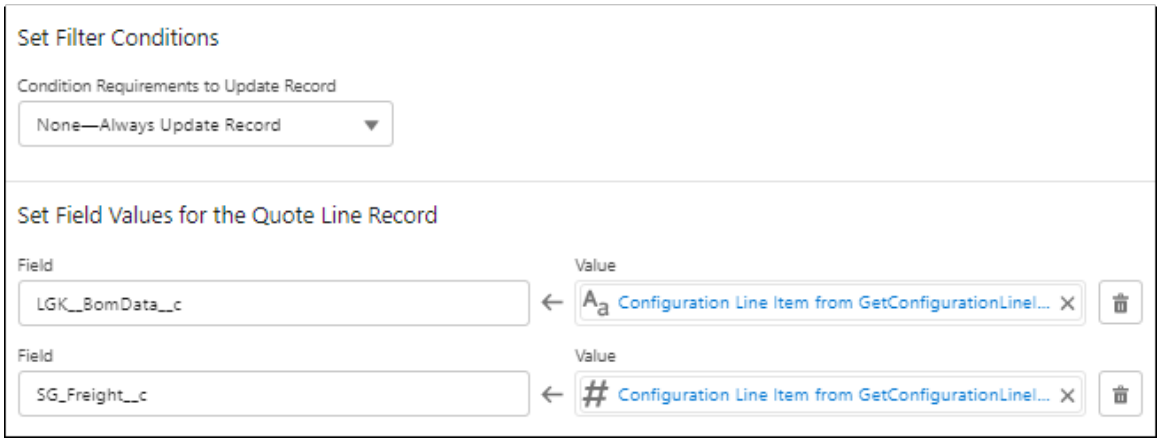



Click **+ Add Field**, and then in the Field column, enter the SFDC field name as below (autocomplete should help you type it in):




If the data is entered correctly, you should see the value for the created field change to the same format as the value above it:

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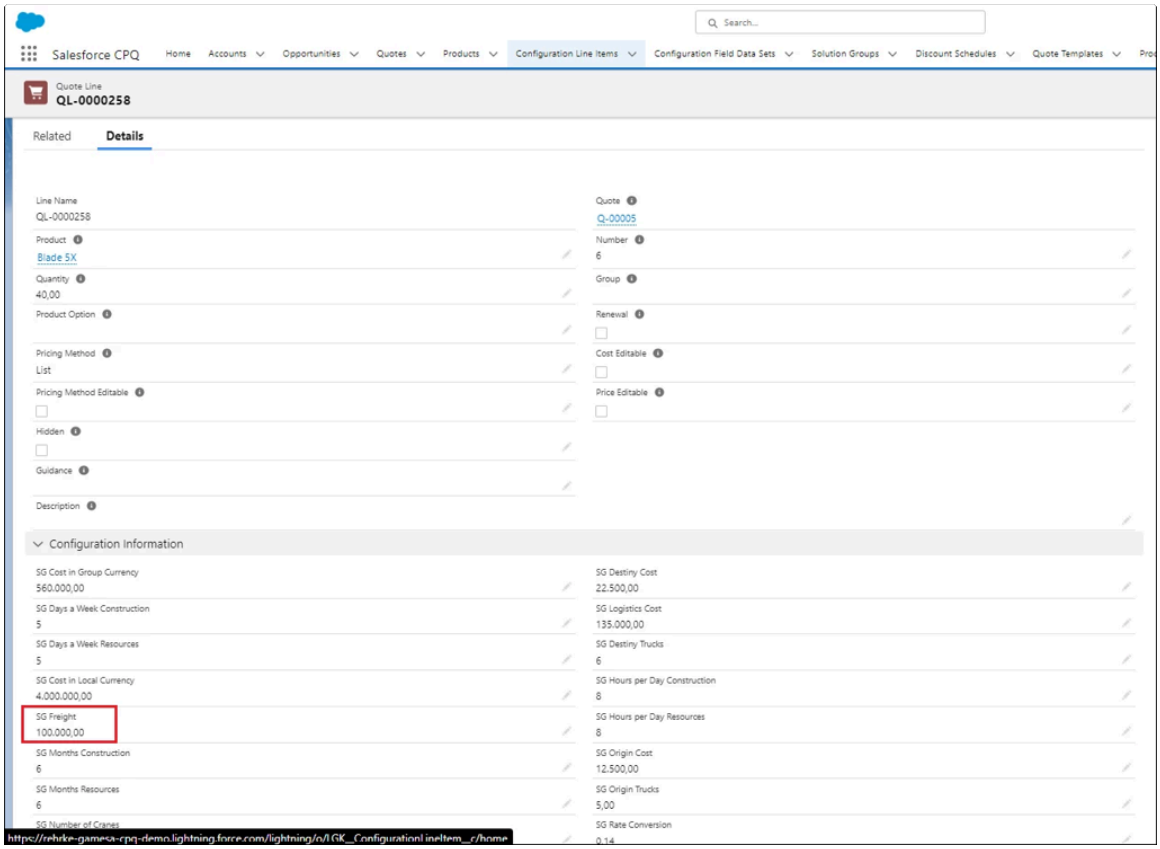



Save the flow and activate. It's recommended to save the flow as a a new flow instead of as a new version, so that you'll always have the original template to go back to if needed.

Add your fields to the configuration line item and quote line layouts in order to see these values where they belong:



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## Integrate configuration data with Quote Calculator

Use the Salesforce Quote Calculator Plugin to parse extended information from a configuration and map it to custom fields in version 1.7 or earlier.

**Note:** This article applies to the CPQ Extension for Salesforce CPQ package version 1.7 or earlier. If your version is 1.8 or later, see Use case: Configuration line item to quote line flow.

Using the extended information of the CPQ ProductList object with the Salesforce Quote Calculator plugin (QCP), you can pass data from CPQ into Salesforce. Use this data to manipulate quote and quote line information.

ProductList.extended can only be populated with an advanced product action, as shown here.



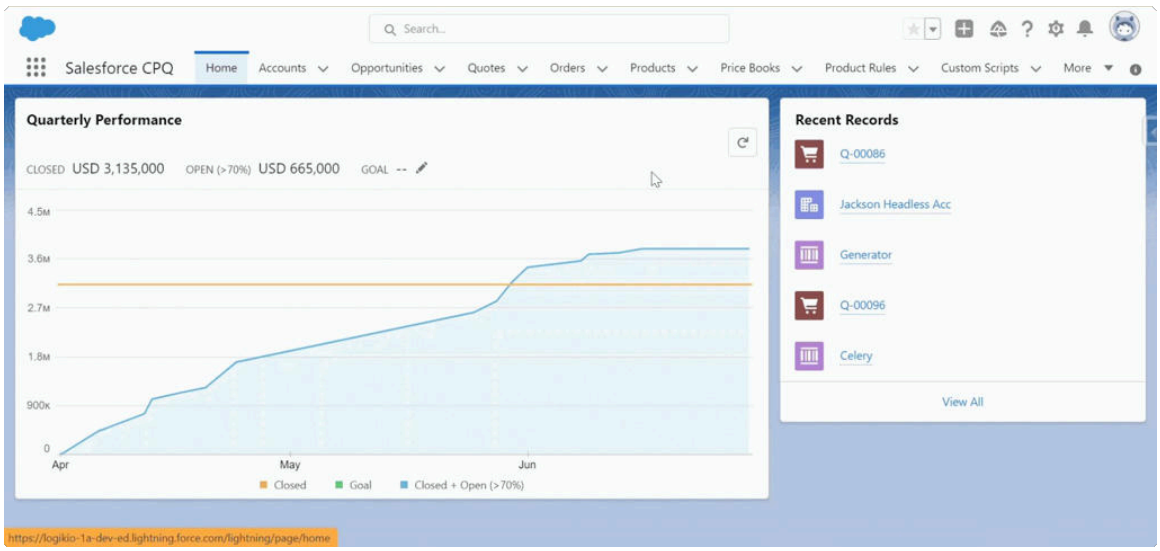

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The ProductList.extended object takes the form of a JSON object and accepts key:value pairs. In the example above, we pass through a dummy text string, "QCP Test Value", with the newValue key. ProductList.extended can hold field values, as well as an array of JSON objects.

When this product is added to the bill of materials (BOM), you can view its associated info in the custom object "BOM Data". This object is held at the quote line of the configurable product.

BOM Data
{"total":150,"items":
[{"id":"01t5f000003tQdAAAU","quantity":5,"bomType":"
Sales","extended":{"newValue":"QCP Test
Value"},"name":"Item
3","description":"","partnerId":"01t5f000003tQdAAAU","
productCode":"headlessItem3","externalId":"","product
Family":"","uom":"","type":"ACCESSORY","price":30,"extP
rice":150,"level":0,"rollUpPrice":150}]}

To leverage this extended information, we will need to use the Salesforce Quote Calculator Plugin. To start, navigate to the Custom Scripts item in Salesforce.




Here, write a script to leverage the extended information from CPQ and use it to manipulate fields in SFDC. The following script is the sample script used in this instance.

```
export function onBeforeCalculate(quote, lines) {
 var result;
 var resultValue;
 var product_code = "headlessItem3";
 if (lines != null) {
  lines.forEach(function (line) { //Parsing all quote lines to
 find BOM Data object
   if(line.record["LGK__BomData__c"] != null){
    var configJson = JSON.parse(line.record["LGK__BomData__c"]);
```

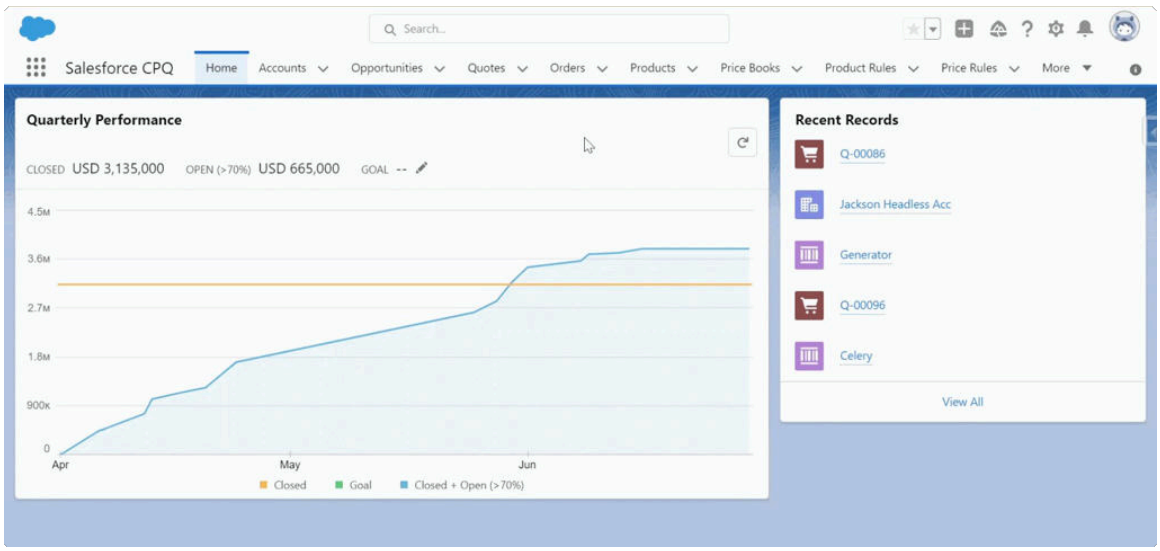
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```
    var itemsJson = configJson["items"]; //Create JSON object
 containing all items in BOM data
    itemsJson.forEach(function(itemsLine){ //For each item in
 the BOM Data
     if(itemsLine["productCode"] == product_code){ //Checking
 for item "headlessItem3"
      result = itemsLine["extended"]; //Parses extended
 information to find "newValue"
      resultValue = result["newValue"]; //Assigning keyed value
 of "newValue"
     }
    });
   }
  });
  lines.forEach(function (line) { //For each line in the quote
   if (line.record["SBQQ__ProductCode__c"] ==
 product_code){ //Checking for the line item "headlessItem3"
    line.record["Test_Text__c"] = resultValue; //Setting the
 quote line field "Test Text" with the value of resultValue
   }
  });
    }
    return Promise.resolve();
};
```

Any quote fields or quote line fields referenced by the custom script you must explicitly define in the appropriate inputs on the custom script record. Our sample script references three quote line fields: *LGK_BomData__c*, *SBQQ_ProductCode__c*, and *Test_Text__c*.

Once your script has been written, define it in the Salesforce CPQ settings. Follow these steps:

1. In Setup, search for "Installed Packages" using Quick Find.
2. Next to **Salesforce CPQ**, select **Configure**.
3. Select the **Pricing and Calculation** tab.
4. If necessary, clear the **Use Legacy Calculator** check box.
5. Select the **Plugins** tab.
6. Define your custom script in the **Quote Calculator plugin** field, and then select **Save**.



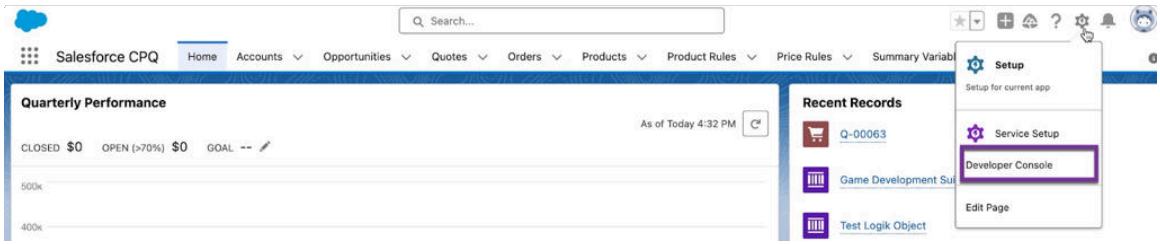

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When you navigate to your quote and trigger any action that performs a calculation in SFDC (such as selecting **Calculate**), the Quote Calculator Plugin runs. The plugin modifies fields as designated.

### Use case: Using Apex to call or test CPQ APIs

Learn how to use Apex to call or to test CPQ APIs.

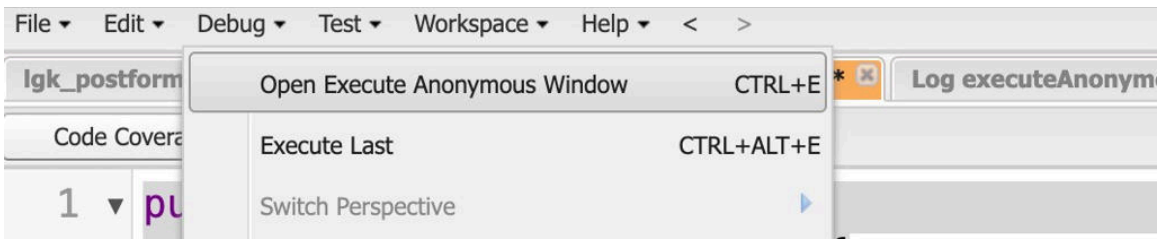
The easiest way to test Apex code for use of CPQ is through the developer console in SFDC.




To test the script from in the console, the code must be wrapped in a larger class with the “exec” function. For example:

```
public class testGetConfig { public static void exec() {
```

Save the code, and then in the Debug menu, click Execute Anonymous Window.




In the execute anonymous window, execute the code `functionName.exec();`

## Example Apex code to call a CPQ API

The following code is an example of an Apex class that will get information about a potential configuration:

```
1 public class testGetConfig {
2  public static void exec(){
3
4   HttpRequest httpRequest = new HttpRequest();
httpRequest.setEndpoint('https://
tenant.sector.logik.io/api/[config id here]');
httpRequest.setTimeout(5000);
5
6   httpRequest.setMethod('GET');
 httpRequest.setHeader('Content-Type', 'application/json');
7
8   httpRequest.setHeader('Authorization', 'Bearer [INSERT TOKEN
 HERE]');
httpRequest.setHeader('Origin',
 'https://tenant.sector.logik.io/');
9
10   Http http = new Http(); HttpResponse httpResponse;
11
12   httpResponse = http.send(httpRequest);
```

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```
13
14   }
15 }
```

This code would be executed as `testGetConfig.exec();`.

### Use case: Displaying the CPQ native UI via direct URL

Learn how to initialize a configuration UI using a URL instead of an external library.

This article provides an outline of how a CPQ Configuration UI can be initialized using a configuration URL rather than relying on an external library (such as easyXDM).

The base configuration URL is in the format `https://{tenant}.logik.io/ui/configure/{configurableProductId}`, where:

- {tenant} is the CPQ tenant that you are using, which can be found in Salesforce or if using CPQ headless, the base URL of the Admin experience
- {configurableProductId} is the Product ID of the CPQ Configurable Product to use for the configuration

Example configuration URL: `https://demo6.demo.logik.io/ui/configure/01t5f000006QKynAAG?v=1`

## Configuration URL query parameters

Additional settings and data can be passed via URL query parameters.

**Configuration URL query parameters**
*Parameters described, along with their valid values*

| Parameter | Description | Required | Values / Notes |
|---|---|---|---|
| v | Version | true | 1 |
| pid | Pricebook ID | | Salesforce Pricebook ID |
| id | Configuration ID | | CPQ UUID of existing configuration to load |
| lid | Quote Line ID | | Salesforce Quote Line ID |
| qid | Quote ID | | Salesforce Quote ID |
| log | Log Execution (Flightpath) | | None \| Available \| Active<br><br>This parameter is case sensitive. |
| cm | Committed Configuration ID | | When a contracted order is amended, CPQ identifies the prior configuration ID. That ID then becomes |

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**Configuration URL query parameters**

*Parameters described, along with their valid values*

**(continued)**

| Parameter | Description | Required | Values / Notes |
|---|---|---|---|
| | | | the committed Configuration ID. |
| fields | Fields | | Array of field objects. For example, `[{"variableName":"textField1","value":"tes{…}]`<br><br>In JavaScript, use encodeURI to ensure any special characters are escaped |
| ac | Action Context | | null or "Amendment" |
| e | Editability | | One of:<br>• "Tm9uZQ" (None)<br>• "QXZhaWxhYmxl" (Available)<br>• "QWN0aXZl" (Active)<br><br>This parameter is case sensitive. |
| layout | Layout Variable Name | | Name of the layout to load from the blueprint of the configurable product |
| return | Return URL | | URL to set window.location to on save or cancel. Needs to be encoded and URL-safe |
| rt | Runtime Token | See note below | Runtime token from CPQ Admin Setup |
| rta | Runtime API URL | | Needs to be encoded and URL-safe. Highly recommended if using the runtime token parameter. Use encodeURI in Javascript to ensure that any special characters are escaped, especially when calling an API. |

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**Configuration URL query parameters**
*Parameters described, along with their valid values*

**(continued)**

| Parameter | Description | Required | Values / Notes |
|---|---|---|---|
| currency | Currency ISO Code | | |

**Note:** When using the runtime token (rt) parameter, it is highly recommended to also include the rta as well to ensure that all of the requests can be authentica

If you are not accessing the configuration URL where you have already authenticated (via Salesforce or directly), you will need the runtime token to authenticate. If you are accessing the configuration URL before authenticating through the associated SFDC environment or accessing the configuration URL for a headless environment, the CPQ tenant URL must be listed as an origin for the leveraged runtime client. For example, `https://<tenant>.test.logik.io`.

Example, `https://<tenant>.test.logik.io`.

If the version parameter is not included, the UI will not load, and you will receive the following error: "Error: A version must be specified."

If a return URL is not included, the UI will broadcast a postMessage up to the parent, with the UUID on save (such as `{"uuid": "8b88c843-d10b-468b-8c49-17f8c9698799"}`) and an empty object on cancel (`{}`).

## Using the configuration URL

The configuration URL can be used either as the top level window or in an iframe on a page.

Unlike when using the easyXDM example to initialize a configuration, configuration data will not be sent to the browser console in Javascript when using the configuration URL.

Considerations for using the configuration URL as the top level window URL:

- On the save or cancel actions, the CPQ UI will make the call to the CPQ backend to save or cancel the configuration. These calls can be viewed in the Network tab of the browser to see the data being sent and returned.
- If a return URL is included, the UI will attempt to set the window location to that URL on save ("Quote") or on cancel.

Considerations for using the configuration URL in an iframe:

- If a return URL is included, the UI will attempt to set the window location to that URL on save ("Quote") or on cancel. If a return URL is not included, the CPQ UI will broadcast a postMessage up to the parent, with the UUID on save (such as `{"uuid": "8b88c843-d10b-468b-8c49-17f8c9698799"}`) and an empty object on cancel (`{}`).
- For either implementation, after executing the save or cancel action, the configuration is removed. Subsequent save actions will result in a 404 error with an error message: "No Rules Engine found for Tenant with Config ID '<CPQ UUID>'. Subsequent cancel actions will also result in a 404 error.

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## Configuration result

The result of the saved Configuration can be accessed by using the GET API to retrieve the BOM data.

Postman Collection with Config API URL

The result can be sent to a downstream system via Webhook. See Webhooks.

### Use case: Modifying layout text with SLDS styles

Learn how to implement styles in the Salesforce Lightning Design System to control the appearance of text.

Using Salesforce Lightning Design System (SLDS) styles, admins have some control over the appearance of text in the CPQ configurator UI. Note that this functionality is not fully supported and may be limited in a number of scenarios. Consult this Salesforce documentation for the available SLDS styles.

Due to the lack of complete support, utilizing an SLDS class will affect everything in the field. That means if you use “slds- text-title_bold”, everything in the field will be bolded. Therefore, consider whether you can use SLDS styling for your use case, as a new field will need to be created for us to insert the class and isolate the styling. A good use case as a result is using styles to make headers, and we’ll use that as the basis for this article.

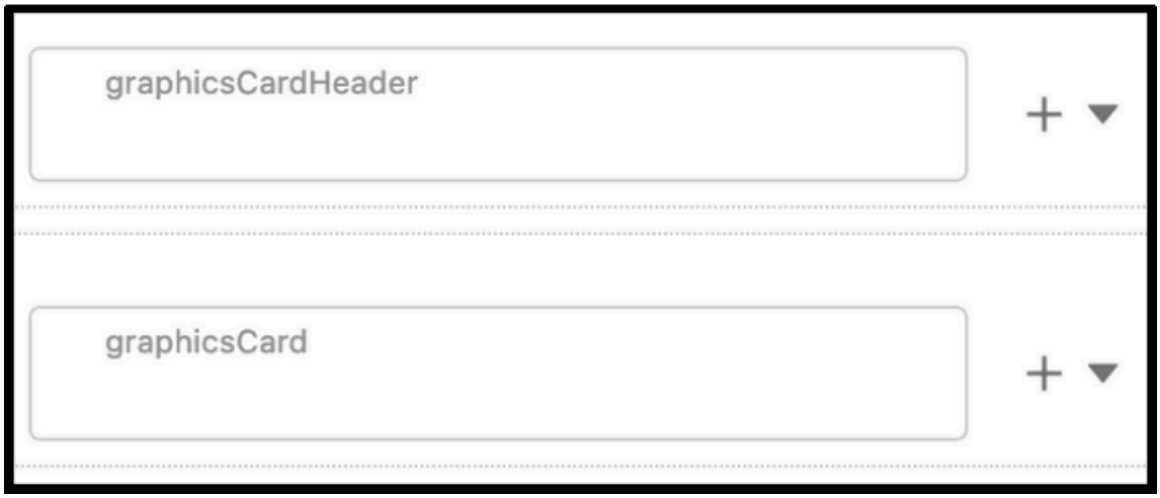
If we want to make a header using SLDS, the first step is to identify which field(s) you want a header for, and make sure they’re displayed in the layout. Then, from the layout screen, navigate to the field and remove its label. This will leave you with just the field’s variable name.



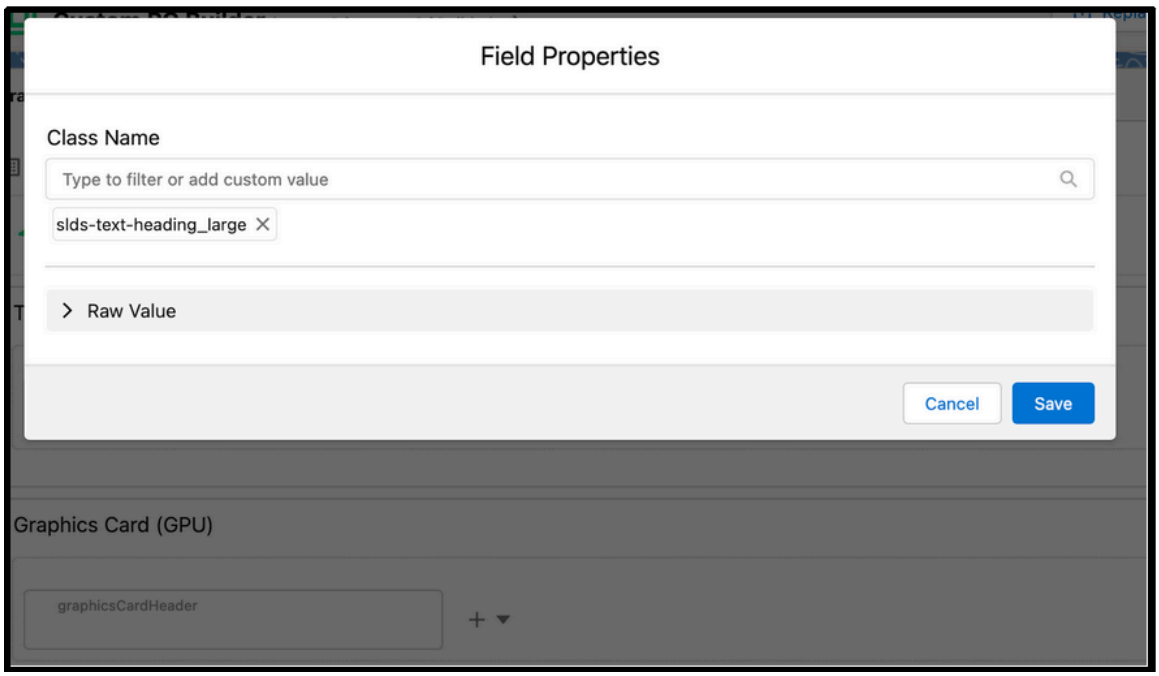

Next, create a new text field and give it some text. This new field will be placed above the existing field and essentially act as its “header”. Place it in the layout and remove its label. Your layout should resemble this example.

**Note:** Instead of creating a new field, you can also just add text directly to the layout. In the image below, you would click the down arrow to create the text. However, unlike when using fields, you wouldn#t be able to conditionally hide the text.

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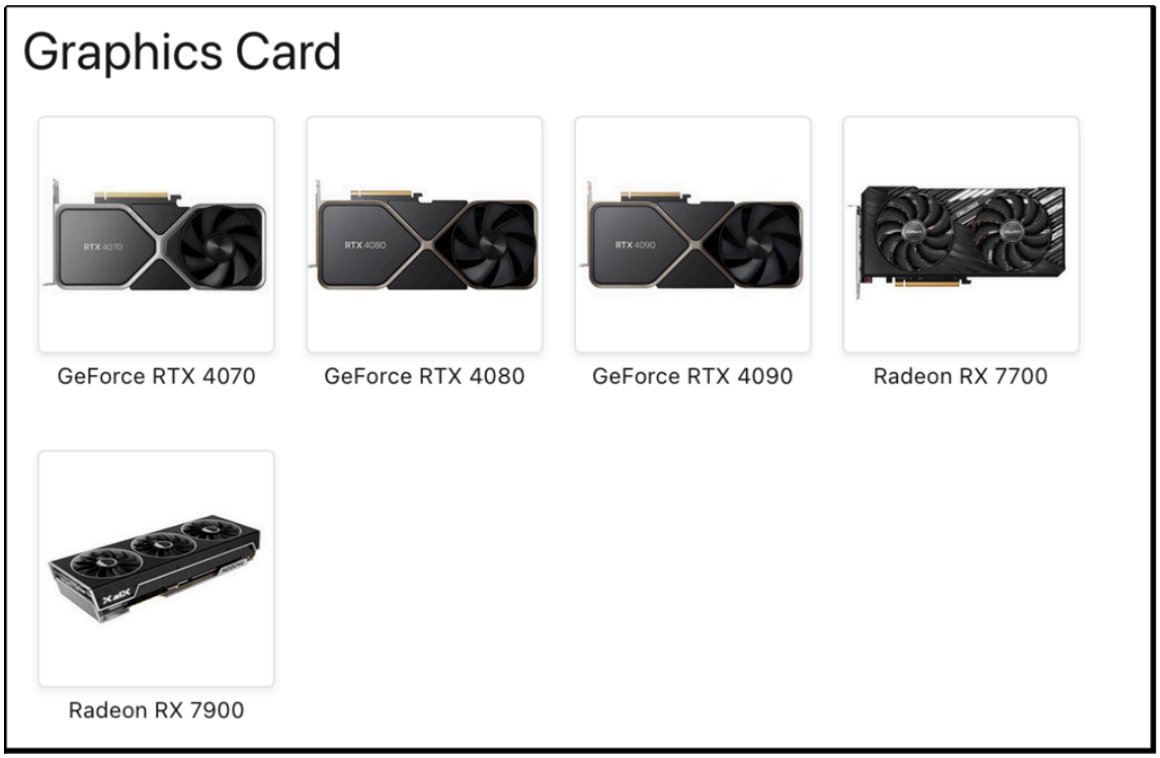



Finally, in the layout, hover over the new field you created that will act as the header, and click the gear to bring up the Field Properties. For Class Name, add the desired SLDS class. In this example, we have used `slds-text-heading_large`.




Redeploy your blueprint and you're done. Open an applicable product in the configurator to see the result.

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### Modify a product subscription with ramped pricing and quantities

Add pricing or quantity ramps to quote line items to set incremental changes during the life of a contract.

In the CPQ configurator, you can modify the configuration of a product subscription so that prices and quantities change during the term of the subscription. This is called ramped pricing because the price or quantity increases or decreases during the term of the contract.

To enable the ramped pricing feature, select the **Enable Ramps** check box on the **Pricing** tab of the product offering configuration page.

When you create a quote for a configurable product, you can set ramped pricing for offerings within the product. Select a quote line item, and then select **Ramps**. A **Price ramps for [product offering]** dialog appears that contains the following fields:

- Start date
- End date
- Term (months)
- Ramp type
- Segments
- Annual % increase

If the start date, the end date, and the term are not already specified in the quote line, exit the price ramps dialog, enter them there, and save the quote line. You can modify them later when you set up a ramp. In the price ramps dialog, for the ramp type, select **Yearly** to change the pricing each year, **Quarterly** to change the pricing each quarter, or **Custom** to specify another period (ramp segment) at which prices are to be adjusted. Ramp segments are created according to the term of the contract and the ramp type. For example, if the term of the contract is 36 months (three years), and you select **Yearly** as the ramp type, three segments are created: one for each year of the contract.

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In the **Annual % increase** box, enter the increase to go into effect each year. If you enter 10, the unit price will increase by 10% each year.

Click **Create**, and the segments display with price changes according to the figure that you entered.

In each segment, the **Quantity** field is editable. For example, to specify a contract during which 1 unit is purchased the first year, 2 units are purchased the second year, and 4 units are purchased the third year, set the quantities accordingly in the three annual segments. To set a quantity ramp with no change to pricing during the term of the contract, enter 0 in the **Annual % increase** box and modify only the quantity in each ramp segment.

**Note:** By default, ramps are hidden in a product's list of line items. To display the ramps in the line items view, set the hierarchy toggle at the top of the list. Then, select **conditions** and remove the default conditions for the view.

**Related topics**

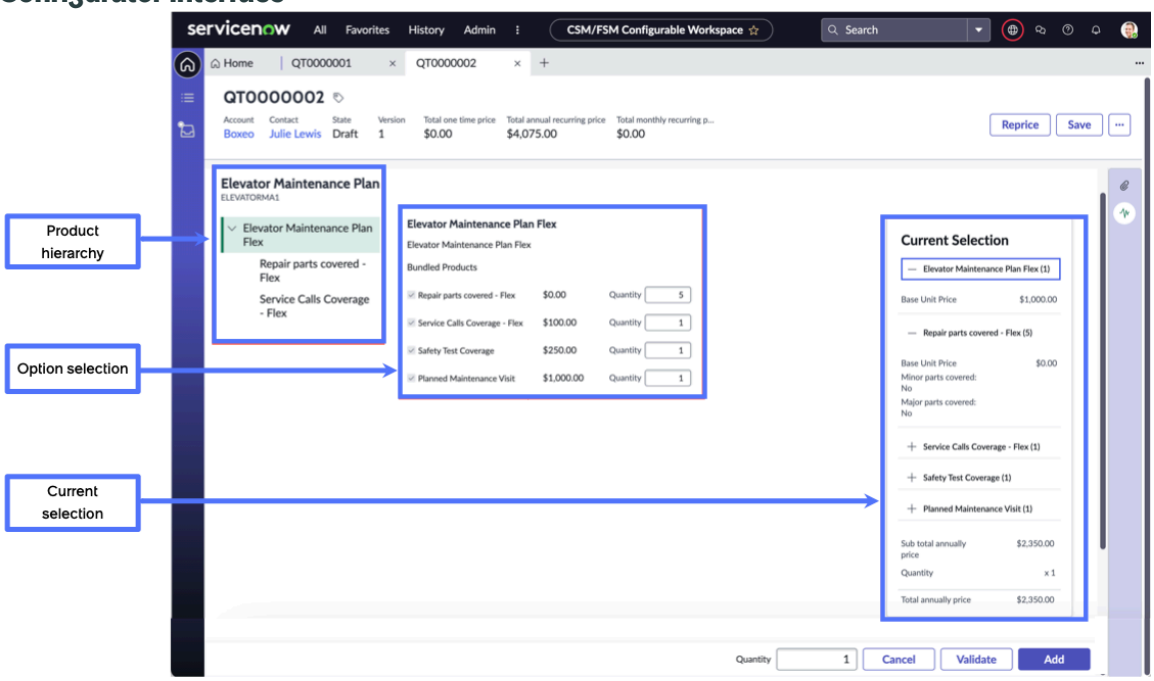
Configurable products

## Using the Configurator

The configurator in Sales Customer Relationship Management is an interface for customizing configurable product offers. The interface displays the product options available and automatically calculates product pricing as you select options.

## Configurator interface

### Configurator interface




The interface consists of three main sections:

- **Product hierarchy**: Lists the parent and child product relationships for configurable products.
- **Option selection**: Displays the product options that can be selected, for example product characteristics such as color or model.
- **Current Selection**: Shows the pricing for the options that you select. The pricing is calculated automatically and displayed dynamically as you select product options.

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When you complete the product offering configuration, select **Add** to add the product as a line item for the transaction.

## Selecting complex product characteristics and options

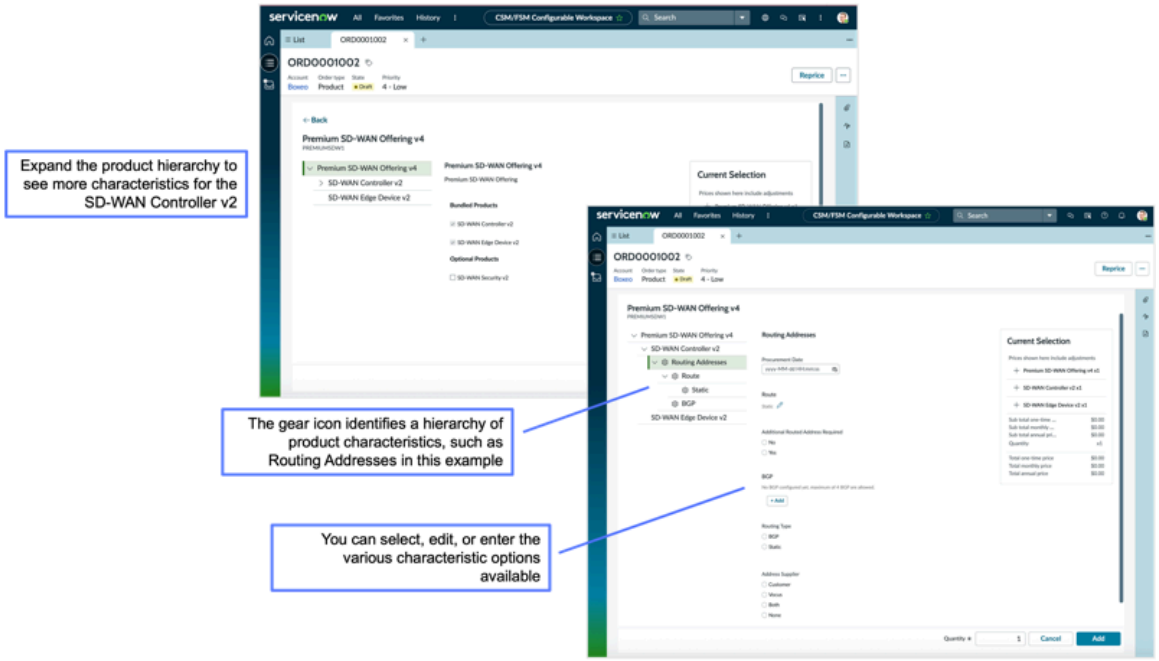
When you select a complex product for opportunities, quotes, and orders, the product hierarchy and option selection sections in the configurator display the complex attributes and options hierarchically.

You can expand the product hierarchy to show the available characteristics and options.

The gear icon displayed next to a child product indicates that a hierarchy of complex characteristics is available at that level. Select that level to view the characteristics and options.

**Note:** Pricing details aren't provided in the **Current Selection** pane for complex characteristics.

### Complex characteristics and options in the product configurator




### Create multiple configurations

Create multiple configurations of a child product offering when you're adding a configurable product to an opportunity, quote, or order. You can then configure the product options and characteristics separately for each offering configuration.

#### Before you begin

Role required:sales_agent or sn_ind_tmt_orm.order_agent

#### About this task

If your product catalog admin has enabled multiple configurations for child offerings in a bundled product, you can create multiple child offering configurations for selected child offerings using the product configurator. When creating multiple configurations of child offering, you can do the following:

- Change the quantity of a child offering that can have multiple configurations.
- Clone a child offering or split a child offering that has a quantity greater than 1.

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- The **Clone** option copies the child offering based on the number of copies that you specify and creates identical offering configurations.
- The **Split** option divides the current child offering quantity by the number of splits that you specify and distributes the quantity evenly across all the copies.

- Customize the options and characteristics for each child offering instance created.
- Delete a child offering instance, as long as the minimum number of child offerings defined for the product is maintained.

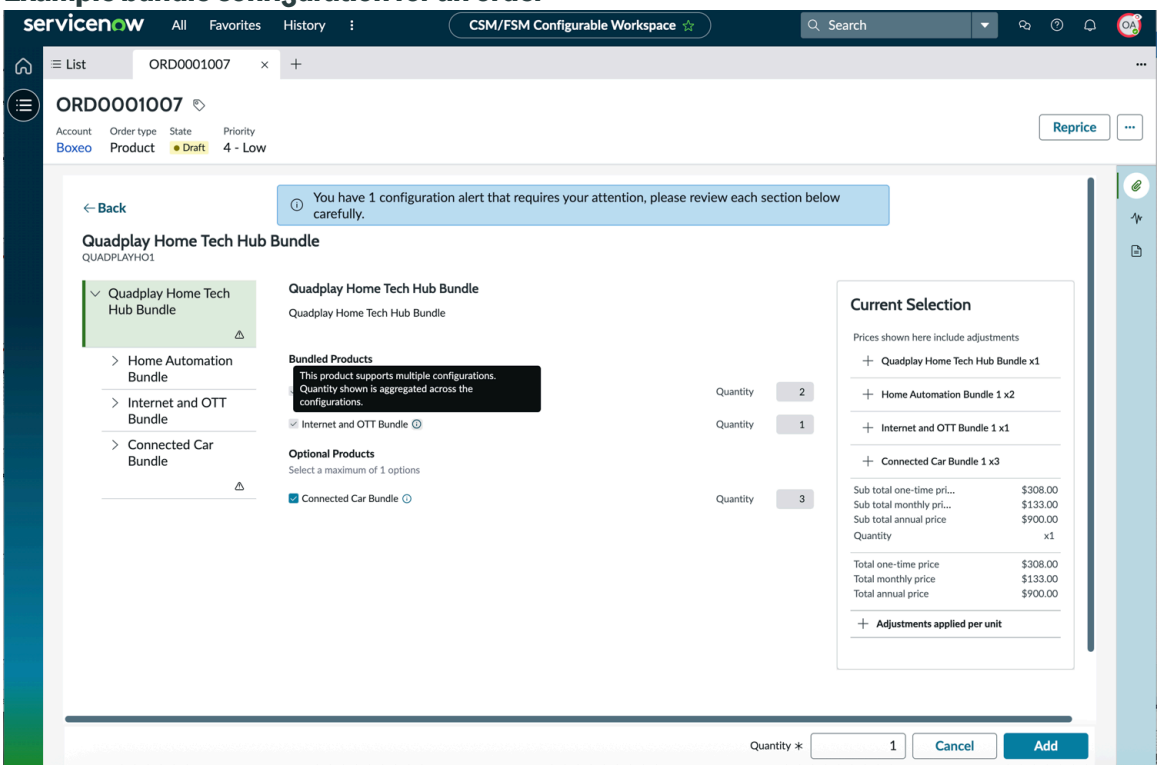
**Note:** Even when the multiple configurations feature is enabled, there are scenarios in which some configuration options might not be available. The system uses the default, minimum, and maximum quantity values from the product definition to determine valid configurations and then enables or disables the **Split** or **Delete** options for managing child offering configurations. For more information on validation, see Multiple configurations.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to the opportunity, quote, or order that you want to work with.
   For example, navigate to **Quotes** > **All** and select the quote that you want to work with.
3. Select the Catalog tab.
4. In the product catalog hierarchy, select the product catalog that you want to use.
   The product catalog displays the available products as product offering cards.
5. Select the configurable product by choosing **Customize** in the appropriate product offering card.
   The product configurator displays the product offering configuration, including the bundle product options and characteristics. Child offerings that can have multiple configurations are identified by information icons. Select the information icon to view a message indicating that the offering can have multiple configurations and that the offering quantity shown is aggregated across the configurations.

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### Example bundle configuration for an order




6. Navigate to the child offering in the product hierarchy, which displays the offering summary page.
   You can do the following:
   - To change the quantity of the child offering, enter the new value in the **Quantity** field.
   - To add new configurations for the offering, select the **More options** menu next to the **Quantity** field and select an option.

#### More options

| Option | Description |
|---|---|
| Clone | Option for creating copies of the selected child offering. Enter the number of clones to be created. The system creates identical copies of the child product offering, and each clone has a quantity of 1.<br><br>For example, if the current child offering quantity is 2, and you specify 2 clones, two identical copies of the child offering are created. Each clone has a quantity of 1 and becomes a separate line item that you can configure.<br><br>**Note:** The system checks the total quantity allowed for the child offering. |
| Split | Option for creating child offering instances by splitting the current child offering quantity and distributing the quantities |

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| Option | Description |
| --- | --- |
| | across the offering instances. Enter the number of splits to be used.<br><br>For example, if the child offering quantity is 5, and you specify 3 splits, the system creates two child offering instances. After the split, you have three child offering instances, which have a quantity of 2, 2, and 1, respectively. You can then configure each line item as needed. |
| Delete | Removes an existing child offering instance. |

New configurations resulting from the clone or split are listed in the product catalog hierarchy. The associated pricing is displayed in the Current Selection pane.

- New configurations have names that reflect the child offering name, followed by an incremental number, for example, Home Automation Hub 2, Home Automation Hub 3, and so on.
- Quantity changes for a child offering are also reflected in the Current Selection pane.

7. For each new offering configuration, select the appropriate characteristics and product options.
8. When you finish configuring the child offerings, select **Add** to add each configuration as a separate line item to your opportunity, quote, or order.

## Using Quote Management

Use the Quote Management application to build your quote. The interface includes the following tabs to help you create and manage product quotes.

### Quote Management tabs

| Quote Management tab | Description |
| --- | --- |
| Details tab | Add details of the quote, such as address and contact information. |
| Catalog tab | Use product catalogs to add products to your quote. |
| Line Items tab | Add quote line items to a quote. |
| Tasks | Displays tasks associated with the quote (approval or fulfillment tasks) generated as part of the quoting workflow. |
| Revisions tab | Create multiple versions of quotes. |
| Customer Orders tab | Convert quotes to product order sales. |
| Involved Parties | Add individuals or organizations associated with the quote beyond the primary contact, for example, approvers, stakeholders, or additional decision-makers. |
| Contacts | Add contact records linked to the account/quote that are relevant to the deal. |
| Pricing adjustment tab | Add manual pricing adjustments to products in a quote. |

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## Building quotes

Use these basic steps to create, build, and manage your quotes.

**Building and managing quotes**

| Step | Description |
|---|---|
| Manage quotes using the Quote AI Agent | Create, modify, and review quotes using agentic workflow. |
| Create a quote | Start a quote, then add and view quote details. |
| Add products to a quote | Build your quote by adding products from the product catalogs. |
| Create a quote PDF document | Sales agents can create a PDF document from a quote to send to customers. |
| View and update products in your quote- | Use the Line items tab to see and update products in your quote. |
| View and update manual pricing adjustments in quotes | Add pricing adjustments to quotes. |
| Get additional product offering recommendations for quotes | Use product offering recommendations to find other products that you can upsell or cross-sell to your customers based on the line items in your quote. |
| Create quote versions | Use the Revisions tab to create and view versions of a quote. |
| Convert quotes into orders | Use the Customer Orders tab to convert quotes to orders. |

Use ServiceNow Otto for CPQ to generate a summary of a quote to:

- Summarize key quote components during early customer discussions or pre-discovery.
- Provide an updated view of the quote after revisions, without requiring the review of multiple records.
- Provide a single, consolidated snapshot of all actions, tasks, and notes derived from a quote in one place.
- Highlight custom pricing, discounts, and negotiated changes made during the quoting process.
- Review the quote prior to sending it to the customer to confirm accuracy and completeness.
- Support internal handoffs by summarizing the quoted offer for internal teams.

### Manage quotes using the Quote AI Agent

Use the Quote AI Agent to create a quote, modify an existing quote, or review a quote that the agent generated automatically from a trigger condition.

#### Before you begin

Role required: sales_agent

#### About this task

The Quote AI Agent supports three operations on quotes. Choose the operation that matches your goal.

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- **Create**—Ask the agent to build a new quote for an opportunity. The agent retrieves the opportunity line items, builds the quote, and presents it for your review. If a primary quote already exists, the agent uses it. If no primary quote exists, the agent creates one.
- **Modify**—Ask the agent to update an existing open quote. The agent interprets your request, applies the changes, and checks that all discounts and pricing conform to company policies.
- **Trigger-generated**—Review a draft quote that the agent created automatically when a trigger condition was met on an opportunity, for example when the opportunity stage is set to **Propose** or when a task or note contains a recognized keyword. The agent notifies you through Microsoft Teams and ServiceNow Otto for CPQ when the draft is ready.

If a change requires approval, the agent notifies you and starts the approval workflow. If the agent can't find enough information to continue, it sends you a message asking for the missing details.

### Procedure

1. Open the starting point for your operation.

| Operation | Starting point |
|---|---|
| **Create a quote** | Open the opportunity for which you want to create a quote. |
| **Modify a quote** | Open the quote you want to modify, or open the linked oppor tunity. |
| **Review a trigger-generated quote** | Open the notification from the Quote AI Agent in Microsoft Teams or ServiceNow Otto for CPQ, then open the opportuni ty linked in the notification. |

2. Open the ServiceNow Otto for CPQ chat panel.
3. Enter your request or respond to the agent, depending on your operation.

| Operation | What to do |
|---|---|
| **Create a quote** | Enter your request in the chat, including the opportunity num ber and any pricing instructions.<br>Example requests:<br>○ `Create a quote for Opportunity OPT001 with a 10% discount on Visibility.`<br>○ `Help me create a quote for Opportunity 123.`<br>○ `Create a quote for Opportunity OPT001 and generate an email with the document.` |
| **Modify a quote** | Enter your modification request in the chat, including the quote number and the change you want to make.<br>Example requests:<br>○ `For this quote, apply a 10% discount to all products.`<br>○ `Remove the Visibility line item from quote QT001.` |

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| Operation | What to do |
| --- | --- |
| | ○ `Update the quantity for Standard on quote QT001 to 50.`<br>○ `Change the price list on this quote to the EMEA price list.` |
| **Review a trigger-generated quote** | Review the draft quote that the agent created, including the products, quantities, and pricing. The agent populates the quote from the opportunity line items and may suggest relat ed or recommended products based on the opportunity data.<br><br>If the agent has sent a message asking for missing informa tion, reply in the chat with the details requested. This applies when no opportunity line items exist and no product informa tion is available in the opportunity notes or tasks. |

4. Review the summary that the agent presents.

   For a new or trigger-generated quote, the agent shows line items, pricing, and any discounts applied. For a modification, the agent identifies the relevant quote line items by product name and shows you the proposed changes before applying them. If the agent needs more information, it sends you a message before continuing.

5. Confirm the details or provide additional instructions.
   - To add products, tell the agent which products to include.
   - To remove products, tell the agent which products to exclude.
   - To apply or change a discount, specify the discount amount or percentage and the products it applies to.
   - To change pricing, ask the agent to update the price list or individual line item prices.
   - To accept or apply the changes as shown, confirm your approval in the chat.
6. If the agent notifies you that a discount or pricing change requires approval, wait for the approval workflow to complete before continuing.
7. **Optional:** Ask the agent to generate the quote document and draft the client email.

   (Optional) Example: `Generate the quote document and prepare an email for the customer.`

   This step applies when creating a new quote or finalizing a trigger-generated quote. Skip this step if you're only updating an existing quote and don't need to send a new document.

8. **Optional:** Review the draft email and send it to the customer.

### Result

The quote is created, updated, or finalized and attached to the opportunity. The agent updates the opportunity work notes with a summary of the actions taken and notifies you through Microsoft Teams and ServiceNow Otto for CPQ.

## Create a quote

Create a quote in Quote Management to start the quote building process.

### Before you begin

Role required: sales_agent

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### About this task

When you start a quote, a dialog box prompts you for quote information. You can choose to create a quote for a customer account or consumer. The dialog box changes depending on your choice.

- Account – The quote is created for an existing customer account.
- Consumer – The quote is created for an existing consumer.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select **New**.
3. On the **Create new quote** form, fill in the fields.

| To | Description |
|---|---|
| **Create quote for an account** | Select the **Account** and enter the following:<br>○ Expiration date: Date and time that the quote expires.<br>○ Contact: Name of the primary customer contact.<br>○ Route to market: Identifies the exact sales channel used to exe cute the deal:<br>▪ Direct<br>▪ Reseller<br>▪ Distributor<br>○ Deal type: Indicates the type of deal associated with the quote:<br>▪ Direct: The seller engages directly with the customer, with no in termediary partner involved.<br>▪ Indirect: The seller engages the customer through an intermedi ary, such as a reseller, service provider, or distributor.<br>○ Channel partner: (Optional) The name of the organization selling a product or service.<br>○ Short description: Brief description of the quote for this account. |
| **Create quote for a consumer** | Select the **Consumer** name and enter the following:<br>○ Deal type: Indicates the type of deal associated with the quote:<br>▪ Direct: The seller engages directly with the customer, with no in termediary partner involved.<br>▪ Indirect: The seller engages the customer through an intermedi ary, such as a reseller, service provider, or distributor.<br>○ Channel partner: (Optional) The name of the organization selling a product or service.<br>○ Expiration date: Date and time that the quote expires.<br>○ Route to market: Identifies the exact sales channel used to exe cute the deal: |

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| To | Description |
| --- | --- |
| | ▪ Direct<br>▪ Reseller<br>▪ Distributor<br>○ Short description: Brief description of the quote for this consumer. |
| **Create quote for a buyer organization** | Select the **Buyer Organization** and enter the following:<br>○ Buyer organization member: Name of the buyer organization for which the quote is created.<br>○ Channel partner: (Optional) The name of the organization selling a product or service.<br>○ Short description: Brief description of the quote for this organiza tion.<br>○ Start Date: Start date of the quote.<br>○ End Date: End date of the quote. |

4. Select **Save and close**.
   The quote is saved and you return to the **Quotes** list view.
5. Select refresh to see the new quote in the list.
6. Select **Add Line Items** to save the quote and begin adding quote line items.

### What to do next
Add and view details of a quote.

### Add and view details of a quote

Use the Details tab to add and view basic information for a quote.

### Before you begin
Role required: sales_agent

### About this task
Use the Details tab to add more information about your quote, such as addresses and contacts. You can also indicate whether the quote is active and set the quote state.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select your quote.
3. Fill in the information on the Details tab.
   For more information, see Quote details forms.
4. Select **Save**.

### What to do next
Add products to a quote.

### Add products to a quote

Use the Catalog tab in Quote Management to add products to your quote.

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### Before you begin
Role required: sales_agent

### About this task
You can use the Catalog tab to search for and select product offerings from catalogs and add them to your quote. You can choose simple and complex product offerings. Complex product offerings have options for customizing the product by using the product configurator.

**Note:** Check your entitlements to see if the product configurator is available.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select the quote that you want to work with.
3. Select the **Catalog** tab.
4. In the product catalog hierarchy, select the product catalog that you want to use.
   The product catalog displays the available products in product offering cards.
5. In the product offering card, select the product.
   - For a simple product that doesn't have any selectable options, select **Add**.
   - For a configurable product that has options that you can choose, select **Customize** to open the product configurator for selecting product options.

     As you configure the product, you can reprice, validate, and then save your selections. For details on using the product configurator, see Using Sales Customer Relationship Management applications.

   The product offering is added to the quote as a line item.

#### Using product offering recommendations in quotes

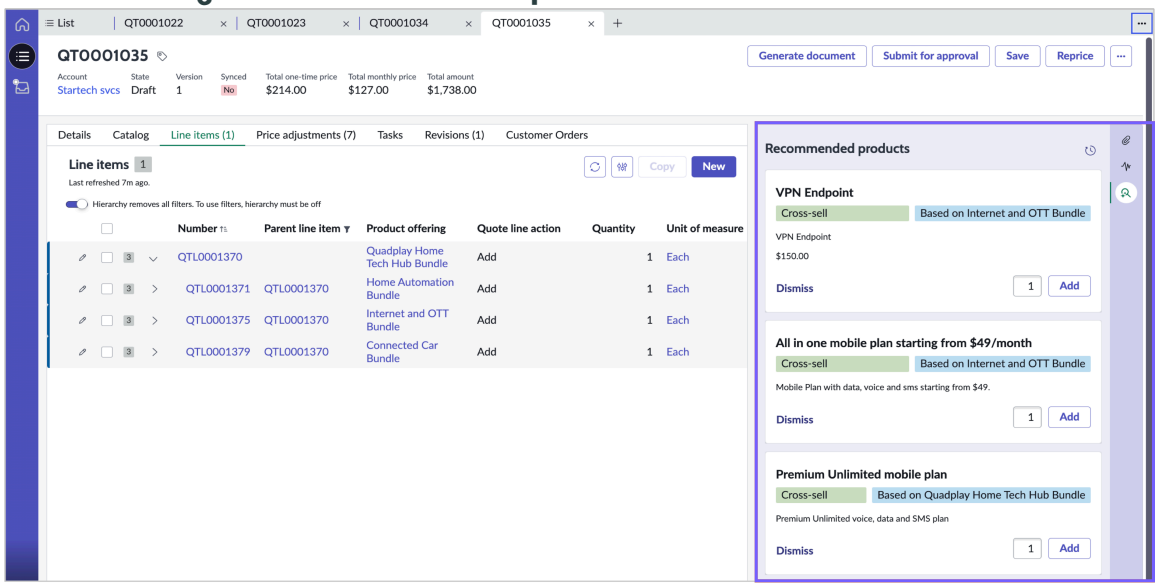
As a sales agent, you can use recommended product offerings to upsell or cross-sell additional products in your quotes.

## Product offering recommendations

Product recommendations appear as cards in the contextual side panel in the CRM Workspace when you're adding, updating, or viewing quote line items using the Catalog or Line items tab. Each card provides a recommendation to either upsell or cross-sell a product.

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### Product offering recommendations for a quote




Product recommendation cards display the following information:

- Name and brief description of the recommended product offering.
- Type of recommendation:
  - Upsell: Sales strategy for upgrading customers to a better or enhanced version of a product that they're buying.
  - Cross-sell: Sales strategy for selling additional products that are related to but different from the items that customers are buying.
- Source product offering to which the recommendation applies.
- Product pricing
- Options to accept the recommendation and set the product quantity or dismiss the product offering recommendation.

When multiple cards are displayed, they're arranged in the order value that was set when the recommendation was created by your product catalog admin.

## Recommendation process

When you add a product recommendation, the recommended product offering is added as a line item to your quote. For more information, see Get additional product offering recommendations for quotes. After you add or dismiss recommendations, they’re moved to the recommendation history. Use the History icon in the Recommended products panel to view the recommendation history.

### Get additional product offering recommendations for quotes

Get product offering recommendations to upsell or cross-sell additional products in quotes.

#### Before you begin

Your quote must have at least one or more line items and be in the draft state.

Role required: sales_agent

#### About this task

When you're working on a draft quote and adding or updating products, product offering recommendations are displayed as recommendation cards in the contextual side panel

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of your workspace. These cards identify the products that you can upsell or cross-sell, to complement or supplement existing products in your quote. When you accept a product offering recommendation, the product is added as a line item to your quote.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select the quote that you want to work on.
3. Select the Catalog or Line Items tab.
   If the quote doesn't have at least one line item, add a line item.

   The contextual side panel displays any relevant recommended products for the quote.
4. Review the recommended product offering cards and do one of the following:
   - To accept a recommendation, change the quantity if needed and select **Add** in the card.

     The product is added as a line item to the quote. When a configurable product is added from the recommendations panel, quote line items are created with default selections configured as set in the product offering definition. The product offering card is moved to the recommendation history.
   - To remove a recommendation from the side panel, select **Dismiss**.

     The product offering card is moved to the recommendation history.

   You can review the recommendation history by selecting the History icon in the Recommended products panel.
5. **Optional:** Continue reviewing the recommended offering cards and add or dismiss them as needed.

### Related topics

Configuring product offering recommendations

Create a product offering recommendation

## Add tasks to a quote

Create a single or multiple tasks for a quote and assign those to different agents. Tasks are the various actions that agents perform to create a quote.

### Before you begin

Role required: sales_manager

### Procedure

1. In the CRM Workspace, navigate to the **List** view and select **Quotes** > **All**.
2. Select the quote that you want to work with and select the **Tasks** tab.
3. Select **New** to start a new quote task or select an existing quote task to make changes.
4. Fill in the fields in the Quote Task form.

#### Quote Task form

| Field | Description |
|---|---|
| Number | System-generated number of the quote task. |

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| Field | Description |
|---|---|
| Quote | Number of the quote. |
| Due date | Date by which the quote task has to be completed. |
| Short description | Information about the quote task. |
| State | State of the quote task. |
| Assigned to | Name of the sales agent to whom the sales manager has assigned this quote task. |
| Work notes | Additional information about the quote task. |

5. Select **Save**.
   The quote task is added to the main quote.

## Create quote versions

Use the Revisions tab to create and view the versions of your quote.

### Before you begin

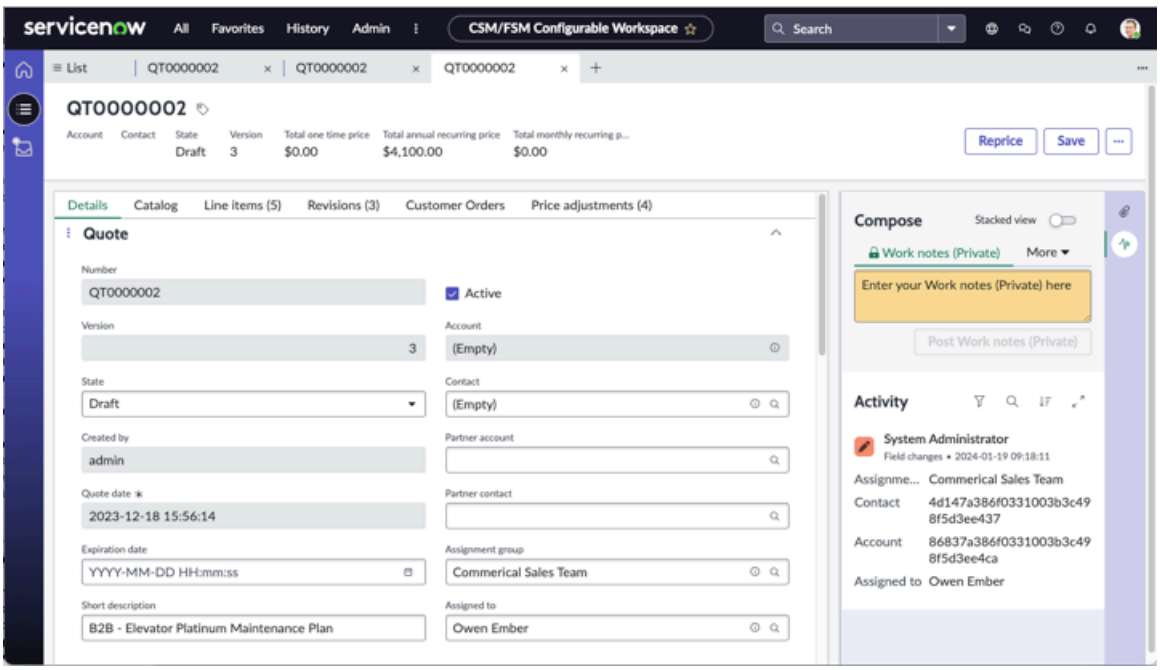
Role required: sales_agent

### About this task

The Revisions tab shows all the versions of a quote. Version numbers are sequential. If the quote is active, the **Active** field is selected.

### Procedure

1. In the CRM Workspace, select the List icon .
2. Select **QuotesAll**.
3. Select the quote that you're working with.
4. Select the **Revisions** tab.




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5. Select the More Actions icon ••• and select **Create new version**.
   A new version of the quote is created. Select the quote in the message to open the new version. The **Active** option, if selected indicates the **Active** version of the quote. Use the Revisions tab to view a list of all the current quote versions. Version numbers are sequential.
6. Return to the **Quote** list view and refresh the view to see the latest version created.
7. Select the **Active** option as a reminder of the active quote.

### What to do next
Use the Customer Order tab to start an order from the Quote. See Convert quotes into orders for more information.

## Convert quotes into orders

Use the Customer Order tab to convert a quote into a customer order in Quote Management.

### Before you begin
Role required: sales_agent

### About this task
The quote must be in an Active state and the quote state must be set to Completed. Then the Customer Orders tab becomes active.

**Note:** Verify your entitlements to see if you have access to this feature.

### Procedure

1. In the CRM Workspace, select the **List** view .
2. Navigate to **Quotes** > **All**.
3. Select the quote that you want to convert to a customer order from the **Quote List** view.
4. In the Details tab, change the quote State to **Completed** and select **Save**.
5. Select **Create Order**.
   When the order is created, a message appears with the order number.
6. Select the Order number in the message to open the order.
   The **Order Line Item** view displays the order line items, pricing adjustments, and order tasks.

## Add pricing adjustment to a quote line item

Add pricing adjustments to quote line items after the line item is created.

### Before you begin
Role required: sales_agent

### About this task
You can make the following types of pricing adjustments for quote line items as a way to incentivize customers during the quote process.

#### Types of pricing adjustments

| Adjustment type | Description |
|---|---|
| Markdown % | Percentage for a markdown in price. |
| Markdown amount | A dollar amount of a markdown in price. |
| Markup % | Percentage for the markup in price. |

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**Types of pricing adjustments (continued)**

| Adjustment type | Description |
|---|---|
| Markup amount | A dollar amount for a markup in price. |
| Price Override | Overrides the product price with a new price. |

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Select **Quotes** > **All**.
3. In the Line items tab, select the quote line item for a pricing adjustment.
4. In the adjustment dialog, use the Adjustment type menu to select an adjustment type.
5. Enter an adjustment value in the Adjustment value.
6. Add a description of the price adjustment.
7. Select **Save**.

## Add price ramps on a quote line item

Add price ramps to quote line items to define incremental price changes for recurring product offerings.

### Before you begin

Configurable product offerings eligible for price ramps must have the **Enable ramps** option turned on and the **Price method** set to recurring.

Role required: Sales_agent

### About this task

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Use price ramps to specify how the price of a configurable product offering in a quote increases over different time segments, yearly, quarterly, or with a custom ramp structure.

- When you create ramps for a parent offering, the same ramps are created automatically for each child product offering in the product bundle.
- If price ramps haven't been created for the parent product offering, you can create ramps for child product offerings. However, if you want to create price ramps for the parent offering later, remove the ramps for all its child offerings, and then create the ramps for the parent offering.
- After price ramps are created on a quote line item, they are visible on order line items for viewing only. Ramps can be created and modified only in quotes.
- After price ramps are created, you can make manual pricing adjustments to a ramp segment.

**Note:** Price ramps aren't supported for quotes with sales agreements.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to **Quotes** > **All**.
4. Select a quote.

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5. In the **Line Items** tab, select the **Select row** check box for the quote line and select **Ramps**.
   The Price ramps dialog displays the default settings for the ramp.
6. On the Price ramps form, fill in the fields.
   Default values are set for the **Term, Ramp type,** and **Segments**. You can change them as needed.

| Field | Description |
|---|---|
| **Start date** | Date that the quote starts. |
| **End date** | Date that the quote ends. |
| **Term (months)** | Number of months for the ramps. The maxi mum term is 60 months. You can enter a two-digit decimal value, for example 36.25. After entering the term, the **End date** is updated au tomatically. |
| **Ramp type** | Option that indicates whether the ramp is Yearly, Quarterly, or Custom. Custom ramp types allows agents to define ramp segments with flexible durations. When custom is select ed, agents can manually add and manage ramp segments. |
| **Segments** | Number of segments in the ramp. The default number of segments is 1. If you change the **Term** value, the number of segments is updat ed automatically based on the **Ramp Type**. |
| **Annual % increase** | The percentage increase to be applied on a yearly basis. |

7. Select **Create**.
   The price ramps are created based on the ramp settings. The Price ramp details section shows each ramp segment created and associated pricing values:**Unit list price**, **Net price**, and **Cumulative net price** for the ramp segment.
8. To change the ramp settings, change the **Term**, **Ramp**, or **Amount % Increase** values as needed, then select **Update**.
   For example, you can change the **Ramp type** from yearly to quarterly or percentage increase.
   The updated price ramp details section.
9. To make manual price adjustments to a ramp segment, do the following:
   - Select the check box for the segment to be adjusted.
   - Select the type of adjustment to be made.
10. If you are amending a quote, modify ramp segments in the price ramps details section as needed.
    - To split a segment into two shorter segments within the original term, select the check box for the segment and select **Split segment**. The system automatically divides the segment and assigns the correct effective dates for each resulting segment. If the segment is

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currently active, the first segment ends on the current date and the second segment begins the following day. If the segment is a future segment, it is divided into two equal segments.

- To remove a split segment, select the check box for the segment and select **Remove segment**. The split segments are re-merged and the ramp returns to its previous state.

**Note:** Only segments created by splitting can be removed. Original ramp segments cannot be removed.

### Add a header discount to a quote

Apply a percentage-based discount to the entire quote, or to a selected type of line items within the quote. The quote line items automatically inherit the designated discount percentage as a manual adjustment on the quote line level.

#### Before you begin

Role required: Sales Agent [sn_sales_common.sales_agent]

#### Procedure

1. In the **Configurable Workspace**, select the **List** view.
2. Navigate to **Quotes** > **All**.
3. Select your quote.
4. In the **Line Items** tab, select the **More Actions** menu at the header level.
5. Select **Apply bulk discount**.
6. In the **Quote bulk discount** dialog, choose either **Override current line-level manual adjustments** or **Retain current adjustments and apply for all other line items**, and enter the quote header discount percentage.
7. Select **Apply**.

### Approving or rejecting quotes

Sales agents request approval for quotes, and approvers decide whether quotes can proceed under an advanced approval workflow.

Quote approvals help organizations manage financial, legal, and operational risk by ensuring that quotes meet internal approval criteria before they are shared with customers. Sales representatives submit quotes for approval, while approvers review quote details to determine whether a quote can proceed, requires changes, or must be rejected.

## Approval workflow

Quote approvals are managed through Advanced Approval Management, which evaluates quotes against configured approval rules and routes approval requests to designated approvers. Approval workflows can include sequential, parallel, or combined approval steps based on pricing thresholds, discounts, payment terms, product characteristics, or other business conditions.

When a sales agent submits a quote for advanced approval, the system creates one or more approval requests and routes them to the appropriate approvers. Each approver is responsible for reviewing only the approval steps assigned to them.

As part of the approval process, approvers review:

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- Quote details and pricing
- The approval reason or condition that triggered the request
- Any comments provided by the requester

Approvers can approve or reject only the approval steps routed to them. Approval actions taken by one approver do not grant access to approval steps assigned to other approvers.

Advanced Approval Management supports multiple channels for taking approval actions, such as from within the workspace, from approval lists, or through notifications, depending on how the approval process is configured.

## Approval reminders and escalations

Administrators can configure reminder schedules so that approvers receive automated notifications when their approval steps are pending. Reminders help ensure that approval requests are not overlooked and that quotes continue to move through the approval process on time.

If an approval step is not completed within the time period defined by the administrator, the step can be escalated to a designated approver. When a step is escalated, the step card updates to display the escalated approver so that all parties know who is responsible for the next action.

## Ad-hoc approvers

Sales agents and administrators can add approvers to an approval request outside of the configured approval workflow when additional review is needed. Ad-hoc approvers are added at the time of submission and are incorporated into the approval process for that request.

## Override approvals

Administrators with the appropriate roles can override an approval to move a quote forward when permitted by the organization's approval configuration. Override approvals allow the process to continue without waiting for all configured approval steps to be completed.

## Recalling approval requests

After a quote is submitted for advanced approval, a sales agent can recall the approval request if changes are required. Recalling an approval request cancels any pending approval steps and returns the quote to a state where it can be updated.

Recalling a quote helps prevent approvers from continuing to review outdated information and allows sales agents to address issues before resubmitting the quote for approval.

## Rejection workflow

If an approver rejects an approval request generated by Advanced Approval Management, the system updates the approval workflow based on the configured process.

When rejecting an approval request, approvers are required to provide a comment explaining the reason for rejection. Rejection prevents the quote from progressing through the remaining approval steps and indicates that changes are required.

Rejected quotes are returned for further review or updates, depending on the approval configuration. The sales agent can modify the quote and resubmit it for advanced approval.

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## Reevaluating and resubmitting quotes

A recalled or rejected quote can be updated and resubmitted for advanced approval. When the quote is resubmitted, Advanced Approval Management reevaluates the quote and determines which approval steps must run again based on the configured rules.

Approval steps that are unaffected by the changes may be automatically approved, while approval steps impacted by the changes are routed again to the appropriate approvers. This helps reduce unnecessary re-approvals while ensuring that all required conditions are met before the quote is approved.

Once all required approval steps are approved, the quote can proceed to the next stage of the sales process.

**Related topics**

- Configuring Advanced Approval Management
- Create an approval configuration
- Components installed with Advanced Approval Management
- Notifications in Advanced Approval Management

### Create an order from a quote line item

You can create an order from all quote line items, or from a subset of top-level line items that you select.

#### Before you begin

Role required: sales_agent

You can create an order for a quote that is in the completed state. The **Create Order** button must be available on the quote layout. If you don't see the button, contact your administrator.

#### About this task

When you create an order from a quote, the quote line items, along with other relevant fields, are populated on the order as order lines. You can create an order from the entire quote or from selected line items:

- To create an order from the entire quote, don't select any line items before you select **Create Order**. All quote line items are converted to order lines.
- To create an order from a subset of the quote, select one or more top-level (root) line items before you select **Create Order**. Only the selected top-level lines, along with all of their child lines, are converted to order lines.

**Note:** You can select only top-level line items. Child lines are included automatically with their selected parent line.

#### Procedure

1. In the CRM Workspace, select **List** view and select **Quotes** > **All**
2. Open the quote that you want to create an order from.
3. Do one of the following:
   - To include all line items in the order, don't select any line items.
   - To include only specific line items, select one or more top-level line items. The **Create Order** button label updates to show the number of line items that you selected.

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4. Select **Create Order**.
   An order is created from the quote. Orders associated with the quote appear in the **Related Lists: Orders** section of the Contextual Side Panel (CSP).

### Add subscription pricing to a quote

Add subscription pricing to a quote or quote line items including start and end dates in Quote Management.

#### Before you begin

Role required: sales_agent

#### About this task

Subscription pricing is a pricing model where customers pay a recurring fee for products or services, typically at regular intervals such as monthly or annually.

In a quote, you can set the subscription pricing start date and end date, or you can enter a term and the subscription end date is automatically calculated.

Subscription pricing can be added at the quote header level or at the quote line item level.

See Subscription revenue metrics for more information about how subscription pricing works.

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**
3. Select the quote that you're working with.
4. In the **Quote Details** tab, add a **Subscription pricing start date** and a **Subscription pricing end date**.
   When the dates are entered, the following information automatically updates.

| Field | Description |
|---|---|
| Total monthly recurring price | Shows the monthly recurring price based on the dates entered in subscription pricing. |
| Total annual recurring price | Shows the total annual recurring subscription pricing based on the dates entered. |
| Total amount | Shows the total amount of the subscription pricing according to the subscription pricing start and end dates. |
| Term | Shows the number of months the subscription is valid based in the start and end dates. |

5. Select **Save**.

### Submit a quote for advanced approval

Submit a quote for advanced approval to route it to required approvers before sharing it with a customer.

#### Before you begin

Advanced Approval Management must be installed to submit a quote for advanced approval.

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Role required: sn_adv_appr_mgmt.approval_request_writer

### About this task

When you submit a quote for advanced approval, the system routes it to the required approvers based on configured approval rules and sequencing. You can also add ad-hoc approvers to the approval request when additional review is needed outside of the configured workflow.

If your administrator has configured reminder schedules, approvers receive automated notifications when their approval steps are pending. If an approval step is escalated, the step card displays the escalated approver so that all parties know who is responsible for the next action. Your administrator configures reminder and escalation settings.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List Icon.
3. Navigate to **Quotes** > **All**.
4. Select the quote that you want to submit for approval.
5. Select **Submit for approval**.
6. In the Preview and request dialog, review the required approvals and their sequence.
7. In **Message to approvers** field, enter comments for the approvers.
8. Select **Request Approval**.

### Result

The quote is submitted for approval and enters the In Review state. Approval requests are generated based on configured approval rules and sequencing.

#### Summarize a quote using quote summarization

Summarize a quote to generate a consolidated report of a quote record to quickly understand the quote without manually reviewing multiple fields, line items, or related records.

### Before you begin

Role required: sn_sales_common.sales_agent

### About this task

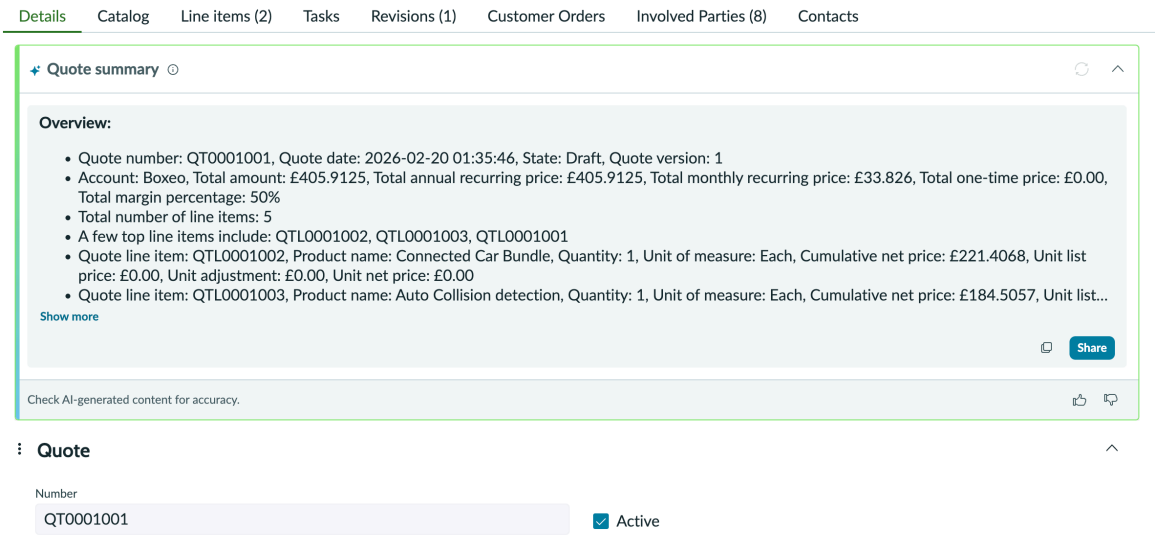
The AI summarization of quotes provides sales teams and stakeholders with fast, reliable insight into complex quote information. AI summaries help:

- Deliver fast, consistent insight into key quote details.
- Reduce manual review and speed up quote turnaround.
- Surface issues early to prevent deal delays.
- Keep teams aligned and helps move deals forward.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select the quote to summarize.
3. In the **Quote summary** field, select **Summarize**.

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The **Quote summary** field appears above the Quote section inside the **Details** tab. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **Show more** and use the scroll bar to view the rest of the content.

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

4. **Optional:** When you're finished summarizing a quote, you can save it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

| Option | Procedure |
|---|---|
| **Save the summary information by adding it to the work notes** | **a.** Select **Share**.<br>**b.** In the Share to work notes dialog box, edit the summary.<br>**c.** Select **Save to work notes**. |
| **Expand or collapse the summary** | Select the expand card icon or the collapse card icon to see more details or fewer summary details. |
| **Provide feedback for the summary** | If you think that the summary was helpful, select the helpful icon. If you think that the summary wasn't helpful, select the not helpful icon.<br>This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do). |

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| Option | Procedure |
| --- | --- |
| **Copy the quote summary** | Select the copy to clipboard icon to use the quote summary information for another purpose, such as pasting into an email. |
| **View the information about the quote summary** | If you want to check details about the summary, select the more info icon. |

### Recall a quote approval request

Cancel a pending quote approval request to change a quote before resubmitting it for advanced approval.

#### Before you begin

Role required: sn_adv_appr_mgmt.approval_request_writer

#### About this task

Recalling an approval request cancels any pending approval steps and returns the quote to the Draft state. Recall a quote approval request when changes are required after submission. For example, recall the request when quote details must be corrected or updated before the quote can proceed through the approval process.

#### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to **Quotes** > **All**.
4. Select the quote with the approval request that you want to recall.
5. Select the **Approvals** tab.
6. Select **Recall approval request**.

#### Result

The approval request is canceled, all pending approval steps are canceled, and the quote is returned to the Draft state. You can update the quote and resubmit it for advanced approval when ready.

### Approve an approval request for a quote

Review and approve or reject a quote advanced approval request that is routed to you as part of an advanced approval workflow.

#### Before you begin

Advanced Approval Management must be installed to approve a quote advanced approval request.

Role required: sn_adv_appr_mgmt.approval_request_approver

#### About this task

You can approve a quote advanced approval request from several locations:

- A quote.
- Your approval entry on the quote.
- My Approvals.

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- Approval notification email.
- My Tasks in Now Mobile.

This task describes how to approve a request directly from a quote.

If your administrator has configured reminder schedules, you receive automated notifications when your approval steps are pending. If an approval step has been escalated, the step card displays the escalated approver in the **Remaining by** section and removes all other remaining approvers, so you know who is responsible for the next action. Your administrator configures reminder and escalation settings.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*
2. Select the List icon.
3. Navigate to **Quotes** > **All**.
4. Select the quote that contains the advanced approval request.
5. Select the **Approvals** tab.
6. Locate the approval step assigned to you.
7. From your approval box, select the **ellipsis** menu, then select **Approve** or **Reject**.
   a. If you select **Approve**, then enter comments (if needed) and select **Approve** to confirm.
   b. If you select **Reject**, then enter a comment explaining the reason for rejection and select **Reject** to confirm.

### Result

If approved, your decision is recorded for the quote approval step, and the approval workflow continues based on the configured sequencing.

If rejected, the approval request is marked as rejected and the quote is returned for further review or updates, based on the configured approval process.

## View and update products using the line items tab

Use the line items tab to review and update products in your quote and to add additional line items.

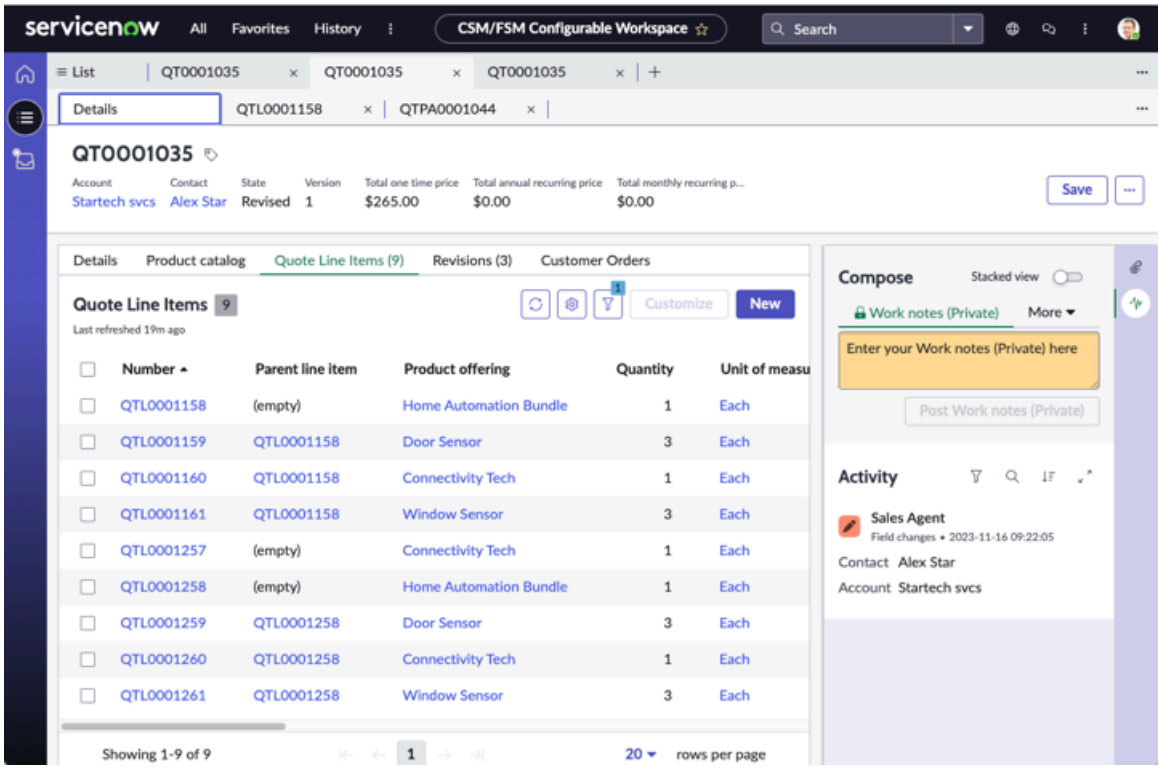
### Before you begin

Role required: sales_agent

### Procedure

1. In the CRM Workspace, select the List icon and select **Quotes** > **All**.
2. Select the quote that you're working with and select the **Quote Line Items** tab.

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3. Select **New** to start a new quote line item or select an existing quote line item to make changes.
4. Fill in the fields in the Quote Line Items.

### Quote line item fields

| Field | Description |
|---|---|
| Quote | Automatically generated field. |
| Number | Automatically generated field. |
| Parent line item | Automatically generated field. |
| Price list | Price lists are added to the product line item. Price lists show pricing that is already configured. |
| Term (months) | Monthly terms for the price list selected. Monthly terms reflect the cost monthly of the product or service. |
| Subscription start dates | Subscription state date is the date when an entitlement or service begins. |
| Subscriptions end date | Subscription end date is the end date for an entitlement or a service. |
| Contract start date | Contract state date is the date a service contract or entitlement contracts start. |
| Contract end date | Contract end date is the date when a service contract or entitlement contract ends. |
| Product offering | Product offering let agents select the product or service for the quote. |

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| Field | Description |
|---|---|
| Quantity | Quantity is the number of a product that is selected for the quote. |
| Unit of measure | Agents can select a unit of measure for products that come in quantities. |
| Service location | Service location allows agents to select a location for the service that is added to the quote. |
| Short description | The description field for the service location, which provides information about the location such as address and phone number. |

5. Select the Quote Line Characteristics tab to add or modify the quote characteristics.
6. Select the **Pricing Adjustment** tab to add or modify a manual pricing adjustment to the quote line item.
7. Select **Save**.
   The Quote Line Item is updated to the main quote.

### What to do next
Add a pricing adjustment to a quote line item. See View and update manual pricing adjustments in quotes for more information.

## View and update manual pricing adjustments in quotes

Use the Pricing Adjustments tab in Quote Management to view and update manual pricing adjustments made to order line items in your quote.

### Before you begin
Role required: sales agent

### About this task
To create a pricing adjustment, see Add pricing adjustment to a quote line item.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Select **Quotes** > **All** and select the quote that want to work with.
3. Select the **Pricing Adjustment** tab.
4. Select the price adjustment line item that you want to update.
5. Make the pricing adjustment.
6. Select **Save**.
   The pricing adjustment is updated and reflected on the overall quote pricing field.

## Initiate a contract request

Initiate a contract request from the Quote Management application.

### Before you begin
Role required: sales_agent

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### About this task
You can create a legal sales contract to finalize a deal and formalist the agreements with your customer.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Select **Quotes** > **All**.
3. Select the quote in the Completed state for which you want to create a contract.
4. Select the **More Actions** menu and select **Initiate contract**.
5. On the form, fill in the fields.

| Field | Description |
|---|---|
| Type of paper | Type of paper to be used in the contract. Select Own paper. |
| Contract type | Type of contract to be generated. Select Sales Contract. If you want to generate a different type of document, select Other types of contract. |
| Signature type | Type of signature to do to complete the contract.<br>○ Electronic signature: You sign the document through electronic medium.<br>○ Wet signature: You download the document and sign it manually. |
| Start date | Date that the contract begins. |
| End date | Date that the contract ends.<br>**Note:** The End date must be later than the Start date. |

6. Select **Initiate**.
   A contract management request is generated in the Contract documents tab. Select the record to view the document.

## View an existing quote

View existing quotes to update the quote status or make other changes.

### Before you begin
Role required: sales_agent

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Select **Quotes** > **All**.

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- All Quote- shows all the quotes in the instance.
- My Quotes- shows your quotes.
- My Teams Quote- shows the team quotes.

3. Select the quote that you're working with.
4. Make updates to the quote as needed.
5. Select **Save**.

### Export quotes

Export a list of all quotes in Quote Management and provide it to a customer.

#### Before you begin

Role required: sales_agent

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**.
3. Select **Export**.
4. Select the **File Type** to be exported:
   - Excel
   - CSV
   - JSON
   - PDF
5. Select the **Delivery Type**:
   - Email - Enter a valid email address.
   - Download - Downloads the export to a local drive.
6. Select **Export**.
   The list of quotes is exported according to the parameters set.

### Enable a sales agreement in a quote

Agents can enable a sales agreement for a quote. Once enabled in Quote Management, sales agreements are generated that show the product and service lines and other relevant details for the quote.

#### Before you begin

Role required: pricelist_manager and sales_manager

#### About this task

A sales agreement is a document that outlines the terms and conditions of a sale between a seller and a buyer.

The agreement specifies the details of the transaction including the goods or services being sold, the price, the quantities, delivery terms, and any other relevant conditions, for a specific period.

Sales agreements filter the product catalog according to the agreement.

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### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quote** > **All-Quotes** and select **New**.
3. Add quote details to the quote and select **Enable sales agreement quote**.
   When the **Enable sales agreement quote** is selected, the quote is set on a sales agreement workflow. See Using Sales Agreement Management for more information.
4. Fill in the **Sales agreement start date** and **Sales agreement end date**.
5. Select **Save**.
6. Use the **Catalog** tab to add quote line items to the quote.
   See Add products to a quote for more information.
7. Make other updates to the quote.
8. Once the quote is ready, select **Submit for approval**.
9. When the quote is at an **Approved** state, change the quote to **Completed** by either updating the **State** field or selecting the context menu and choosing **Mark as complete**.
   The quote is saved to a **Completed** state and the **Create sales agreement** button appears in the quote details form.
10. Select **Create sales agreement**.
    A sales agreement is created. The message displays the sales agreement number.
11. Select the sales agreement message to open the sales agreement.

## Sync a quote with an opportunity

Agents can sync quote information with an opportunity to ensure that information is consistent between both applications in Quote Management.

### Before you begin

Role required: sales_agent

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quote** > **All-Quotes** and select a quote that you want to sync with an opportunity.
3. In the **Details** tab of the quote, go to the **Source Opportunity** option and choose the opportunity you want to sync with.
4. Select **Save**.
   The **Enable sync** button is enabled.
5. Select the **Enable Sync** option.
   Current Information and future changes to the quote are automatically synced. The following areas show the sync status.
   - The **Sync** check box shows that the quote is synced.
   - The **Sync** flag on the secondary header changes to **Yes**.
   - The **Synced** column in the Quotes related list on the Opportunity record shows **Yes** when sync is activated and **No** when the quote isn't synced.

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6. Turn off automatic sync by selecting the **Disable sync** button.

**Note:** When sync is enabled, the following conditions occur:

- No changes can be made to that opportunity (for example, adding line items, changing quantities).
- Additional changes should be made to the quote record.
- The opportunity record is updated asynchronously with the latest product offerings and prices that are added to the quote.
- The synced opportunity state changes to closed when the quote is marked as complete

### Add covered products to a quote

Add a covered product to line items in a quote in Quote Management.

#### Before you begin

Role required: sales_agent or sales_manager

#### About this task

Covered products are products that are added to a warranty or entitlement. Once you add a warranty or entitlement to your quote line items, the covered product option becomes available.

When converting quotes to orders, the covered product relationships are transferred from the quote to order.

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quote** > **All** and select a quote to which a covered product is to be added.
3. From the **Quote line items** tab, select the quote line item.
4. Select **More** > **Covered product**.
5. In the **Covered Product** tab, select **New**.
6. In the **Create New Covered Product** form, select the covered product line item you want to add.
   There are three types of covered products types that you can add to a line item:

| Covered product type | Description |
|---|---|
| **Covered quote line item** | Select a quote line item to be added as a cov ered product. |
| **Covered sold product** | Select a covered sold product to be added as a covered product. |
| **Covered install base item** | Add an install base item as a covered prod uct. |

7. Select **Save**.
8. On the quote line item page, select the contract start date and the contract end date.
9. Change the state to **Complete**.
   A contract is created with the contract details for the order line.

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### Filter catalogs by location in a quote

Use the location filter on the Catalog tab to filter products by location in Quote Management.

#### Before you begin
Role required: sales_agent

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**.
3. Select the quote that you're working with.
4. Select the **Catalog** tab.
5. In the **Select a location** field, choose a location.
   The products in the catalog are filtered according to the selected location.

### Copy locations for quote line items

Use the copy location function to change the location of multiple quote line items in Quote Management.

#### Before you begin
Role required: sales_agent

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**
3. Select the quote to work on and select the Line Items tab.
4. Select one or more quote line items that you want to copy to another location.
5. Select **Copy**.
6. In the **Copy line items** dialog box, choose one of the options.

| Option | Description |
|---|---|
| **Keep original location** | Line items for the selected quote are created and the source location is retained. |
| **Choose new location** | This action copies the quote line items to a new location.<br><br>In the **Service location** filter, select the new location that you want the line items to be copied to. |

**Note:** Be sure to select **Continue to copy only eligible lines for this location (exclude ineligible)** within the **Copy line items** dialog box.

This selection copies the eligible line items to your preferred location and skips the line items that aren't eligible. If the option isn't selected, no quote line items are copied if any line item is ineligible.

7. Select **Copy**.

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## Create a quote PDF document

In Quote Management, sales agents can create a PDF of a quote that can be sent to customers for review and signatures.

### Before you begin

Create a quote PDF document

Role required: sales_agent

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**.
3. Select the quote that you're working with.
4. On the **Details** tab, go to **Quote Document Details** and fill in the fields.

| Option | Description |
|---|---|
| **Document template** | A document template is required to create a quote document PDF. A standardized tem plate is included with the base system. Select the template that you want. See Set up PDF document templates for more information about how to create customized templates. |
| **External signer** | Option that enables you to have the quote document signed by someone outside the or ganization. See Set up PDF document sign ers for more details on how to set up external signers.<br><br>When you select **Send for signature**, the ex ternal signer's email address is used to send an email through Docusign for review and electronic signature. |
| **Internal signer** | Option that lets you select an internal signer for the quote.<br><br>When you select **Send for signature**, the in ternal signer's email address is used to send an email using Docusign for review and signa ture.<br><br>See Set up PDF document signers for more details about how to set up an internal signer. |

5. Select **Save**.
6. In the Quote form, select **Generate Document**.
   The PDF document is generated and appears in the **Attachment** side window.
7. Select the attachment icon to open the attachments window.
8. Select the actions icon and choose an action for your PDF document.

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| Choice | Description |
| --- | --- |
| **Download** | Agents can download a document that en ables them to send is a different way. |
| **Remove** | This option deletes the document. |
| **Rename** | This choice enables agents to rename the document. |
| **Send for signature** | Agents use this option to send the document for signatures. The document is sent to the signers indicated on the Quote details tab un der Quote document. |

A message appears indicating that the PDF document was generated.

9. To view the generated PDF, select the PDF in the attachments window.

### View a quote PDF document

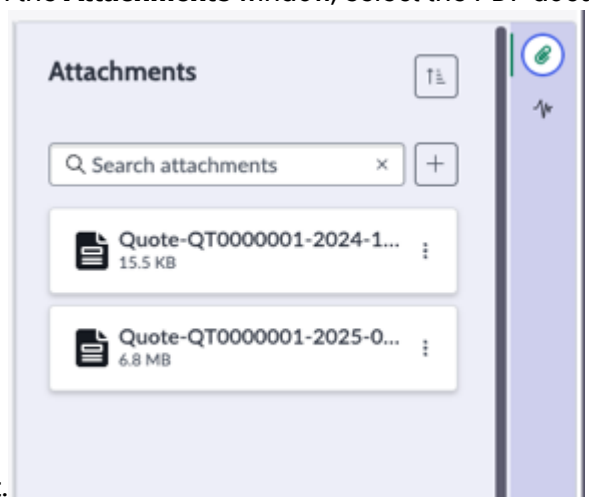
Agents can view quote documents in the PDF viewer window. The PDF viewer window has controls that enable agents to manage the PDF.

#### Before you begin

Role required: sales_agent

#### Procedure

1. In the CRM Workspace, select the List icon .
2. Navigate to **Quotes** > **All**.
3. Select the quote that you're working with.
4. In the **Attachments** window, select the PDF document to open it.




The PDF document opens in the PDF viewer.

5. Use the PDF viewer controls to manage the PDF.

### Use hierarchical list view for quote line items

Sales agents can view quote line items as a hierarchical list, which helps to view the parent and child relationship between line items.

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### Before you begin
Role required: sales_agent

### Procedure

1. In the CRM Workspace, select the List icon .
2. Navigate to **Quotes** > **All**.
3. Select the quote that you're working with and open the **Line items** tab.
4. Use the control to manage the line items.

| Control | Description |
|---|---|
| Caret | Opens the hierarchical list view showing the child line items. |
| Pencil | Make additional configuration changes to the products in the line item. |
| Number 5 | Shows the number of child line items contained in the parent line item. |
| Filter | Filters line items. |
| Toggle | Toggles between hierarchical view and standard view. |

## Consolidate quotes

Consolidate renewal quotes to merge multiple quotes for the same account into a single unified quote.

### Before you begin
The admin needs to configure the Quotes related list on the Account Details page.

Role required: sn_customerservice_manager and sn_sales_common.sales_agent.

### Procedure

1. Navigate to **All** > *CRM Workspace*.
2. In the List view, navigate to **Accounts** and select the required account.
3. On the Account Details page navigate to **More** > **Quotes**.
4. On the **Quotes** related list, select the quotes that you want to consolidate.
5. Select **Consolidate**.
6. In the Quote Consolidation dialog box that appears, select the target quote from the **Select a target quote** list.
7. Select **Proceed**.
   The selected quotes are merged into the target quote. A confirmation message appears with a link to the consolidated quote. The target quote displays a **Consolidation History** related list that shows all source quotes that were merged into it.

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## Using Advanced Approval Management

Sales teams can use workflows for approving Sales Customer Relationship Management entities such as customer quotes. Workflows begin with approval requests submitted by sales agents, which are then routed for approval by designated approvers.

**Prerequisite**: Ensure the necessary roles are added and configured, if not already, to configure Advanced Approval Management and manage approvals. For more information, see Advanced Approval Management reference and Components installed with Sales Common.

**Related topics**

- Advanced Approval Management
- Configuring Advanced Approval Management
- Advanced Approval Management reference
- Notifications in Advanced Approval Management
- Create an approval configuration

### Tracking approval status and history

Monitor the progress of an approval request as it moves through the steps in an approval workflow.

## Approval workflow interface

After an approval request is submitted, approval users can view the approval steps in the CRM Workspace. For example, in a quote approval workflow, requesters, approvers, and users with view access can navigate to the quote. They access the approval workflow interface from the quote Approvals tab.

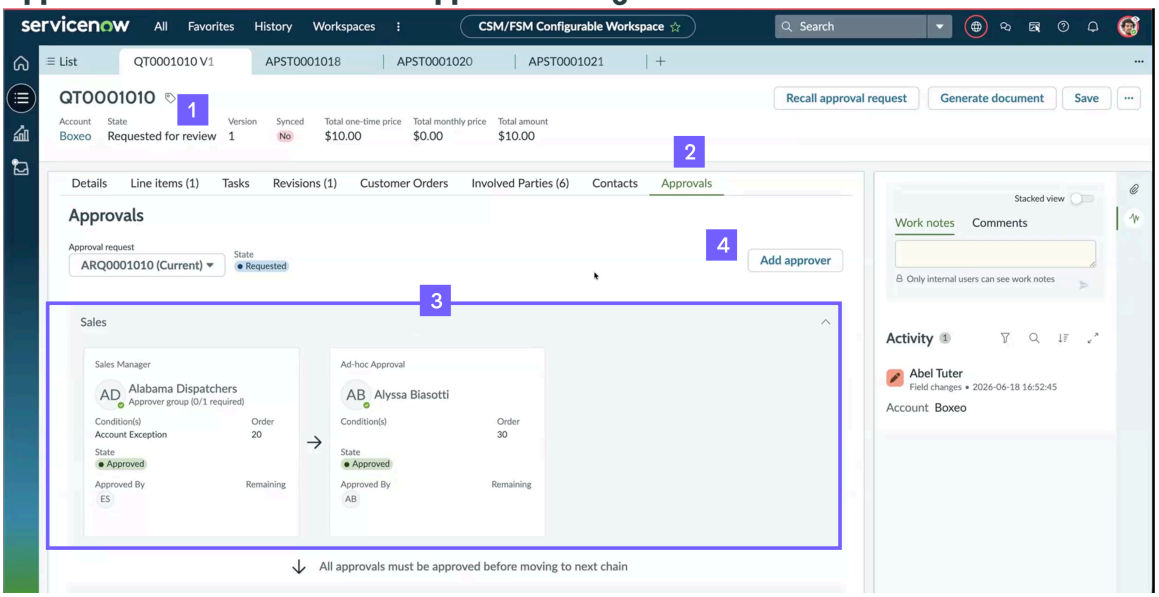
The approval workflow interface provides an audit trail of approval steps and steps approval chains. Approval cards identify the:

- Approval rule
- Assigned approvers
- Actual approvers for completed steps
- Approval comments
- Approval duration timestamp for a step with pending approvals

Approvers use the More options menu in a step card to approve or reject the request.

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## Approval interface in Advanced Approval Management




## Approval workflow interface elements

| Feature | Description |
|---|---|
| 1. Quote state | Quote state:<br>• Draft: Initial state of the quote. Editable by agent.<br>• Requested for review: Quote has been submitted for approval. Not editable by agent unless the quote is recalled by the agent, or the quote has been approved or rejected.<br>• Approved: Approvals for the quote are complete.<br>• Rejected: Quote rejected by an approver. Editable by agent so that it can be revised and resubmitted for approval. |
| 2. Approvals tab | Related list for the entity, such as a quote, which displays the approval workflow. |
| 3. Approval chain with approval step cards | Grouping of approval steps that are run in sequential order, based on the chain order specified for the steps in the approval rules. Each step card represents an approval rule and its associated approvers.<br>A step card provides the following information:<br>• Approval step state<br>• Approval duration, which reflects the time elapsed for the active step (no action taken): |

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**Approval workflow interface elements (continued)**

| Feature | Description |
|---|---|
| | ○ Number of minutes, for example 43m<br>○ Number of hours and minutes, for example 1h 43m<br>○ Number of days and hours, for example 2d 4h<br>○ Number of weeks days (over seven days has elapsed), for example 1w 2 d<br>If the approval step state is escalated, the approval duration is highlighted and shows the elapsed time for the escalated approval.<br>• If the request was previously recalled during the approval process, an Auto-approved flag indicates at least one or more previously completed approvals has been automatically reapplied.<br>• For approvers assigned to a step, the card displays the More options ( ) menu to approve or reject the approval step.<br>• For approval admins that also have the requester role, the More options ( ) menu provides an **Override** option to bypass the step if it's no longer required. For details, see Override an approver. |
| 4. Approval options | Options displayed for certain approval actions, depending on the user role.<br><br>For example, requesters and approvers have the option to add an ad hoc approver to the approval workflow using the **Add approver** option. For more information, see Add ad-hoc approvers to an approval request. |

**Related topics**

- Configuring Advanced Approval Management
- Create an approval configuration
- Components installed with Advanced Approval Management
- Notifications in Advanced Approval Management

### Working with approval requests as a requester

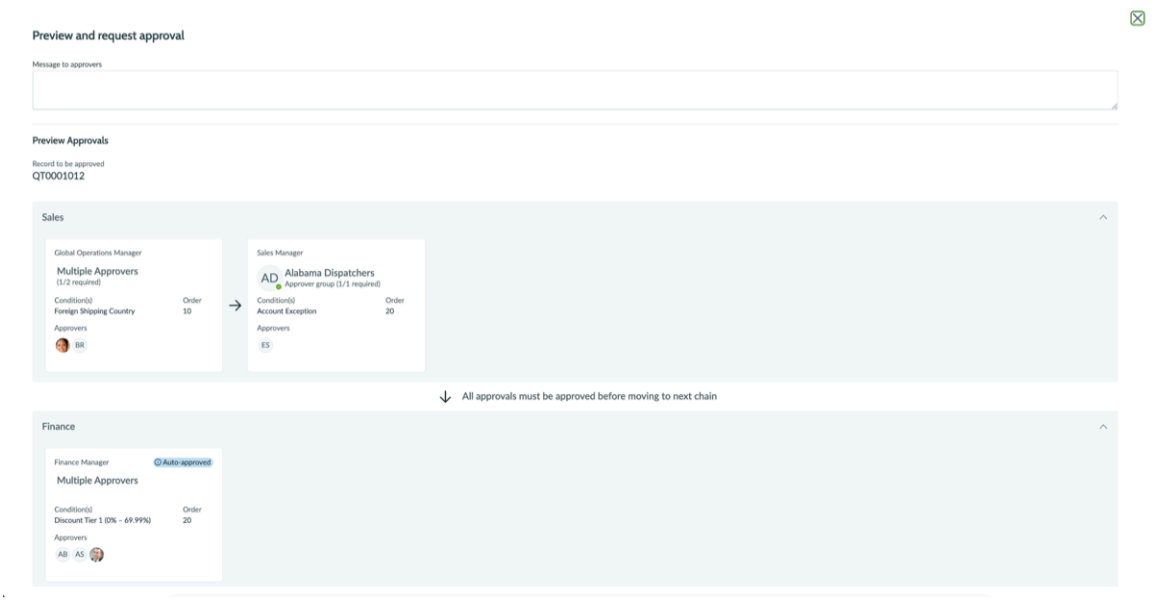
As a requester with the approval request writer role, when you submit your request for approval, you preview it, then request approval. You can also recall a request if you need to make changes or update a request if it was rejected, then resubmit it for approval.

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## Previewing and submitting approval requests

When a business item such as a customer quote is ready for approval, you can submit an approval request from the Sales Customer Relationship Management application for the entity, for example Quote Management. When you select the **Preview and Submit for approval** option, a preview of your request and the approval workflow opens. You can see the approval conditions that will be used to evaluate your request, the approval steps in the process, and the approvers who review your request. After reviewing the approval workflow, select **Request Approval** to generate the request.

### Preview approval request




## Recalling approval requests

If you need to change an approval request after you submit it for approval, you can recall the approval request using the **Recall approval request** option in the quote header. Recalling an approval request cancels any pending approval steps and returns the request to a draft state where it can be updated.

Recalling a request helps prevent approvers from continuing to review outdated information while you address issues before resubmitting the request for approval.

## Resubmitting rejected or recalled approval requests

If you recalled an approval request or your request was rejected, you can revise it and resubmit the request for approval. For example, when you resubmit an approval request for a quote, the approval engine reevaluates the request and determines which approval steps must run again based on the configured rules and conditions.

Approval steps that are unaffected by the changes might be automatically approved (smart reapprovals) depending on the reapproval conditions set by your approval admin. But approval steps affected by the changes are routed again to the appropriate approvers. This helps reduce unnecessary reapprovals while ensuring that all required conditions are met before the quote is approved.

Once all required approval steps are approved, your business item, such as the quote that was approved, can proceed to the next stage of the sales process.

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## Adding ad-hoc approvers to an approval request

As a requester, you can add one or more approvers or approval groups to a chain when an approval request requires approval by others who are familiar with the rules or business guidelines relevant to the request, but outside of the original approvers.

By default, ad-hoc approvers are added to the General chain, but you can add an ad-hoc approver to an existing approval chain and specify the order (step) to which the approver is added. For details on adding ad-hoc approvers, see Add ad-hoc approvers to an approval request.

## Overriding an approval step

There may be times when an approval is no longer required. If you're a requester who also has the approval admin role, you can override or bypass a pending approval request step to unblock an approval request when the approval is no longer required. For more information, see Override an approver.

### Related topics

- Configuring Advanced Approval Management
- Create an approval configuration
- Components installed with Advanced Approval Management
- Notifications in Advanced Approval Management

### Submit a quote for approval

Submit a quote for approval when you have configured approval rules that require authorization before the quote can be completed.

### Before you begin

Role required: sn_adv_appr_mgmt.approval_request_writer or sn_adv_appr_mgmt.approval_request_approver

**Important:** Before submitting quotes for approval, ensure that your administrator has completed the following setup tasks:

- Set up the environment to manage approvals - Install required plugins and enable approval tenant settings
- Create an approval configuration - Create approval configurations with trigger conditions and rules
- Define an approval user - Assign approvers for the configured approval rules

### About this task

When you create or modify a quote, the approval engine automatically evaluates whether the quote meets any configured approval conditions. If one or more conditions are met, you must submit the quote for approval before it can proceed to the completed state.

Before submitting, you can preview which approvals are required and who will review your quote. This helps you understand the approval chain and any conditions that triggered the approval requirement.

Approvals are triggered based on conditions configured by your approval administrator. Common examples include:

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- Account-based triggers: Approvals required for specific customer accounts (for example, VIP accounts or accounts requiring compliance review)
- Discount triggers: Approvals required when quote discounts exceed configured thresholds
- Price adjustment triggers: Approvals required for line-level price modifications
- Custom triggers: Any other business conditions configured by your organization

If your quote does not meet any configured approval conditions, the approval framework automatically approves the quote without requiring manual review. You can proceed directly to completing the quote.

### Procedure

1. Open the quote you want to submit for approval.
2. Click the **Request Approval** button.

   A preview panel appears showing:

   - All approval rules that apply to your quote
   - The trigger conditions that activated each approval (for example, "Account Exception" or "Discount Tier 1: 0-69.99%")
   - The approver names or groups assigned to each approval rule
   - The sequence in which approvals will be routed (sequential approval chains)
3. Review the approval preview to confirm the required approvers and approval sequence.

   The preview shows:

   - First approval: The initial approver or group that will receive your request
   - Subsequent approvals: Approvers who will receive the request after the previous step is approved
   - Parallel approvals: Multiple approvers who can approve simultaneously (when configured with OR logic)
   - Sequential approvals: Approvers who must approve in order (when configured with AND logic)
4. If you want to make changes to your quote before submission, click **Cancel** to close the preview and edit your quote.

   After making changes, click **Request Approval** again to see the updated approval requirements.
5. When you are ready to submit your quote for approval, click **Submit** in the approval preview.

   Your approval request is submitted. A confirmation message appears, and the quote status changes to "Pending Approval." The approval engine routes your request to the first assigned approver.

   **Note:** If your quote was already approved previously and you are resubmitting without significant changes, the system may use **smart approvals** to skip re-approval if this feature is enabled. Contact your administrator for details.
6. Click **View Approval** to track the status of your submitted request.

   A panel shows:

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- The current approval request status
- Each approver assigned to your request
- Which approvers have already reviewed your quote
- Approval history from any previous requests

### What to do next

After submitting your quote for approval:

- Monitor the approval status using the **View Approval** button
- If an approver rejects your quote, you can make revisions and resubmit (see Reject or return a quote for revision)
- If all required approvers approve your quote, proceed to complete the quote transaction.

#### Related topics

Configuring Advanced Approval Management

Create an approval configuration

Components installed with Advanced Approval Management

Notifications in Advanced Approval Management

## Add ad-hoc approvers to an approval request

As a requester or an approver, add one or more ad-hoc approvers to an approval request in Advanced Approval Management.

### Before you begin

The person or group to be added as an ad hoc user must be defined as an advanced approval user or advanced approval group by your advanced approval admin.

Role required: sn_adv_appr_mgmt.approval_request_writer or sn_adv_appr_mgmt.approval_request_approver

### About this task

After an approval request has been submitted, you (as a requester or approver) can add other approval users or approval groups to an approval request. Add approvers when the request requires approval by others who are familiar with the rules or business guidelines relevant to the request, but were not included as original approvers.

When you add an ad-hoc approver, you can choose to add the approver to a General chain for the approval request. Or, you can specify an existing chain to which the ad-hoc approver is added and the rule order for step to be added to the chain. The approval engine validates the chain and rule order values, allowing ad-hoc approvers to be added only to chains that have not yet been triggered and approved.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to the approval request.
   Access the request by navigating to the transaction entity, and then select the entity, such as a quote for which an approval request was submitted. Select the Approvals tab for the transaction to open the approval workflow interface.

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4. Select **Add Approver**.
5. In the Add ad-hoc approver dialog box:
   a. Select **Approver(s)** or **Approver group**.
   b. In the **Approver(s)** or **Approver group** field, enter the approver users or approver group.
   c. In **Approval criteria**, select Anyone or All to indicate the approvers required.
   d. In the *Approval chain* field, select the chain to which the approver is being added.
   If you don't select a chain, the approver(s) or approval group is added to the General chain, which is displayed at the top of the approval workflow.
   e. In the **Rule order** field, enter the numeric value of the approval step to which the ad-hoc approver is being added.
   f. In **Comment to approvers**, enter the reason for adding approvers or approval groups.
   g. Select **Add**.

   The approval engine verifies that the chain and rule order specified have not yet been triggered and approved. If valid, the ad-hoc approvers are added to the approval workflow in the rule order specified for the step.

### Result

The ad-hoc approver can approve or reject the approval request in one of the following ways:

- From the simple Advanced Approval notification received informing the ad-hoc approver of the approval request.
- In the approval step card in the chain, by selecting the **More options** menu and choosing the **Approve** or **Reject** option.
- In the My approvals feature in the ServiceNow AI Platform.

#### Working with approval requests as an approver

As an approver, you can approve or reject the requests in the approval workflow or from the notifications informing you of approval requests for items such as customer quotes. You may also receive approval reminders for pending approval requests.

## What you can do as an approver

If your advanced approval admin has defined you as an approver or a member of an approval group, you can do the following:

- Approve or reject approval requests.
- Approve or reject escalated approval requests if your advanced approval admin has configured the escalation feature. An escalated approver handles requests that have been reassigned when the original approver hasn't acted on requests.
- Add other approvers, called ad-hoc approvers, if they are qualified to review approval requests for an approval rule and should be included in the approval process.
- If your organization uses granular delegation as part of the HR Service Delivery application, delegate your approval responsibilities when you're not available.

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## Approval workflow

When a sales rep (requester) submits an approval request, the advanced approval engine creates one or more approval requests and routes them to the appropriate approvers. As an approver, you're responsible only for the approval steps assigned to you. Approval actions taken by another approver do not give you access to approval steps assigned to other approvers. But you can track and review the approval process for the request using the approval workflow interface.

You evaluate requests based on business policies, financial rules, legal rules, or other internal guidelines that your company follows:

- Details of the approval entity, such as quotes and their related pricing
- The approval reason or condition that triggered the request
- Any comments provided by the requester

You can approve or reject requests from different channels, depending on how the approval process is configured and your notification preferences for various channels.

- From the approval workflow interface in the CRM Workspace
- From system email notifications reminding you of your approval request tasks

  For example, you may receive a simple notification for a single approval request or a consolidated email notification that informs you of multiple approval requests for a given grouping of requests. You can approve or reject requests directly from the email. For consolidated email approvals, you can:

  - Selectively approve or reject individual requests, or approve or reject all the requests from the notification.
  - Reply to email notifications using text commands to approve or reject specific requests, or do a bulk approval or rejection of all the requests in the notification.
- In push notifications from the ServiceNow Now® Mobile application
- From My Approvals in the ServiceNow AI Platform

You may also receive email reminders if your approval rule admin has set up email reminders for your approval configuration.

**Note:** For more information on setting up your preferred notification channels, see Notification Preferences.

## Rejection workflow

When you reject an approval request, the advanced approval engine updates the approval step record. Rejection helps prevent the request from progressing to the remaining approval steps and indicates that changes are required.

When you reject an approval request, you specify the reason for the rejection. You can reject an approval request from:

- An email notification: An Approval Request Rejected notification is generated and sent to the requester. The notification indicates the request was rejected and the reason for rejection. The requester can modify the business item, such as a quote, and resubmit the request for approval.
- From the step card in the approval workflow interface: Use the More options menu in the card to select the Reject option. You are prompted to enter the rejection reason.

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If you reject the request from an email notification, an Approval Request Rejected notification is generated and sent to the requester. The notification indicates the request was rejected and the reason for rejection. The requester can modify the business item, such as a quote, and resubmit the request for approval.

In the approval workflow interface for a request that has been rejected, the Approvals tab shows the rejection reason for the request and the approver who rejected it. The approval step card shows the approval request state as Rejected. The requester can edit the quote as needed, then preview and resubmit the quote for approval.

## Escalation workflow

When an approver doesn't act on an approval request within a certain time period, your advanced approval admin can designate an escalation assignee to handle the request. As an escalation assignee, you receive notifications for approval requests that are reassigned to you.The original approver also receives a notification indicating the approval request has been escalated.

As an escalated assignee, you can approve or reject requests from different channels, as in the basic approval workflow.

## Adding ad-hoc approvers

You can add one or more ad-hoc approvers or approval groups when others outside the original approver list must review the request. For example, an approval request may require approval by others who are familiar with the rules or business guidelines relevant to the request. For more information on adding an ad-hoc approver, see Add ad-hoc approvers to an approval request.

If you've been added as an ad hoc approver, you can accept or reject the approval request from the approval request notification. You can also approve or reject the request from a step card in an approval chain or from the General Chain of the approval workflow interface.

## Delegating approvals

If you need to be away from work for a specific time period and can't take action on your approval requests, you can delegate your approval responsibilities to another coworker if the granular delegation feature in Employee Service Managementhas been configured by your admin.

For more information on delegation, see Configure granular delegation rules for an approver and Granular Delegation .

### Related topics

- Configuring Advanced Approval Management
- Create an approval configuration
- Components installed with Advanced Approval Management
- Notifications in Advanced Approval Management

### Review and approve a submitted quote

As an approver, review the details of a submitted quote and approve the request when it meets your organization's requirements.

**Before you begin**
Role required: Approver

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**Important:** You can receive approval requests through multiple channels:

- Email notifications
- Approval dashboard or approval center in your workspace
- Direct on the quote record

## About this task

Approvers are responsible for reviewing submitted quotes and either approving or rejecting them based on organizational policies such as pricing guidelines, legal requirements, and discount thresholds. Your approval decision routes the request to the next approver in the approval chain, or completes the approval process if you are the final approver.

As an approver, you must:

- Review quote details and verify that they comply with company policies
- Check the approval conditions that triggered the approval request (for example, "Account Exception" or discount percentage)
- Make an approval decision: approve, reject, or request revision
- Document your decision with comments if needed
- Complete the approval within the expected timeframe (escalations may be configured for overdue approvals)

Approval requests may be configured to work in different ways:

- **Sequential approvals:** Your approval must be completed before the request moves to the next approver. The quote remains pending until all required approvals are received.
- **Parallel approvals:** Multiple approvers review the request simultaneously. The quote can proceed when any one approver approves it (OR logic) or when all assigned approvers approve it (AND logic).
- **Multi-level chains:** Different approval rules may be assigned to different approvers based on the approval sequence (for example, Sales Manager first, then Finance Manager).

## Procedure

1. Open the approval request notification or navigate to your approval dashboard to find pending approval requests.

   You can access approval requests from:

   - Email notification from the approval system
   - Approval section in your CRM Workspace
   - Dedicated approval dashboard or approval center
   - Directly on the quote record by clicking **View Approval**

2. Click on the approval request to open the quote details.

   The quote record displays with:

   - All quote fields and line items
   - Customer account information
   - Pricing and discount details
   - Any other relevant business information

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3. Select **View Approval**.
   The approval panel appears and displays:
   - The trigger conditions that required this approval (for example, "Account Exception" or "Discount Tier 2: 70-89.99%")
   - The approval rule that applies to your decision
   - Other approvers in the chain and their status
   - Any comments from the requester or previous approvers
4. Verify that the quote meets your organization's approval criteria.
   Review the following based on your role and the approval rule:
   - Sales team approvers: Verify customer information, special terms, and account status
   - Finance approvers: Verify pricing, discount levels, and financial terms
   - Legal approvers: Verify compliance, contract terms, and regulatory requirements
5. Click **Approve** to approve the quote.

   The approval action is recorded, and the system:
   - Documents your approval with the current timestamp
   - Routes the request to the next approver in the chain (if applicable)
   - Completes the approval process if you are the final required approver
   - Notifies the quote requester and other approvers of the status change
6. **Optional:** Add comments to document your approval decision.

   Use the comments field to:
   - Document your approval rationale
   - Flag any issues or concerns that the requester should address in future quotes
   - Provide guidance to other approvers in the chain
   - Record business context for audit purposes

### What to do next

After approving a quote:

- If you were the final required approver, the quote moves to the "Approved" state and the requester can proceed to complete the transaction
- If additional approvers are required, the request is routed to the next approver in the approval chain
- If the requester resubmits a previously rejected quote with changes, you may receive another approval request for review
- Track all your approval decisions in your approval history

**Tip:** If you cannot complete the approval within your assigned timeframe, contact your administrator about delegation or escalation options.

#### Reject or return a quote for revision

As an approver, reject or return a submitted quote when it does not meet organizational requirements. The quote requester can then revise and resubmit for approval.

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### Before you begin
Role required: Approver

### About this task
Reject an approval request when:

- Pricing or discounts violate company policies
- Customer account does not meet qualification criteria
- Terms or conditions don't meet legal or contractual requirements
- Required information is missing from the quote
- Business conditions have changed since the quote was submitted

When you reject an approval request:

- The quote status changes to Rejected, or to a customized status if configured.
- The approval request is marked as rejected and removed from active approval workflows
- The quote requester receives a notification with your rejection comments
- The requester can make changes and resubmit the quote
- When resubmitted, the quote goes through the complete approval process again , starting from the first approver

### Procedure

1. Open the approval request for the quote you want to reject.
2. Review the quote details and approval context to identify the reasons for rejection.
   Review the following:
   - The specific approval conditions that aren't met
   - Policy violations or non-conformance issues
   - Missing information or required clarifications
3. Select **Reject**.
   A form appears to document your rejection decision.
4. In the **Comments** field, enter the reason for rejection and provide specific guidance for the requester.
   Provide clear, actionable feedback, for example, Discount exceeds approval threshold by 5%. Reduce by at least 6% for tier compliance.
5. Select **Submit** to send the rejection.
   The rejection is processed. The system:
   - Changes the quote status to **Returned for Revision**
   - Records the rejection with timestamp and comments
   - Sends a notification to the quote requester with your rejection reason
   - Returns the quote to the requester for editing

### What to do next

- The requester makes revisions based on your feedback
- The requester resubmits the quote for approval by selecting **Request Approval**
- The revised quote goes through the complete approval workflow from the beginning

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- You receive another approval request for the revised quote
- You can track all previous rejection comments in the approval history

The **View Approval** panel shows:

- All previous approval requests for the same quote
- Status of each request (approved, rejected, recalled)
- Your rejection comments and the requester's responses
- Timestamp of each approval action

### View approval history and track status

Track the progress of submitted quote approval requests. View the complete history of approvals and rejections for audit and reference.

## Before you begin

Role required: approval_requester, approver, or approval_request_viewer.

## About this task

The approval history shows where a request is in the approval process. The history includes submitted requests, approver decisions, comments, and rejection reasons.

Approval requests can have the following statuses:

- Pending: The request has been submitted and is awaiting an approver decision.
- Approved: The approver has approved the request.
- Rejected: The approver has rejected the request and returned it for revision.
- Recalled: The requester withdrew the approval request before a decision was made.
- Completed: All required approvals have been received and the approval process is complete.

The approval history records the following details for each approval action:

- Timestamp of the approval action
- Approver name or group that took the action
- Action taken (approved, rejected, recalled)
- Comments or notes provided by the approver
- Approval rule or condition that triggered the approval
- Approval request ID and version number

## Procedure

1. Open the approval request for which you want to view approval history.
2. Select **View Approval**.
   The approval panel opens showing the current approval status and a list of all approval requests for this quote or order.
3. Review the current approval request details in the main approval panel.

### Approval panel form

| Field | Description |
|---|---|
| Request ID | Unique identifier for this approval request |

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| Field | Description |
|---|---|
| Status | Current state of the approval (Pending, Approved, Rejected, Recalled, Completed) |
| Assigned Approvers | Names or groups that must approve this request |
| Approval Progress | Visual indicator showing which approvers have acted and which are pending |
| Trigger Conditions | The approval conditions that triggered this request (for example, **Account Exception** or **Discount Tier 2**) |
| Request Date | Date and time when the request was submitted |

4. View a specific approval request by selecting it from the list.
   The list shows all approval requests for the current quote or order, including:
   - Request ID number
   - Date submitted
   - Final status (Approved, Rejected, Recalled, or Active)

   The approval panel updates to show the details of the selected approval request, including its complete history.
5. Review the approval history timeline to see all actions taken on the request.
   The history shows a chronological record of:
   - Request Submitted: Timestamp of the submission, including the requester name.
   - Approvals Received: Each approval action taken, with timestamp and approver name.
   - Approver Comments: Any notes or comments provided by approvers when they made their decision.
   - Rejections and Recalls: Any rejection or recall actions, with reason documented by the requester or approver.
6. View detailed comments from an approver by selecting the specific approval action in the history timeline.
   The approver's decision details appear, including:
   - Approver name
   - Decision made (Approved, Rejected, Returned for Revision)
   - Approval rule applied
   - Full text of the approver's comments or rejection reason
   - Date and time of the decision
7. If the request was rejected, review the rejection comments.
   The rejection comments explain:
   - What specific issues need to be corrected
   - What policy violations must be addressed
   - What information is missing from the quote
   - What actions you should take to get the quote approved
8. Check the status of each assigned approver to monitor progress on pending requests.
   The approval panel shows:

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- Which approvers have already acted on the request
- Which approvers are still pending
- The sequence of approvals (if using approval chains)
- How many approvals have been completed versus the total required

**What to do next**
Based on the approval status and history, you can:

- If approved: Proceed to complete the quote or order transaction
- If rejected: Revise the quote to address the feedback from the approver and resubmit (for more information, see Reject or return a quote for revision)
- If pending: Wait for remaining approvers to complete their review, or contact them for status updates
- If recalled: You can view previous approval requests to understand the decision history, then resubmit with updates

If your approval request is pending and has exceeded the expected approval timeframe:

1. Check the approval panel for escalation status (if escalations are configured)
2. Contact the pending approver directly to request an expedited review
3. Escalate to your manager if the approval has been pending longer than your organizational SLA
4. Contact your approval administrator for escalation options

## Using Advanced Approval Management AI

Advanced Approval Management AI enables approval requesters and approvers to manage quote approvals using natural language requests in an MCP client, without opening a ServiceNow instance.

## Using Advanced Approval Management AI tools in the quote approval workflow

Approval users use the chat feature in the MCP client to perform, manage, and track the approval steps that use the MCP tools provided with Advanced Approval Management AI.

### Using MCP tools as a requester (sales rep)

As part of managing quote approvals, including submitting them for approval, requesters can do the following using an MCP client:

1. Before submitting a quote, get quote details to review the current state of the quote.

   The requester can prompt to see quote header details and line details, for example to check discounts applied and quote composition if there are multiple lines.

2. Request an approval preview to see the approvers, approval rules, and the approval routing required for the quote.

   The requester can determine whether the quote meets the approval rules and any conditions, such as margin limits or specific regulatory guidelines, before submitting a quote for approval.

3. If needed, add an ad-hoc approver for an approval rule relevant to the quote.

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4. Submit the quote for approval with a comment.
5. Recall an approval request for the quote to make any changes to the quote.
6. Update a quote that has been recalled or was rejected, then resubmit for approval.

### Using MCP tools as approver

As part of approving or rejecting quotes, approvers can do the following using an MCP client:

1. Request pending approvals to identify quotes that require action.
2. Request quote header and line details to review the quote.
3. Optionally request approval history to review previous decisions on the quote.
4. If needed, add an ad-hoc approver for an approval rule relevant to the quote.
5. Act on an approval request by approving or rejecting the quote with a comment.

### Related topics

Configuring Advanced Approval Management AI

## Get quote details in an MCP client

Retrieve quote header and line-level information using natural language in a Model Context Protocol (MCP) client.

### Before you begin

The following applications must be installed and configured on your ServiceNow instance:

- Advanced Approval Management AI
- Quote Management

Input required: Number of an active quote.

Role required: sn_adv_appr_mgmt.approval_request_writer or sn_adv_appr_mgmt.approver

### About this task

The Get Quote Details tool enables you to retrieve information from a quote header and quote lines in an MCP client. Header-level detail includes the quote status, approval state, and key quote attributes. Line-level detail includes the individual products, quantities, and pricing on the quote. You can specify the level of detail in your natural language prompt. Or you can simply enter the quote number to return both header and line details.

### Procedure

1. Open your MCP client application, which is connected to your ServiceNow instance using the Sales CRM Common Server.
2. In your MCP client, enter a natural language request to get details for a quote.

   The following examples show typical requests for retrieving quote details and the level of detail:

   - To request header and line-level details:
     - `Get the details for quote QT0001006.`
     - `Show me the header and line details for quote QT0001006.`
   - For line-level details: `Get the line details for quote QT0001006.`

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- For other quote details:
  - `What is the MRR for quote QT0001006?`
  - `What is the state of quote QT0001006?`

3. Review the quote details returned.

   For header-level requests, the MCP client returns information such as:

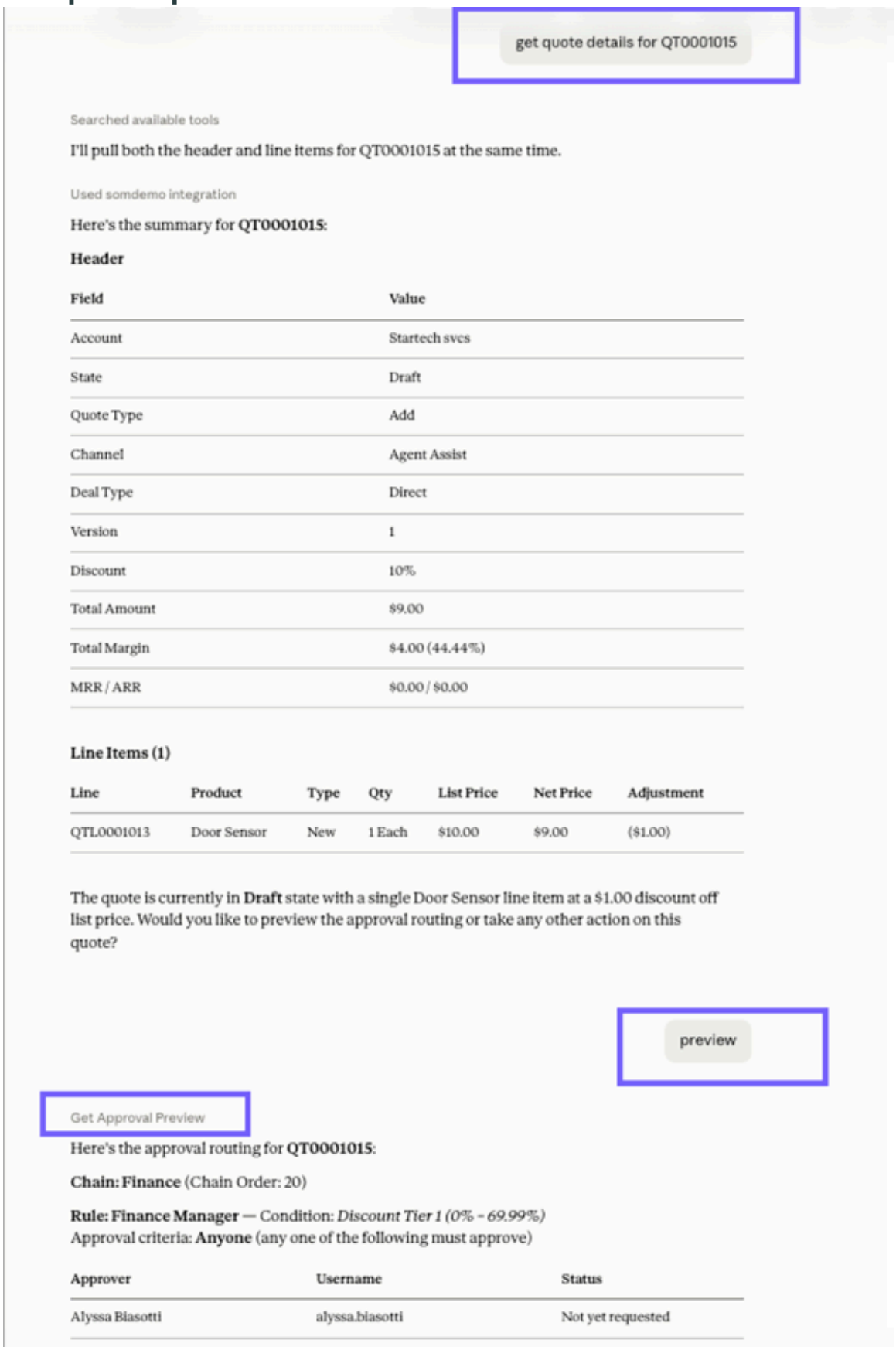
   - Quote number and name
   - Quote status and approval state
   - Account and opportunity details
   - Quote owner and creation date

   For line-level requests, the MCP client returns information such as:

   - Product names and catalog item details
   - Quantities and unit prices
   - Discounts and net amounts
   - Line-level approval status

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## Example: Get quote details




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### What to do next

The MCP client considers the next approval activity in a typical approval workflow that you might want to take, depending on your role and the quote state.
For example:

- If you're a requester and the quote has not been submitted for approval, the MCP client asks if you want to preview the approval routing for the quote. If the quote is in a rejected state, the MCP client asks if you want to see the approval history. You can view the rejection reason so that you can update the quote accordingly before resubmitting the quote for approvals.
- If you're an approver, the MCP client asks if you want to see your pending approvals so that you can take action on your approval requests.

## Get approval history and status in an MCP client

Retrieve the approval history and status for a quote approval by using natural language in a Model Context Protocol (MCP) client. You can use this information to review past approval decisions and check the progress of an in-progress approval.

### Before you begin

The following applications must be installed and configured on your ServiceNow instance:

- Advanced Approval Management AI
- Quote Management

Input required: Number of an active quote.

Role required: sn_adv_appr_mgmt.approval_request_writer or sn_adv_appr_mgmt.approver

### About this task

The Approval Details tool in Advanced Approval Management AI retrieves the approval activity for a quote. You can check the current status of a submitted quote and review decisions made during the approval process.

Enter a natural language request in your MCP client to run the tool.

### Procedure

1. Open your MCP client application, which is connected to your ServiceNow instance using the Sales CRM Common Server.
2. In your MCP client, enter a natural language request to get the approval history for a quote.

   The following examples show typical requests for retrieving the approval history:

   - `Show me the approval history for quote QT0001006.`
   - `What approvals have been completed for QT0001006?`
   - `Who has approved quote QT0001006 so far?`
   - `Who rejected this QT0001006 and why?`
   - `Who recalled this quote?`
   - `What is the full approval path for this quote?`

   The MCP client returns the approval history for the quote, which may include:

   - The approvers who have acted on the quote
   - The decision made by each approver (for example, approved or rejected)

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- The date and time of each approval action
- Any comments or rejection reasons provided by approvers

### What to do next

Depending on your role and the state of the quote, you can submit the quote for approval if you're a requester. If you're an approver, you can approve or reject an approval request for a quote.

## Preview approval routing in an MCP client

View the approval routing to be triggered for a quote that has not been submitted for approval by using natural language in a Model Context Protocol (MCP) client. You can view the approval rules to be applied and the assigned approvers in the routing sequence.

### Before you begin

The following applications must be installed and configured on your ServiceNow instance:

- Advanced Approval Management AI
- Quote Management

Input: Quote number of the quote you want to preview.

Role required:sn_adv_appr_mgmt.approval_request_writer

### About this task

Use the Approval History tool in Advanced Approval Management AI to see the approval routing that will be triggered for a quote approval. You can then determine whether to adjust your quote before submitting it for approval.

You don't invoke the tool directly. Instead, enter a conversational request in your MCP client, which calls the tool for you.

### Procedure

1. Open your MCP client application such as Claude, which is connected to your ServiceNow instance using the Sales CRM Common Server.
2. In your MCP client, start a chat by entering a natural language request about the approval routing for a quote.
   For example:
   - `What will happen when this request is submitted?`
   - `Show me the approval routing for quote QT0001006.`
   - `Who will approve quote QT0001006?`
   - `Preview approvals for QT0001006 before I submit.`

   The MCP client returns the approval routing information for the quote, which includes:
   - The approval chain, for example a Finance chain and the order of steps in the chain.
   - The approval rule (condition) that triggers the approvers for your request and the routing sequence.
   - The approvers in the routing sequence and their approval status.

   #### Quote approval preview in MCP client

3. Indicate whether you want to submit the request for approval.

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- To submit the approval request, enter `Yes, go ahead and submit the quote for approval`.

  Your quote is submitted for approval. Your quote is in the Pending state until the first approver approves or rejects your request.

- If you want to make further changes to your quote, enter `Update quote`. The client asks if you like to review quote details. You can review the details. Next, if needed, update the quote, perhaps to make pricing adjustments to the quote in your ServiceNow instance.

### Submit an approval request in an MCP client

Submit an entity such as a quote for approval or resubmit an entity that currently has no active approval request by using natural language in an MCP client.

#### Before you begin

The following applications must be installed and configured on your ServiceNow instance:

- Advanced Approval Management AI
- Quote Management

Input required: Number of an active quote.

Role required: sn_adv_appr_mgmt.approval_request_writer

#### About this task

Use the Requester Actions tool in Advanced Approval Management AI to submit a quote for approval or to resubmit an approval request that was previously rejected or recalled.

Enter a natural language request in your MCP client to run the tool.

#### Procedure

1. Open your MCP client application, which is connected to your ServiceNow instance using the Sales CRM Common Server.
2. In your MCP client, enter a natural language request to submit a quote for approval.

   The following examples show typical requests for submitting a quote for approval for the first time:

   - `Submit quote QT0001006 for approval`
   - `Send QT0001006 for approval`
   - If you're currently chatting about a particular quote, enter `Submit this quote for approval` or `This quote is ready, get it approved`

   The MCP client submits the approval request for the quote and creates the approval request record. Notifications to approvers and requesters are generated, informing them of the approval request.

## Using Customer Contracts and Entitlements

Learn how consumers, managers, agents, and administrators use the Customer Contracts and Entitlements application to generate customer contracts and contract lines.

Customer contracts, customer contract lines, and entitlements can be created in the following ways:

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- Via workflows: You can create customer contracts, customer contract lines, and entitlements by using the contracts and entitlements workflow. For more information, see Creating contracts and entitlements using workflows.

  **Note:** When a customer contract line or entitlement is created via the Sales Customer Relationship Management workflow, the account/consumer/household details are copied from the sold product and it inherits the state of the sold product. Further, when the state of the contract line changes, the same state is synced back to the parent sold product.

- Via API integrations:
  - Service Contract API
  - Entitlement API

Customer Contracts and Entitlements is integrated with ServiceNow® Quote Experience that provides a unified Quote Experience for creating, pricing, approving, and completing quotes. It is a single, modern quoting solution that supports both simple and complex quoting needs. It provides a configurable workspace for managing quotes, including products, pricing, approvals, and lifecycle progression. You can create and manage quotes directly from your CRM opportunity workflow. To install ServiceNow® Quote Experience, see ServiceNow Quote Experience.

You can perform the following features using Customer Contracts and Entitlements Workflows:

- Standard renewals: A standard renewal occurs when a contract is renewed on schedule. The system creates a new contract with the existing contract lines, entitlements, and child records, with the new term starting immediately after the original contract ends. There is no pricing adjustments that are needed beyond the agreed renewal terms.
- Non-standard renewals: A non-standard renewal occurs when a contract is renewed outside of the renewal cycle. This covers three scenarios: an early renewal, a late renewal, and a short-term renewal. For more info, see Renew a customer contract line.
- Consolidation of Contracts: You can merge multiple contracts for the same account into a single contract. Use contract consolidation during renewal to align contract terms and combine subscriptions into one contract. For more info, see Renew a customer contract line.
- Upsell or Downsell: You can add or reduce the quantity to an existing contract during its term.

### Using Contracts and Entitlements Workflows

Learn how contracts and entitlements using workflows enable you to create and manage customer contracts, customer contract lines, and entitlements.

You can manage the life cycle of customer contracts and entitlements from offer creation to contract generation using contracts and entitlements workflows. Using workflows you can suspend, resume, cancel, and renew multiple entities at once. You can view customer contract lines as a hierarchical list that helps to view the parent and child relationship between line items. Customer Contracts and Entitlements supports variable and derived pricing models. Contracts and entitlements correctly reflect dynamically calculated prices, ensuring consistency with underlying pricing logic and improving accuracy across contract-driven workflows. For more info, see Configuring derived pricing. You can also perform the following functions using workflows:

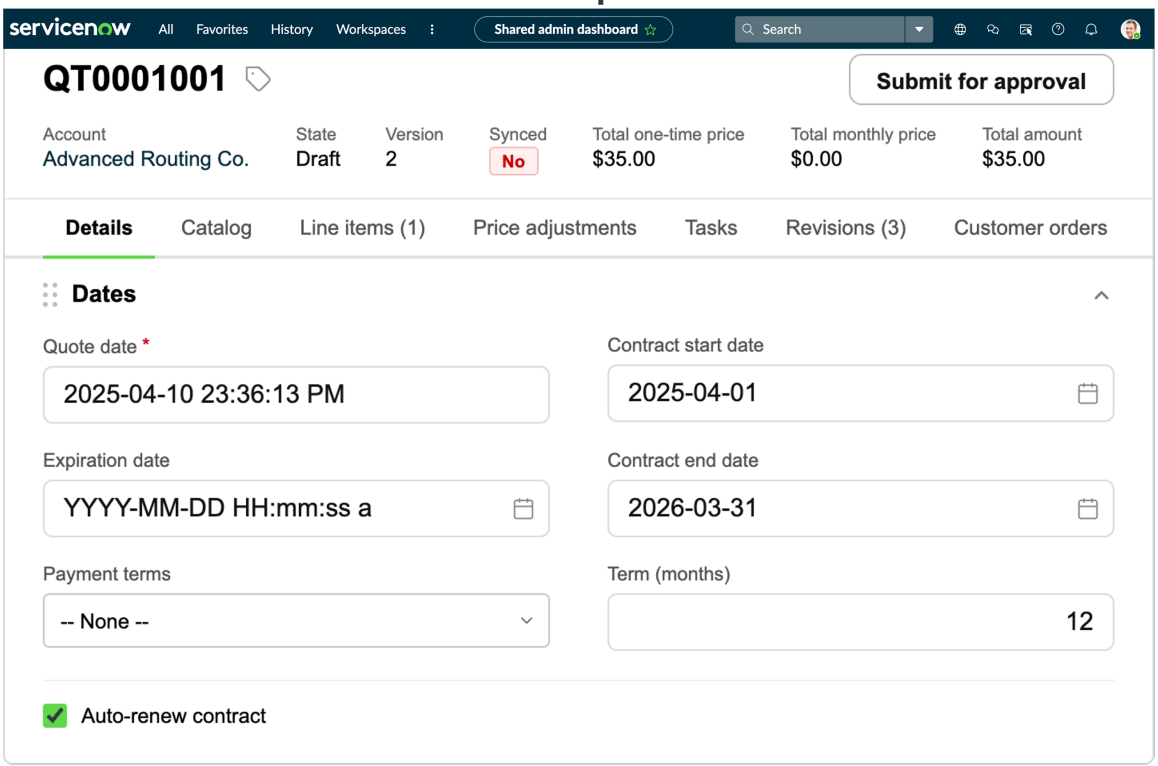
- Create, suspend, resume, cancel, and renew customer contracts.
- Create, modify, suspend, resume, cancel, and renew customer contract lines, and entitlements.

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## Automatic renewal of customer contracts

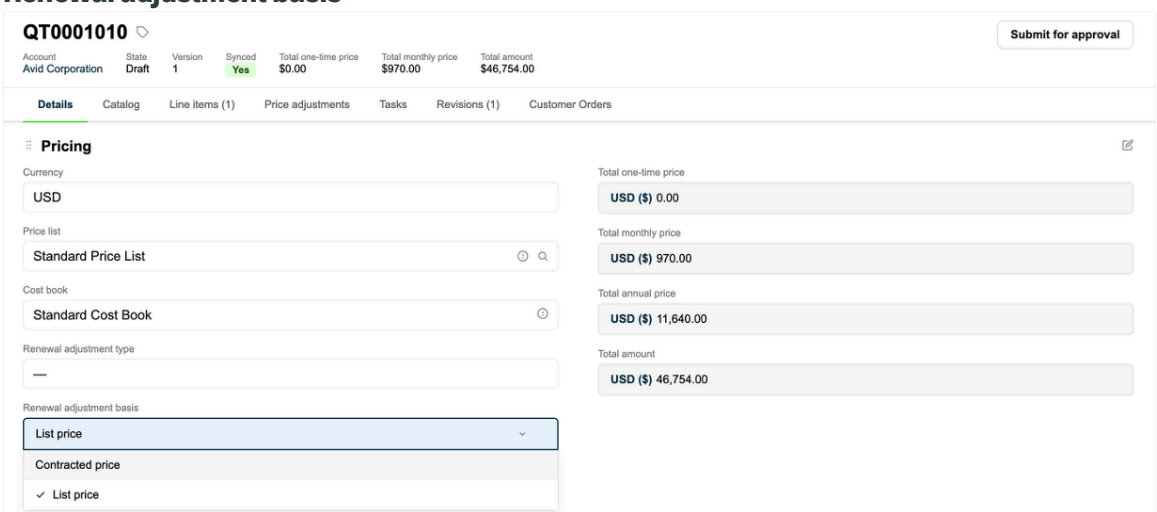
While creating customer contracts from quote or orders, you can select the **Auto-renew contract** option on a quote or order to automatically renew the contracts. When you add or delete a contract line from these customer contracts, the renewed quotes and opportunities are updated. You can configure the auto-renewal date of the contract in the Customer Life Cycle Workflows Policy decision table. By default, you can choose to initiate the auto-renewal 90, 60, or 30 days before the contract end date, or on the contract creation date. For more info, see Creating contracts and entitlements using workflows.

### Automatic renewal for customer contracts on quotes




In the Renewal adjustment basis field, you can select **List price** or **Contracted price**. Selecting List price renews the contract at the market price of the contract at the time of the renewal date.

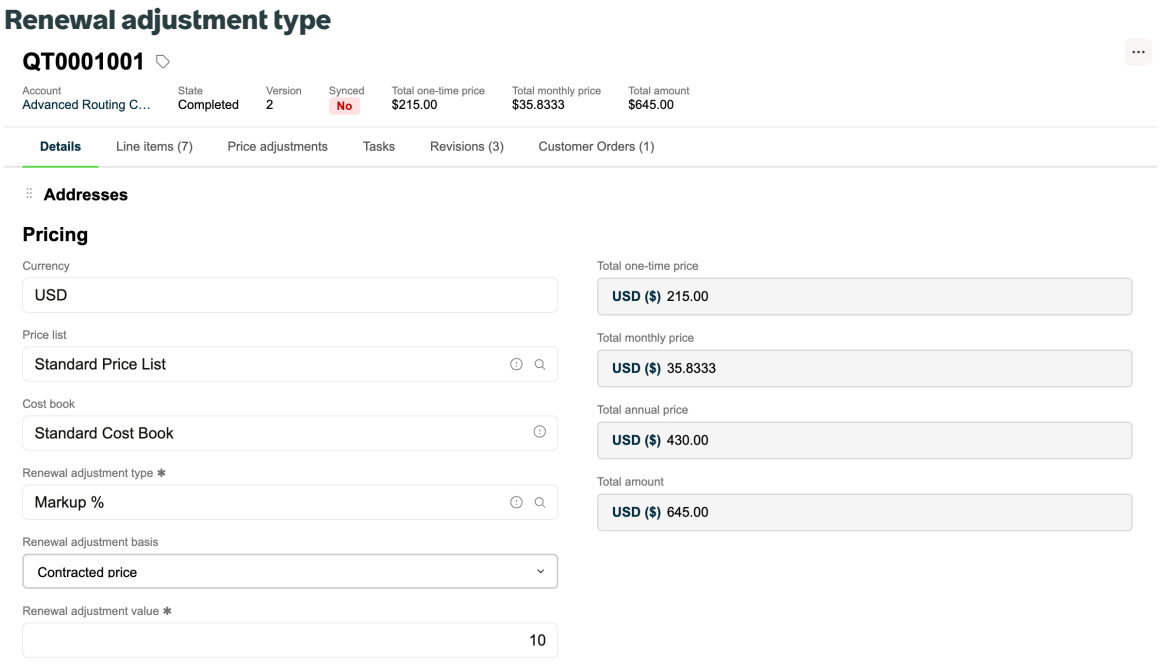
### Renewal adjustment basis



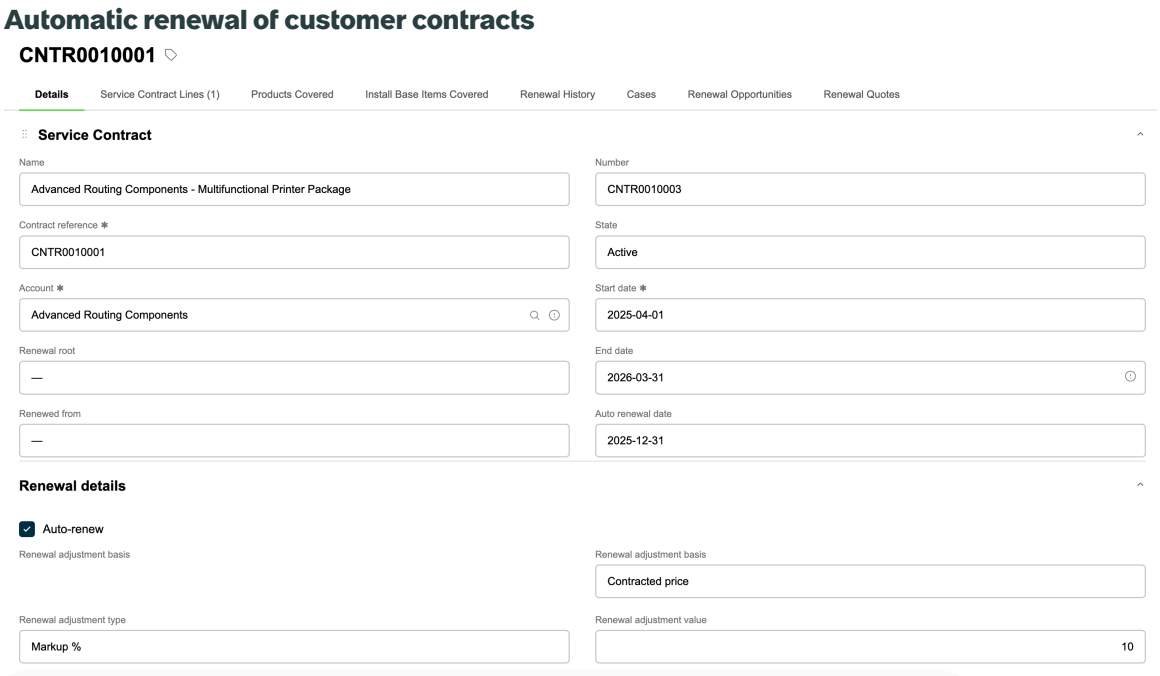

Selecting Contracted price gives you the option to renew the contract at Markdown % or Markup % of the current contract price. For example, if you select **Markup %** field and you enter 10 in

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**Renewal adjustment value**, the customer contract is renewed at 10% above the current contract price.




That exact renewal date and the renewal adjustments for that customer contract will be visible on the customer contract form in the **Auto renewal date** field.



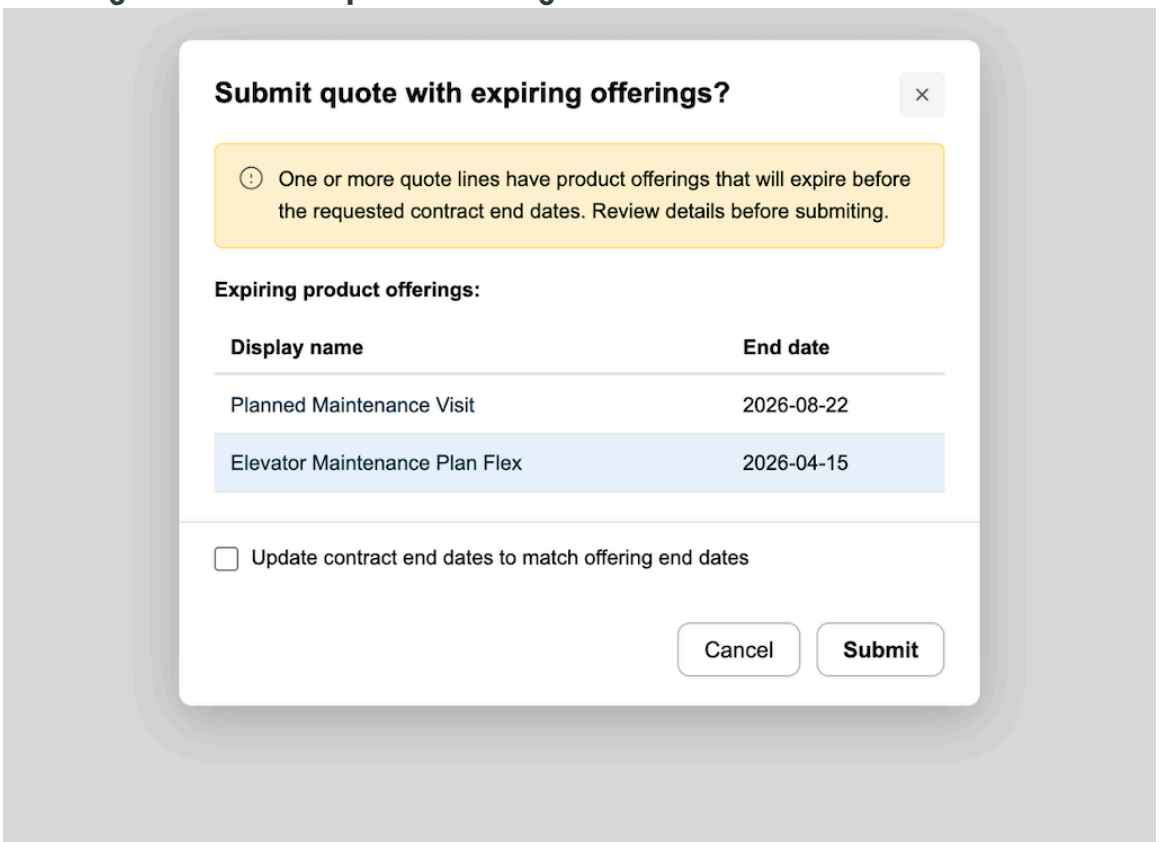

You cannot modify the renewal adjustment fields on the customer contract. You can only modify the renewal adjustment values on the quote and orders.

## Updating contract end date

During quote processing, the system alerts you when the contract end date is exceeding the product offering end date. When you submit quotes for approval, a dialog box appears alerting you. You can select the option **update contract end dates to match offering end dates** to match the contract end date to the product offering end date.

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### Matching the contract and product offering end dates

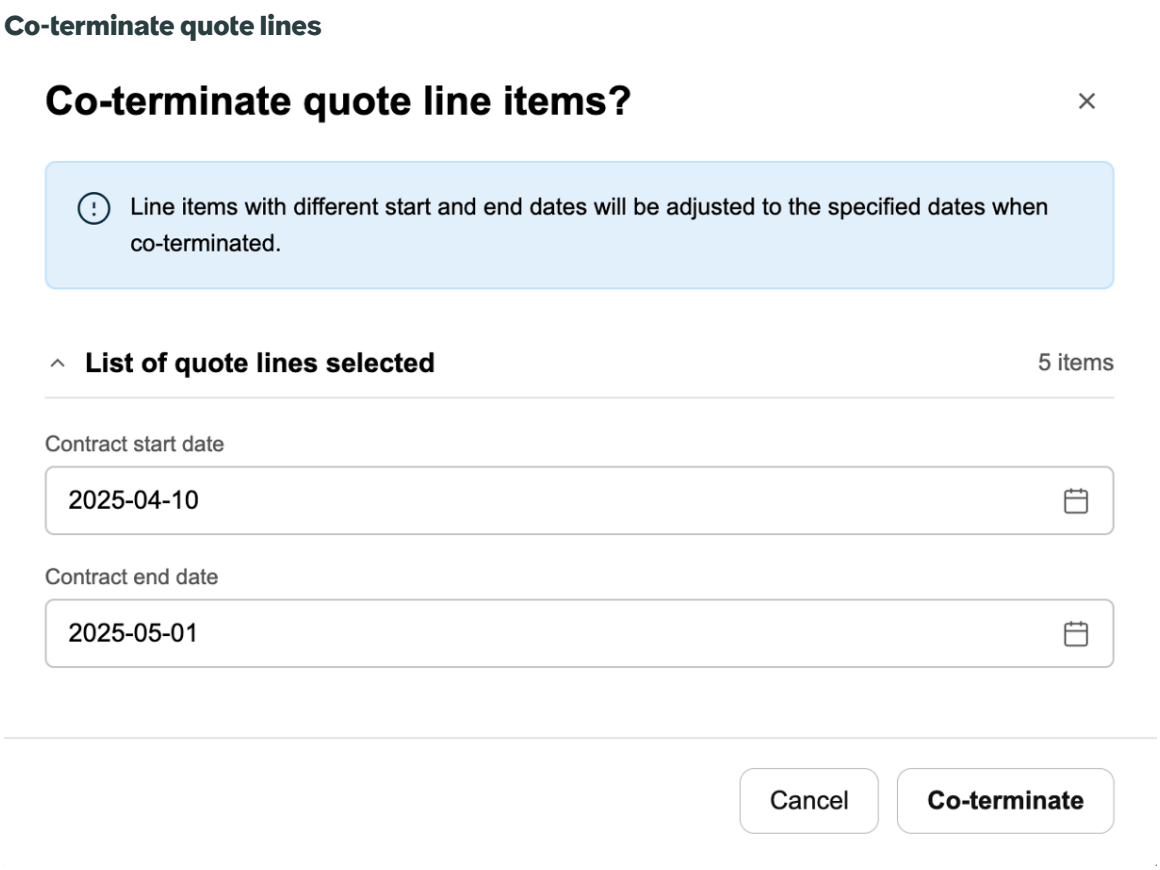



If you do not select this option and approve the quote, the contract end date remains the same.

## Co-terminate quote lines

You can assign the same start and end dates to multiple quote lines while creating or renewing a quote. On the **Line items** tab on the quote details page, select multiple quote lines and then select **Co-terminate**. All the selected quote lines have the same start and end date.

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## Viewing price ramps

Customers can scale their purchases by adjusting the pricing and quantity throughout the contract or subscription term by using the Ramps feature. For more info, see Add price ramps on a quote line item. You can view the price ramp details on the contract line. Only the active price ramp segment is displayed on the contract line. Select a contract line and select **Ramps** to view all the details of the price ramp for that contract line. You can view start and end date, term period, ramp type (yearly or quarterly), ramp segments, and Annual percentage increase (API%). You can also process early renewal and early termination of contract lines with ramps. For more info, see, Renew a customer contract line and Modify a customer contract line.

### Add contract lines to a customer contract

Add one or more contract lines to a customer contract on the CRM Workspace.

#### Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

#### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract to add more contract lines.
4. On the Customer Contract form, select **Customer Contract Lines** related list.

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5. Select **New**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to create new customer contract line is created.
   - If the selected target entity is an order, an order to create new customer contract line is created.
   - If the selected target entity is an opportunity, an opportunity to create a new customer contract line is created.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to create the customer contract are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.

   The Existing contract field will refer the current customer contract. All the other fields like Contract start date, Contract end date, and contract renewal fields will be auto-populated with the current contract details.
6. In the Catalog tab, add products to the new quote or order that is created.
   For more info, see Add products to a quote.
7. Select **Submit for approval**.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   On the Customer Contract Line related list, a new customer contract line is created and added.

### Result

The new customer contract line is added to the contract and is visible on the selected target entity. The new customer contract line is synced with auto-renewal quote or opportunity that is generated for the contract. When the associated customer contract is auto renewed, the new customer contract line is automatically renewed and added to the renewal quote or opportunity.

## Renew

Renew customer contracts, contract lines, and entitlements.

Renewing a customer contract, contract line, or entitlement initiates the configured renewal workflow and generates a new renewal record as applicable. The workflow carries forward relevant terms, pricing, and relationships to ensure continuity. Renewal maintains life cycle history while enabling ongoing service and billing processes.

## Renew a customer contract line

Renew a customer contract line on the CRM Workspace. You can renew the services specified in the customer contract line and its associated child customer contract lines and entitlements.

### About this task

You cannot renew a customer contract line when it is in Canceled state or it does not have an end date.
The order processing for product inventory based contract lines are executed according to the fulfillment flow defined by the customer for these offerings being renewed.

### Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote or opportunity, you need sn_customerservice_manager and sn_sales_common.sales_agent.

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### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**.
3. In the customer contract lists, select the customer contract that you want to renew.
4. In the customer contract lines related list, select the customer contract lines that you want to renew.
5. Select **Renew**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to renew the customer contract line is created. You can select the quote number from the confirmation message to review the renewal quote. After the quote is approved and the status is updated to **Complete**, an order is created for further processing.
   - If the selected target entity is an order, an order to renew the customer contract line is created. You can select the order number from the confirmation message to review the renewal order.
   - If the selected target entity is an opportunity, an opportunity to renew the customer contract is created. You can select the opportunity number from the confirmation message to review the renewal opportunity.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to renew the customer contract are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.

     **Note:** If you select a quote or an opportunity, the line items with same product offerings and configuration will be consolidated into a single quote or opportunity line. The consolidated line item reflects the total quantity of all the combined items. For more info, see Consolidate quotes.

   If more than 20 contract lines are renewed, the target entities are created asynchronously. You can configure the threshold value for the number of contract lines.
6. Perform an early or late renewal on the customer contract line.
   For an early renewal, you can terminate the contract before the expiry date and create a new contract with the new start date. For a late renewal, you can renew expired contracts that are not renewed.
   - Select a date before the contract expiry date in the **Renew from** field to perform an early renewal. Two quote or order line items are created. One change order or quote line is created with the modified expiry date of the current service contract line. A new renewal quote or order line is created with the new start date.
   - For an expired contract line, enter a new date to renew the service contract line in the **Start from** field. A new renewal quote or order line is created with a new start date.
   - For a ramped contract line, select a date before the contract expiry date in the **Renew from** field to perform an early renewal. The contract line splits into two contract lines. One contract line has the early renewal end date that you selected and the second contract line has the

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original end date with State as **Canceled** and Quantity as **Zero**. The remaining segments are canceled and their quantities are zero.

> **Note:** If a customer contract line is terminated before its end date, the status of that contract line is updated to **Canceled** after its end date. That early terminated customer contract line is excluded from the renewal workflow and any renewal quote line for that contract line is deleted.

7. After the order line items are fulfilled, set the status to **Completed**.
   A new customer contract line is created.

### Result

The new customer contract line is created with the renewed contract line in the Draft state. You can see more details in the Renewal History related list.

#### Renew an entitlement

Renew an entitlement on the CRM Workspace.

### Before you begin

You cannot renew an entitlement when it is in Canceled state or it does not have an end date. For more info, see Order fulfillment.

The order processing for product inventory based entitlements are executed according to the fulfillment flow defined by the customer for these offerings being renewed.

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote or opportunity, you need sn_customerservice_manager and sn_sales_common.sales_agent.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to renew.
5. Select **Renew**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to renew the entitlement is created. You can select the quote number from the confirmation message to review the renewal quote. After the quote is approved and the status is updated to **Complete**, an order is created for further processing.
   - If the selected target entity is an order, an order to renew the entitlement is created. You can select the order number from the confirmation message to review the renewal order.
   - If the selected target entity is an opportunity, an opportunity to renew the entitlement is created. You can select the opportunity number from the confirmation message to review the renewal opportunity.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to renew the entitlement are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.

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6. After the order line items are fulfilled, set the status to **Completed**.
   A new entitlement is created.

### Result

The new entitlement is created in the Draft state. You can see more details in the Renewal History related list.

## Modify

Modify Customer contracts, contracts lines, and entitlements.

Modifying customer contracts, contracts lines, and entitlements applies the requested changes and updates the record based on configured amendment rules. Modifications can impact terms, pricing, dates, or related records while preserving life cycle history.

## Modify a customer contract

Modify a customer contract so that you can update its existing configurations.

### Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Modify all lines** to modify the customer contract.
5. On the Configurator UI, modify the existing configurations for the customer contract line.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.

   **Note:** The Configurator UI is displayed only if the customer contract has a single customer contract line. For multiple customer contract lines, a quote or an order will be created with contract lines in Draft or Active state.

6. Select **Update**.
   An order or a quote will be created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to modify the customer contract is created. You can select the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
   - If the selected target entity is an order, an order to modify the customer contract is created. You can click the order number from the confirmation message to view the modified order line items.
7. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

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### Modify a customer contract line

Modify a customer contract line so that you can update its existing configurations.

## Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. In the customer contract lines related list, select one or more customer contract lines that you want to modify.
5. From the **Modify** list, select one of the options to perform one of these actions:
   - If you select **Modify entire line**, the Configurator UI is displayed. Modify the existing configurations for the customer contract line.

     **Note:** The Configurator UI is displayed only if you select a single customer contract line. If you selected multiple customer contract lines, the order or quote created is displayed.

   - If you select **Modify quantity**, you can reduce or increase the quantities of the products specified in the selected contract lines. For more info, see Upsell or Downsell a customer contract line.

     **Note:** You cannot modify quantity on a ramped contract line.

   - If you select **Modify end date**, you can select an earlier end date or a later end date than the current end date to perform an early termination or extension of a contract line. For a ramped contract line, you can only select a date before the contract expiry date in the **End date** field to perform an early termination. The contract line splits into two contract lines. One contract line has the new end date that you selected and the second contract line has the original end date with State as **Canceled** and Quantity as **Zero**. The remaining segments are canceled and their quantities are zero.
6. Select **Update**.
   An order or a quote is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to modify the customer contract line is created. You can select the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
   - If the selected target entity is an order, an order to modify the customer contract line is created. You can select the order number from the confirmation message to view the modified order line items.
7. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

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### Modify an entitlement

Modify an entitlement associated to an account so that you can update its existing configurations.

## Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to modify the characteristics for.
5. Select **Modify**.

   **Note:** You can only modify entitlements associated with an account. You cannot modify entitlements associated to customer contract lines.

6. On the Configurator UI, modify the existing configurations for the selected entitlement.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.
   An order or a quote will be created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to modify the entitlement is created. You can click the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
   - If the selected target entity is an order, an order to modify the entitlement is created. You can click the order number from the confirmation message to view the modified order line items.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

### Suspend

Suspend Customer contracts, contract lines, and entitlements.

Suspending a customer contract, contract line, or entitlement to pauses the life cycle processing and related service activities. During suspension, associated workflows, renewals, and dependent records are paused based on configuration.

### Suspend a customer contract

Suspend a customer contract and its child customer contract lines by creating an order on the CRM Workspace. Suspending a customer contract suspends or disables the services specified in that customer contract.

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### Before you begin

You can suspend a customer contract when at least one of the associated root sold products is in Active state. For product inventory records, you can suspend a customer contract when the associated product inventory record is in Active state.

**Note:** If you don't create a resume order, the customer contract is indefinitely suspended.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Suspend**.
5. In the Suspend customer contract window, enter the period of suspension for the customer contract in the **Start date and time** and **End date and time** fields.

   **Note:** If you do not enter a value in the **End date and time** field, the customer contract is suspended indefinitely. You can resume the customer contract manually. For more info, see Resume a customer contract.

6. Add a reason for a suspension in the **Reason for suspension** field.
7. Select **Suspend**.
   An order with the suspend action is created for that customer contract.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

### Result

With the customer contract, all the associated customer contract lines and entitlements are also suspended. However, the customer contract stays in the current state. If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the customer contract and all its associated child customer contract lines and entitlement will be in Active or Draft state again. After the end date of the customer contract, the suspended customer contract and all its associated child customer contract lines and entitlement move to Expired state.

## Suspend a customer contract line

Suspend a customer contract line and its child customer contract lines by creating an order on the CRM Workspace. By suspending a customer contract line, you are suspending or disabling the services and characteristics associated with that customer contract line.

### About this task

### Before you begin

You can suspend a customer contract line when the associated root sold product is in Active state. For product inventory records, you can suspend a customer contract line when the associated product inventory record is in Active state.

**Note:** If you don't create a resume order, the customer contract line is indefinitely suspended.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

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### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select the customer contract line from the customer contract lines related list, that you want to suspend.
5. Select **Suspend**.
6. In the Suspend customer contract line window, enter the period of suspension for the customer contract line in the **Start date and time** and the **End date and time** field.

   **Note:** If you do not enter a value in the **End date and time**, the customer contract line will be suspended. You can manually resume the customer contract by using the resume option. For more info, see Resume a customer contract line

7. Add a reason for a suspension in the **Reason for suspension** field.
8. Select **Suspend**.
   An order with the suspend action is created for that customer contract line.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

### Result

With the customer contract line, all the associated entities in the hierarchy are also suspended. If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the customer contract line will be in Active state again. After the end date of the customer contract, the suspended customer contract line and all its associated child customer contract lines and entitlement move to Expired state.

## Suspend an entitlement

Suspend an entitlement by creating an order on the CRM Workspace. By suspending an entitlement, you are suspending or disabling the services and characteristics associated with that entitlement.

### Before you begin

You can suspend an entitlement when the associated root sold product is in Active state. For product inventory records, you can suspend an entitlement when the associated product inventory record is in Active state.

**Note:** You can only suspend entitlements associated with an account. You cannot suspend entitlements associated to customer contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to suspend.
5. Select **Suspend**.

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6. In the Suspend entitlement window, enter the period of suspension for the entitlement in the **Start date and time** and the **End date and time** field.

   **Note:** If you do not enter a value in the **End date and time**, the entitlement will be suspended You can resume the entitlement manually by using the resume option. For more info, see Resume an entitlement.

7. Add a reason for a suspension in the **Reason for suspension** field.
8. Select **Suspend**.
   An order with the suspend action is created for that entitlement.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

### Result

If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the entitlement will be in Active state again. After the end date of the entitlement, the suspended entitlement will move to Expired state.

#### Resume

Resume customer contracts, contract lines, and entitlements.

Resuming customer contracts, contract lines, and entitlements updates the record status and reactivates associated life cycle workflows. Resuming restores service delivery and allows renewals, amendments, and related transactions to continue based on configuration.

#### Resume a customer contract

Resume a customer contract and its child customer contract lines by creating an order on the CRM Workspace. By resuming a customer contract, you are restarting the services specified in that customer contract.

### Before you begin

You can resume a customer contract when at least one of the associated root sold product is in Inactive, Canceled, or Suspended state. For product inventory records, you can resume a customer contract when the associated product inventory record is in Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Resume**.
5. In the Resume customer contract window, in the **Start date and time** field, enter when you want to resume the customer contract.
6. Add a reason for a resuming the customer contract in the **Reason for resumption** field.
7. Select **Resume**.
   An order for resuming the customer contract is created.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

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### Result
The customer contract and all its associated child contract lines and entitlements are back in Active or Draft state, depending on the start date of the respective entity.

#### Resume a customer contract line

Create an order to resume a customer contract line and its child customer contract lines on the CRM Workspace. By resuming a customer contract line, you are restarting the services specified in that customer contract line.

### Before you begin
You can resume a customer contract line when the associated root sold product is in Inactive, Cancelled, or Suspended state. For product inventory records, you can resume a customer contract line when the associated product inventory record is in Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

### Procedure
1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. In the customer contract lines related list, select the customer contract line that you want to resume.
5. Select **Resume**.
6. In the Resume customer contract line window, in the **Start date and time** field, enter when you want to resume the customer contract line.
7. Add a reason for a resuming the customer contract line in the **Reason for resumption** field.
8. Select **Resume**.
   An order for resuming the customer contract line is created.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

### Result
With the customer contract line, all the associated entities in the hierarchy are also back in Active or Draft state, depending on the start date of the respective entity.

#### Resume an entitlement

Resume an entitlement by creating an order on the CRM Workspace. By resuming an entitlement, you are restarting the services and the characteristics specified in that entitlement.

### Before you begin
You can resume an entitlement when the associated root sold product is in Inactive, Cancelled, or Suspended state. For product inventory records, you can resume an entitlement when the associated product inventory record is in Suspended state.

**Note:** You can only resume entitlements associated with an account. You cannot resume entitlements associated to customer contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

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### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to resume.
5. Select **Resume**.
6. In the Resume entitlement window, in the **Start date and time** field, enter when you want to resume the entitlement.
7. Add a reason for a resuming the entitlement in the **Reason for resumption** field.
8. Select **Resume**.
   An order for resuming the entitlement is created.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

### Result

The entitlement is back in Active or Draft state, based on the start date of the entitlement.

## Cancel

Cancel customer contracts, contract lines, and entitlements.

### Cancel a customer contract

Create an order to cancel a customer contract and its child customer contract lines on the CRM Workspace. By canceling a customer contract, you are terminating the services specified in that customer contract.

### Before you begin

You can cancel a customer contract when at least one of the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel a customer contract when the associated product inventory record is in Active or Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Cancel**.
   All the associated customer contract lines and entitlements will also be cancelled and will be set to the Cancelled state.
5. In the Cancel customer contract window, in the **Start date and time** field, enter the date when the customer contract will be cancelled.
6. Add a reason for a cancellation in the **Reason for cancellation** field.
7. Select **Cancel**.
   An order with the cancel action is created for that customer contract.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

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### Result
With the customer contract, all the associated customer contract lines and entitlements are also cancelled and will be in **Cancelled** state.

#### Cancel a customer contract line

Create an order to cancel a customer contract line and its child customer contract lines on the CRM Workspace. By canceling a customer contract line, you are canceling or disabling the services and characteristics associated with that customer contract line.

### Before you begin
You can cancel a customer contract line when the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel a customer contract line when the associated product inventory record is in Active or Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. In the customer contract, select the customer contract line from the customer contract lines related list, that you want to cancel.
5. Select **Cancel**.
6. In the Cancel customer contract line window, in the **Start date and time** field, enter the date when the customer contract line will be disabled.
7. Add a reason for a cancellation in the **Reason for cancellation** field.
8. Select **Cancel**.
   An order with the cancel action is created for that customer contract line.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

### Result
With the customer contract line, all the associated entities in the hierarchy are also cancelled and move to Cancelled state.

#### Cancel an entitlement

Cancel an entitlement by creating an order on the CRM Workspace. By canceling an entitlement, you are canceling or disabling the services and characteristics associated with that entitlement.

### Before you begin
You can cancel an entitlement when the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel an entitlement when the associated product inventory record is in Active or Suspended state.

**Note:** You can only cancel entitlements associated with an account. You cannot cancel entitlements associated to customer contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

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### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to cancel.
5. Select **Cancel**.
6. In the Cancel entitlement window, in the **Start date and time** field, enter the date when the entitlement will be disabled.
7. Add a reason for a cancellation in the **Reason for cancellation** field.
8. Select **Cancel**.
   An order with the cancel action is created for that entitlement.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

### Result

The entitlement is permanently cancelled and will move to Cancelled state.

#### Add Covered Products using Contracts and Entitlement Workflow

Covered products refers to specific products or order line items that are included in a customer contract. These items are linked to the contract to define what is covered for service or maintenance. Covered products can be directly tracked through the contract records, facilitating changes and visibility of what is covered.

Agents in Order management can select the products to be covered by a contract when the order is captured for the contract offering. To manually associate a covered product with a contract line, see the Add covered products to order line items

You can also modify the covered products added to a contract line. You can add new covered products to that contract line or entitlement and remove the existing covered products.

#### Upsell or Downsell a customer contract line

Upsell or downsell a customer contract line on the CRM Workspace. You can reduce or increase the quantities of the products specified in the customer contract line.

### Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

### About this task

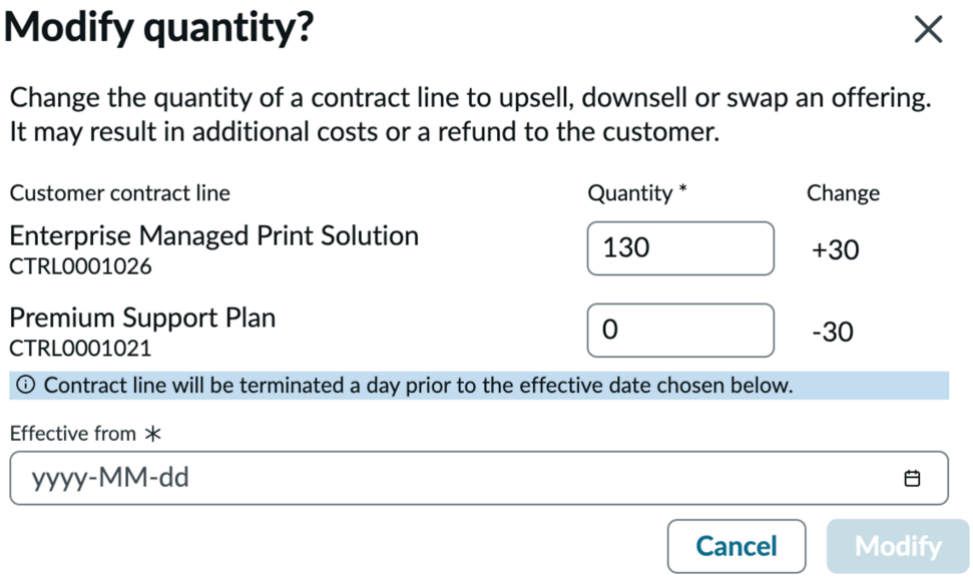
https://player.vimeo.com/video/1185322362?h=80bb86b2dd&badge=0&autopause=0&player_id=0&app_id=58479

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**.
3. In the customer contract lists, select the customer contract that you want to update.

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4. In the customer contract lines related list, select one or more customer contract lines that you want to modify.
5. From the **Modify entire line** list, select **Modify quantity**.
6. In the Modify quantity dialog box, you can swap the values fully or partially in the **Quantity** field for both the contract lines.




For example, if one product has a quantity of 100 and another has 30, you can perform either a full swap or a partial swap. In the screenshot above, a full swap is completed by updating the Quantity field of the first contract line to **130** (adding the 30 units from the second line) and setting the second contract line's quantity to 0. The Change field reflects the change in quantity.

You can also perform a partial swap. For instance, you can update the second contract line from 30 to 20, and add the remaining 10 units to the first contract line, increasing it from 100 to 110.

7. Select the start date of the new customer contract line from the **Effective from** field.
8. Select **Modify**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - In case of a partial swap, three quote lines are created. You can select the quote number from the confirmation message to view the quote line items. The quote is approved and the status changes to **Complete** to create an order with three order line items.
   - In case of a full swap, two quote lines are created. You can select the quote number from the confirmation message to view the quote line items. The quote is approved and the status changes to **Complete** to create an order with two order line items.
9. In the Line Items related list, select the State value of the parent order lines and set them to **Completed**.
   In case of partial swap, two new customer contract lines with the modified quantities are created with the Start date as the **Effective from** date. The end date of the existing contract line is updated. In case of full swap, one new customer contract line with the modified quantity

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is created with the Start date as the **Effective from** date. The end date of the existing contract line is updated.

**Note:** You can perform a partial or a full swap with a new product from the catalog by following the same procedure.

### Add a sold product or install base item to a customer contract

Add the sold products or the install base items covered to customer contracts, contract lines, or entitlements.

#### Before you begin

Role required: sn_customerservice_manager

#### About this task

Sold products are products and components that have been sold to an account or a consumer and can have multiple contracts. An install base item is an instance of sold product that has been provisioned for an account or consumer.

Associating sold products or install base items to a Customer Contracts and Entitlements entity helps keep a track of the products or install base items that are serviced to a customer under that entity.

A sold product or an install base item can be added to a Customer Contracts and Entitlements entity in the Draft, Active, or Suspended states.

**Note:** If an entity is deleted, the related sold product or install base item covered is also deleted.

#### Procedure

1. Navigate to the ServiceNow AI Platform interface or the CRM Workspace.

| Interface | Action |
|---|---|
| **ServiceNow AI Platform interface** | Navigate to **All** > **Customer Service** > **Contracts and Entitlements**. |
| **CRM Workspace** | ○ Navigate to **All** > **Workspace Experience** > **Workspaces** > *CRM Workspace*.<br>○ In the list view, navigate to **Contracts and Entitlements**. |

2. Add the sold product or install base item covered to customer contracts, contract lines, or entitlements.

| Add to | Procedure |
|---|---|
| **Customer Contracts** | **a.** In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**.<br>**Note:** In the ServiceNow AI Platform interface, select **Customer Contracts** in the navigation menu. |

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| Add to | Procedure |
| --- | --- |
| | **b.** Select the customer contract that you want to add the sold product or install base item to.<br>**c.** From the Products Covered or Install Base Items Covered related list, select **New**. |
| **Customer Contract Lines** | **a.** In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**.<br>**Note:** In the ServiceNow AI Platform interface, select **Customer Contracts** in the navigation menu.<br>**b.** Select the customer contract that has the required contract line.<br>**c.** From the Customer Contract Lines related list, select the contract line that you want to add the sold product or install base item covered to.<br>**d.** From the Sold Product Covered or Install Base Items Covered related list, select **New**.<br>**Note:** When a sold product or an in stall base item covered is added to a contract line, it is not added to the relat ed entitlements. |
| **Entitlements** | **a.** In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**.<br>**Note:** In the ServiceNow AI Platform interface, select **Customer Contracts** in the navigation menu.<br>**b.** Select the customer contract that has the required contract line.<br>**c.** From the Customer Contract Lines related list, select the contract line that has the re quired entitlement.<br>**d.** From the Entitlements related list, select the entitlement that you want to add the sold product or install base item to.<br>**e.** From the Sold Product Covered or Install Base Items Covered related list, select **New**.<br>You can also directly navigate to Entitlements form as follows: |

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| Add to | Procedure |
| --- | --- |
| | **a.** In the list view, navigate to **Contracts and Entitlements** > **Entitlements**.<br><br>**Note:** In the ServiceNow AI Platform interface, select **Entitlements** in the navigation menu.<br><br>**b.** Select the entitlement that the sold product or install base item must be added to.<br><br>**c.** From the Sold Product Covered or Install Base Items Covered related list, select **New**. |

**Note:**

- You can either add a sold product or an install base item to the Customer Contracts and Entitlements entity.
- The state of the entity shouldn't be Expired or Canceled.

3. On the Sold Product Covered form, fill in the fields.
   For a description of the field values, see Sold product form.
4. Select **Submit**.

### Record the usage on the entitlement

Record the consumption or usages made out of the total characteristic quantities allotted for an entitlement.

#### Before you begin

Role required: sn_customerservice_manager, sn_customerservice_agent, sn_customerservice.consumer_agent, or sn_bus_loc.svc_location_support_agent

**Note:** For details on which entitlements, a user with sn_bus_loc.svc_location_support_agent role can edit entitlement usage, see Location Support Agent.

#### About this task

When an entitlement moves to the Active state, usage records are created. You can update the usage records on the basis of units or quantities used as and when the customer uses the services. For example, if a characteristic includes 50 visits to the customer, then the Total units field displays 50 and the Used units field is updated after each visit. Managers can create and update usage records for an entitlement but agents can only update the Used units field.

#### Procedure

1. Navigate to the ServiceNow AI Platform interface or the CRM Workspace.

| Interface | Action |
| --- | --- |
| **Platform interface** | Navigate to **All** > **Customer Service** > **Contracts and Entitlements** > **Customer Contracts**. |

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| Interface | Action |
| --- | --- |
| **CRM Workspace** | ○ Navigate to **All** > **Workspace Experience** > **Workspaces** > *CRM Workspace*.<br>○ In the list view, navigate to **Contracts and Entitlements** > **Entitlements**. |

2. Record the usage on an entitlement.

| From | Do this |
| --- | --- |
| **Customer Contracts** | **a.** Select the contract that has the entitlement that you want to track the usage on.<br>**b.** From the Customer Contract Lines related list, select the contract line that has the enti tlement.<br>**c.** From the Entitlements related list, select the entitlement.<br>**d.** From the Entitlement Usages related list, open the usage record. |
| **Entitlements** | **a.** Select the entitlement that you want to track the usage on.<br>**b.** From the Entitlement Usages related list, open the usage record. |

3. On the Entitlement Usage form, fill in the **Used units** field.
4. Select **Update**.
5. On the Entitlement page, select **Update** to save the entitlement.
   If you have used the Customer Contracts menu to record the usage, then select **Update** to save the contract line and then the customer contract.

## Using Sales Agreement Management

Learn how managers, agents, and administrators use the Sales Agreement Management application to generate sales agreements from quotes.

To create a sales agreement from a quote, the following conditions must be met:

- Make sure that the selected quote is not converted to another sales agreement. You cannot create multiple sales agreements from a single quote.
- The quote is in a closed or complete state.
- A sales agreement can be created from a quote that is for an account and a buyer organization. For more info, see Create a quote.

The Sales agreement window has the following tabs that help you create and manage your sales agreement.

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**Sales agreement tabs**

| Sales agreement tabs | Description |
|---|---|
| Details | Details of the related quote, start and end date of the agreement, and so on. |
| Sales Agreement Line | Details about the product and the services agreed between the buyer and the seller. |
| Order | Displays the list of all the orders placed with the current sales agreement. |
| Price List | Details about the account and currency that is updated from quote header. In the Price List Line table, you can view the actual pricing details about the products and services from the related quote. |

### Create a sales agreement

Create a sales agreement from a quote between a buyer and a seller for future transactions.

#### Before you begin

Role required: sn_csm_pricing.pricelist_manager and sn_sales_common.sales_manager

#### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Quote** > **All-Quotes** and select the quote to enable a new sales agreement.
3. Select **Enable sales agreement quote**.

   After the sales agreement is created, a message displays the sales agreement number. The request tracker enables agents to monitor the progress of sales agreements creation. All the information on the sales agreement is captured from the selected quote.

   For more information, see Enable a sales agreement in a quote.

4. Select the sales agreement number.
   The new sales agreement is displayed. The price list created for this new sales agreement is referred in the Default price list field.

#### What to do next

An order can be placed in the Order Management application based on a sales agreement. For more info, see Add a sales agreement to an order in Order Management.

## Using Order Management

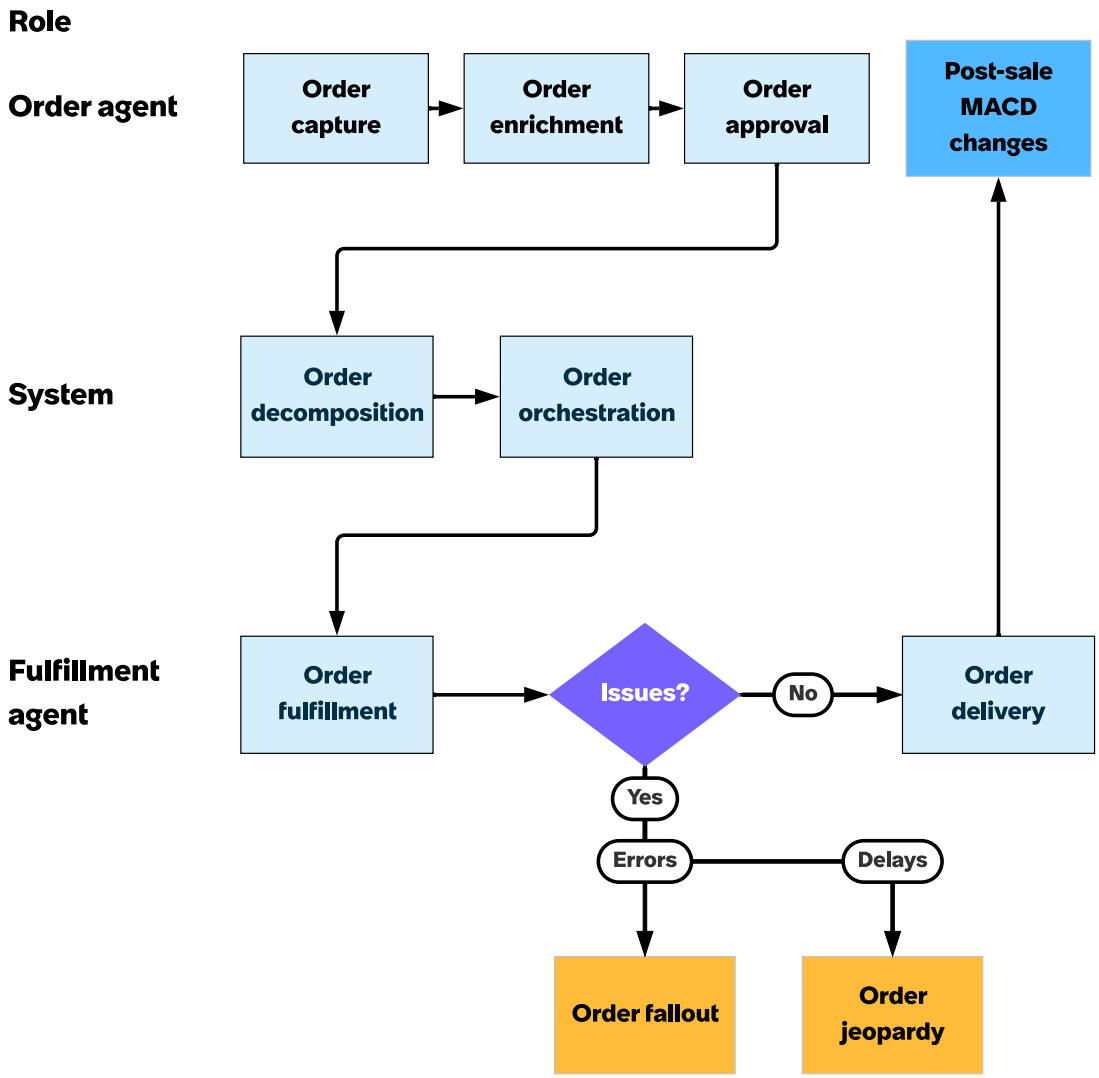
ServiceNow Order Management provides a centralized platform to create and manage customer and service orders throughout their entire life cycle. It automates the complex process from order capture and enrichment through to fulfillment and closure, promoting seamless coordination between sales, operations, and technical teams.

### Overview of the order life cycle

Access the Order Management capabilities from the CRM Workspace to capture and manage orders. A typical order life cycle is a structured, multiphase process that guides a customer's request from initial submission to final delivery and fulfillment, as shown in the following illustration.

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## Creating and managing orders




1. Creating orders

   The order life cycle begins when a customer's request is submitted. This could be from a salesperson creating a quote that's then converted to an order, a sales agent directly capturing an order through the workspace, a customer placing an order online through the Business Portal, or an order being created via an API from another system. This phase focuses on getting all the customer-facing details, including what was ordered, pricing, and customer information, into the system.

2. Enriching orders

   If order enrichment subflow is configured for a product offering, then order enrichment tasks are created. The fulfillment agent captures additional details required to fulfill the order. This phase prevents errors from propagating further into the process. Not all orders need enrichment.

3. Approving or rejecting orders

   The fulfillment manager reviews the order, order lines, and pricing details and approves or rejects the order.

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4. [System] Order decomposition

   This is a critical step for businesses selling complex products or services. The single, high-level order is automatically broken down into smaller, actionable service orders or fulfillment tasks based on how the process admin has configured order decomposition. For example, a customer's order for a telecom bundle would be decomposed into separate tasks for IT provisioning, a field technician, and the billing department. This process translates the customer's request into a detailed operational plan.

   View product, service, or resource orders for tracking the fulfillment process, verifying that all required tasks and suborders are created correctly, and confirming that the order progresses through its life cycle as expected. For more information, see View domain orders.

5. [System] Order orchestration

   The system orchestrates the fulfillment of each individual product, service, and resource orders. Tasks are automatically created and assigned to the correct teams and systems, and the application tracks their progress.

   Work orders are created if you have an integration with Field Service Management.

6. Order fulfillment

   Fulfillment agents complete order tasks assigned to them. Fulfillment managers monitor the fulfillment process and manage issues using features such as Jeopardy Management to alert teams about potential delays and Fallout Management to handle errors.

   As each fulfillment task is completed, the service or product is activated or delivered to the customer. This can involve anything from a physical delivery to the electronic provisioning of a digital service. Once all products and services are activated and delivered, the order is officially closed. The system updates the order status to reflect completion and updates creates sold product records.

7. Managing order fallouts

   Manage failures that may take place during order fulfillment due to errors and exceptions. These exceptions include incorrect data, connectivity problems, inadequate inventory supply, or other unforeseen issues.

8. Monitoring order jeopardy

   Proactively monitor and mitigate order delivery delays, dynamically track task progression to predict potential order fulfillment delays, and alert service delivery teams when fulfillment plans exceed or are expected to exceed committed completion times by monitoring the jeopardy status.

9. Managing post-fulfillment order changes

   Order agents can make the following post-sale changes to the orders after an initial order has been placed and fulfilled:

   - Change
   - Disconnect
   - Suspend
   - Resume

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**Related topics**

- Configuring Order Management
- Order types in Sales Customer Relationship Management
- Action types for customer and service orders
- Order life cycle states
- Methods of creating orders in Sales Customer Relationship Management
- Reviewing customer or partner accounts
- Order Management reference

## Order types in Sales Customer Relationship Management

Customer orders and service orders are the two main type of sales orders in ServiceNow Order Management. Learn about their differences and how to select an appropriate order type for your use case.

Use customer orders for ordering products or services. Use service orders for the activation of new services or for the post-sales requests for the services that were activated for and delivered to customers at earlier dates. By using this process, you ensure that service orders are correct and handled efficiently throughout the entire fulfillment process. The following table compares customer and service orders and lists the differences between the two.

| Aspect | Customer order | Service order |
|---|---|---|
| Definition | Orders for products (tangible or digital) that a customer wants to purchase or change. | Orders for services that are non commercial in nature and only require technical fulfillment.<br><br>Use service orders for the activation of new services or for the post-sales requests for the services that were activated for and delivered to customers at earlier dates. |
| Order record structure | • Customer order record with one or more line items based on the product offering.<br>• Includes product specification, characteristics, and values. | • Service order record with one or more line items based on service specification.<br>• Includes service specification, characteristics, and values. |
| TMF APIs for order capture | TMF622: Product Ordering API | TMF641: Service Ordering API |
| MACD order options | • Add<br>• Change<br>• Delete | • Add<br>• Change<br>• Disconnect<br>• Suspend<br>• Resume |

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| Aspect | Customer order | Service order |
|---|---|---|
| Decomposition | • It's based on product, service, and resource specification, and rules.<br>• Upon approval, order is decomposed into product, service, and resource orders.<br>• Can create multiple domain orders (product, service, resource) per line item. | • It's based on service specification and rules.<br>• Upon approval, order is decomposed into service and resource orders.<br>• Typically creates service and resource orders per line item. |
| Unique roles | • Order agent [sn_ind_tmt_orm.order_agent]<br>• Order fulfillment manager [sn_ind_tmt_orm.order_fulfilment_manager] | • Service order agent [sn_ind_tmt_orm.service_order_agent]<br>• Service order manager [sn_ind_tmt_orm.service_order_manager] |
| Inventory impact | Sold products | Product inventory |
| Suitable for | All industries | All industries, highly preferred for the telecommunication industry |

## Differences between the pre- and post-approval service orders

Like customer orders, captured service orders also have an ID with a prefix of ORD(nnn). The **Order Category** field in the order forms indicates if the order is for a **Product** (a customer order) or a **Service** (a service order). These labels enable you to identify the type of order.

When you approve a captured service order for fulfillment, the post-approval decomposition process generates actionable service orders and resource orders. You may see a single service order, multiple service orders, and resource orders that are associated with your approved service order.

- Service orders with a prefix of SO(nnn) are referred to as domain orders. These orders, and their related resource orders, with a prefix of RO(nnn), must be fulfilled to complete the service order line items on the captured service orders.
- The resource order manages the resources required to fulfill the services that the customer is requesting.
- These domain orders manage the fulfillment of the requested service orders.

To learn more, see Order decomposition.

## Order types for service orders

The following are the two key fulfillment actions for service orders:

- Deliver: Involves providing the ordered items to the customer once the order is ready.
- Qualify: Validates whether a service or product can be fulfilled before actual execution.

Service qualification request orders with fulfillment type as Qualify can only be created in the ServiceNow Order Management system using APIs from external qualification request systems. When you capture an order using Order Management, the orders are created with the fulfillment type as Deliver.

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**Related topics**

Service qualification requests

## Action types for customer and service orders

Learn how you can take various types of actions for your customer orders. Action types include move, add, change, disconnect, suspension, resume, or no-change of services.

By using an order action type, you can define the type of actions that you want to do with an order. The following table lists the order action types.

### Order action types

| Order action type | Description |
|---|---|
| Add | Add a customer order that isn't associated with an existing order from the same customer. This customer order results in new order management and fulfillment activities.<br><br>For example, you place a new order for a home internet service. |
| Change | Change an existing order, which changes a previously ordered or fulfilled product or service. This order action type includes the following scenarios:<br>• Addition of a child product specification that the customer didn't previously order.<br>• Deletion of an optional child product specification that the customer already has. For example, you upgrade the download speed of your home internet from 100 Mbps to 1000 Mbps.<br>• Change characteristics or service location for existing products.<br>• As part of the fulfillment workflows, define a PONR (Point of No Return) step for each service or resource order. |
| Disconnect | Disconnect an existing customer service order. For example, you can disconnect your home internet service. |
| Suspend | Product or service order to temporarily inactivate the product inventory of its order line items. |
| Resume | Product or service order to activate the product inventory of its order line items that were previously suspended. |
| No change | Order line items with No change action are included in the order for informational purpose only. For example, an order contains multiple items, but only one of those items must be changed (such as the speed, which has changed from 100 Mbps to 1000 Mbps), which affects the parent line item. However, all the other line items in the order remain unchanged. |

**Note:** The Move action type has been deprecated and can't be used.

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**Related topics**

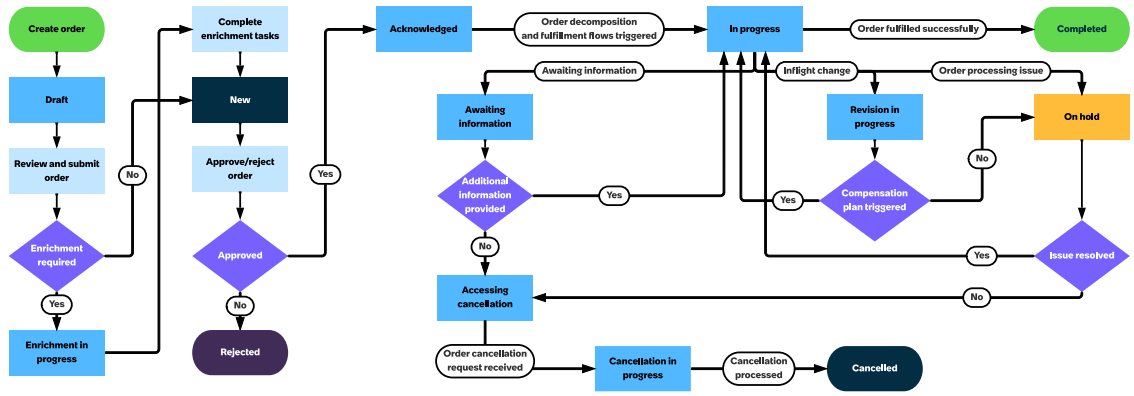
- Suspend and resume products and services
- Managing post-fulfillment order changes

## Order life cycle states

Learn about the order states from initial capture through enrichment, decomposition, fulfillment, and completion.

When you create an order with add as the action type, the order state changes after each step or a decision point as shown in the following illustration.

### Order states




1. A new order gets created in the Draft state.
2. After you review and submit the order, either of the two things happen:
   - If post-capture order enrichment is configured, enrichment tasks are created, and the order state changes to Enrichment in progress.

     If you're blocked on order enrichment tasks, change the order state to Enrichment on hold. When you're unblocked, change the order state back to Enrichment in progress.

   - If the details captured while creating the order are sufficient to process the order and no enrichment is required, then the order state changes to New.
3. When the order is in the New state, you can either approve or reject the order. Accordingly, the state changes to either Acknowledged or Rejected.
4. The order in the Acknowledged state then undergoes decomposition. Domain orders are created and fulfillment flows are triggered and the order state changes to In progress.
5. If the order is successfully fulfilled, the order state changes to Completed. If there are issues during order processing, then the outcome depends on how the issue was handled. The scenarios and their outcomes are listed in the following table.

| Scenario | State | Outcome |
|---|---|---|
| More information needed to process the order | Awaiting information | ○ If additional information is received, the order state changes to In progress.<br>○ Or else, the order state changes to Accessing cancellation. |

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| Scenario | State | Outcome |
|---|---|---|
| Inflight order change | Revision in progress | ○ If compensation plan is triggered, then the order state changes back to In progress.<br>○ Or else, the order state changes to Accessing cancellation. |
| Issues during order processing | On hold | ○ If the issue blocking the order processing is resolved, then the order state changes back to In progress.<br>○ Or else, the order state changes to Accessing cancellation. |

6. After the cancellation request is reviewed and processed, orders in the Accessing cancellation state change to Canceled.

**Related topics**

Configuring Order Management

Order management

## Methods of creating orders in Sales Customer Relationship Management

Orders can be created by agents, customers, or using APIs in ServiceNow Order Management. Irrespective of where or how you create orders, all orders can be managed, tracked, and fulfilled using Order Management.

### Order capture by the agents

Order agents and service agents can capture orders for existing customers from the CRM Workspace. Sales agents can create orders by converting an approved quote. The following table lists the various order creation channels and their benefits.

**Order capture channels for agents**

| Channel | Persona | Benefit |
|---|---|---|
| Converting a quote to an order | Sales agents | The quote-to-order conversion supports post-quote workflows such as order capture, fulfillment, and contract creation. Benefits include:<br>• Reduced errors from manual data handling<br>• Consistency across systems by using a unified data model<br>• Support for complex product configurations and pricing strategies, including bundles and multi-currency pricing |
| Creating orders from Accounts page | Order or service agents | The Accounts Information tab provides a 360-degree view of customer interactions, including quotes, contracts, entitlements, and previous orders. Creating orders from this context promotes: |

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**Order capture channels for agents (continued)**

| Channel | Persona | Benefit |
|---|---|---|
| | | • Better-informed decisions based on historical data<br>• Fewer errors due to pre-filled fields and validated account details<br>• Faster order initiation based on pre-existing account data |
| Creating orders from Customer Orders or Service Orders list view | Order or service agents | Alternate way to create an order for an account or a consumer with a different set of contact information or parameters. |

## Order creation using TM Forum (TMF) APIs

Most of the service orders that you process are captured from third-party customer order management systems through the Service Order Open API. The Service Order Open API is a ServiceNow implementation of the TM Forum TMF641 Service Ordering Open API specification. To learn more, see Service Order Open API.

Order creators and order integrators for a Communications Service Provider (CSP) company can use the following TMF APIs to create orders:

- TMF622: Product Ordering API
- TMF641: Service Ordering API

**Note:** You need a Telecommunications Service Management subscription to create orders using TMF APIs.

## Order creation using Service Exchange

Your ServiceNow instances can be integrated with the instances of your customers by using Service Bridge. With this integration, you can create and publish product offerings to your customer's instances. Enterprise customers can then submit requests for products or services, which you can then fulfill using Order Management. For detailed benefits on using the Service Bridge applications, see Exploring Service Exchange.

## Order creation by B2B customers

Business-to-Business (B2B) customers can leverage self-service capabilities provided through the Business Portal to browse products and submit orders. These orders are then processed by the order and fulfillment agents. For more information, see Create orders from the Business Portal.

## Post-capture order record generation

When you capture or directly enter a customer or service order, the corresponding order record is generated in the ServiceNow AI Platform. The order record has one or more associated order line items that describe the product or service and the action (Add, Change, Disconnect) to perform any required service for the item. The order line also contains the following elements:

- The details of the product or service being added, updated, or deleted.
- For Add type orders, the order line item holds the details of the product specification, with its required characteristics and characteristic values.

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- For Change and Disconnect type orders, the order line holds the details of the product inventory that you're updating or disconnecting.
- The order line item can have a location and related information such as customer contacts detail.

**Related topics**

Creating orders in Order Management

Convert quotes into orders

## Creating orders in Order Management

Familiarize yourself with the steps for creating customer or service orders in Order Management using the CRM Workspace.

The following illustration lists the high-level steps for creating a fresh order with the Add action type. At this stage, the order agents focus on capturing commercial details such as quantity, product configuration, and pricing for placing an order. Fulfillment agents capture technical details required for fulfilling the order in the order enrichment stage.

### Order creation process




1. Initiate the order process from the CRM Workspace.
2. Input delivery information, including the shipping and billing preferences.
3. Select and include desired products into the order using the product catalog.

   Customize configurable products using the product configurator.
4. Review order line items and customize product specifications such as quantity, options, or attributes.
5. (Optional) Apply manual price adjustments.
6. (Optional) Include any products that are covered under warranties, service plans, and so on.
7. Finalize and submit the order for further processing and fulfillment.

**Note:** If you add a sales agreement while creating the order, only the products listed in the sales agreement are available for selection.

**Related topics**

Configuring Order Management

Order management

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### Create an order in Order Management

Create a product or service order for an account or consumer in Order Management.

## Before you begin

Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

## Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon ☰.
3. Navigate to **Customer Orders** > **All**.
4. Select **New**.
5. On the form, fill in the fields.

**Create an Order form**

| Field | Description |
|---|---|
| Account | The customer account for which you want to create an order. |
| Consumer | The consumer for which you want to create an order. |
| Buyer organization | The buyer organization for which you want to create an order. |
| Buyer organization member | Employee of the buyer organization for whom the order is created. |
| Order Type | The type or order you want to create. The available options are:<br>○ Product<br>○ Service |
| Contact | The name of the contact for the order. |
| Deal type | Indicates the type of deal associated with the order:<br>○ Direct: The seller engages directly with the customer, with no intermediary partner involved.<br>○ Indirect: The seller engages the customer through an intermediary, such as a reseller, service provider, or distributor. |
| Order action | This option should be set to **Add** to create a new order. |
| Route to market | Identifies the exact sales channel used to execute the deal:<br>○ Direct<br>○ Reseller<br>○ Distributor |
| Channel partner | (Optional) The name of the organization selling a product or service. |

**Note:** The fields displayed on the form change depending on whether you select account or consumer.

6. Select **Create**.

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### Result
The order is started and the product catalog opens.

### What to do next
Browse the product catalog and add products and services to the order. For more information, see Add products or services to an order in Order Management.

#### Related topics
- Order types in Sales Customer Relationship Management
- Action types for customer and service orders

## Filter product catalog by location

Agents can filter products in the catalog by using the location function in Order Management. The location filter helps agents be more efficient when creating orders.

### Before you begin
Location-based product transaction capability must be activated to enable location-based filtering in Order Management. For more information Activate location-based transactions.

Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.service_agent

### Procedure
1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select an order you want to work with.
   The order opens in the **Catalog** tab with the **Select a location** field available.
5. Select a location from the Service location field.
   The products in the catalog are filtered according to the selected location.

#### Related topics
- Configuring location-based product transactions

## Add a sales agreement to an order in Order Management

Add a sales agreement to an order to set pricing, filter catalog options, and streamline product configuration.

### Before you begin
Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.service_agent

### About this task
A sales agreement is a contract to purchase a defined set of products and services for a fixed price. With a sales agreement:

- Terms are defaulted for the order.
- Price lists are defaulted based on the pricing terms.
- The order catalog#is filtered for products and options.
- Agents can configure product bundles for orders.
- Agents can move quickly through the order process.

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See Using Sales Agreement Management and Create a sales agreement to learn more about creating a sales agreement.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select an order.
5. Select the more actions icon , and then select **Order details**.
6. In the Customer Order form, select the sales agreement you want in the **Sales Agreement** field.
7. Select **Update**.
   The sales agreement with its product offerings and price lists is added to the order.

### What to do next

Add products or services to an order in Order Management

#### Related topics

Sales Agreement Management

Configure Sales Agreement Management

## Add products or services to an order in Order Management

Add order lines for products or service orders using the product catalog and product configurator in Order Management.

### Before you begin

**Note:** Check your entitlements to see if the product configurator is available.

Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.service_agent

### About this task

The product catalog displays tiles that contain product information. Simple products have an **Add** button that adds the product with no options available to the order.

Products with options have a **Customize** button that opens the product configurator, which lets you select product options.

When the#product configurator opens you can select from the available options for the product or service. The product configurator consists of three columns.

- The product hierarchy displays product catalog items and child products associated with the product.
- The option selection displays any available options for the product, service, order lines, and order tasks.
- The Current Selection displays the selected products options and the pricing.

Depending on your configuration, you'd either see a CPQ Configurator or product configurator. To learn more about these, see Using the CPQ Configurator and Using the Configurator.

As you configure your product, use the following options:

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| Option | Description |
| --- | --- |
| Reprice | Resets the pricing and updates the total price when you make changes.<br><br>If cascading pricing is enabled, pricing information is cascaded from parent to child line items. See Control cascading quantity values in child product offerings for more information. |
| Validate Related Items | Validates the product and prices when changes are made. |
| Add | Adds the product to the order after you've configured it. |

**Note:** If you added a sales agreement while creating the order, only the products listed in the sales agreement are available for selection.

### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select an order.
5. In the **Catalog** tab, choose a catalog from the drop-down menu.
6. Add products to your order.
   - Select **Add** to add a simple product.
   - Select **Customize** to add products with configurable options.
7. Select the **Line items** tab to view products and services in your order.

### Related topics

Filter product catalog by location

Set up and review order lines

### Order quantity support

Learn how you can support and fulfill your customer orders for multiple instances of a product or service. You can create multiple domain orders that equal the order quantity for each instance of the product or service. This way, you can efficiently decompose and manage the fulfillment of your customer orders.

## Example of order quantity

An instance of a product or service refers to an ordered item with a unique set of order characteristic values, such as the speed and memory size. A customer might order the same top-level product or service for different locations, but each might differ in their order characteristics. For example, if a customer orders a router for one of their locations, it might have a memory size selection that varies from the same router model that was ordered for another location. Order Management supports this order quantity processing for the following scenarios:

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### Support for the order line item quantity that is provided by the customer when they order an item

If your customer places an order with more than one instance, the Quantity field on the order line item captures the number of instances of your customer order line items. The order decomposition process then creates the same number of product or service orders and manages the fulfillment process for each order independently.

### Support for the catalog-driven characteristic quantity

In this scenario, the decomposition process decomposes a product or service order into the required number of domain orders. These domain orders are based on the quantity mapping that you define in the product catalog between the source and target specifications that are used in a product offering. The quantity mapping in the specification relationship triggers the decomposition process to create the required number of domain orders for the fulfillment process.

### Support for the characteristic based quantity

In this scenario, you accept and support your customer order that has the information for order characteristics value which impacts the quantity of the domain orders. So, the order decomposition process refers to following information to create the required number of domain orders.

- Specification relationship with quantity characteristic
- Characteristic mapping

#### Related topics

Configuring Order Management

Order management

#### Set up and review order lines

Once products and services are added to an order in Order Management, you can set up order lines with order characteristics, pricing adjustments, and other items.

### Before you begin

Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.order_approver, sn_ind_tmt_orm.order_viewer, or sn_ind_tmt_orm.order_fulfillment_manager

### About this task

Product and service order lines items contain the product or service that you have added to your order. You can also make the following changes and updates to the order line items.

- Details - shows the details of the order including the name and address fields for the order.
- Order Orchestration - shows the order orchestration details in a node map view.
- Order Characteristics - add characteristics to a product and service orders.
- Order Line Item Contacts - add a contact for each product order line item.
- Order Line Related Items - connect this order line item with other order line items
- Pricing Adjustments - add pricing adjustments to a product order.
- Products Orders - lets agents create product orders and add them to the current order.
- Order Tasks - tasks that are assigned to complete the orders.

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- External product Inventories - connect to external product inventories.
- Involved Parties - add multiple involved parties to a customer order, each with a specific role.

### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon ☰.
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you're working with.
5. Select the order line tab and choose the order line item that you want to update.
6. Select the tab that you want and fill in the fields.

| Field | Description |
|---|---|
| Details | Details include shipping address and product information. Details tab also contains pricing, general information, and contract start and end dates. |
| Order Orchestration | Open this tab to see the steps needed to execute the order. |
| Order Characteristics | Characteristics are the options available. |
| Order Line Item Contacts | Add contacts that enable agents to find more information about an order. |
| Order Line Related Items | Connect this order line item with other order items. |
| Pricing adjustments | Agents can adjust product pricing. |
| Product Orders | Shows the product orders that are part of this order. Also lets agents add products to the order. |
| Order Tasks | Shows order tasks that must be completed. |
| External Product Inventories | Agents can view external product inventories. |
| Involved Parties | Add entities assigned with defined roles in an order, such as billing, shipping, entitlement, and partner participation. |

7. To add related items for your customer orders with horizontal relationships, do the following actions.

   a. On the **Order Line Related Items** tab, select **New**.

   **Note:** Only those product specifications that are available for a selection appear.

   b. In the Related order line items list, select the order line items to add.

   c. In the Related product inventory list, select the product inventory to add.

   d. Select **Save**.

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The order line item is configured. Review the order line item details and submit to start the fulfillment process for the new product.

8. Select **Save** to save the changes to the order line.

**Related topics**

Review and submit a product or service order in Order Management

### Add a header discount to an order

Apply a percentage-based discount to an order. You can apply it to the entire order or specific line item types. The order line items automatically inherit the designated discount percentage as a manual adjustment on the order line level.

## Before you begin

Role required: sn_ind_tmt_orm.order_agent

## About this task

You can only add discounts to a quote while the quote is being crafted. Once the quote is approved or closed, discounts are no longer available.

## Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select your order.
5. Select the **More Actions** icon and select **Apply header discount**.
6. In the Order header discount window, select how to apply the discount:
   - **Apply discount to all order lines**: Apply discounts for the entire order, including all order lines.
   - **Retain existing line-level manual adjustments and discount remaining lines**: Apply discounts to all the order line items except those with manual price adjustments.
7. In the **Order header discount %** field, enter the discount percentage.

   **Note:** You can't enter a negative percentage or a percentage higher than 100%.

8. Select **Apply**.

## What to do next

Review and submit a product or service order in Order Management

**Related topics**

Configuring Order Management

Order management

### Price adjustment breakdown on order lines

Order agents can view the price adjustments that were applied to the base price in the price list to reflect attribute adjustments and any custom adjustments that you added through the pricing plan, and see how the net price was calculated while processing orders.

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## Where to find the price adjustment details

The unit base price, unit list price, and unit adjustment details are listed on the Pricing section of the Order Line Item Details page.

The Price Adjustments tab on the Order Line Item page displays the manual price adjustments that were applied to an order line item. For information about the fields on the list view, see Price adjustment fields.

## Price adjustment example

To understand price adjustment and the terms used, let's consider a scenario where a customer is purchasing an API Edition license from a provider.

- Unit Base Price: The price defined in the Price List, say $1000.
- Attribute Adjustment: The customer opts for the "Professional Plus Edition" version of the product with Price Point as List Price which costs them additional $200.
- Volume adjustment: The customer receives a discount of $50 when they purchase 100 licenses. Here as well, the Price Point is the List Price.
- Price Point: The Price point is the entity on which the price adjustments were applied. It could be the List Price or Net Price.
- Unit List Price: The Unit List Price is calculated as $1000 + $200 - $50 = $1150.
- Customer also receives a premier account discount of $100 with Price Point as Net Price.
- Unit Net Price: The Unit Net Price is the final price after all adjustments have been applied. This is calculated as $1150 - $100 = $1050.

### Related topics

Configurable pricing plans

### Add subscription pricing to an order

Add contract pricing to an order or order line items including start and end dates in Order Management.

## Before you begin

Role required: sn_ind_tmt_orm.order_agent

## About this task

Subscription pricing is a pricing model where customers pay a recurring fee for products or services, typically at regular intervals such as monthly or annually.

In an order, you can set the contract start date and end date, or you can enter a term and the contract end date is automatically calculated.

Subscription pricing can be added at the order header level or at the order line item level.

See Subscription revenue metrics for more information about how contract pricing works.

## Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Orders** > **All**
3. Select the order that you're working with.

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4. Select the More Actions icon and select **Order details**.
5. In the **Order Details** tab, add a **Contract start date** and a **Contract end date**.
   When the dates are entered, the following information automatically updates.

| Field | Description |
|---|---|
| Total monthly recurring price | Shows the monthly recurring price based on the dates entered in subscription pricing. |
| Total annual recurring price | Shows the total annual recurring subscription pricing based on the dates entered. |
| Total amount | Shows the total amount of the subscription pricing according to the contract start and end dates. |
| Term | Shows the number of months the subscription is valid based on the contract start and end dates. |

6. Select **Update**.

### Related topics

Order details page - Dates fields

## Add covered products to order line items

Enhance orders by adding covered products such as contracts or entitlements at the order line level.

### Before you begin

Role required: sn_ind_tmt_orm.order_agent or sn_ind_tmt_orm.order_manager

### About this task

Order agents can add covered products to an order line during the order capture process. Covered products refer to offerings that act as entitlements or contracts linked to a primary product, such as a warranty purchased with a phone. They are not standalone products but provide additional value or service to the main product. In the product offering record, covered products are marked with Entitlement as the offering type. You can only link the entitlement to a specific product, sold product, or install base item associated with the account.

You can add multiple covered products to an order line item.

### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace*.#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you're working with.
5. From the **Line items** tab, select the entitlement or contract type of order line to open the order line record in its own tab.
6. In the Covered Product form, select **New**.
7. In the Create New Covered Product form, select the covered product line item you want to add.

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You can add either of the following covered products types to a line item:

- **Covered sold product**: Add a sold product to an entitlement/contract type of order line to establish a coverage relationship between them.
- **Covered order line item**: Add a covered order line item to the order line.
- **Covered install base item**: Add an install base item to the order line.

8. Select **Save**.

> **Note:** You can't modify a covered product added to an order line. To make changes, delete the covered product by selecting **More Actions icon** > **Delete** and add the covered product again by selecting **New**.

9. On the order line item page, select the contract start date and the contract end date.
10. Change the state to **Complete**.
A contract is created with the contract details for the order line.

### Related topics

Add Covered Products using Contracts and Entitlement Workflow

## Review and submit a product or service order in Order Management

Review all the order line items as the next step in the process to create a product order. Edit the order details as needed before submitting it for fulfillment approval.

### Before you begin
Role required: sn_ind_tmt_orm.order_agent, order_approver

### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace*.#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you want to submit for approval.
5. Select **Review & Submit**.
6. Review the order line items details and configurations.

#### Review order form

| Field | Description |
|---|---|
| Order Line | Unique system-assigned number of the order line item with a prefix ORDL. |
| Product Offering | Product offering that the customer is ordering for fulfillment. |
| Product Specification | Product specification that is associated with the order line item. |
| Qty | Product quantity. |
| Unit list price | Price of a product or service as defined in the Price List Line. |

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| Field | Description |
| --- | --- |
| Cumulative monthly price | Total monthly recurring charges for this order line item. An example is a monthly line charge. |
| Cumulative annual price | Total yearly recurring charges for this order line item. |
| Cumulative one time price | Total non-recurring charges for this order line item. An example is a one-time installation fee. |
| Cumulative net price | Total price for this order line item. |
| Total monthly recurring price | Aggregated monthly cost of all recurring charges associated with an order line item or subscription contract. |
| Total one time price | Aggregate cost of all non-recurring charges associated with an order line item. These are typically setup fees, installation charges, or product costs that are billed once rather than on a recurring basis. |
| Total amount | Aggregate cost of all charges, both, one-time and recurring, associated with the entire order. It is a calculated field that reflects the final payable amount after applying quantity, pricing, and adjustments. |

**Note:** You can't manually adjust the amounts that appear in the pricing fields. They only change if you change the characteristic values for the order line items.

7. **Optional:** To update the configuration or quantity for an order line item, select the Edit icon .
   You're redirected to the configurator UI for making updates.
8. **Optional:** To delete an order line item, select the Delete icon .
9. Save any changes or updates and select the **Reprice** to reset the total pricing.
10. After reviewing the order, select **Submit**.
    The state of the order changes from Draft to New. The order progresses to the next step of the order life cycle.

**Note:** For orders that include recurring or entitlement offerings, ensure that required contract details such as the contract start date, contract end date, and term are populated before submitting the order. These details are validated during order approval.

### What to do next

For complex orders, capture technical details. For more information, see Capture order enrichment details for complex fulfillment.

If order enrichment tasks don't apply, move to order approval. For more information, see Approving or rejecting orders.

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**Related topics**

Configuring Order Management

Order management

### Create a request definition

Create a request definition and configure it into an order task to help your agents provide additional order attributes for the order fulfillment from the CRM Workspace.

## Before you begin

Role required: admin

## Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon ☰.
3. Navigate to **Request Definition Setup** > **Request Definition**.
4. On the form, fill in the fields.

**Create New Request Definition form**

| Field | Description |
|---|---|
| ID | Unique identifier for the request definition.<br>**Note:** You can't modify an ID after the request definition is created. |
| Task type | Task table that is associated with the service request.<br>**Note:** You can create new order tasks only in the Order Task [sn_ind_tmt_orm_order_task] table. |
| Name | Name to identify the request definition. |
| Task Fields | Fields of the Task table. |

5. Select **Save**.
6. Repeat Step 2.
7. Navigate to **Request Definition Setup** > **Request Definition Characteristic**.

**Request Definition characteristic form**

| Field | Description |
|---|---|
| Request definition | |
| Specification | Name of the product specification. |

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| Field | Description |
| --- | --- |
| Characteristic | Name of the product characteristic that you want to capture the information from the customer order. |
| UI Visible | Option that designates if the **UI Visible** field appears as true in the Request Definition characteristics table and the characteristic appears in the Order Task form.<br><br>If you clear the check box, the field value appears as false, and the characteristic doesn't appear in the order task form. |
| Mandatory | Option that designates if the **Mandatory** field appears as true in the Request Definition characteristics table. Your agent must provide the characteristic value in the order task form to close the order task.<br><br>If you clear the check box, the field value appears as false and your agent can close the task without providing any characteristic value in the order task form. |
| Read-only | Option that designates if the **Read-only** field appears as true in the Request Definition characteristics table, and you can't edit the characteristic value in the order task form.<br><br>If you clear the check box, the field value appears as false in the Request Definition characteristics table and you can edit the characteristic value in the order task form. |

8. Select **Save**.

**Related topics**

Configuring Order Management

Order management

## Enriching orders in Order Management

Order enrichment is a post-capture stage in the Order Management life cycle that enables fulfillment agents to gather additional information from customers for complex orders before submitting the order for approval.

### Overview of post-capture order enrichment

The order enrichment process is designed to improve fulfillment accuracy and help prevent potential delays or fallouts for complex product or service orders. Fulfillment agents collect additional, context-specific information from customers that is not required during initial order capture because these details don't affect product selection or pricing. The order enrichment

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process helps the order agents to create basic order entries quickly without needing to wait for technical details that are crucial for fulfillment.

Not all orders require enrichment. For complex offerings such as elevator installations, critical details like installation location and door configuration may not be available during initial order placement. Capturing this information later helps the fulfillment agents to have the necessary data for executing the order efficiently and accurately.

## How the order enrichment process works

After an order is captured by an order agent, the system checks whether the Order Enrichment Flow Policy is configured for the product or service in the decision tables. If the Order Enrichment Flow Policy is configured, enrichment tasks are automatically created against the order lines that require enrichment and are assigned to the appropriate fulfillment agent. At this stage, the state of the order and its line items change to Enrichment in progress. If an order line doesn't qualify for enrichment, it's state changes to New.

Next, the agent then contacts the customer to collect the required details and captures them using the configurator UI. For example, if a customer orders elevators, the fulfillment agent must know the following site details before they send out install technicians:

- Door configuration (for example, side-opening, center-opening)
- Building entrance width
- Electrical rating

Only the information necessary for fulfillment is displayed in the configurator UI and stored in the order record.

The fulfillment agent reviews and closes each task after capturing the required additional details for order decomposition and fulfillment. When the order enrichment is completed, the state of the order line items and the parent order changes to New.

The fulfillment agent or manager can now approve or reject the order.

## Benefits

- Improved accuracy: Reduces delays or fallouts caused by incomplete or incorrect data.
- Higher conversion rates: Enables customers to place orders quickly without needing all technical details upfront.
- Operational efficiency: Ensures that fulfillment agents have the correct data at hand.
- Customer engagement: Builds trust through multi-step collaboration rather than one-time transactions.

## Configuration requirements

Order enrichment tasks are only created if the enrichment process is explicitly configured in the Order Enrichment Flow Policy in the decision tables for a product or service offering. This process ensures that enrichment is applied selectively and only when necessary. For more information, see Configure order enrichment flows using Decision Tables.

**Related topics**

Configuring Order Management

Order management

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### Capture order enrichment details for complex fulfillment

Collect additional order details and technical information necessary for order decomposition and fulfillment, promoting accurate delivery and helping prevent delays or fallouts for complex products or services.

## Before you begin

Role required: sn_ind_tmt_orm.order_fulfilment_agent

## About this task

You can enrich order and order line items that meet the following conditions:

- The Order Enrichment Flow Policy is configured for this product offering
- The order has been captured, reviewed, and submitted by an order agent
- The order and order line items are in the Enrichment in progress state

## Procedure

1. Navigate to#**Workspaces** > *CRM Workspace*.#.
2. Select the List icon .
3. Navigate to the order enrichment task using either of the following options.

| Navigation option | Steps |
| --- | --- |
| **From Customer Orders** | **a.** Navigate to **Customer Orders** > **All**.<br>**b.** Select the order record that's ready for en richment, which is indicated by the Enrich ment in progress state.<br>**c.** View the order enrichment tasks by select ing the **Order Tasks** tab.<br>**d.** Select the order enrichment task to open the task record and view its details. |
| **From Order Tasks** | **a.** Navigate to **Order Tasks** > **All**.<br>**b.** Select the order record that's ready for en richment.<br>This is indicated by the Enrichment in progress state.<br>**c.** Select the order enrichment task to open the task record and view its details. |

4. Select **Configure**.
5. Capture the additional information that you gathered from the customer in the configurator UI. Depending on the product configuration, you can choose from a value range, a drop-down menu, or enter text in the configurator UI.
6. **Optional:** Adjust the quantity by entering a value in the **Quantity** field.
7. Review the quantity and other details in the Current Selection pane before proceeding.
8. Select **Update**.
   You're redirected back to the enrichment task Details page.

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9. To mark the task as complete, select the **Closed complete** option from the **State** drop-down menu and select **Save**.
   You're redirected back to the **Order Tasks** tab where you can see new set of tasks that are asynchronously created.
10. Complete all the enrichment tasks in a similar manner.
11. **Optional:** View the summary of your selections for each enrichment task by going to its **Order Task Characteristics Values** tab.
    The **Characteristic Options** tab displays all the available options for that product characteristic.

### Result

The order record is updated with all necessary fulfillment details. The order state changes to New. The fulfillment manager can now approve or reject the order.

### What to do next

Approve orders in Order Management

#### Related topics

Configuring Order Management

Order management

## Order header tasks

Order header tasks are associated with an order at the header or top order line item level, independent of domain orders or fulfillment tasks. They can be generated automatically or created manually to support validation and coordination activities.

## Overview of order header tasks

Order header tasks extend the standard order task model to support task association at the order header level and the top order line item (OLI) level. Order header tasks operate independently of fulfillment logic and product specifications, unlike enrichment and fulfillment tasks that are tied to specific domain orders or order line items.

Order header tasks can be generated at three stages of the order life cycle:

- After order submission
- After order approval
- After order fulfillment

## Task categories

Two task categories are introduced to differentiate order header tasks from existing enrichment and fulfillment tasks:

- Order Header: Associated with the order at the header level, based on order-level parameters such as account and order action.
- Top OLI: Associated with the top order line item, based on parameters available at the order line item level, such as product offering and order line item action.

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## Automatic task generation

Order header tasks and top order line item tasks are generated automatically based on conditions configured in the Customer Order Task Policy decision table. Conditions can use any parameters available at the order or order line item level. For example:

- Order header tasks can be triggered by account and order action.
- Top order line item tasks can be triggered by product offering and order line item action.

For more information, see Configure the customer order task policy using Decision Tables.

## Manual task creation

Order agents can create order header tasks manually from the CRM Workspace. When an agent creates a task from the Order Tasks tab, the order number is automatically populated and is read-only.

For more information, see Create an order header task.

### Related topics

Configuring Order Management

Order management

### Create an order header task

Create an order header task manually to track and coordinate activities at the order level that are not tied to a specific domain order or fulfillment task.

### Before you begin

Role required: sn_ind_tmt_orm.order_agent or sn_ind_tmt_orm.order_fulfillment_manager

### About this task

Order agents and fulfillment agents can create order header tasks manually when a task is needed that is not automatically generated by the Customer Order Task Policy. The order number is automatically populated when a task is created from the Order Header Tasks tab and cannot be changed.

Order header tasks remain open until explicitly closed. The order is not marked as completed until all associated order header tasks are closed.

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Open the order for which you want to create a task.
3. Select the **Order Tasks** tab.
4. Select **New**.
   The **Order number** field is automatically set to the current order and is read-only.
5. On the form, fill in the fields.

#### Order Task form

| Field | Description |
|---|---|
| Number | This field is automatically set to a unique task number. |

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| Field | Description |
|---|---|
| Order number | This field is automatically set to the order from which the task was created. Read-only. |
| Account | Customer account associated with the order. |
| Primary contact | Primary contact for the order. |
| State | Current state of the task. Defaults to **Draft**. |
| Priority | Priority level for the task. |
| Assignment group | Group responsible for completing the task. |
| Assigned to | Agent responsible for completing the task. |
| Short description | Brief description of the task. |
| Additional comments (Customer visible) | Notes visible to the customer. |

6. Select **Save**.

### Result
The order header task is created and appears in the **Order Tasks** tab.

#### Related topics
Configuring Order Management

Order management

## Approving or rejecting orders

Fulfillment managers bridge the gap between order intake and execution by reviewing the order information and deciding whether an order is ready to proceed or requires further review.

## Approval workflow

To begin the approval process, start by reviewing the order and its line items thoroughly. Verify that all required fields such as order number, customer account details, contact information, pricing, critical dates, and product or service specifications are complete and accurate. The order must be in a New state to be eligible for approval.

As part of this review, the system validates key order details such as contract dates to ensure the order meets approval criteria before it can proceed.

Next, validate the order against your organization’s approval criteria. The approval criteria could include checks such as:

- Accuracy of order details
- Completeness of required fields
- Compliance with business rules such as discount thresholds, contractual terms, or inventory availability
- Validity of associated agreements or entitlements

Throughout the process, maintain clear documentation and communication. If any issues arise, coordinate with relevant teams to resolve them before approval, promoting a smooth transition from order intake to fulfillment, and minimizing delays or fallout.

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You can make corrections or updates to order characteristics before approval. Once the order passes all checks, proceed to approve it. This action updates the order status to In progress, which triggers the fulfillment workflows such as decomposition into domain orders, tasks, assignment to teams, and scheduling. The system logs the approval action and updates revision fields to reflect the change.

## Rejection workflow

Begin by carefully reviewing the order details against your organization's rejection criteria checklist. The following is a list of common rejection triggers:

- Missing or incorrect data
- Policy violations such as unauthorized discounts or invalid entitlements
- Inventory constraints
- Fraud or risk flags

Once a rejection decision is made, update the order status to Rejected in the system. This action automatically halts any associated fulfillment workflows, stopping the order from being processed further. It's important to document the reason for rejection clearly using work notes so that the requester or relevant teams understand what must be corrected.

## Reevaluating rejected orders

A rejected order can be corrected and resubmitted for reevaluation by the order agent. If all issues are resolved and the order meets approval criteria, you can approve the order. Approving a rejected order updates the status back to In progress, enabling fulfillment to resume.

**Related topics**

Configuring Order Management

Order management

### Validate the related items of a customer order for its compatibility

Validate the related order line items of your customer order, which includes the horizontal specification relationships, to make sure that the order-related information is correctly generated to fulfill your customer order.

#### Before you begin

A horizontal specification relationship is defined by defining a compatibility rule between the product, service, or resource specifications in a product catalog.

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

#### About this task

After you define a compatibility rule, when you capture a customer order, you can validate the order related items before you approve the order. For this validation, you review the specification relationships of the order line items and the order input data of your customer when you created the order.

Validations occur at two levels:

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1. Validations before the order approval. If these validations fail, the order decomposition process doesn't stop. The following validations take place:
   - Source specification and source specification configuration
   - Compatibles validation
   - Compatibles quantity validation
2. Validation at the time that a domain order is closed. If this validation fails, the order fulfillment process stops. The following validations take place:
   - Source specification and source specification configuration
   - Compatibles validation
   - Compatibles quantity validation
   - Compatibles configuration

### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you want to validate.
5. To validate the related items of the customer order, select the more actions icon and select **Validate Related Items**.

| Option | Description |
|---|---|
| **If the validation is successful** | The ServiceNow AI Platform displays the fol lowing message:<br><br>Provided related inventory/order line items are compatible.<br><br>This message confirms that the order informa tion doesn't require any additional input and you can proceed to the next steps of the or der fulfillment. |
| **If the validation is unsuccessful** | The ServiceNow AI Platform displays a mes sage that confirms whether the order informa tion requires additional details for its decom position. You can provide the required infor mation to proceed for the next process of the order fulfillment. |

**Note:** For change and disconnect type of customer orders, the following message is displayed for the validation of the related items of the customer order: `This validation is not applicable for order line items with change or disconnect action.`

### What to do next

Approve orders in Order Management

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**Note:** Upon approving for the change and disconnect type of order requests with horizontal relationships, the ServiceNow system analyzes its impact on the product inventory relationships and displays a message if it invalidates the existing relationships due to the impact of the requested change by the customer.

**Related topics**

Configuring Order Management

Order management

### Approve orders in Order Management

Approve an order in Order Management to begin decomposition and fulfillment process.

## Before you begin

Role required: sn_ind_tmt_orm.order_fulfilment_manager, sn_ind_tmt_orm.order_approver

## Procedure

1. Navigate to#**Workspaces** > *CRM Workspace*.#.
2. Select the List icon ☰.
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you want to review and approve.
   Orders ready for approval are in the New state.
5. Review the order line items.
6. **Optional:** Select **Reprice** to recalculate prices when updates are made to an order line item.
7. **Optional:** To add more products to this order, select **New**.
8. Delete selected order line items by selecting **Delete**.
   When you delete an order line item, the prices are recalculated.
9. **Note:** Before approving an order, the system validates contract information based on the order line type. For recurring or entitlement offerings, the **Contract start date**, **Contract end date**, and **Term** are required before the order can be approved. For one#time offerings, **Contract start date** and **Contract end date** must be empty. If these conditions are not met, the order cannot be approved and must be updated by an agent before approval can proceed.

   When you're satisfied with the order details, select **Approve**.

## Result

The order is approved and the order state changes to In progress while it's being validated, before it enters fulfillment.

**Related topics**

Configuring Order Management

Order management

### Reject orders in Order Management

Reject a customer or service order in scenarios where the customer request is invalid, the product or service is no longer available, or the pricing or terms are incorrect.

## Before you begin

Role required: sn_ind_tmt_orm.order_fulfilment_manager, sn_ind_tmt_orm.order_approver

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### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace*.#.
2. Select the List icon ☰.
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you want to reject.
   Only the orders in the New state can be rejected.
5. Select **Reject**.

### Result

The order is rejected and its state changes to Rejected. Rejected orders can be made available to the order agents to address issues after changing the state of the order and order line items to the Draft state.

#### Related topics

Configuring Order Management

Order management

## Order decomposition

Order decomposition is the process of breaking down an approved customer or service order into a set of smaller, manageable domain orders for fulfillment. This process is driven by definitions in the product catalog to ensure that all necessary components are provisioned correctly. Learn about the decomposition process for customer and service order and their differences.

## Overview of order decomposition

When an order is approved, the system breaks down the commercial elements of an approved order into its smaller, actionable technical components called domain orders (product, service, and resource orders) for fulfillment. Decomposition defines the Bill of Material for an ordered component. The decomposition is guided by specifications, specification relationships, and decomposition rules defined in the product catalog. Decomposition rules (often exclusion rules) determine when domain orders should or should not be created, based on characteristics or options present in the order line item. Decomposition establishes hierarchical relationships between source and target specifications, generating the necessary product, service, and resource orders.

For example, consider the SD-WAN Service Package from the demo data. For this product, specification relationships and decomposition rules determine which product, service, and resource orders are generated based on the order's characteristics.

During order decomposition, work orders are created for product or service orders that need further action. For example, installation of a device at the customer site. You must close the order tasks and work order tasks associated with the domain orders to proceed with order fulfillment. Fallout records are created if you manually close the domain orders.

## Hierarchy of domain orders

The domain order hierarchy is structured as follows:

**Product order (Parent)**

Defines the commercial intent of what is being sold. It is based on a product specification that includes brand, pricing, terms, and other product-related

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materials. The product order initiates the fulfillment process by triggering associated service and resource orders.

**Service order (Child of product order)**

Manages the fulfillment of a specific service specification. It outlines the technical realization and delivery of the service, often involving multiple service and resource orders.

**Resource order (Child of service order)**

Handles the provisioning of physical or logical resources required to deliver the service. It is based on a resource specification and may include multiple resource orders depending on the complexity of the service.

Each product order can have multiple service orders, and each service order can have multiple resource orders, depending on the relationships defined in the product specification.

## The role of specification relationships and decomposition rules

The following core components drive the decomposition process:

- Specifications: Define the attributes of products, services, and resources.
- Specification relationships: Define how different specifications are related to each other.
- Decomposition rules: Provide conditional logic for the decomposition process.

Decomposition runs on the specification associated with the order line item and its hierarchy. The type of relationship between specifications determines the outcome.

- If the relationship is of type Bundles, Realized as, or Requires, decomposition process creates the following types of orders for the target specification:
  - A corresponding customer-facing service order (CFS), which is a service order that is generated for performance of customer-faced services.
  - A resource-facing service order (RFS), which is a service order that is generated for internal use of resources required to perform the actual services for the customer.
  - Resource order.
- If the relationship is of type Composed of, decomposition does not occur for that relationship.

Decomposition rules function as exclusion rules. They are used to prevent the creation of certain domain orders if the incoming order does not contain a specific characteristic or characteristic option. This allows for optional components within a product or service offering. For example, a rule can be set to only generate a service order for a specific feature if the customer explicitly selected that feature during the ordering process.

Specification relationships and decomposition rules can be defined to exclude domain orders when certain characteristics are not present. For example, if a customer or service order does not include a required characteristic such as Tenancy or WAN Optimization, the related domain order is not generated.

The decomposition process uses the source specification (defining the relationship) and the target specification (being defined to), with rules mapped to specific characteristics and values.

When the attribute value is increased, more number of CFS/RFS is created.

When the attribute value is decreased, it decreases the number of CFS/RFS.

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## Customer order vs. Service order decomposition

While the fundamental principles of decomposition remain the same, there are key differences when decomposing a service order compared to a customer order. The most significant difference is that service order decomposition does not generate product orders. The process is focused exclusively on the fulfillment of services and their underlying resources. The decomposition of a service order generates a specific set of service and resource orders:

- Customer-Facing Service (CFS) Order: A service order for the performance of a customer-facing service.
- Resource-Facing Service (RFS) Order: A service order for the internal use of resources required to perform the actual service for the customer.

The scope of service order decomposition is focused on the logical breakdown of services. It does not typically involve concepts like staggered or quantity-based decomposition, which are more common in customer orders that may include physical products with variable quantities and complex, multi-stage fulfillment cycles. The key differences are listed in the following table.

### Comparing decomposition of customer and service orders

| Aspect | Description | Customer order | Service order |
|---|---|---|---|
| Trigger | Action that triggers order decomposition | Approval of a customer order by fulfillment manager | Approval of a service order by service order manager |
| Basis for decomposition | Basis on which the domain orders are generated | Based on specifications, specification relationships, and the decomposition rules that are defined in the product catalog between the product, service, and resource specifications. | Based on specifications, specification relationships, and the decomposition rules that are defined in the product catalog between the service, and resource specifications. |
| Domain order generated | Type of domain orders | Product, service, resource orders | Service and resource orders only |
| Staggered decomposition | The process that allows domain orders to be created at a later stage, based on updated information such as customer needs, service availability | Yes | No |
| Quantity-based decomposition | The process that supports splitting orders based on quantity, handling changes in order quantity, and managing inventory updates or cancellations for in-flight orders | Yes | No |

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**Comparing decomposition of customer and service orders (continued)**

| Aspect | Description | Customer order | Service order |
|---|---|---|---|
| Example | - | SD-WAN Service Package<br>• Bundles multiple product specifications.<br>• Decomposition creates a parent product order and multiple child product and service orders, with rules to include or exclude based on characteristics like Tenancy or WAN Optimization. | Managed firewall service<br>Decomposition creates a customer-facing service order (CFS), multiple resource-facing service orders (RFS), and resource orders, based on relationships and characteristics present in the order. |

## Additional features in customer order decomposition

Customer order decomposition supports the following additional features:

- Staggered decomposition: Customer orders may use staggered decomposition, creating domain orders at later stages based on updated information such as service availability or customer needs.
- Quantity-based decomposition: Customer orders can be decomposed into multiple domain orders based on order quantity, supporting revisions, and fulfillment of multiple instances.
- Support for change orders: Customer order decomposition supports updates to quantity characteristics, enabling upgrades, downgrades, and inventory management during fulfillment.

Fore more information, see Customer order decomposition.

**Related topics**

Configuring Order Management

Order management

### Order decomposition examples

Examples using demo data illustrating how customer and service orders can be decomposed under diverse conditions help you to understand the decomposition process. The conditions include optional characteristics, quantity-based decomposition, staggered fulfillment, and exclusion rules that support complex order management and fulfillment workflows.

## Specification relationship and decomposition rule example

The Managed Firewall service demo data is an example of a customer facing service specification that has a Requires relationship with the following three resource-facing service specifications:

- Firewall administrator
- Firewall and DMZ
- Threat and Intrusion Prevention service

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The decomposition process creates an RFS service order only when the corresponding characteristic is available in the order line item for the Managed Firewall service specification.

After receiving a service order for adding a Managed Firewall service, a service manager reviews and approves it. This process triggers decomposition, which creates the RFS service orders and resource orders. The service order has one order line item for the Managed Firewall service, which includes all of its characteristics. The service order decomposition process creates the following:

- A CFS service order for Managed Firewall service.
- Three RFS service orders for all three RFS specifications.
- Three resource orders for resource specifications.

Next, the ServiceNow AI Platform triggers a fulfillment workflow for the decomposed service and resource orders. This workflow generates the required order tasks for fulfilling the domain orders and uses decision tables to identify the workflow for a decomposed order. The selected workflow is based on various attributes in the original service order. These attributes include the specification category, and an order line item action (Add, Change, or Delete), among others.

To learn more about decision tables, see Decision tables :

## Example of an order decomposition that is based on specification relationships

Specification relationships define the relationships between a product, service, and resource. When you define specification relationships, you can optionally create decomposition rules to specify how a customer order is decomposed, fulfilled, and delivered to your customer.

The best way to view a decomposition rule is as an exclusion rule. You use decomposition rules to specify to exclude domain orders from being created when you receive a customer order that doesn't contain a characteristic or characteristic option. For example, in the SD-WAN Service Package demo data, the following occurs:

- A specification relationship is defined between the SD-WAN Controller product specification and its service specifications.
- The service specification details the services that are required for the product. When an order is received for the SD-WAN Controller product, a product order and a service order are generated for the SD-WAN Controller Service.

Decomposition runs on the specification that is associated with the customer order line item and its hierarchy of specifications. It works as follows:

- If the relationships between the source and target specifications are Bundles, Realized as, or Requires types, a product, service, or resource order is created for the target specification when the customer order is decomposed.
- Decomposition establishes the hierarchical relationship between the source and targets while generating the product, service, and resource orders.
- If the specification relationship is of a Composed of type, decomposition doesn't happen.

The SD-WAN Service Package demo data is an example of a composite product specification that bundles three other product specifications within it:

- SD-WAN Controller
- SD-WAN Edge Device
- SD-WAN Security

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The SD-WAN Service Package defines the following relationships:

- SD-WAN Service Package has a Bundles relationship with an SD-WAN Controller
- SD-WAN Service Package has a Bundles relationship with an SD-WAN Edge Device
- SD-WAN Service Package has a Bundles relationship with SD-WAN Security

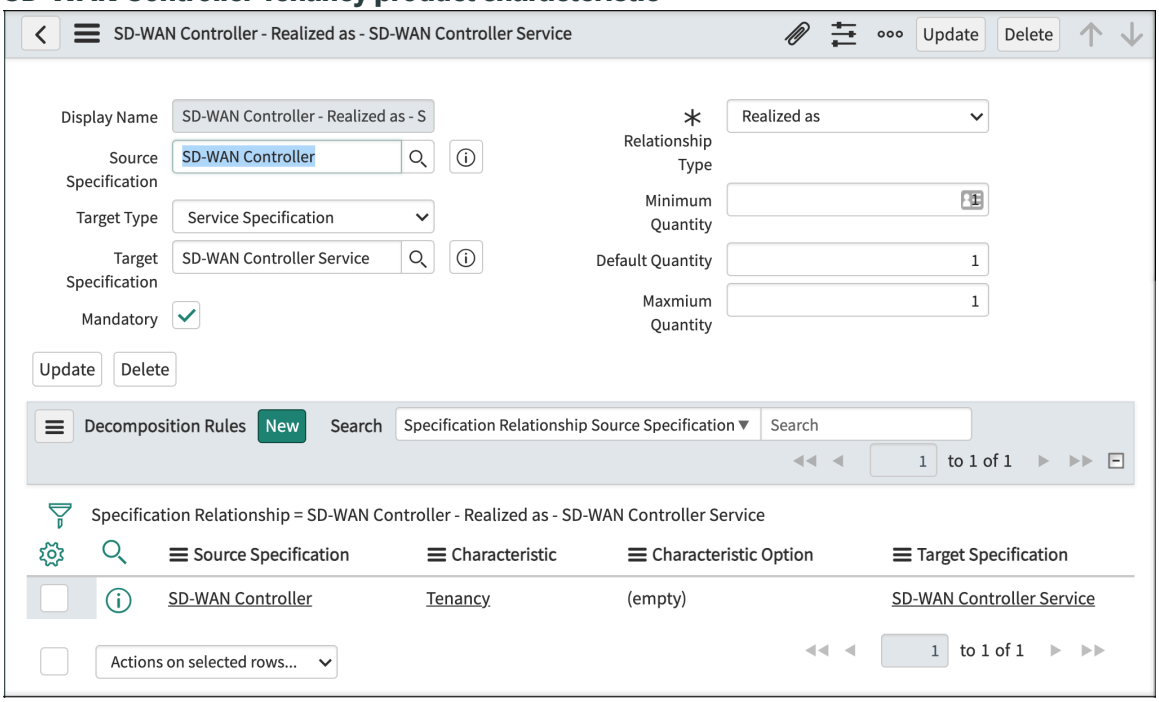
When a customer order is received for the SD-WAN Service Package, and that order is approved, decomposition is triggered. The customer order line item for the SD-WAN Service Package has a single product order for the SD-WAN Service Package. That SD-WAN Service Package Product order has three child product orders:

- SD-WAN Controller
- SD-WAN Edge Device
- SD-WAN Security (if the option security product was ordered)

## Example of order decomposition that is based on defined decomposition rules

When you define specification relationships, you can optionally create decomposition rules. With a decomposition rule, you can specify to exclude domain orders from being created when you receive a customer order that doesn't contain a specific characteristic or characteristic option. The following example shows that the SD-WAN Controller Tenancy product characteristic was designated as optional.

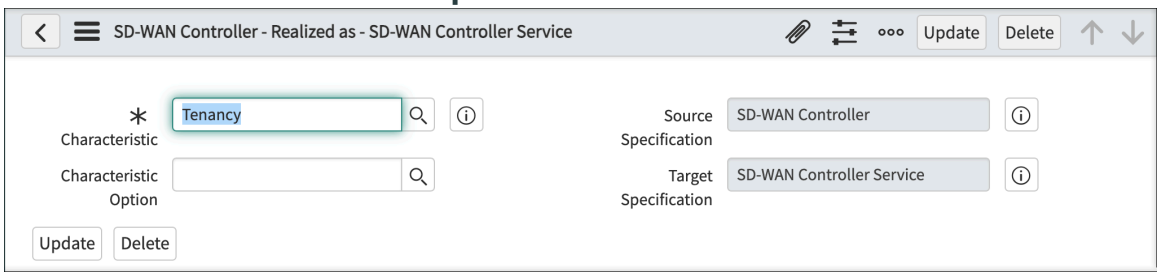
**SD-WAN Controller Tenancy product characteristic**




In the example, you see that a decomposition rule was defined for the SD-WAN Controller product specification relationship to the SD-WAN Controller Service. This rule excludes the specification when a customer does not select the **Tenancy** option.

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**SD-WAN Controller Service decomposition rule**




When a customer places an order and doesn't select the **Tenancy** option, the related service order doesn't generate for it.

## Example of order decomposition that include references to characteristics and options

You can define the decomposition rules for a specification relationship and include references to a characteristic and characteristic option. The following elements comprise the specification relationship:

- The source specification is the specification that defines the specification relationship.
- The target specification is the specification that the relationship is being defined to.
- Both values are automatically defined when you create the decomposition rule from the specification relationship.

If the characteristic and value are present on the order line, the ServiceNow AI Platform applies the decomposition rules to Add and Change type orders. They are not applied to customer order line items with a Disconnect (Delete) order action.

In this example, the SD-WAN Edge Device is a product specification and SD-WAN Security is a service specification.

- The SD-WAN Edge Device has a characteristic called WAN Optimization and has a Realized as relationship with SD-WAN Security.
- There is a decomposition rule for this relationship with WAN Optimization as the characteristic.

If you receive an order for the SD-WAN Service Package that doesn’t include the WAN Optimization characteristic, the decomposition rule prevents the generation of an SD-WAN Controller Service service order. The rule designates that the decomposition of that service order only happens if that characteristic is ordered.

## Order decomposition for order line-item quantity and order quantity characteristics changes

When order decomposition process uses the order quantity information from the order capture process to create multiple product orders that match the line item quantity for a customer order. An agent then fulfills each instance of the product separately, which create the inventory records for each of the fulfillment instances.

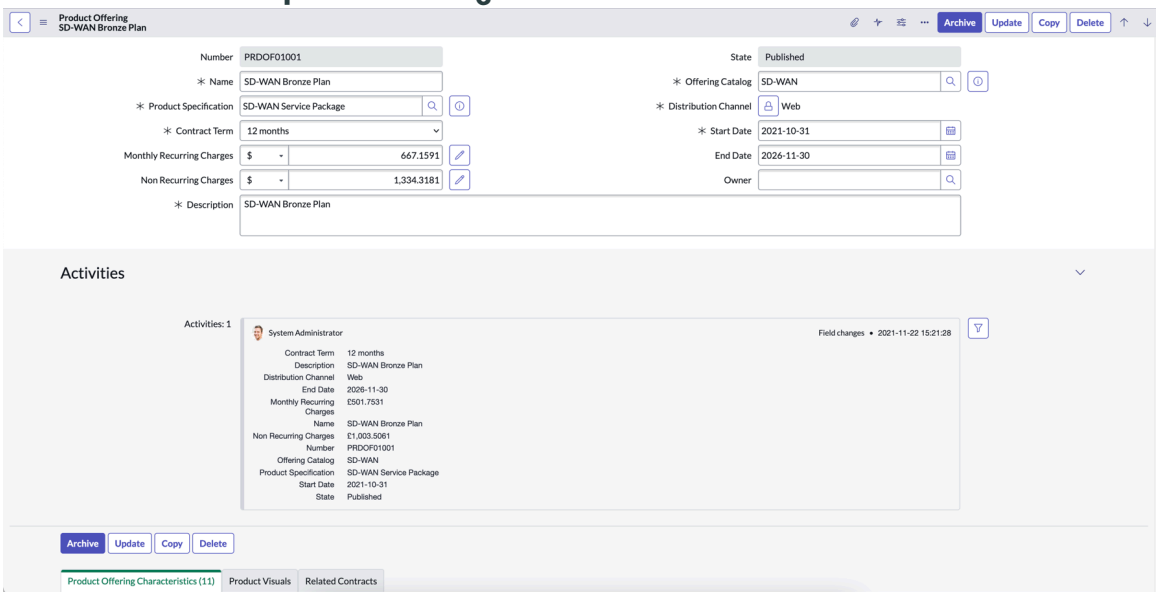
When a customer submits an order for three instances of the SD-WAN Service Package product and you approve the order, the decomposition process creates three product orders for the SD-WAN Service Package including one product order for each order line item. Each product order in the SD-WAN Service Package creates three child orders for the products and services for the order fulfillment process.

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## Example of staggered decomposition

The following example describes the staggered decomposition process for a product offering called SD-WAN Bronze Plan.

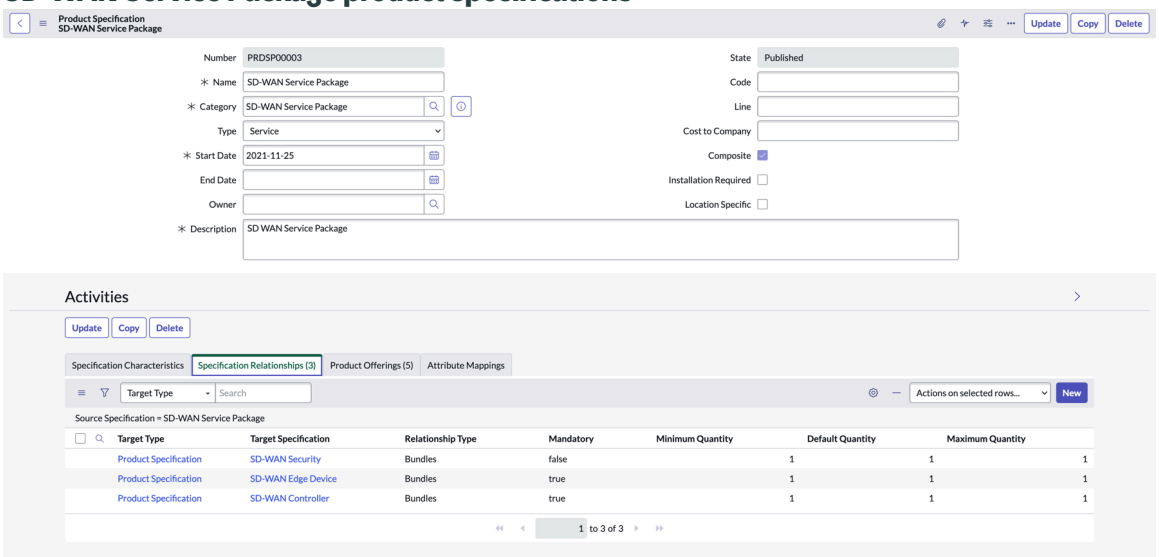
### SD-WAN Bronze Plan product offering




The SD-WAN Bronze Plan product offering uses a product specification, called an SD-WAN Service Package (as shown in the following example), that has three target specifications:

- SD-WAN Edge Device
- SD-WAN Security
- SD-WAN Controller

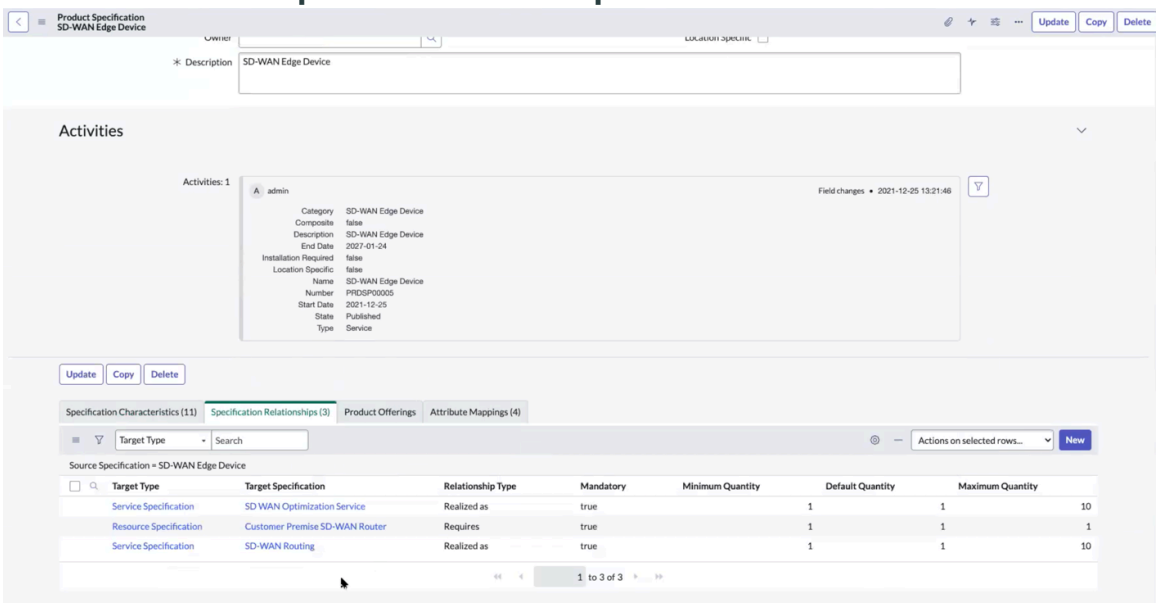
### SD-WAN Service Package product specifications




The SD-WAN Edge Device product specification has specification relationships with SD WAN Optimization Service and SD-WAN Routing, and the underlying decomposition rules don't have any values for WAN Optimization and Routing characteristics.

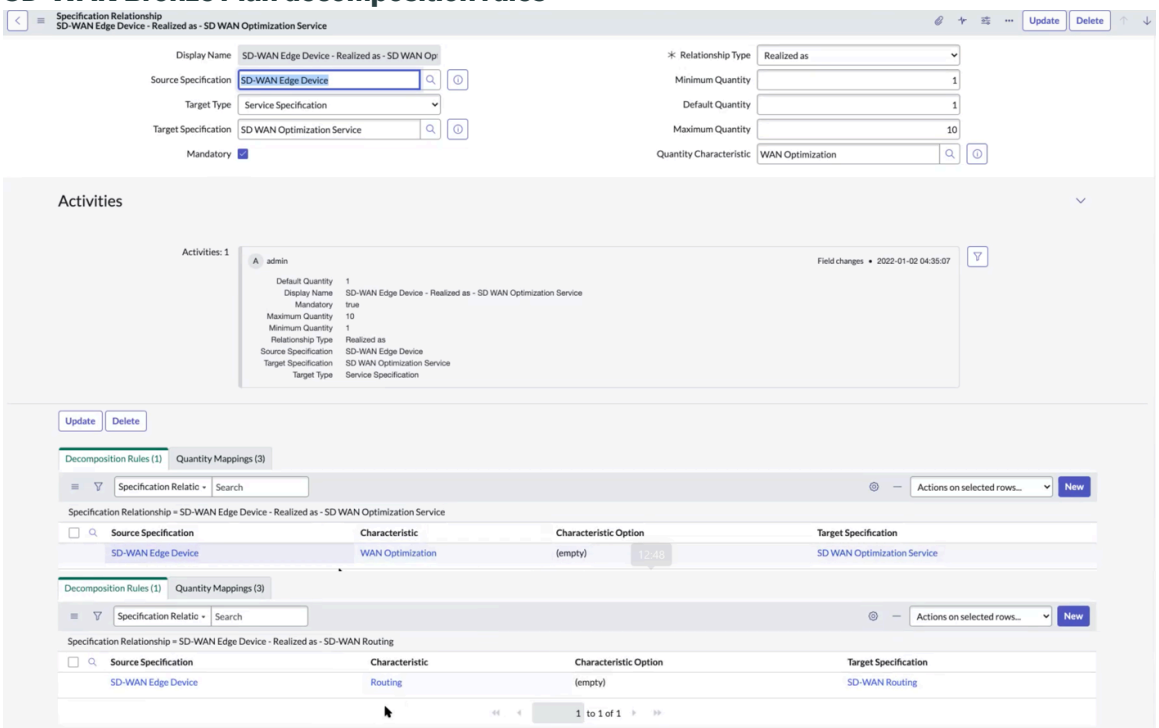
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### SD-WAN Bronze Plan specification relationships




The following example shows the decomposition rules for the product offering for the SD-WAN Bronze Plan.

### SD-WAN Bronze Plan decomposition rules




When your customer places an order for the SD-WAN Bronze Plan product offering and you approve this customer order, decomposition begins with the creation of the domain orders as per the defined specification relationships and decomposition rules. Because this customer order doesn't have the values for these characteristics for Routing and WAN Optimization, the decomposition rule doesn't create the service orders.

However, as a part of the order fulfillment process, the information for Routing and WAN Optimization must be available. When your fulfillment agent provides the values for these characteristics, the decomposition rule creates the necessary service orders and the order decomposition completes.

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**Related topics**

- Configuring Order Management
- Order management

## Staggered decomposition

Learn how you can stagger the decomposition for your customer orders. You can decompose your customer orders in multiple iterations by using the available information at the domain level, rather than decomposing an entire customer order at one time after it is approved for fulfillment.

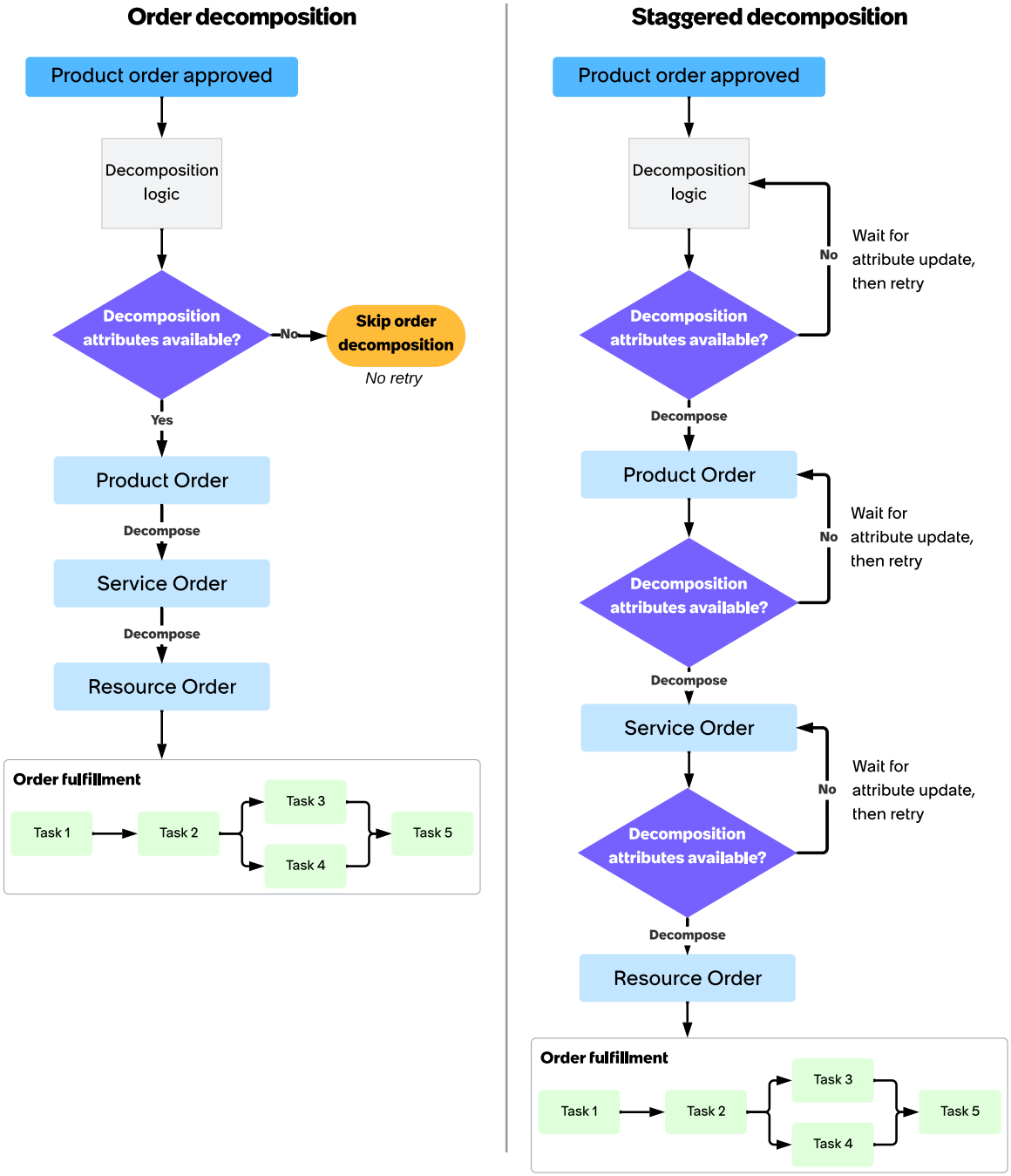
Staggered decomposition helps you fulfill your customer orders even when service and resource orders were created from different factors, such as a customer's need, availability of the services at a customer's location, and so on. Staggered decomposition creates the domain orders (product, service, and resource orders) at a later stage during the order fulfillment process. The decomposition process is based on the latest information.

However, the one-time order decomposition process (before the staggered decomposition) works well when the products and services have the necessary information and order approval to create the domain orders for the order fulfillment.

The following diagram shows how the staggered decomposition process works in comparison to the standard order decomposition. You can start the decomposition process with the information that you already have for your order and order line items. The decomposition process skips the domain orders (product or service or resource orders) that you don't have the required information for at this time. When you add this information later, the decomposition process triggers and completes the processing for the remaining domain orders.

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## Decomposition process




## Contrast to earlier decomposition processing

Before staggered decomposition was available, order decomposition processing started immediately after a customer order was approved for fulfillment. Order decomposition was based on the specification relationships and decomposition rules that were defined in the product catalog.

If the decomposition rule depended on any characteristic value that was not available at the time of order decomposition, the order processing skipped the decomposition of orders. However, in staggered decomposition, with the initial decomposition, the decomposition automatically triggers again for the skipped orders when the dependent characteristic value is available. The characteristic value can be set by your order fulfillment users or by the attribute propagation rules.

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## How staggered decomposition works

To support order decomposition in a staggered manner, you can use this method to retrigger the decomposition process for the skipped domain orders when the characteristic values are assigned in the corresponding decomposition rules.

When you approve an order, the order decomposition process starts. The decomposition process creates domain orders by using the information that is available from the order, order line items, and catalog definition. It also evaluates the decomposition rules to create the target domain orders. If the decomposition feature fails to evaluate the decomposition rules due to the unavailability of characteristic values, the decomposition is stopped for those domain orders.

When the characteristic values are available either from a user's action or from an attribute propagation rule, the decomposition process is retriggered. The process then creates the required domain orders and completes the order decomposition. If you again update the characteristic value after the order decomposition is complete, it does not trigger the decomposition for the domain order.

To understand staggered decomposition with the help of an example, see Customer order decomposition.

**Related topics**

Configuring Order Management

Order management

### View domain orders

View product, service, or resource orders for tracking the fulfillment process, verifying that all required tasks and suborders are created correctly, and confirming that the order progresses through its life cycle as expected.

### Before you begin

Role required: sn_ind_tmt_orm.fulfillment_agent, sn_ind_tmt_orm.fulfillment_manager, or process admin

### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select an order for viewing domain orders.
5. From the **Line items** tab, select an order line item.
6. Select one of the following options depending on whether your order is a customer or service order.
   - Customer order: Select **Product Orders** tab to view product orders associated with the order line.
   - Service order: Select **Service Orders** tab to view service orders associated with the order line.
7. Select the product or service order record to view the associated child objects.
8. View the service and resource orders by navigating to the **Service Orders** and **Resource Orders** tabs respectively.

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9. Select **Associated Move Domain Order** tab in the related list to view the cease domain order and provide domain order.

   When a move order is raised, you can view these domain orders in the related lists:

   - Cease domain order: Shows a domain order linked to an old inventory from the existing service location.
   - Provide domain order: Shows a domain order linked to a new inventory in the new service location.

10. Select **Associated Composed of Item** tab in the related list to view the cease composed of item and provide composed of item.

    When a move order is raised, you can view these composed of items in the related lists:

    - Cease composed of item: Shows old composed of Items from the existing service location.
    - Provide composed of item: Shows new Composed of Items in the new service location.

**Related topics**

Configuring Order Management

Order management

### Customer order decomposition

Learn about the customer order decomposition, including quantity-based decomposition, handling change orders with updated quantity characteristics, and support for quantity revisions in in-flight orders.

## Quantity-based decomposition

Quantity based decomposition enables you to decompose your order into separate domain orders as per the order quantity to manage the fulfillment process and independently. This method also supports:

- Revision of order line item quantity for in-flight orders to fulfill customer’s request to modify (increase or decrease) the quantity of the order.
- Support for change of product order to fulfill a customer's request to update the quantity characteristics. It leads to either the creation of new product inventories or the cancellation of existing product inventories.

## Support for a change order with an update for quantity characteristics

When you receive a customer request to revise an order through changing a product characteristic or characteristic value, you can upgrade or downgrade an existing product inventory. As a part of the fulfillment process, you either create new product inventories or cancel existing product inventories.

- If a change in a quantity characteristic option leads to additional new product inventories, the decomposition process creates the domain orders for the target specification and inventories for the fulfillment process.
- If a change in a quantity characteristic option leads to the cancellation of some existing inventories, the decomposition process creates the domain orders needed to manage both the cancellation and changes to the inventories.

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- The fulfillment process notifies the order fulfillment manager to identify the inventories require cancellation or update.
- The decomposition process sets the **Needs Attention** field to **True** for the domain orders.
- The order fulfillment manager then views these orders in the Needs Attention widget. The order fulfillment manager can wait to open the domain orders, select the product inventories for cancellation, or update it to resume the order decomposition and fulfillment process.

## Support for quantity revision for in-flight orders

When the order fulfillment process is in progress, and you receive a request to revise to increase or decrease an order line item quantity, it is captured as a quantity change. To incorporate the revision, the decomposition process then either creates additional domain orders (referred to internally as a `+ve change`) or cancels the existing domain orders (referred to internally as a `+ve change`) for the order fulfillment.

- If the order revision request is for an increase to the order line item quantity, the decomposition process creates new domain orders to match the updated order line item quantity.
- If the order revision request is for a reduction in the order line item quantity, the decomposition process initiates the cancellation process for some of the domain orders to match the reduced order line item quantity.

### Related topics

Order quantity support in Order Management

## Order orchestration

Order orchestration begins after a customer or service order is decomposed into smaller, individual product and service orders. The primary goal of order orchestration is to promote accurate, timely, and efficient fulfillment of orders.

Order orchestration is a strategic framework and set of coordinated processes that define how an organization fulfills customer orders or service requests. The Order Management application automates the complex, multi-step fulfillment of customer and service orders by breaking them into smaller product, service, and resource tasks corresponding to the domain order. These tasks are executed across various systems, both internal and external to ServiceNow.

Order orchestration involves the coordination and optimization of multiple functions and resources, including inventory management, order processing, shipping, and delivery.

## Supporting systems

Effective orchestration relies on integrated technologies such as the following:

- Order management systems: Centralized platforms for handling order data and workflows.
- Warehouse management systems: Tools for tracking inventory, storage, and fulfillment operations.
- Transportation management systems: Solutions for planning, executing, and optimizing the movement of goods.

## Steps in an orchestration plan

An order orchestration plan typically includes the following steps:

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- Order capture and validation: Receiving and verifying customer orders.
- Inventory check and allocation: Verifying stock availability and assigning inventory.
- Supplier and carrier coordination: Engaging third-party vendors and logistics partners.
- Fulfillment and delivery tracking: Monitoring shipment progress and delivery performance.

**Related topics**

Configuring Order Management

Order management

### Using the order orchestration UI

By using the order orchestration user interface (UI), you can make sure that you do all the tasks that are required to fulfill your customer orders. You can also view the complete order hierarchy, the status of the associated decomposed orders, the order line items, and the order tasks.

As an order fulfillment manager or agent, the order orchestration UI is your command center for managing the end-to-end fulfillment process. Use the order orchestration UI to track all domain orders and order tasks for an order, order line item, or domain order. You can also use the UI to review and resolve any issues for related order tasks and domain orders.

## Accessing the UI

You can access the order orchestration UI in the following two ways:

- From the Order Details page: Go to the Order breakdowns section and select **View order orchestration**.
- From individual order lines: Open an order line item, then navigate to the **Order Orchestration** tab.

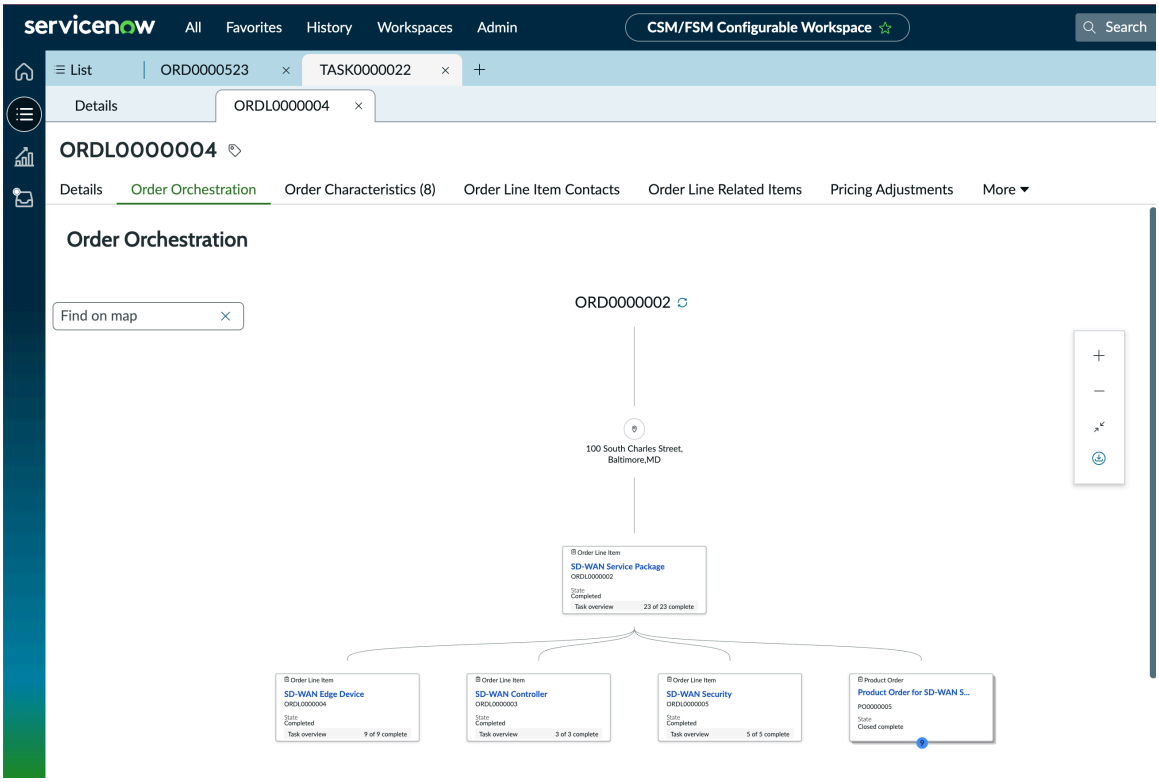
Use the order orchestration UI to see:

- A pictorial representation that shows the hierarchy of all order line items, domain orders, and order tasks for an order, order line item, or a domain order.
- The dependencies between the domain orders and order tasks.
- The current state of the associated order line items, domain orders, and order tasks in the hierarchy.

The following image shows the order orchestration UI:

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### Order orchestration UI




By using the order orchestration UI, you can perform the following actions:

- View a hierarchical visual representation of all order line items, domain orders, and order tasks for the selected order.
- Open a node in the hierarchy and view the additional details.
- Determine the current state of the associated order line items, domain orders, and order tasks.
- Identify any order delays or fallouts in the order fulfillment process, and resolve them on time.

## Fulfilling multi-site orders

The order orchestration UI is especially helpful when you fulfill customer orders that involve multiple products that are fulfilled at multiple locations. For example, a customer orders the SD-WAN Service Package for their San Jose, San Diego, Denver, and Dallas locations. That means that there's a minimum of three order line items for each of the four locations:

- One line item for the SD-WAN Service Package
- One line item for the SD-WAN Controller product
- One line item for the SD-WAN Edge product

If the same customer also orders an optional SD-WAN Security product for each location, there would be an extra four order line items. That is, there's one order line item for each of the four locations (San Jose, San Diego, Denver, and Dallas).

To initiate the fulfillment process for a multi-site order, the Order Management application decomposes the order into multiple domain orders for fulfillment. The domain orders are the product, service, and resource orders that are generated during decomposition. Each decomposed order has a corresponding fulfillment flow with several order tasks. To fulfill an order by the delivery dates that you promise to your customer, you must complete all the related domain orders and resolve all the related order tasks on time.

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**Related topics**

- Order fulfillment
- Review an order orchestration plan
- Managing order fallout

## Order fulfillment

Learn about the order fulfillment process and tools available for monitoring and tracking order tasks so your teams can fulfill orders efficiently, handle exceptions in a timely manner, and drive customer satisfaction.

## Order fulfillment process

Order fulfillment tasks are the actionable units that drive the completion of domain orders (product, service, resource) in Order Management. For each domain order, a subflow is initiated to coordinate its fulfillment. The specific subflow is selected using a decision table (Product/Service/Resource Order Fulfilment Policy) based on the type of the domain order. This subflow is responsible for defining order tasks and their dependencies, managing the state of the domain order, and notifying SOM when the tasks are ready for tracking in Jeopardy Management.

1. Task creation
    - Order fulfillment tasks are automatically generated as part of the orchestration plan when an order is approved and decomposed into domain orders.
    - Each domain order (product, service, resource) can have multiple associated tasks, created based on product specifications, decomposition rules, and subflow logic.
    - Order tasks are created in parallel or in sequence, with dependencies managed via subflow configuration.
2. Task assignment
    - Tasks are automatically assigned to fulfillment agents or teams responsible for execution using the orchestration logic. Fulfillment managers can manually reassign tasks as needed.
    - SLA definitions and jeopardy management policies are linked to tasks to monitor progress and flag delays.
3. Task execution
    - Fulfillment agents perform the required actions for each task, such as provisioning, configuration, shipment, or installation.
    - Fulfillment managers track the progress of tasks and domain orders in real time using tools like the timeline view and order orchestration UI, which provide visibility into task status, dependencies, and risk indicators.
    - Agents update task status, add notes, and resolve issues as they work through the fulfillment steps.
4. Monitoring and exception handling
    - Agents periodically monitor the progress of all fulfillment tasks and the overall order.
    - If a task encounters an issue such as missing information, system error, or delay, it can be escalated or flagged for jeopardy management.
    - Notifications are sent to relevant stakeholders if tasks are delayed or require attention.
5. Task completion and closure

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- After the required actions for a task are completed, agents update the task status to Complete.
- Closing all tasks associated with a domain order triggers the closure of the domain order itself.

6. Order closure
   - When all fulfillment tasks and domain orders are closed, the overall order is marked as complete.
   - Final updates are made to the sold products or product inventory, and customer records as needed.

## Tools for tracking order fulfillment

Provide powerful tools to fulfillment agents and managers for monitoring and managing the entire order fulfillment life cycle. The order timeline view and the order orchestration UI enables users to track order line items, domain orders, and order tasks for any given order, all in a single, unified workspace.

The timeline view offers a comprehensive, Gantt-style visualization of all order line items and associated tasks for an order. Fulfillment agents and managers can see the current status of each task, including jeopardy indicators that highlight at-risk items, estimated durations, and dependencies between tasks. This view allows users to quickly assess progress, identify bottlenecks, and take proactive action to expedite fulfillment. By consolidating all relevant information such as order lines, domain orders, and tasks into one interface, agents no longer need to navigate multiple forms or lists, streamlining their workflow and improving operational efficiency. To learn more, see View an order timeline.

The order orchestration UI provides a hierarchical, expandable view of how fulfillment tasks are grouped and related by domain helping you to visualize how order line items, domain orders, and order tasks are structured and interconnected. Fulfillment agents and managers can drill down into specific domains or tasks, understand relationships and dependencies, and view summary information such as duration and jeopardy status. The order orchestration UI displays the dependencies between domain orders and order tasks, helping you understand which tasks must be completed before others can begin. You can also view the current state of each associated order line item, domain order, and order task within the hierarchy, making it easy to identify progress, spot bottlenecks, and address issues proactively. This tool is especially valuable for complex orders that span multiple domains, as it clarifies how tasks are sequenced and coordinated. The orchestration UI complements the timeline view by offering deeper insight into the structure and flow of fulfillment activities, empowering users to resolve issues and optimize task execution without losing sight of the broader order context. For more information, see Using the order orchestration UI.

### Related topics

Manage work orders

### View an order timeline

View Gantt chart timelines that display the status of a domain order and order tasks, show dependencies between order tasks, and identify tasks that are in jeopardy.

#### Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

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### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace*.#.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All**.
4. Select the order that you want to view.
5. In the **Order breakdowns** section of the order, select **View order timeline**.
   The **Timeline** tab opens and displays the order tasks for the order line items and columns for the order task state and jeopardy status, if Jeopardy Management is enabled. Tasks in jeopardy are flagged with the jeopardy icon. For each task, a timeline shows the start and end dates of the task and any dependencies.
6. To change the information or elements displayed in the timeline view, use these options.

| Option | Description |
|---|---|
| **Add or change columns** | **a.** Select the gear icon .<br>**b.** In the **Columns** tab of the Personalize pane, select the items to display or dese lect the items that are no longer displayed.<br>**c.** Select **Apply**. |
| **Change the timeline elements displayed** | **a.** Select the gear icon .<br>**b.** In the **Timeline** tab of the Personalize pane, select the items to display or suppress, such as bar labels, child lines, domain or ders, critical path, or dependency lines.<br>**c.** Select **Apply**. |
| **Adjust the time scale used** | In the time scale drop-down, select the time view, such as day, week month, or year.<br>The time scale for the Gantt charts changes immediately. |

### Related topics

Configuring Order Management

Order management

## Review an order orchestration plan

Track the progress of an order in the fulfillment process by reviewing the orchestration plan for the order, its order line items, and domain product, service, or resource orders. By using the order orchestration UI, you can easily identify and resolve any delays or fallouts so that you can do the order fulfillment process more efficiently.

### Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_manager

### About this task

By using the order orchestration UI, you can perform the following actions:

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- View a hierarchical visual representation of all order line items, domain orders, and order tasks for the selected order.
- Open a node in the hierarchy and view the additional details.
- Determine the current state of the associated order line items, domain orders, and order tasks.
- Identify any order delays or fallouts in the order fulfillment process, and resolve them on time.

To learn more, see Using the order orchestration UI.

### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon .
3. Navigate to **Customer Orders**.
   - To view all customer orders, select **All**.
   - To view only open, unfulfilled customer orders, select **Open**.
4. Select an order you want to fulfill.
5. Access the order orchestration UI for a selected order, order line item, or domain order by performing the respective task from the following table.

| Task | Description |
|---|---|
| **Review the orchestration plan for an entire customer order** | In the Customer Order form, under Order breakdowns, select **View order orchestration**. |
| **Review the orchestration plan for a customer order line item** | **a.** On the Order Details page, select an order line item from the **Line items** tab.<br>**b.** Select the **Order Orchestration** tab. |
| **Review the orchestration plan for a domain order associated with a customer order line item** | To view the orchestration plan for a domain order (product, service, or resource), perform the following steps:<br>**a.** On the Order Details page, select an order line item from the **Line items** tab.<br>**b.** Navigate to the one of the following tabs for which you want to view the orchestration details:<br>▪ **Product Orders**<br>▪ **Service Orders**<br>▪ **Resource Orders**<br>**c.** Select the **Order Orchestration** tab. |

6. On the order orchestration UI, review the visual representation of the order, including all domain product, resource, service orders, order tasks, and their current states as described in the following table.

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### Order orchestration details

| Field | Description |
| --- | --- |
| ORD | Unique system-assigned number for the customer order. Both customer orders and service orders have an assigned ID with a prefix of ORD. |
| Address, city, state | Orchestration plan hierarchy level that represents the individual shipping locations for the domain orders of an order line item. |
| Order line item | Orchestration plan hierarchy level that contains the individual order line items that are associated with each shipping location. An order line item can also contain child line items, which are shown in the order hierarchy. Each order line item contains the following elements:<br>**Description**<br>Description of the product or service ordered on this line item.<br>**Order line item identifier**<br>System-assigned customer or service order line item number.<br>**Task overview**<br>Overview of the total number of domain orders and order tasks that are associated with the order line item that have been fulfilled. |
| Domain orders and order tasks | Orchestration plan hierarchy level that contains the individual domain orders and order tasks for an order line item. A domain order can also contain child domain orders, which are shown in the order hierarchy. Each domain order or order task contains the following elements:<br>**Type**<br>Type of related transaction:<br>○ Domain order - Product Order, Service Order, or Resource Order<br>○ Order Task<br>**Description**<br>Description of the product or service on this domain order or order task. |

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| Field | Description |
| --- | --- |
| | **Identifier**<br>System-assigned domain product or order task number.<br>**State**<br>Current state of the domain product or order task. To learn more, see:<br>○ Customer order states<br>○ Service order states |

### What to do next
Review and close fulfillment tasks

#### Related topics
View an order timeline

### Review and close fulfillment tasks

Review and update the fulfillment tasks that are associated with an order, or order orchestration plan, so that you can make sure that all tasks are properly completed.

### Before you begin
Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager, or sn_ind_tmt_orm.service_order_manager (for service orders)

### About this task
If you encounter issues with resolving or completing an order task, you can create fallout records. Fallout records enable you to identify, investigate, and resolve order processing issues so that orders can continue processing through to completion.

When you create a manual fallout record, or an automated one is generated, the following occurs in the related order task:

- Its **State** field changes to On hold, with a comment on which logged-in user caused it to change.
- In the Activity section, a work order note indicates that the order task state has changed from its former state, usually In Progress, to On hold. A work order note with the message A `fallout record FOnnnn has been created` also appears.

If you create a manual fallout record or an automated one is generated for order tasks, you can review and track all fallout records for a specific order. Use the **Fallouts (n)** tab (where n is the number of fallouts) that appears when you view the related customer or service order in the Customer Order form.

To learn more about order fallout, see Managing order fallout.

### Procedure
1. Navigate to#**Workspaces** > *`CRM Workspace#`*.
2. Select the List icon ☰.
3. Navigate to **Order tasks**.

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- To view all open order tasks, select **All**.
- To view only the tasks that are assigned to you, select **My order tasks**.

4. Select the order task that you want to work on.
   You can also directly access the task records for an order from the order orchestration UI. To learn more about accessing the UI, see Order fulfillment.
5. For each order task, set the status by selecting an option from the **State** drop-down menu and update the work notes, as required.
6. On the Order Task form, review the order task details and update as needed.

   For information about the field descriptions, see Order Tasks form.
7. When you finish reviewing and updating the order task or encounter issues that are preventing its closure, perform one of the actions from the following table.

| Action | Description |
|---|---|
| **Save the updated order task** | Select **Save**. |
| **Delete the order task** | Select **Delete** from the more options icon . |
| **Create a fallout record** | Select **Create Fallout** from the more options icon . To learn more, see Create a manual fallout record. |

### Result

After your agents complete all fulfillment tasks for the entire customer order, the following actions occur:

- The **State** field for the customer order is automatically set to **Completed**.
- The **State** field for each of the individual customer order line items is set to **Completed**.
- Corresponding sold products or product inventory records are created depending on the configuration.

### What to do next

Create MACD orders directly from the sold products. For more information, see Request post-sale change orders.

#### Related topics

Configuring Order Management

Order management

### Creation of sold product and product inventory records

Learn how the Order Management application creates and maintains the customer product and service inventory. By using this application, you can maintain an accurate inventory of your customer products and services.

## Customer product data record creation

Sold product records are created and added to the Sold Product [sn_install_base_sold_product] table after an order line is marked as closed complete. Product inventory records are created and added to the Product Inventory [sn_prd_invt_product_inventory] table after an order is decomposed, completed, and fulfilled. Product inventory records are created for products with specifications. Depending on how your admin has configured the

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sn_ind_tmt_orm.enable_prod_invt_for_order_management system property, either sold products or product inventory records are created. For more information, see Configure customer product data management.

The Product Inventory table extends the Sold Product table. Only the items from the product inventory are available for change, disconnect, suspend, or resume type orders.

## New order workflow

The new order workflow is as follows:

1. After the fulfillment or service order manager approves the order, the product inventory record is created. This record has placeholders for all the specifications that are generated after decomposition. The associated models have an Installation Pending state.
2. During the fulfillment process, when the product, service, and resource orders are closed, the state of the associated specification updates to Active in the product inventory record.
3. When you close the customer order, all the characteristics that are associated with the specifications on the customer order update the record.

## Change order workflow

The change order workflow is as follows:

1. After the fulfillment manager or service order approves the order, the state of the changed or removed specifications are updated to Change Pending. The models that are associated with the changed specifications are also updated to reflect the latest model that is generated due to the change.
2. During the fulfillment process, when the product, service, and resource orders are closed, the state of the associated specification updates to Active.
3. When you close the customer order, all the characteristics that are associated with the specifications on the customer order update the record.
4. If the change order included a request to disconnect a product or service, the associated product inventory record moves to an Inactive state after the order is complete.

   You can create orders with action type as disconnect for product inventory records that are in Active or Suspended states.

   For suspend type orders, the end state is Suspended after the suspend workflow is completed. Product inventory state changes from Active to Suspended after all tasks and jobs have finished.

   For resume type orders, the end state is Active after the resume workflow is completed. Product inventory state changes from Suspended back to Active after all tasks and jobs have finished.

### Related topics

Customer Life Cycle Management Workflows

Managing post-fulfillment order changes

Request post-sale change orders

### Horizontal relationships between products

By using a compatibility rule, you can define the horizontal relationships between your product, service, and resource specifications.

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When you create a product catalog, you can create a vertical relationship, which is the relationship between your parent and child entities. As a product catalog manager, you can also enable a horizontal relationship, which is a relationship between a product to product, product to service, or product to resource, by defining compatibility rules in the product catalog.

## Using a horizontal relationship

The compatibility rules include the horizontal relationships between your product, service, and resource specifications. Your customers can place orders for enterprise products where a product can depend on another product in the same or different product offering, like a sibling or a peer.

A compatibility rule pairs a source specification with a target specification and defines the relationship between them. You can define one of two relationship types:

**Requires**

The source specification needs the target specification.

**Excludes**

The source specification cannot be ordered with the target specification.

You can establish the relationship by selecting the specifications or by defining their characteristics. You can also set the minimum and maximum quantity of specifications to support order fulfillment.

Let's look at an example of a horizontal relationship, such as the relationship between the Voice over Internet Protocol (VoIP) and an internet service. VoIP requires an active internet connection but VoIP and an internet service are defined in a different product hierarchy. With a horizontal relationship, you can define a Requires relationship between VoIP and an internet service in the product catalog to support the order creation process for VoIP and to fulfill the order.

**Note:** To configure a compatibility rule for a horizontal relationship, see Configuring compatibility rules for horizontal relationships.

**Related topics**

Configuring Order Management

Order management

## Managing order fallout

Order fallout occurs when an order encounters an error in its normal fulfillment flow. Learn how Fallout Management enables you to identify, investigate, and resolve order issues so that orders can be processed to completion.

## Overview of order fallout

Order fallout refers to the failures that occur due to errors and exceptions that may take place during order fulfillment. Fallout is a task-type object created to support scenarios where an order fails to proceed. These exceptions include the following:

- Incorrect data
- Connectivity problems
- Inadequate inventory supply
- Other unforeseen issues

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Some issues could originate in inbound and outbound external systems that integrate with Order Management. A single order task can have multiple types of fallout issues.

The following table provides examples of fallout errors and exceptions that can occur during order processing.

**Fallout errors and exceptions**

| Type of failure | Description |
|---|---|
| Failures in downstream fulfillment systems | Fulfillment system can't process the request due to incorrect or missing data. |
| Failure to complete system interaction in a timely manner | Timeouts that occur during system interactions. |
| Failure in connection | • Network connectivity issue.<br>• Unable to locate or route a request to a target system. |
| Unavailable inventory | Inventory stock isn't available in the Enterprise Resource Planning (ERP system) to fulfill certain items on the order. |

## Order fallout management flow

With Fallout Management, you can track each order fallout and automatically trigger the actions and interventions that can resolve your order fallout in a timely manner. The following diagram shows the order fallout management flow. Fallout Management processes order fallout through the following stages:

1. Identify and classify order fallout: Detect orders that have encountered errors or exceptions and classify the type of fallout.
2. Notify and assign order fallout: Route the fallout record to the appropriate team and notify them to begin investigation.
3. Resolve order fallouts: During runtime execution, fallout can be resolved through one of two paths:
   - Manual intervention: An agent investigates and resolves the fallout directly.
   - Automated process followed by manual intervention: An automated process attempts resolution first. If the automated process cannot resolve the fallout, it is escalated for manual intervention.
4. Verify and close order fallout: Confirm the issue is resolved and close the fallout record so the order can continue to fulfillment.

Fallout Management enables you to identify the orders in a failed state. Fallout tasks can be triggered and automatically routed to the appropriate team to investigate, diagnose, and resolve the underlying issue that is stopping order fulfillment.

## Fallout Management tools

The Fallout Management function includes the following tools:

**Order fallout tracking**

With this tool, you can assign a unique number to each order fallout to track the progress of the fallout, from inception through resolution. By using an Order Fallout

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dashboard, a designated order fallout manager can view the status of all open fallout records. To learn more, see Review a fallout record.

**Fallout resolution**

With this tool, you can use the ServiceNow AI Platform features such as routing, notifications, and Workflow Studio to process order fulfillment exceptions in an automated manner. To learn more, see Creating automated fallout records.

For example, your customer orders a router, but insufficient inventory quantities are available in your ERP system to reserve the item and fulfill the order.

- You create a fallout record for tracking and investigative purposes. This record places the customer order line item on hold.
- An order fulfillment agent can follow up to determine what is causing the shortage. It can be due to the unavailability of the host ERP system or because of an actual stock outage for the ordered item. If it's due to a stock outage, someone can take remedial action to contact the customer, reorder the item, or find a suitable replacement.

After you resolve the issue, you can restore the customer order line item back to a normal state for completion of the order.

Without a fallout management process, your order fulfillment personnel would have to analyze and resolve these fallout issues manually. These additional tasks would result in a longer fulfillment process and could lead to poor customer and employee experiences.

**Related topics**

Configuring Order Management

Order management

### Creating automated fallout records

With Fallout Management, a provider can create automated fallout records for specific order tasks so that your orders can continue processing through to completion.

To enable creation of automated fallout records, you configure an order fulfillment workflow in the Workflow Studio.

- To do so, use the **Create fallout** action when defining processing scenarios and conditions.
- You can define workflows for the parent records that the order tasks originate from. Generally, order tasks originate from the customer or service orders and order line items.

To learn more, see Flow Designer.

You might encounter the following scenarios when you are attempting to fulfill customer and service orders.

## Scenarios of fallout failures with downstream systems

This fallout scenario could be a situation where failures are expected to be temporary and resolved over time. Ideally, order processing should not be affected, and work should resume after the network and system resources come back online. A typical scenario is as follows:

- The order task sends a request to an external or provisioning system.
- The response from the external system comes back as `Timeout` or `Unable to reach`.

You can requeue the task to be sent to the downstream system for processing, up to a predefined number of times. If the error persists after the predefined number of times, you should change the status of the order task to Failed, and then create an incident. You can define

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a workflow that automatically creates a fallout record whenever you send or retrieve order data to or from an external system that is not available.

## Scenarios that involve data problems

If data problems originate with an order that you captured from an external order system, you should revise the order there. You then submit the revised order to the Order Management for Telecommunications, Media, and Technology application. If data problems originate with the tasks that are executed earlier in the process, you can do the following actions:

- Create an exception from the order task.
- Enable the revision of the existing order.
- Create an order task.

## Inventory availability issues

You can define a workflow that automatically creates fallout records whenever inventory availability issues prevent the fulfillment of order line items.

## External system issues

Even when the right data structure is submitted in an external system, errors can happen due to the business logic that is implemented in the external system.

### Related topics

Configuring Order Management

Order management

### Create a manual fallout record

Create a fallout record manually for an order task that has a condition or issue that prevents it from being completed.

#### Before you begin

Role required: sn_fallout_mgmt.fallout_manager

#### About this task

You can create manual records as needed basis so that you can raise awareness of an issue or condition that is preventing order fulfillment. By creating a record manually, you can also assign it to a person for resolution.

#### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All** or **Service Orders** > **All**.
4. Select and open an existing customer or service order.
5. To view the line item details, select **Line Items** where (n) represents the number of the total number of line items for the order.
6. In the Order Line Items form, select the order line item that you want to review.
7. Select the **Order Tasks** tab.
8. In the Order Tasks form, select the order tasks that you want to review.

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9. When you finish updating the order task, or encounter issues preventing its closure, select the more options icon ••• and then select **Create Fallout**).
10. On the form, fill in the fields.

    For information about field descriptions, see the Create Fallout form fields section in Field descriptions for Fallout Management.
11. Select **Save**.

### Result

When you create a manual fallout record, or an automated one is generated, the following occurs in the related order task:

- Its **State** field changes to On hold, with a comment on which logged-in user caused it to change.
- In the Activity section, a work order note indicates that the order task state has changed from its former state, usually In Progress, to On hold. A work order note with the message A `fallout record FOnnnn has been created` also appears.

### Related topics

Fallout Management data model

Flow Designer

Flows

Create a flow

## Review a fallout record

Review a fallout record to make sure that the detailed information is correct and complete.

### Before you begin

Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

### About this task

You select fallout records to review in CRM Workspace. You can also review and track all fallout records for a specific order by using the **Fallouts (n)** icon where n is the number of fallouts. This icon appears when you view the related fallout record.

### Procedure

1. Navigate to#**Workspaces** > *`CRM Workspace`*#.
2. Select the List icon ☰.
3. Navigate to **Fallouts** > **All**.
   To view only those fallout records that are assigned to you, select **My Fallouts**.
4. Select the fallout record you want to view.
   For information about field descriptions, see the Fallout workspace fields section in Fallout form fields.
5. To view the associated order line item, select **Open Context Record**.

### What to do next

Update a fallout record

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### Related topics

Configuring Order Management

Order management

## Update a fallout record

Review the detailed information for a selected fallout record to verify that the information is correct and complete. You can change the fallout type, state, or priority. You can even assign it to a specific person to follow up on.

### Before you begin
Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

### About this task
If you have a fallout agent role, you can change the state of the fallout records, create work notes in them, or assign them to other users.

### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon .
3. Navigate to **Fallouts** > **All**.
   To view only those fallout records that are assigned to you, select **My Fallouts**.
4. Select the fallout record you want to update.
5. On the Fallout form, update the required fields.
   For information about field descriptions, see the Fallout workspace fields section in Fallout form fields.
6. Select **Save**.

### Related topics

Configuring Order Management

Order management

## Resolve order fallouts

Learn how to close the order fallout tasks in Order Management so that you can progress with order fulfillment.

### Before you begin
Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

### Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon .
3. Navigate to **Fallouts** > **All**.
   To view only those fallout records that are assigned to you, select **My Fallouts**.
4. Select the fallout record you want to view.
   For information about field descriptions, see the Fallout workspace fields section in Fallout form fields.
5. **Optional:** Enter a work note to as you work with the fallout task.

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6. Close the fallout task by selecting **Closed complete** from the **State** drop-down menu.
7. Select **Save**.

### What to do next

After resolving a fallout task, review and close the order fulfillment task. For more information, see Review and close fulfillment tasks.

### Related topics

- Configuring Order Management
- Order management

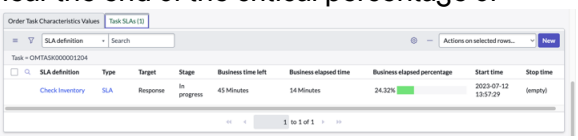
## Monitoring order jeopardy

Order managers and agents can monitor jeopardy-enabled fulfillment tasks. When a task enters jeopardy, managers can take action to ensure the fulfillment workflow isn't delayed.

When Jeopardy Management is added to fulfillment task flows, Jeopardy Management tracks the time to complete tasks and creates a predictive assessment of the risk level to the fulfillment plan. If a task is taking longer than the defined time, jeopardy alerts are shared.

The following table describes where you can view the jeopardy status.

**View jeopardy status**

| Option | Description |
|---|---|
| In Jeopardy enabled order forms, look for the **Jeopardy Level** column | Look for jeopardy status in the **Jeopardy Level** column of the order status form. Jeopardy levels include Low, Medium, High, and Critical. |
| Order timeline view | 1. Navigate to **Customer Order** > **All** and select an order you're working with.<br>2. On the Order Details page, select **View order timeline** from the Order breakdowns section. |
| Order orchestration view | Navigate to **Customer Order** > **Order** > **Order Line Item** > **Orchestration**. Each Orchestration tile shows the task and Service Level Agreements (SLA) progress. |
| SLA Definition Progress Bar | Navigate to **Customer Order** > **Order** > **Order Line Item** > **Task** > **SLA** and view the status bar. The status bar shows the SLA progress, for example:<br>• Green: SLA progressing on its time line.<br>• Red: Task is near the end of the critical percentage of allotted time.  |

### Related topics

- Configuring Order Management
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## Managing post-fulfillment order changes

Efficiently handle a variety of post-fulfillment changes to maintain service quality and operational accuracy after initial order fulfillment. These changes include canceling, suspending, resuming, disconnecting, and modifying orders. Each change type has distinct workflows, dependencies, and impacts on inventory and service states.

After an initial order is fulfilled, existing customers may want to disconnect, suspend, or resume a product or service or change specifications or location for a product they've purchased. For example, a customer might want to disconnect their current 4G connectivity and upgrade it to 5G connectivity. You can manage such requests by creating orders with action type as Change, Move, Disconnect, Suspend, and Resume. For more information, see Action types for customer and service orders.

When you change a product or service inventory record, the ServiceNow AI Platform creates the order line items from the specifications that you have defined. In a change service order inventory, the order line items are created only for your selected service inventories. If you select inventories that are top-order parent items, the order line items are created only for the parent items, not for the child order items. When the additional product is added to the change order, an inventory record is created for the added product. The new inventory is mapped to the new hierarchy.

When you're canceling a product or service order inventory, the ServiceNow AI Platform creates the order line items according to the specifications that you have defined. To cancel a product order inventory record, if your selected inventories are top-order parent items, the order line items are created for both the parent items and the child order items. If your selected inventories are child-order items, the order line items are created only for the child items.

As a part of post-fulfillment order changes, Return Merchandise Authorization (RMA) is also possible through modify, add, change, and disconnect (MACD) has a part of out of box process. For more information about RMA, see Return Merchandise Authorization.

Validation is required to successfully create the move order. To complete the validation and approve the move order, check the following:

- All the associated child line items of the move order must have the move operation selected as **true** and the Order line action must have one of the actions **Change** or **Add** or **Disconnect**.
- All the associated child line items of the move order the service location must be the same.
- All the inventory associated with a product being moved must be available in the move order.

For

The process to capture post-sale modification requests is similar to order capture and fulfillment. The high-level steps are as follows:

1. Create an order with the required action type.
2. Select product inventory items that you want to modify from the catalog.
3. Review and submit the order for approval.
4. Approve the order.

   The order is decomposed and order tasks are created.
5. Fulfill the orders by closing the order tasks, domain orders, and work orders, if any.

You can also manage post-sale change requests from the customer accounts page, not only for products and services sold to a customer, but also to contracts and entitlements associated

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with the products and services. For more information about customer life cycle workflows, see Customer Life Cycle Management Workflows.

**Related topics**

Configuring Order Management

Order management

### Request post-sale change orders

Learn how to create orders for disconnecting, suspending, resuming products or services and changing specifications, characteristics, or service location for orders after an initial order has been fulfilled.

## Before you begin

Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

## Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon .
3. Navigate to **Customer Orders** > **All** or **Service Orders** > **All** to create a product or service order respectively.
4. Select **New**.
5. On the form, fill in the fields.

**Create a new Order form**

| Field | Description |
|---|---|
| Account | The customer account for which you want to create an order. |
| Consumer | The consumer for which you want to create an order. |
| Order Type | The type or order you want to create. The available options are:<br>○ Product<br>○ Service |
| Contact | The name of the contact for the order. |
| Order action | The available options include:<br>○ Change - For changing product specifications or service location.<br>○ Disconnect - For disconnecting an active product or service.<br>○ Suspend - For suspending an active product or service.<br>○ Resume - For resuming a disconnected or suspended product or service. |
| Channel partner | (Optional) The name of the organization selling a product or service. |

**Note:** The fields displayed on the form change depending on whether you select account or consumer.

6. Select **Create**.

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The product catalog displays your available inventory which includes all the product or services that are ordered by your customer and successfully fulfilled by you.

7. Select **Manage** for a product inventory item you want to manage.
8. For changing order quantity, specifications, or characteristics for a product offering, perform the following steps.

   a. On the Modify order page, review the product configurations and select **Modify**.

   b. Using the product configurator, select the new product characteristics or specifications or revise quantity.

   c. Select **Update**.
   Order line items are created with Order line action as Change.

9. For disconnecting, suspending, or resuming products or services, perform the following steps.

   a. On the Modify order page, review the details and select one of the following options from the **Modify** drop-down menu.

| Option | Description |
|---|---|
| Disconnect | Disconnect an active or suspended product or service. |
| Suspend | Suspend an active product or service. |
| Resume | Resume a suspended product or service. |

   b. Enter suspension start and end dates for suspend requests and select **Suspend**.
   If you do not specify a date, the suspension is effective immediately. For more information, see Suspend and resume products and services.

10. Review the order lines by selecting the **Order Line Items** tab.
11. Verify the order details by selecting **Review & Submit**.
12. Select **Submit** to place the order.
    The order state changes to New and is available for approval.

**Related topics**

Suspend and resume products and services

### Move order

The move order helps agents to change the location for product inventory at the order line level.

The move order is triggered from the TMF 622 and 641 APIs.

When the action is **Change** and move operation is **true**. Two sets of domain orders and composedof items are created with the action state **Add** and **Change**. The inventory hierarchies present in change domain order are got replicated for add domain order. If the Order Characteristics values are available for change domain order, it gets replicated for add domain order.

The state of inventory for an add domain order becomes **Installation pending**.

The state of inventory for change domain order becomes **Change pending**.

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If the move order is canceled for all the product inventory records before the PONR, then all the product inventory records that are associated with the move order are changed to **Active** state from **Change Pending** state.

For all the product inventory records that are in **Activation pending** state are moved to the **Inactive** state, after cancellation is completed.

On successful completion of the order, the old inventory with state **Change pending** becomes **Inactive**. The new inventory with state **Activation pending** becomes **Active**.

**Related topics**

Configuring Order Management

Order management

### Suspend and resume products and services

You can use suspend and resume actions to temporarily suspend or inactivate your product and service inventories. That way, you can capture a customer's suspend request and resume the products and services later.

## About suspend and resume actions

You can temporarily suspend or inactivate your product and service inventories. The suspend and resume requests are managed as orders with the changes in the inventory of the product and service orders during the order decomposition and fulfillment process. An order suspension and resume action can occur immediately or at a future date.

With suspend and resume actions, you can do the following tasks:

- Ingest and fulfill the suspend product and service orders.
- Ingest and fulfill the resume product and service orders for suspended inventories.
- Support future-dated suspend and resume orders by using a scheduler.
- Manage the product inventory state for suspend and resume scenarios.

## How the Suspend and Resume actions work

The process for the suspend and resume actions is as follows:

1. A customer order of type Suspend or Resume is received in the order management system. After reviewing the order details, a fulfillment manager approves the customer order.
2. When a customer order is approved, a new Product Inventory Operations [sn_prd_invt_product_inventory_operations] table is created as a related list in the order line items form. In case of scheduled scenario, as part of fulfillment process the state of the product inventory operations record marks to Scheduled state for order line items.
3. A pre-configured scheduler tracks the Product Inventory Operations table to check for any future scheduled date of the customer order:
   - If your customer order contains order line items with a future date (a date value for the `committedDueDate` field on the order line items form), the suspend or resume action starts on the scheduled date.
   - If your customer order doesn't include any date for the suspend or resume action, it starts immediately at the time of closure of the orders.
4. At the time of order closure, the following changes occur:

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- For a scheduled scenario, the scheduler picks up the record with a Scheduled state from the Product Inventory Operations table on the scheduled date and marks the record state to Completed. And the inventory state of the order line item is updated to Suspended for the suspend action and to Active for the resume action in the product inventory table.
- For an immediate scenario, the state of the record in the Product Inventory Operations table is updated to Completed. And the inventory state of the order line item is updated to Suspended for the suspend action and to Active for the resume action in the product inventory table.

5. The inventory state in the Product Inventory Operations table is updated to Canceled in the following two scenarios:
   - During the inflight changes or due to the cancellation of any order line items.
   - The dates for both the suspend and resume operations are scheduled, but the date for the resume operation is before the date of the suspend operation.

## Additional validations and scenarios

When the order line items for the suspend or resume actions are combined with the change or disconnect actions in a single order and the inventory state of any order line item is in a pending state, the order approval fails. The reason is due to the approval validation for the change or disconnect order.

**Note:** During the order approval for suspend or resume or no change actions, the product inventory should not be in the Installation Pending state.

In the order creation process for the suspend or resume actions, the `committedDueDate` field value on the order line item form can be a past date, present date, or a future date. If it's a past or present date, the inventory state should be set as Active for the suspend action and set as Suspended for the resume action.

If the `committedDueDate` field value of the customer order line items is invalid (the date field value exceeds the calendar date) for the suspend or resume action, it's then considered as an immediate action.

In the suspend or resume type of customer orders, the parent order has precedence over a child order. If the parent order is scheduled for an immediate suspend or resume action, but the child order is scheduled for any future date, the entire inventory hierarchy is considered for the immediate action.

If the top order line item for suspend or resume action is scheduled for a future date, the entire inventory hierarchy is then considered for the suspend or resume action. Child order line items are considered for suspend or resume action when they’re combined with a change or a no-change action.

For an inflight change of the suspend or resume type order, only Cancellation is supported. If an order line item or the entire order gets canceled, the Product inventory Operations record is marked as Canceled during the order fulfillment process. The state change doesn't occur for the Product inventory record.

In the order creation process for the suspend or resume action, you can use the external inventory ID in the payload instead of the system-generated ID for the inventory.

**Related topics**

Configuring Order Management

Order management

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## Managing service orders

Learn how to qualify and manage service orders, work with external product inventory, and manage outbound requests.

**Related topics**

Configuring Order Management

Order management

### External product inventory ID

You can use a product inventory ID from external Configure, Price, and Quote (CPQ) systems in the Order Management application to complete the order fulfillment flow for various actions on the product and service orders.

## Overview of external product inventory ID

If you're using the Order Management application, you can use the enhanced TM Forum's Open APIs to create, change, disconnect, suspend, and resume product and service orders. After the order capture and fulfillment process, the system-generated IDs are created against the product inventory records to manage any future requests on the inventory for different order action types.

## Using an external ID

With the support of an external inventory ID, you can do the following tasks:

- Capture the external product inventory ID in the Order Management system through the Product and Service Order APIs.
- Store the external inventory ID in a new table for new orders and associate them with the product inventory records that were created after the order fulfillment. Also, update the ID in the external product inventory table for any inflight revisions during the order fulfillment process.
- Allow external CPQ or southbound systems to use the external inventory ID to submit, change, disconnect, suspend, and resume orders on the product inventory in the order management system.

**Note:** You can also map the external product inventory ID with the product inventory record by using the Product Inventory Open API. For more information, see Product Inventory Open API.

**Related topics**

Configuring Order Management

Order management

### Review the external product inventory details for a customer order

Review the external inventory details of the customer orders that you've received from the external Configure, Price, and Quote (CPQ) system during the order capture process.

**Before you begin**

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager

**Procedure**

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

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3. Navigate to **Customer Orders** > **All**.
4. Select an order you want to view.
5. View the external product inventories that are currently associated with an order line item by selecting the customer order line item.
6. Select the **External product inventories** tab.
7. On the form, review the fields values.

**Note:** To create a new external product inventory table, select **New**. On the Create New External product inventory form, fill in the fields.

**External product inventory form**

| Field | Description |
|---|---|
| Number | Unique system-assigned number of the external inventory ID. |
| External product inventory ID | External product inventory ID from the CPQ system. |
| Order line item | Order line item number against which the external inventory ID is captured. |
| State | State of the external product inventory ID:<br>**Valid**<br>When the order was closed, the state of the external product inventory ID was updated to Valid.<br>**Invalid**<br>During the inflight order changes, the state of the external product inventory ID was updated to Invalid.<br>**Note:** The state of the external inventory ID is updated after the order fulfillment is complete (the order state is Closed Complete). |

8. Save or delete the product inventory details.

| Action | Description |
|---|---|
| **Save the external product inventory details** | Select **Save**. |
| **Delete the external product inventory de tails** | Select the options icon ••• next to the **Save** button, and then select **Delete**. |

**Related topics**

Configuring Order Management

Order management

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### Create outbound requests for service orders

As a provider, create an outbound request for the service orders. You can interact with the external Service Order Management (SOM) or Technical Order Management (TOM) systems to manage the end-to-end order fulfillment process.

## Before you begin

Role required: sn_ind_tmt_orm.order_fulfilment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

## About this task

The outbound requests are enabled through the bi-directional integration over a REST API between Order Management for Telecommunications, Media, and Technology and the external systems.

## Procedure

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon ☰.
3. Navigate to **Service Orders** > **All**.
4. Select a service order and open it.
5. Select **Create Outbound Fulfillment Request**.
6. Select **OK** on the Initiate Fulfillment Request pop-up window.
   - A record with a new request ID is created in the Outbound Requests related tab with the state as Not Applicable. The order agent can view the details of this new record in the Work notes.
   - If the request action is successful, the order agent updates the state of this new record to Pending. If the request action is unsuccessful, the order agent deletes this new record. The agent can reselect the UI action to reinitiate the outbound request.
   - If the Service Order Outbound Policy decision table in the decision builder has identified the configuration of the domain service order as hierarchical, records are also created for the hierarchy of the individual service order with the same request ID. If it's non-hierarchical, a record is created only for the individual service order.

> **Note:**
>
> During any inflight order changes or order enrichment changes, the Updates available field on the domain service order form gets a tick mark and the existing UI action label changes to **Revise Outbound Request**. In this revised outbound request, the information that is related to the changes in the domain service order is also sent to the external systems.

7. Select the outbound request record to see the details of the received order response from the external system as shown in the following table.

#### Outbound Request form

| Field name | Description |
|---|---|
| Number | Unique system-assigned outbound request number, starting with a prefix of FO. |
| State | State of the outbound request: |

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| Field name | Description |
|---|---|
| | **Not applicable**<br>Created, but not in use yet.<br>**Fulfilled**<br>The service order fulfillment is completed.<br>**Pending**<br>The service order has encountered an error and is waiting for a resolution.<br>**Error**<br>The service order has encountered an error and is waiting for a resolution. |
| Source record | Record from which the outbound fulfillment request was triggered. |
| Table | Name of the table that is referenced in the request context. |
| Request ID | Outbound request ID that is generated by the Order Management for Telecommunications, Media, and Technology application. |

**Related topics**

Configuring Order Management

Order management

### Orders for 5G sliced networks

A communication service provider (CSP) can define 5G services in the technical catalog and manage the creation and fulfillment of these orders for a sliced network.

## Network slicing

Network slicing refers to a method of partitioning a physical network into multiple, separate networks. These separate networks are called slices.

By slicing a 5G network, a CSP can do the following tasks:

- Create and manage the slice templates with the required slice attributes in their product catalog.
- Support slice specifications by using the slice templates to define the slice services.
- Support the ingestion of slice orders from external systems through the existing product order API.
- Decompose the slice orders and trigger the fulfillment workflows for the decomposed orders.
- Trigger the southbound slice orders with southbound attributes toward southbound systems, such as Network Slice Management Function (NSMF), by using the service order open API.

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## How a slicing order is managed

A product catalog administrator creates templates in the product catalog by defining the template characteristics and template characteristic options. When the product catalog administrator is finished creating the templates, they publish it to the product catalog. With this process, the product catalog administrator can create templates for the various types of slices with the slice attributes and attribute values for the 5G network services.

Next, the product catalog administrator maps the slice templates with the various specification categories. The product catalog administrator does the mapping by using the Template Selection Policy decision table in the Decision Builder. The mapped templates are automatically filled in the service specification form when a user selects a specification category. .

**Note:**

- If a specification category is mapped with multiple templates, the latest published template is considered to be in the service specification.
- If a specification category is not mapped with any templates, the default category-template mapping is considered to be in the service specification.

The product catalog manager then uses the templates to define the new specifications for the 5G services.

After the 5G service specifications are created, they can be used in the slice order creation and fulfillment process. The 5G slice ordering process follows the existing order approval, decomposition, and fulfillment process in the Order Management application.

**Related topics**

Configuring Order Management

Order management

### Service qualification requests

Use the Technical Service Qualification API to evaluate a service request for feasibility and availability before you submit an order for fulfillment in the Order Management application.

## Service qualification request overview

If orders are submitted without feasibility checks, the order fulfillment process may be delayed and lead to cancellations and order fallouts. When you make feasibility checks a part of the pre-ordering process, the order fulfillment process is more efficient, and unnecessary delays can be avoided.

Let's understand this with an example. A communication service provider wants a broadband service at 3000 Main Street, Santa Clara, CA. As a part of the service delivery process, the service provider determines the technical feasibility of whether a given service can be delivered to their customers. This request then goes to the external inventory systems, which would do a further feasibility check based on the capacity, resources, and other parameters and send a response back to the order management system. The response regarding the qualified response can vary, or if the qualification isn't met, alternate proposals could be provided.

The key capabilities of the Technical Service Qualification process are as follows:

- Confirm service availability before placing an order and meet customer expectation.
- Confirm service availability by sending technical service qualification requests.

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- Process and coordinate technical service requests and responses with external inventory systems via APIs.
- Aligned with the Service Qualification Management TMF 645 Open API.

## Use cases

The Technical Service Qualification process enables the service order managers to perform the following activities:

- Support the creation of technical service qualification request via open TMF APIs so that they can enable external systems to submit qualification request to ServiceNow system for qualification process.
- Decompose service qualification request in to underlying services as per the product catalog definition so that they can perform qualification for all underlying services to qualify the parent service.
- Trigger service qualification requests for both parent and child services to external systems in TFM-aligned standard so that they can support interoperability with external systems to get the feasibility studies performed for service qualification request.

## Qualification process

Customer orders that have the fulfillment type as **Qualify** are captured from third-party customer order management systems through the Technical Service Qualification Open API. You can use this API, which is a ServiceNow implementation of the TMF645 API, to request the qualification of services for:

- One or more service specifications with characteristics.

  For example, you can make a qualification request to check if Voice over IP (VoIP) and Access Service with a download speed of 1 GBPS could be delivered at a specified address.

- Service specifications that use location information of an existing inventory.

  For example, you can make a qualification request to check if VoIP and 4000 TV services can be delivered at the same location of an existing and active Access Service.

- Upgrading or downgrading an existing service.

  For example, you can make a qualification request to check if the download speed can be upgraded to 500 Mbps for an existing Access Service.

Order fulfillment managers can review customer orders that are captured through this API and confirm the availability of services before submitting requests for delivery. The requests are then sent to the external inventory system for approval and the customer order is updated with the result.

1. A qualification requester system sends a qualification request for a customer facing service (CFS) into the ServiceNow Order Management system using the TM Forum Open API for Service Qualification (TMF645).

   An order is created in Order Management with order type as service and fulfillment type as Qualify.

   Order line items are automatically created based on the service specification relationship.

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2. The system decomposes the order line items into resource facing domain orders (RFS) based on catalog definition.
3. The Order Management system coordinates and processes the technical service qualification request and returns the response to the external inventory system.

**Related topics**

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Order management

### Review and approve service qualification requests

Review and approve customer orders captured through the Technical Service Qualification API.

**Before you begin**

Role required: sn_ind_tmt_orm.order_fulfilment_manager, sn_ind_tmt_orm.order_fulfilment_agent, sn_ind_tmt_orm.service_order_manager, sn_ind_tmt_orm.service_order_agent

**Procedure**

1. Navigate to#**Workspaces** > *CRM Workspace#*.
2. Select the List icon ☰.
3. Navigate to **Service Orders** > **All**.
4. Select an order with the Order type as Service and Fulfillment type as Qualify.
5. Select **Approve**.
   The State field changes to **In Progress** and order decomposition occurs and service orders are generated for each customer order line Item.

   **Note:** During order decomposition, only service orders are created, resource orders are not generated for service qualification requests.

6. Navigate to the **Line Items** tab, select a parent line item in the list and select **Qualify Order**.

   **Note:** The **Qualify Order** option is available only on the top order line items in the hierarchy.

   - The Result field is updated to **Pending** and the Process Qualification Request subflow subflow is launched. After the subflow has been executed, depending on the response from the external inventory system, the Customer Order Result field is updated to one of the following:
     - Qualified: Requested service is available.
     - Alternate: Requested service is not available but an alternate proposal is available.
     - Unqualified: Requested service and alternate proposals are not available.
     - None: If any errors occur during the execution, the result is updated to None.
   - The following business rules are invoked to derive the result:
     - Update Line Item Qualification Result: Propagates result from domain order to order line item.
     - Update Qualification Result on Order: Propagates result from top order line items to the customer order.

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The Customer Order Result status is based on the status of the domain order and order line items. If the order line items have different or mixed results, the Result status is derived as follows:

| Domain order | Order line item result |
|---|---|
| All domain orders are set to Qualified. | Qualified |
| All domain orders are set to Alternate. | Alternate |
| All domain orders are set to Unqualified | Unqualified |
| All domain orders are set to None | None |

| Top Order Line Item | Customer Order Result |
|---|---|
| All top order line items are set to **Qualified**. | Qualified |
| At least one top order line item is set **Alternate** and no items are set to **Unqualified**. | Alternate |
| At least one top order line item is set to **Unqualified** | Unqualified |
| At least one top order line item is set to **None** | None |

### Manually updating the qualification request

You can manually update the Result field in two ways:

- Update the *qualificationresult* field inn the *api/sn_ord_qual_mgmt/qualification/checkServiceQualification/processResult* API for all the order line items.
- Update the Result field on the Domain Order, Order Line Item, and top Order Line Item forms. The Result field on the Customer Order is also updated.

### Data model changes

The following forms have been updated to process service qualification requests:

- Customer order
  - Result: Can be None, Qualified, Unqualified, Alternate, or Pending.
  - Fulfillment code: Readonly field.
- Order line item

  Result: Can be None, Qualified, Unqualified, Alternate, or Pending.

- Domain order
  - Result: Can be None, Qualified, Unqualified, Alternate, or Pending.
  - Unavailability reason

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**Related topics**

- Configuring Order Management
- Order management

### Process Qualification Request subflow

The Process Qualification Request subflow generates a qualification request based on the customer order, sends the request to the third party inventory system, and executes the integration request.

## Generate a qualification request

In the first step of the subflow, a TMF-641 compatible payload to be sent to the inventory system is generated. The *`serviceQualificationItem`* list in the payload consists of the service order information, the hierarchy, and all the characteristics. A sample payload is shown in the following example:

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In this example, you can see that the *serviceQualificationItem* has multiple service orders and you can also see the hierarchy or the parent and child relationships between them.

## Execute integration request

This step launches the Order Qualification Request integration request type from the Spoke selector. The payload information specified in the first step of the subflow and the top order line item from the customer order are accepted as inputs. This information is then sent using an API call to the third party inventory system and the response is received either synchronously or asynchronously and Result field is updated in the customer order.

If the response is received asynchronously, the response should be passed to the Process Qualification Response. Along with the result, if the response has additional information related to alternate service proposal or eligibility unavailability reason, this information is updated for the corresponding service order. A sample response is shown here:

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In this example response, the *qualificationresult* is set to Qualified for all the service orders in the hierarchy and the final *result* is also set to Qualified.

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**Related topics**

Configuring Order Management

Order management

### Edit the Order Qualification Request

Use the Order Qualification Request integration request type in the Order Management for Telecommunications application to process the customer order qualification requests and retrieve the results from the external inventory systems.

## Before you begin

Role required: admin

## About this task

The Order Qualification Request type is used to integrate order management with third-party inventory systems. You can specify the following information:

- Integration request inputs: Inputs for the customer order qualification request which include the top order line item and payload details.
- Integration request definition: Definition for the condition and the subflow that invokes the API call to the third-party inventory system.

## Procedure

1. Navigate to **All** > **Spoke selector** > **Request type**.
2. Select the **Order Qualification Request** integration request type.
   In the Order Qualification Request integration request type page, you can see the Demo Order Qualification Implementation request definition listed under the Integration request definitions tab. This is a sample request definition that invokes the Demo Order Qualification (Mock Response) subflow, simulates the response from a third-party inventory system, and updates the qualification request.

   You must add a new request definition, specify the conditions and create a subflow that you can use to invoke the API call to the third-party inventory system. You can create one or more request definitions depending on the number of external systems being used.
3. Select **New** to add a new request definition.

   **Note:** To add a new request definition, you must be in the Order Management for Telecommunications, Media, and Technology scope.
4. Enter the name for the request definition and specify the conditions.
5. In the Request adapter field, select the subflow that will communicate with the third-party system to update the customer order and select **Submit**.
   - Each request type can have multiple request definitions. For example, if you have multiple inventory systems or vendors, depending on the system you want to invoke, you can add multiple request definitions for each system. You must create a separate spoke to interact with each vendor or third-party system, create a flow in the spoke, and point the request adapter to this flow.
   - For more information on how to create a spoke, see Spokes. As shown in the demo subflow, ensure that the response from the third-party system passed to the Process Qualification Response block.
   - When the Process Qualification Request subflow is invoked, the response from the third-party inventory system is received either synchronously or asynchronously, and the Result is updated in the customer order.

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**Related topics**

Configuring Order Management

Order management

### Alternate proposal for service orders

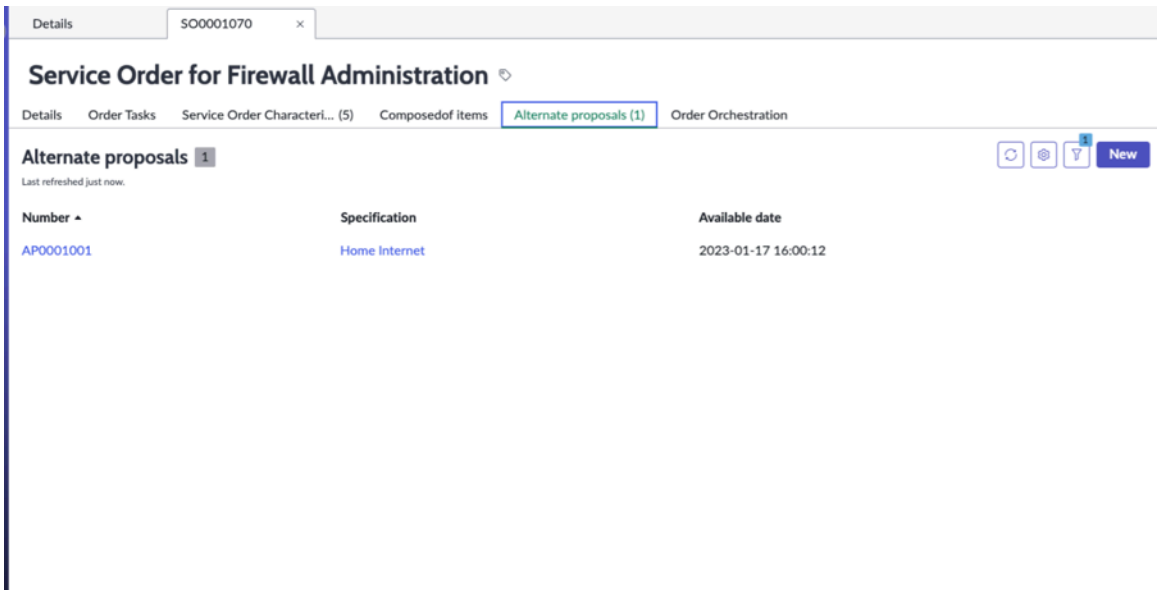
Learn how you can provide alternate proposals if a service qualification isn't met.

Qualification requests can be created for a service specification using information from existing inventory. If the requested service with the specified characteristics or date is not available, an alternate proposal may be provided. The alternate proposal can be similar to the requested one or may be the same service but available on a different date.

When you receive an alternate qualification request and click **Qualify Order** in the top level order line item form, the Result field is updated to **Alternate** and a list of alternate proposals are listed in the Alternate proposals related list. A single service order can have multiple alternate proposals. This list can also be manually updated by the service order agent.

**Note:** When you initiate a new qualification request is initiated and receive an alternate proposal for a service order, any existing alternate proposal entries will be deleted before new entries are created.

Navigate to the *CRM Workspace*, click a service order with Fulfilment type as **Qualify** and select the **Alternate proposal(s)** tab.




Select the Number link to view the alternate proposal. It contains the following information:

| Field name | Description |
|---|---|
| Number | Number of the alternate proposal. |
| Domain order | The domain order for which the alternate proposal is created. |
| Specification | The alternate service specification that has been proposed. |
| Available date | The date on which the alternate proposal will be available. |
| Order characteristics | The specification characteristics (in JSON format) provided as part of the alternate proposal in the response from the inventory system. |

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**Related topics**

Configuring Order Management

Order management

## Reviewing customer or partner accounts

Learn how your order entry and fulfillment agents, managers, and fulfillers can use the 360 View in the Order Management application to get a better perspective about the activity that is associated with a customer's or partner's account.

As an order agent, manager, or fulfiller, you can use your customer's or partner's account Information to gain a clear understanding of the contact, order, customer service, product inventory, and installed base item activity for an account. With this information, you can track the following types of information:

- How many service contracts have been created or renewed for the account.
- How many customer and service orders have been submitted by the customer, and what are their current states of fulfillment.
- How many active requests or customer service cases the account has, and what are their current states.
- What products and equipment the customer has ordered or has installed at their sites. By using this information, your order agents can gain insights into what additional products or services they can sell to the customer.

**Note:** To learn how to create new customer accounts, see Configure accounts and contacts in Customer Service Management (CSM).

**Related topics**

Configuring Order Management

Order management

### Review an account using the 360 View

Review a customer or partner's account by using the 360 View in the Order Management application. You can track the service contracts of your customers or partners. You can also view customer and service orders, cases, products, and equipment to see how you can improve your customer service.

#### Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

#### Procedure

1. Navigate to **All** > **Customer Order Management** > **Workspace** > **Configurable Workspace Home**.
2. From the **Configurable Workspace Lists** tab, select **Customer**, and then select **Accounts**.
3. In the Accounts list, select a customer account.

**Note:** You can also access an existing customer account by selecting a customer account link in the Account column of the Orders, Customer Orders, or Service Orders lists in the Configurable Workspace Lists.

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4. In the Account Information form, in the Customer Summary section, review the general customer details for the selected account.

**Account Information form - Customer Summary section**

| Field | Description |
|---|---|
| Account | Name of the customer or partner, and the name of the primary contact for the account.<br><br>To view the details for the primary contact, including the account, title, email, phone numbers, and time zone, select the contact name. |
| Contacts | Name of each contact for the account.<br>○ To access the Customer Contacts form so that you can view all contacts for the account, select **View All**.<br>○ To view the details for a contact when you are in the Customer Contacts form, select the contact name. |
| Contracts | Name of the contracts, if any, that are associated with this account.<br>○ To view the details for a contract, select the contract number.<br>○ To view all contracts for the account, select **View All**. |

5. In the Overview section, in the **Customer Orders** field, review the customer and service orders for the selected account.

**Account Information form - Customer Orders section**

| Field | Description |
|---|---|
| Customer Orders (n) | (n) represents the total number of customer and service orders for this account. |
| Number | System-assigned identifying number for the order.<br>○ To access the Customer Order form and view the order details for a customer order, select the order number.<br>○ To access the Service Order form and view the order details for a service order, select the order number.<br>○ To access the Customer Orders form to view all orders for the account, select **View All**. To view the detailed information for an order when you are in the Customer Orders form, select the order number. |
| Order Type | Type of order: |

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| Field | Description |
| --- | --- |
| | **Product**<br>Order for a product that you sell.<br>**Service**<br>Order for a product that you sell. |
| Contact | Name of the customer contact that is associated with the order. To view the details for the contact, select the contact name. |
| State | State of the product or service order. To learn more, see these two topics:<br>○ Customer order states<br>○ Service order states. |

6. In the Cases section, review the customer service cases, if any, for the selected account.

**Account Information form - Cases section**

| Field | Description |
| --- | --- |
| Number | System-assigned identifying number for the customer service case:<br>○ To view the details for a customer service case, select the case number.<br>○ To view all the customer service cases for the account, select **View All**. |
| Short description | Short description of the customer service case. |
| Contact | Name of the customer contact that is associated with the customer service case. To view the details for the contact, select the contact name. |
| State | State of the customer service case. To learn more, see Case states. |

7. In the Product Inventory section, review the product inventory items for the selected account.

**Account Information form - Product Inventory section**

| Field | Description |
| --- | --- |
| Product Inventory (n) | (n) represents the total number of the product inventory items that were ordered for this account. |
| Number | System-assigned identifying number for the product inventory item: |

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| Field | Description |
|---|---|
| | ○ To view the details for a product inventory item, select the product inventory number.<br>○ To view all the product inventory items for the account, select **View All**. |
| Specification | Product specification that is associated with the product inventory item. To view the details for a specification, select the specification number. |
| Location | Current location for the product inventory item. *(empty)* denotes that the product inventory item hasn't yet been installed at the customer site. |
| State | State of the product inventory item. *Installation Pending* denotes that the installation of the product inventory item is pending at the customer site. |

8. In the Installed Base Items section, in the Product Inventory section, review the installed base items for the selected account.

**Account Information form - Installed Base Items section**

| Field | Description |
|---|---|
| Installed Base Items (n) | (n) represents the total number of the base items that were installed for this account. |
| Number | System-assigned identifying number for the installed base item:<br>○ To view the details for an installed base item, select the installed base item number.<br>○ To view all the installed base item numbers for the account, select **View All**. |
| Configuration Item | System-assigned identifying number for the configuration that is associated with the installed base item. To view the details for a configuration item, select the configuration item number. |
| Contact | Name of the customer contact that is associated with the order. To view the details for the contact, select the contact name. |

**Related topics**

Configuring Order Management

Order management

## Summarize an order using Summarization for Order Management

Generate a summary of a complex order for faster, more accurate decision-making and improved customer responsiveness.

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### Before you begin

**Note:** When both the skills are active, the order capture skill takes precedence.

Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.order_fulfilment_agent

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Customer Orders** > **All** and select the order to summarize.
3. In the Customer Order summary by ServiceNow Otto, select **Summarize**.

   The Customer Order summary by ServiceNow Otto appears above the activity stream. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

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

4. **Optional:** When you're finished summarizing an order, you can add it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

| Option | Procedure |
|---|---|
| **Save the summary information by adding it to the work notes** | **a.** Select **Share to work notes**.<br>**b.** In the Share summary as Work notes dialog box, edit the summary.<br>**c.** Select **Save to work notes**. |
| **Expand or collapse the summary** | Select the expand card icon or the collapse card icon to see more details or fewer summary details. |
| **Provide feedback for the summary** | If you think that the summary was helpful, select the helpful icon. If you think that the summary wasn't helpful, select the not helpful icon.<br><br>This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do). |
| **Copy the order summary** | Select the copy to clipboard icon to use the order summary information for another purpose, such as pasting into an email. |
| **View the information about the order summary** | If you want to check details about the summary, select the more info icon. |

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## Manage order updates with ServiceNow Otto

Use ServiceNow Otto for Order Management to manage order updates, such as applying bulk changes to order line items, removing order lines, or creating an order case, without navigating between individual records.

### Before you begin

Role required: sn_ind_tmt_orm.order_agent.

### About this task

The Order Assistant Agent is a context-aware assistant that works inside the order workspace and helps order agents perform order updates while working on a single order. In this task, you can use ServiceNow Otto for Order Management to:

- Bulk apply a discount to all order lines.
- Update the shipping address for all order lines.
- Update quantity for order lines.
- Delete order lines.
- Create order case.

Some bulk update actions offer an undo option immediately after the change is applied. Undo is available only within the current ServiceNow Otto chat and only for supported actions, such as updating quantity or shipping address.

Bulk quantity updates apply to top-level (parent) order lines. Child order lines reflect the change through the parent relationship and aren't updated directly.

The actions available in ServiceNow Otto depend on the current state of the order.

| Order state | Actions available to the order agent |
|---|---|
| Draft | • Bulk update quantity<br>• Update shipping address<br>• Apply bulk discount<br>• Delete an order line item |
| New | • Bulk update quantity<br>• Update shipping address<br>• Apply bulk discount<br>• Delete an order line item<br>• Create case for order<br>• Create a case for order lines |
| Acknowledged | • Create case for order<br>• Create case for order lines |

**Note:** For best results, start a new ServiceNow Otto chat for each bulk action. Long conversations can reduce accuracy overtime.

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### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to **Orders** > **All**
4. Select an order.
5. Launch the ServiceNow Otto chat panel by selecting the ServiceNow Otto icon.
6. In the ServiceNow Otto panel, start Assistance for orders (Order Assistant Agent).
7. If prompted, confirm the order number (or enter a different order number).
8. Choose the order update that you want to perform.

| Action | What to do in ServiceNow Otto panel |
|---|---|
| **Bulk update quantity** | **a.** Enter the new quantity value when prompted.<br>**b.** Confirm the bulk update. |
| **Bulk update shipping address** | **a.** Provide the complete shipping address when prompted.<br>**b.** Confirm the bulk update. |
| **Apply bulk discount** | **a.** Enter the discount percentage when prompted.<br>**b.** Choose how to handle lines with manual adjustments (if prompted).<br>**c.** Confirm the bulk update. |
| **Delete order line** | Specify the top-level order line you want to remove when prompted, then confirm the deletion. |
| **Create Order case** | Describe the issue with the order when prompted, review the generated summary, then confirm to create the order case. |

9. Review the order lines to verify the update was applied.

### What to do next

After updating quantity or shipping address, you can keep the changes or undo them when prompted.

## Using order operations applications

Learn how to use order operations applications.

Manage cases

Case management provides a structured and efficient approach to handling a wide variety of service requests, incidents, and inquiries. It encompasses the processes and tools used to manage individual cases from initiation through resolution, ensuring that service delivery is consistent, timely, and aligned with organizational goals.

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**Related topics**

- Configuring the order operations applications
- Order operations

## Using Lead-to-Cash Process Management

Sales process managers can use Lead-to-Cash Process Management to create sales process records and monitor and track sales processes through a consolidated dashboard.

## Overview of creating and monitoring sales processes

Access the Lead-to-Cash Process Management application from the CRM Workspace to create sales process records and monitor the sales process using the sales process dashboard.

- Create a sales process record

  Create a sales process record to monitor and track sales activities for a customer account.

- Navigating the sales process dashboard

  Become familiar with the sales process dashboard so you can navigate and use the dashboard to monitor the sales process.

- Monitoring and tracking sales activities

  Monitor and track sales activities for a customer account after you have created a sales process record.

- Create and manage task checklists

  Create checklists to ensure thoroughness, consistency, and prevent errors while completing routine tasks and processes such as fulfilling orders.

- Add attachments for a sales process record

  Attach files, documents, images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

- View and send emails in Lead-to-Cash Process Management

  View consolidated emails for all hard-linked entities monitored in a sales process record and compose emails from the sales process dashboard.

- Linking, delinking, and link conversion conditions

  Become aware of the conditions for linking, delinking, and hard or soft-linking records on the node map.

- Create business process tasks

  Create business process tasks to track miscellaneous tasks at the sales process record-level.

**Related topics**

- Configuring Lead-to-Cash Process Management
- Lead-to-Cash Process Management

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### Create a sales process record

Monitor and track sales activities for a customer account by creating a sales process record in Lead-to-Cash Process Management.

## Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Lead to Cash Process Management** > **Sales Process Records**.
4. Select **New**.
5. On the form, fill in the fields.

**Create new sales process record form**

| Field | Description |
|---|---|
| Short description | A brief summary of the business process record used for quick identification in lists and notifications. |
| Business process | A business process that you want to monitor such as order-to-cash. |
| Account | Customer account for which you want to monitor the sales activities. |
| Assigned to | (Optional) Person responsible for managing and monitoring the sales process record. |
| Business entity | The top-level sales entity that you want to monitor, for example, opportunity. Quotes and orders related to that entity are automatically included in the node map. |

When you select a business entity, all similar entities related to the selected account are displayed.

6. Select the records you want to monitor directly under the sales process record.
7. Select **Save and Open**.
   A dashboard containing a hierarchical node map and details section related to the selected records is displayed.

## What to do next

Track and manage sales process using the sales process dashboard. For more information, see Navigating the sales process dashboard and Monitoring and tracking sales activities.

### Related topics

Configuring Lead-to-Cash Process Management

Lead-to-Cash Process Management

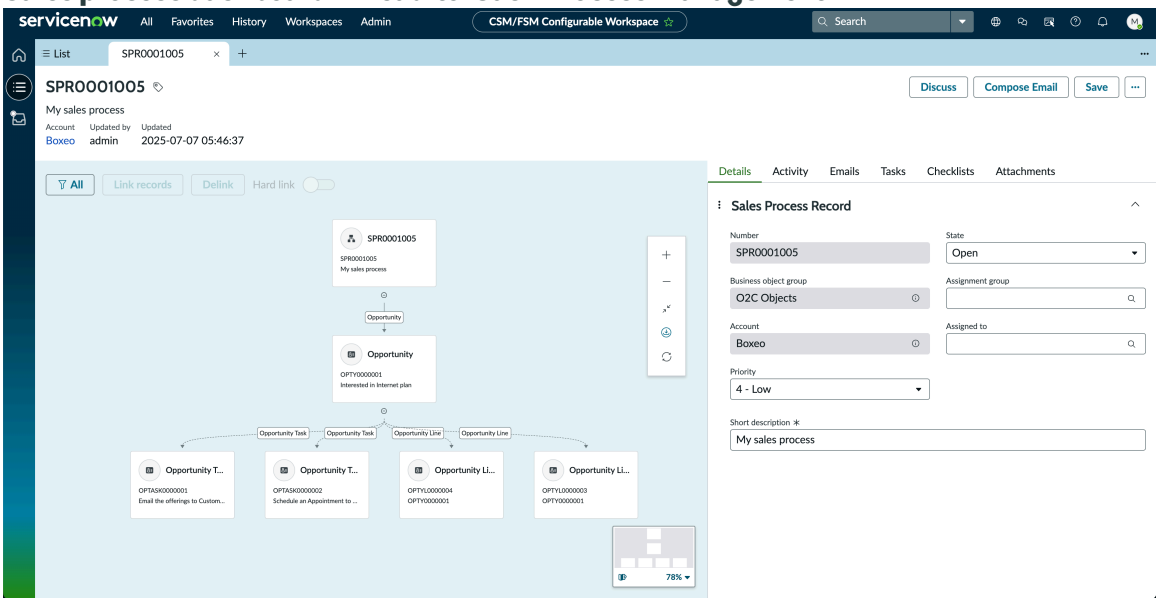
### Navigating the sales process dashboard

Become familiar with the various elements that make up the sales process dashboard in the Lead-to-Cash Process Management application.

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The sales process dashboard in the Lead-to-Cash Process Management application offers a consolidated view of sales activities across entities such as opportunities, quotes, and orders.

**Sales process dashboard in Lead-to-Cash Process Management**




## Node map elements

The hierarchical node map visually represents the relationships of sales entities. Sales process managers and contract admins can dynamically manage this map by linking or delinking records, converting soft links to hard links for active monitoring. The following table describes the function of node map elements.

**Node map elements**

| Element | Function |
|---|---|
| Filter icon | Filter link by types to view associated nodes. You can filter to view all nodes or hard-linked nodes. |
| Link records | Link more sales records to the selected node. To add more records, select **Link records**, then select a **Business entity** on the Link records pop-up window. Select specific records that you want to link and select **Link selected**. |
| Delink | Delete child record and its hierarchy. To delink a record, select a link connecting a parent node and its child nodes you no longer want to monitor, and select **Delink**. |
| Hard link | Enables you to convert soft links to hard links and vice versa. To convert a link, select it and select the **Hard link** toggle switch. |

By default, only three levels are displayed on the node map when you open a sales process record in the CRM Workspace. Admins can increase or decrease the number of levels displayed. For more information, see Customize hierarchical node map levels for Lead-to-Cash Process Management.

Only 250 nodes can be displayed on the node map at a time. If you have more than 250 nodes, collapse some nodes and then expand and view the other nodes.

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## Details pane

A details section consolidates all relevant operational elements—tasks, emails, checklists, and attachments—into a single pane.

**Note:**

Related lists configured in the Sales cockpit view in Next Experience UI govern the tabs that are displayed for a sales entity on the sales dashboard.

**Related topics**

- Monitoring and tracking sales activities
- Create and manage task checklists
- Add attachments for a sales process record
- Manage attachments for a sales process record
- View and send emails in Lead-to-Cash Process Management
- Linking, delinking, and link conversion conditions
- Using Sidebar

### Monitoring and tracking sales activities

Monitor and track sales activities for a customer account after you have created a sales process record.

The **Details**, **Activity**, and **Tasks** tabs provide the following information when you select a node on the Lead-to-Cash Process Management sales process node map:

**Sales entity details for an account**

Access key information about a sales process record such as the record number, state, the agent assigned to the record, account, and priority, and additional details for related sales entities such as the product offering, quote date, pricing information, and so on to expedite decision making and issue resolution.

**Activities**

View a running history of updates such as field changes or the availability of new file attachments, enabling you to stay informed about the sales process record without having to switch contexts. Activities can only be viewed for a sales process record.

Filter, search, and sort activities using the Filter , Search and Sort icons respectively.

**Task assignment and status**

View a consolidated list of tasks that provides information about hard-linked entity records that are monitored using the sales process record, including business process tasks. The information includes the task's status, description and the agent assigned to it. You can also search and filter tasks using the task ID, short description, or state through the search box and Filter icon .

Related lists configured in the Sales cockpit view in Next Experience UI govern the tabs that are displayed for a sales entity on the sales dashboard. For example, you can display tabs such as **Line Items for an Opportunity** and **Line Characteristics for Opportunity Line** containing the respective record details.

By accessing the sales data and using integrated communication channels such as sidebar discussions and emails, you can promote record completeness and accuracy, and support downstream processes such as order fulfillment, revenue recognition, and reporting.

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### Related topics

- Create and manage task checklists
- Add attachments for a sales process record
- View and send emails in Lead-to-Cash Process Management
- Linking, delinking, and link conversion conditions
- Using Sidebar

## Create and manage task checklists

Create and manage checklists to track progress on completing routine or repetitive tasks and processes such as fulfilling orders.

### Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.
5. Select the **Checklists** tab.
6. Select **Add item**.
7. Enter a task in the **Checkbox** field.
8. Repeat the steps to add more tasks to your checklist.

   To remove a task while creating the checklist, select the Delete icon next to the task entry.
9. Select **Save**.

   You can add more tasks to your checklist by selecting **Edit**.
10. **Optional:** Modify a saved checklist by adding or deleting items.

    a. In the sales process record on the dashboard, select **Checklists**.

    b. Select **Edit**.

    c. Add or delete an item.

    - To delete an item, select the Delete icon next to the task entry.
    - To add an item, select **Add item** and provide the task name.

    d. Select **Save**.

### Related topics

- Configuring Lead-to-Cash Process Management
- Lead-to-Cash Process Management

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### Add attachments for a sales process record

Attach files, documents, or images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

## Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

## About this task

You can attach files only to a sales process record. To add attachments to child records, you must navigate to the respective entity's record page.

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.
5. Select the **Attachments** tab.
6. Upload files.

> **Note:** The default maximum file size is 1 GB, but this may vary based on the size limit set by your admin on your ServiceNow instance.

| Method | Action |
|---|---|
| **Drag and drop** | Drag and drop the file from your system to the Attachments pane. |
| **Select a file from your system** | **a.** Select **Select file**.<br>**b.** In the browse files pop-up window, select the file.<br>**c.** Select **Open**. |

7. Select **Upload**.
8. **Optional:** Attach more files by selecting the Add icon .

## What to do next

Download, rename, or delete attachments. For more information, see Manage attachments for a sales process record.

### Related topics

Configuring Lead-to-Cash Process Management

Lead-to-Cash Process Management

### Manage attachments for a sales process record

Rename, download, or delete files, documents, or images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

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### Before you begin
Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

### Procedure
1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.
5. Select the **Attachments** tab.
6. Select the attachment.
7. Select the More actions icon ⋮ for the attachment entry.
8. Select the desired action.
   - Download
   - Delete
   - Rename

   **Tip:** For bulk deletions or downloads, select the files or select **All Files** and then select the action.
9. **Optional:** Select an attachment to preview it.

### Related topics
Configuring Lead-to-Cash Process Management

Lead-to-Cash Process Management

## View and send emails in Lead-to-Cash Process Management
View consolidated emails for all hard-linked entities monitored in a sales process record and compose emails from the sales process dashboard.

### Before you begin
You can compose and send emails related to a sales process record by default. To compose emails for child entities such as an opportunity or quote, you must be granted access to those entities. For more information, see Setting conditions for enabling email access in Lead-to-Cash Process Management.

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

### Procedure
1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Lead to Cash Process Management** > **Sales Process Records**.
4. Select the sales process record.
5. View emails from all hard-linked entities tied to the sales process record by selecting the **Emails** tab.
6. Compose and send the email.

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a. Select **Compose Email**.

b. Enter the list of recipients.

c. Draft your email.

d. Select **Send email**.

**Related topics**

Configuring Lead-to-Cash Process Management

Lead-to-Cash Process Management

### Linking, delinking, and link conversion conditions

Several conditions can enable or disable you from linking, delinking, and hard or soft-linking records in Lead-to-Cash Process Management.

## Difference between hard and soft-linked nodes

Links can be toggled between hard and soft types based on whether they need to be actively monitored.

**Hard-linked nodes**

A hard link is an active monitoring connection established by the sales process manager. When a record is hard linked, it's actively tracked, and its emails and tasks are consolidated and visible in the sales process record. Hard links are represented by solid lines in the node map.

**Soft-linked nodes**

A soft link is a passive connection based on database relationships. Records that are soft linked aren't actively monitored by the sales process manager, and their emails and tasks aren't consolidated in the sales process record. Soft links are represented by dotted lines in the node map.

## Conditions for linking and delinking records

Linking records: You can link records to all hard-linked nodes, including those records that are converted from soft links to hard links.

Delinking records: You can delink only hard-linked records and they must meet either of the following conditions:

- The target node was added using the Link Records flow
- The target node is a top-level entity

## Conditions for converting link types

Hard links cannot be converted to soft links if they meet the following conditions:

- The target node was added using the Link Record flow.
- The target node has immediate hard-linked child nodes but only one hard-linked source node.

Soft links can be converted to hard links only if the source node has at least one hard-linked record.

**Related topics**

Configuring Lead-to-Cash Process Management

Lead-to-Cash Process Management

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### Create business process tasks

Track tasks for sales process records in Lead-to-Cash Process Management such as the closure of all linked opportunities or generating orders.

## Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon ☰.
3. Navigate to **Lead to Cash Process Management** > **Business Process Tasks**.
4. Select **New**.
5. On the form, fill in the fields.

### Business Process Task form

| Field | Description |
|---|---|
| Number | Unique ID of the business process task record. |
| Business process record | The sales process record. |
| Parent | (Optional) Parent record of the selected object. In this case, another business process task. |
| Priority | The order in which the task should be addressed. The available options are:<br>○ 1 - Critical<br>○ 2 - High<br>○ 3 - Moderate<br>○ 4 - Low<br>○ 5 - Planning |
| State | State of the task record. The available options are:<br>○ Open<br>○ Work in Progress<br>○ Closed Complete<br>○ Closed Incomplete<br>○ Closed Skipped |
| Assignment group | User group to assign to the task. |
| Assigned to | The sales process manager to assign to the task. |
| Short description | (Optional) A brief description summarizing the task. |
| Work notes | (Optional) Records activities by internal users. |

6. Select **Save**.

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### What to do next

Monitor the business process task from the sales process dashboard. For more information, see Monitoring and tracking sales activities.

### Related topics

- Configuring Lead-to-Cash Process Management
- Lead-to-Cash Process Management

## Using post-sales engagement applications

Learn how to use post-sales engagement applications.

Customer Life Cycle Management Workflows

Modify, suspend, resume, or disconnect the sold products and their complete hierarchy.

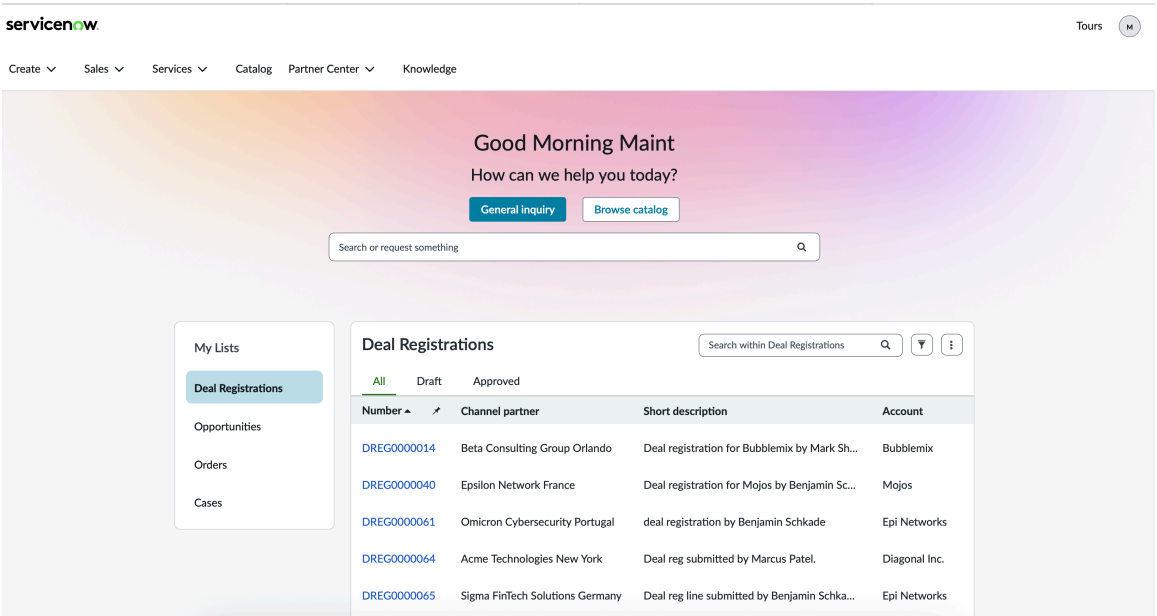
## Using Partner Relationship Management

Install the Partner Relationship Management plugin (com.snc.partner_relationship_management) to enable admins and channel partners to use the self-service Partner portal.

As an Enterprise Partner Relationship manager or a channel partner you can use the Partner Portal to do any of the following tasks.

- Get a 360° view of the Partner portal.
- Add and manage staff members.
- Submit an inquiry to connect with the enterprise.
- Create quotes directly from the Partner portal.
- Access knowledge base articles and engage with the community.

### Partner Portal




From the Partner Portal, you can use and access the following features.

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### Partner portal home page for logged-in users

| Task | Description |
|---|---|
| Create | Allows channel partners to create deal registrations, cases, or quotes.<br><br>To learn more about creating deal registrations, see Register a deal on Partner portal.<br><br>To learn more about creating quotes, see Create a Quote via Self-Service for Channel Partners. |
| Sales | Overview of deal registrations, opportunities, and quotes.<br><br>View deal registrations in the **Draft**, **Submitted**, and **Approved** states.<br><br>View Self-service quotes<br><br>View a list of all active opportunities and their detailed analytics. |
| Services | Provides access to all cases and quick links to open cases that require action. |
| Catalog | List of all services that can be performed by a channel partner. |
| Partner Center | List of all the channel partners. |
| Knowledge | Select **Knowledge** on the header to view the kb_home page.<br><br>You can search the knowledge base or view a list of top-rated or most viewed knowledge base articles. |
| General Inquiry | Raise concerns or queries with the enterprise.<br><br>To learn more about general inquiry, see . |
| Browse catalog | List of all catalog forms. |
| Cases | Provides access to all cases and quick links to open cases that require action. |
| My Lists | Lists of deal registrations, opportunities, quotes, orders, and cases associated to the channel partner.<br><br>Select **Opportunity** to view detailed information about the line items and activity associated with an oportunity. |
| Quick Links | Links to knowledge articles and other information. |

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**Partner portal home page for logged-in users (continued)**

| Task | Description |
|---|---|
| Tours | View a tour for additional guidance on how the Partner Portal works.<br><br>Your administrator determines whether tours appear on pages. |
| Profile menu | Select your profile picture to view your profile or log out of the Partner portal. |
| Search | Search for support articles and other requests.<br><br>Enter a search word or term and select **Search** to view the results. |

**Related topics**

## Register a deal on Partner portal

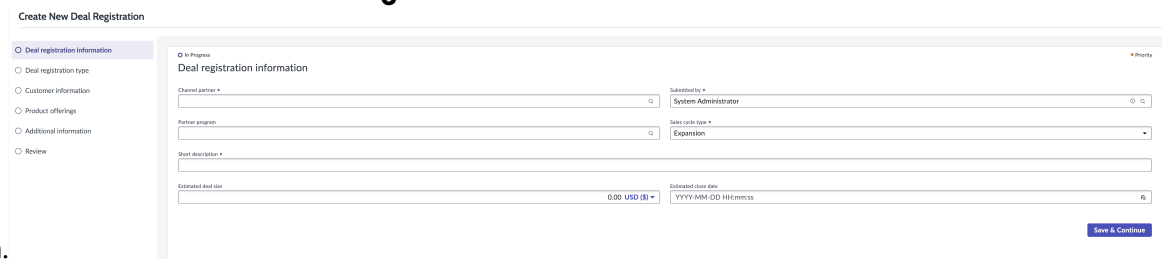
Register a deal on the Partner portal to update its state and trigger the end-to-end life cycle of the deal.

### Before you begin

Role required: sn_prm_dr.deal_reg_ui

### Procedure

1. Navigate to the Partner portal.
2. From the portal header, select **Create > Create Deal Registration**.
3. On the **Create New Deal Registration** screen, enter the required information on the **Deal registration information** form.




| Field | Type | Description |
|---|---|---|
| Number | String | Number assigned to the deal registration |
| Channel partner | Reference | Reference to the channel partner (sn_prm_channel_partner) table |
| Submitted by | Reference | Reference to the user and the initiator of the channel partner |

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| Field | Type | Description |
|---|---|---|
| Partner program | Reference | Reference to partner program (sn_prm_partner_program) table |
| Deal registration type | Reference | Reference to deal registration type (sn_prm_dr_deal_registration_type) table |
| Account | Reference | Reference to account (customer_account) |
| Contact | Reference | Reference to contact (customer_contact) |
| Short description | String | Summary of the details of the deal |
| Description | String | Detailed information about the deal |
| State | Choice | Current state of the deal registration<br>○ Draft<br>○ Pending approval<br>○ Approved<br>○ Submitted<br>○ Closed<br>○ Under-review<br>○ Canceled |
| Sales cycle type | Reference | Choice of sales cycle type field in the Opportunity (sn_opty_mgmt_core_opportunity) table |
| Estimated deal size | Currency | Estimated size of the deal |
| Estimated close date | Date/Time | Estimated end date of the deal |
| Assignment group | Reference | Reference to the user group |
| Assigned to | Reference | Reference to the user (sys_user) that the deal is assigned to.<br>If the deal registration is a B2B deal, only B2B agents are visible in this list. If the deal registration is a B2C deal, only B2C agents are visible in this list. |
| Consumer | Reference | Reference to consumer (csm_consumer) |

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| Field | Type | Description |
|---|---|---|
| Account name | String | Name of the account |
| First name | String | First name of the contact or consumer |
| Last name | String | Last name of the contact or consumer |
| Email | String | Email of the contact or consumer |
| Opportunity | Reference | Reference to the Opportunity (sn_oppty_mgmt_core_opportunity) |
| Closure code | Choice | State of the closure code.<br>○ Rejected<br>○ Duplicate<br>○ Converted<br>○ Incomplete |
| Active | Boolean | Determines whether the deal registration is active or not |
| Comments | Journal input | Comments and important information related to the deal, visible to channel partner and enterprise personas |
| Work notes | Journal input | Comments and important information related to the deal, only visible to enterprise personas |
| Domain | Domain id | Domain to which the deal registration belongs |

4. On the **Deal registration type** screen, select the preferred deal registration type.
   The deal registration types are listed based on the channel partner and partner programs selected in the Partner Program deal type relationship (sn_prm_dr_pp_deal_type) table.
5. On the **Customer information** screen, select an existing account or create an account or consumer.
   To create an account, select **Can't find account details?** and fill in the fields. To learn more about the fields, see Deal registration table fields.
6. On the **Product offerings** screen, select the list of product offerings that the customer is interested in.
   This is an optional step and can be skipped.
7. On the **Additional information** screen, provide a description of the deal registration.
   You can also add attachments to support additional information.
8. Select **Review** to review all the details and select **Submit**.
   As an agent you can update the status of the field on the *CRM Workspace*. To learn more, see Update deal registration record.

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**Result**
A deal registration is created with an associated account, a channel partner, and a partner program. The state of the deal registration is **Submitted**. Multiple deal lines with an associated product offering are also created. You can also view the list of all deal registrations, along with the deals in **Draft** and **Approved** states on the Partner portal home page.

**Note:** Select **Actions** from the details page to edit or delete the deal registration. You can only delete deal registrations that are in the **Draft** state.

**Related topics**

Configure Partner Relationship Management

Partner Relationship Management

## Register a deal using agentic AI

The **Deal Registration Agent** assists users in submitting deal registrations and perform specific actions, such as updating fields, managing products, and retrieving deal details.

## Deal Registration Agent overview

The Deal Registration AI agent is an assistant that enables you to manage the creation, update, and submission of deal registrations, including management of their product line items. Invoke this agent to create, draft, update, or submit a deal registration, or to add, remove, or verify products on an existing one. It resolves user-named products against the product catalog and adds them as deal registration line items. Using natural language, the AI agent gathers deal information, validates records, and automates submission through an integrated approval process. You can use the Deal Registration AI agent to do the following:

- Create, draft, submit a new deal registration (for a business account or an individual consumer)
- Add products to a deal registration
- Remove a product from a deal registration
- Verify whether a specific product is already on a deal registration
- Update a field on a deal registration
- Show or retrieve deal registration details

To modify the Deal Registration Agent, duplicate it and adjust the settings for your requirements. You can activate the AI agent by making triggers active and setting the display settings to include the ServiceNow Otto panel.

For information about how to create and register a deal, see Deal Registration.

**Note:** When you modify an AI agent or tool, verify that you update all instructions.

## Prerequisites for using the Deal Registration Agent

Before using the Deal Registration AI agent, complete the following prerequisites:

- Confirm that the ServiceNow Otto panel is turned on. For more information, see ServiceNow Otto panel is turned on. For more information, see AI capabilities in Sales CRM.
- Duplicate the AI agent and activate the triggers.

For information on installing AI plugins, see Install plugins for ServiceNow Otto.

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

To run the AI agents autonomously, duplicate the agentic workflow and then complete 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 is not necessary.

There might be AI agents installed on your instance that aren't used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

## Deal Registration Workflow

To access the Deal Registration workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **Workflows**.
2. Review the information in the Define the specialty screen, make any necessary updates, and then select **Save and Continue**.
3. In the Add trigger screen, activate the triggers for your requirements or create your own triggers, and then select **Save and Continue**.
4. Select **Deal Registration**.

The AI agent executes the testing in AI Agent Studio for the workflow.

In the ServiceNow Otto panel, the agent receives a notification when the interaction is generated. The agent can then follow the on-screen instructions and complete the task. For more information, see Request the generative AI capabilities in Customer Service Management by using the ServiceNow Otto panel.

## Deal Registration AI agent

The following table lists the Deal Registration AI agents.

**AI agents and their roles in the Deal Registration workflow**

| AI agent | AI agent role |
|---|---|
| Deal Registration Agent | Helps to create, draft, update, or submit a deal registration, or to add, remove, or verify products on an existing one. |

**Note:** In the Define availability screen for the AI agent, confirm that the **Status** field is enabled to activate the AI agent.

## Roles that can access Deal Registration AI agent

The following roles can access the Deal Registration AI agent:

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**Roles and access points for the Deal Registration AI agent**

| Role | User Type | Access Point |
|---|---|---|
| Enterprise Deal Registration Relationship Manager | Internal | Now Assist Panel |
| Enterprise Deal Registration Relationship Contributor | Internal | Platform workspace |
| Enterprise B2B Deal Registration Agent | Internal | Platform workspace |
| Enterprise B2C Deal Registration Agent | Internal | Platform workspace |
| Enterprise Deal Registration Agent | Internal | Platform workspace |
| Partner B2B Deal Registration Initiator | External | Partner portal |
| Partner B2C Deal Registration Initiator | External | Partner portal |
| Partner B2B Sales Representative | External | Partner portal |
| Partner B2C Sales Representative | External | Partner portal |

## Deal registration with the Now Assist panel

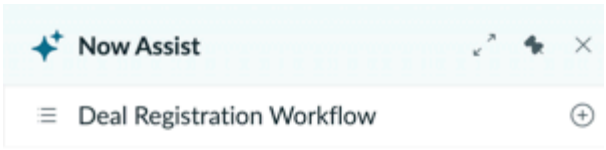
To register a deal, use the Now Assist panel to start the Deal Registration workflow.

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Launch the ServiceNow Otto chat panel by selecting the ServiceNow Otto icon .
3. Type your query in natural language, for example, `Create a deal`.

   The invoice dispute assist agentic workflow invokes the invoice dispute support assistant AI agent.

   The Deal Registration workflow invokes the Deal Registration agent.

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create a new deal registration

Processing new information

## New Deal Registration

To continue, please provide only these required details:

1. Channel Partner
2. Either an Account or a Consumer for the deal
3. Submitted By — the name of the Channel Partner staff member on whose behalf you are submitting this deal

Please provide the Channel Partner.

Show less

6 minutes ago

Acme technologies Boston, Test account, Arian Chen

Processing new information

The submission by user Arian Chen could not be found. Please verify the details and try again.

## New Deal Registration

The Submitted By value could not be validated: Arian Chen was not found.

Please provide the correct Submitted By name for the Channel Partner staff member on whose behalf you are submitting this deal.

Show less

Ariana Chen

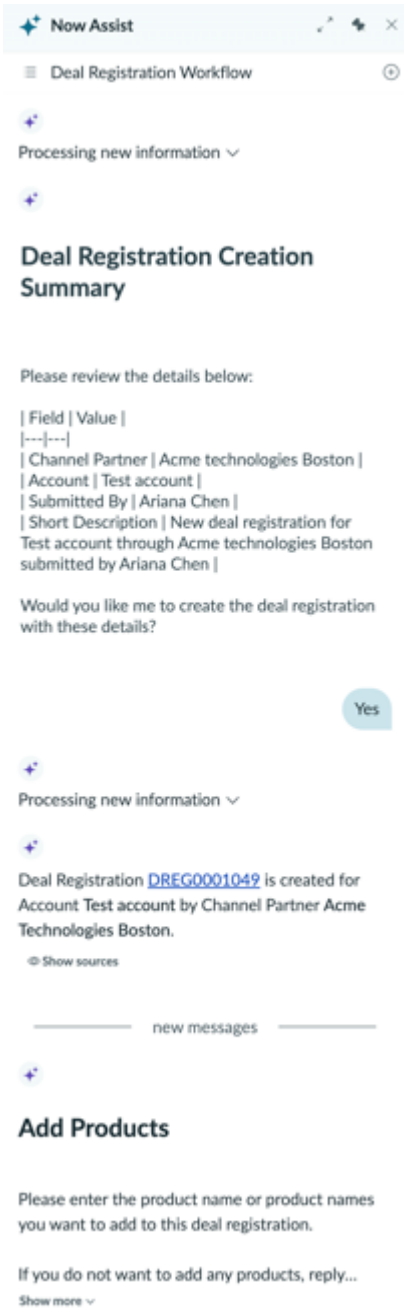
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4. When prompted, provide the required details, such as the channel partner name and account.

   After you provide the required details, the agent validates the information.

5. Review the confirmed details. If any information is incorrect, update it when the agent prompts you.

   The deal is created, and the deal registration number is displayed.




**Related topics**

Using ServiceNow Otto for Customer Service Management (CSM)

## Create a Quote via Self-Service for Channel Partners

Use the Quote Self-Service plugin (com.sn_quote_self_service) to create and submit a configured quote directly from the Partner portal.

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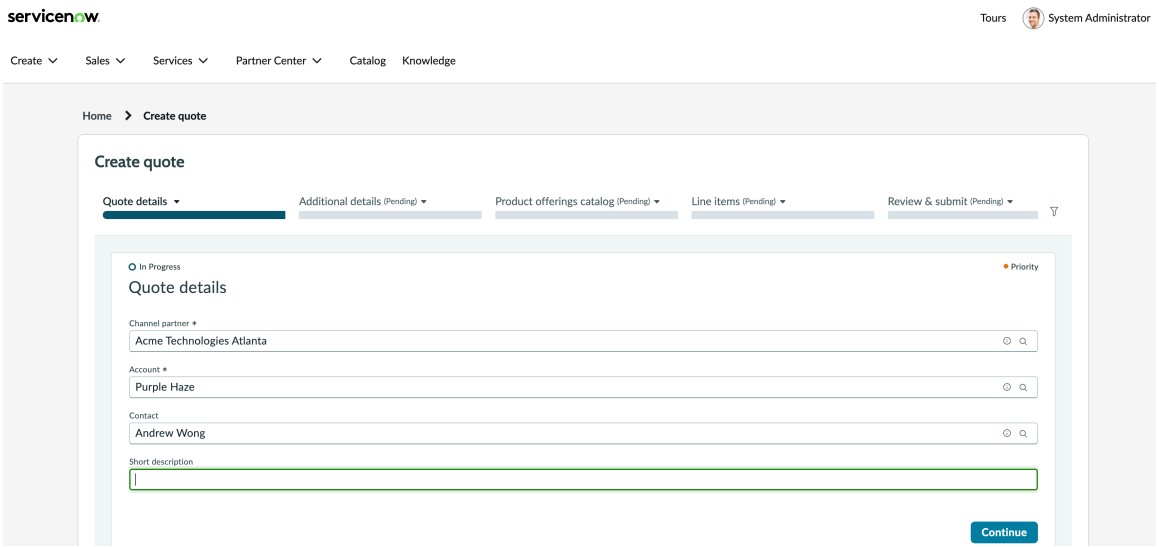
## Before you begin

Role required: sn_prm_qm.quote_partner_ui along with one of the following roles:

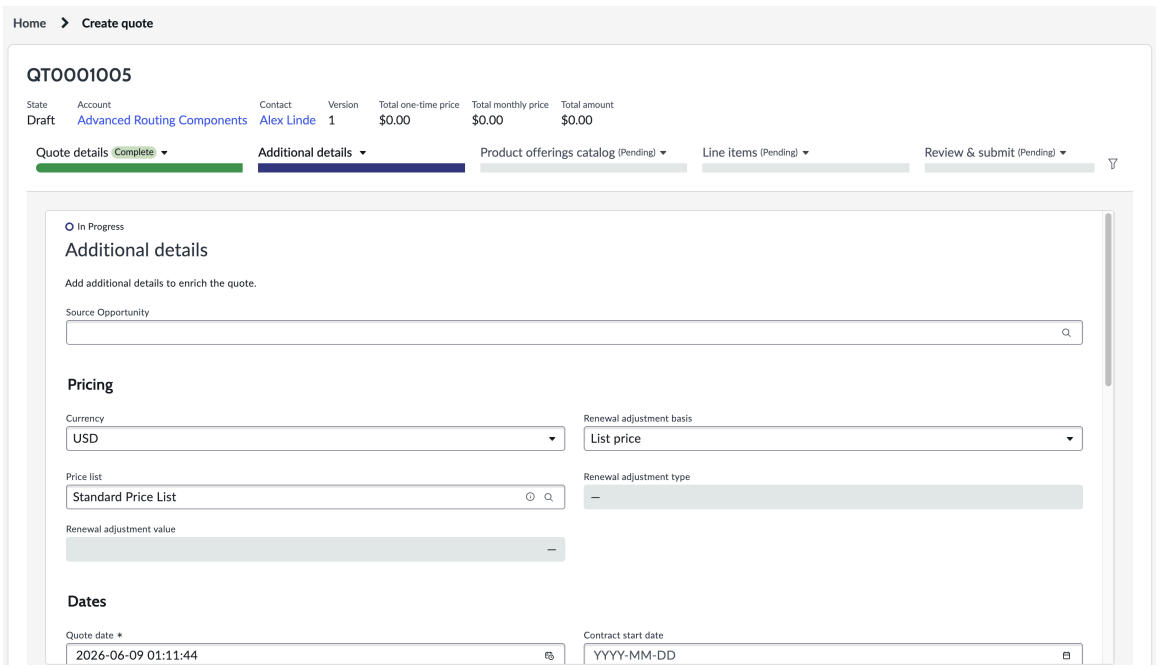
- sn_prm.external_partner_manager
- sn_prm.partner_sales_manager
- sn_prm_sales.partner_b2b_sales_rep
- sn_prm_sales.partner_b2c_sales_rep

## Procedure

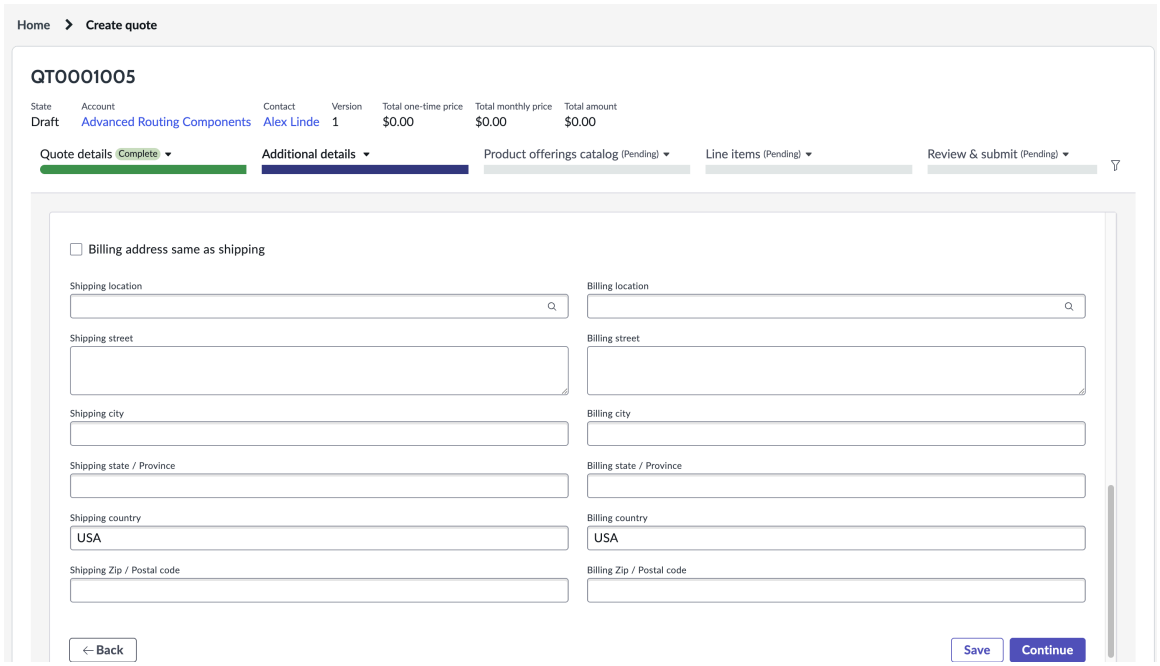
1. Navigate to the Partner portal.
2. From the portal header, select **Create**, then select **Create Quote** from the drop-down, or select **Catalog > All Services > Create Quote**.
3. On the quote form, review the following tabs and fill in the required fields:
   - **Quote details** tab: Enter customer and quote-level information.



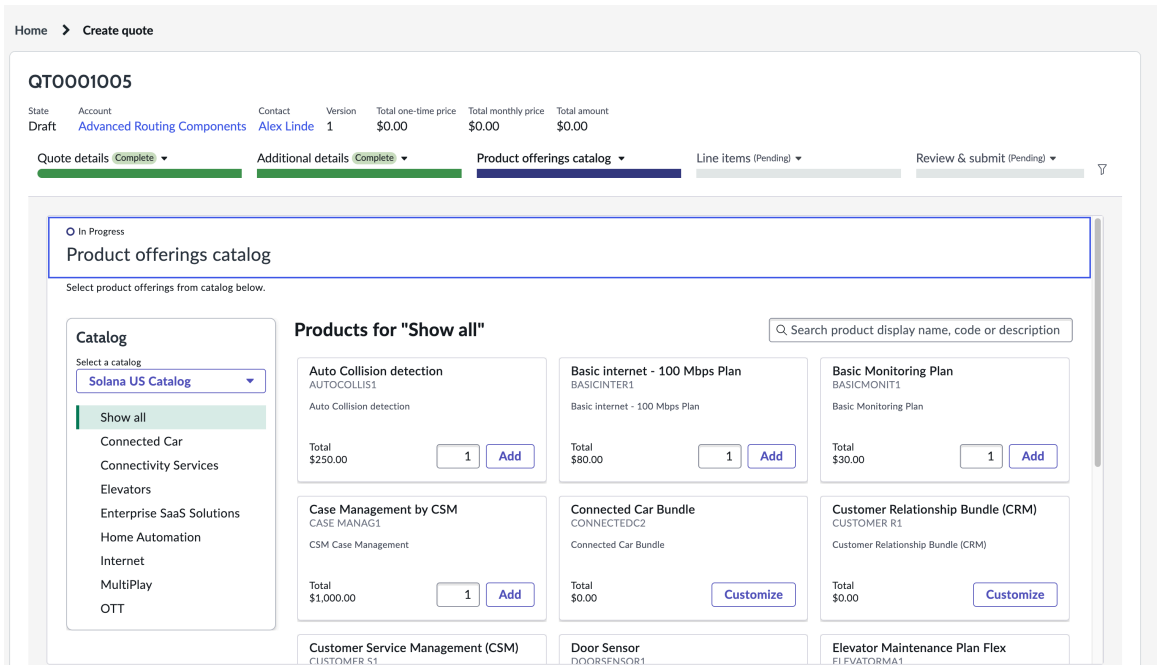

   - **Additional details** tab: Specify billing and shipping addresses.




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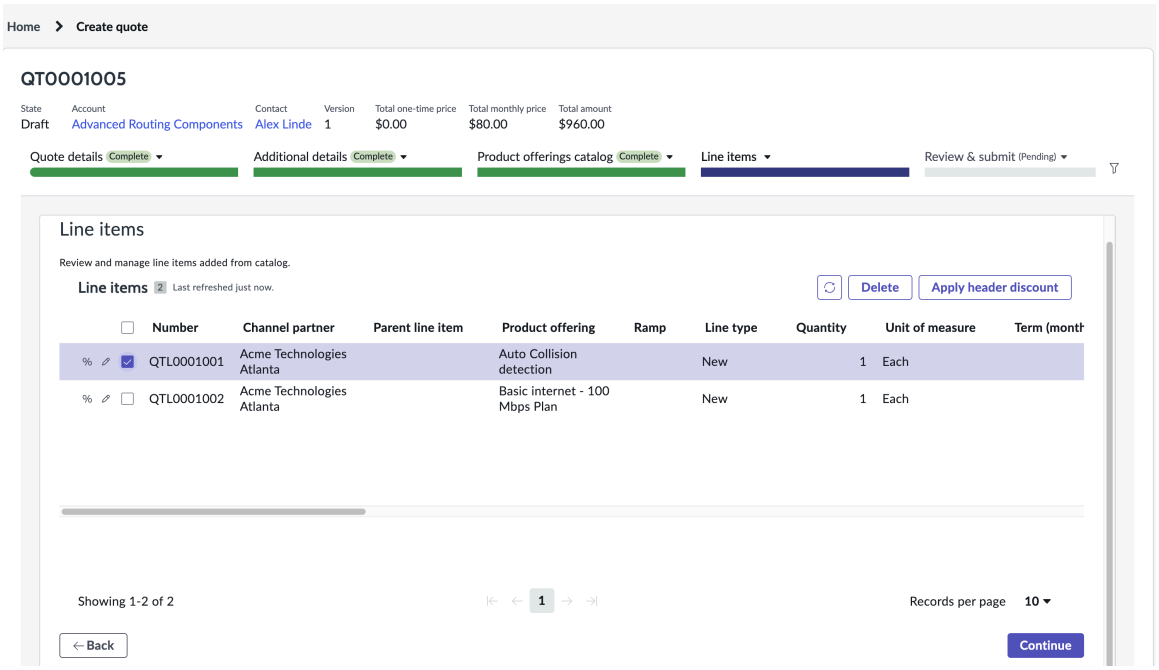



- **Product offerings catalog** tab: Browse and select products to include in the quote.

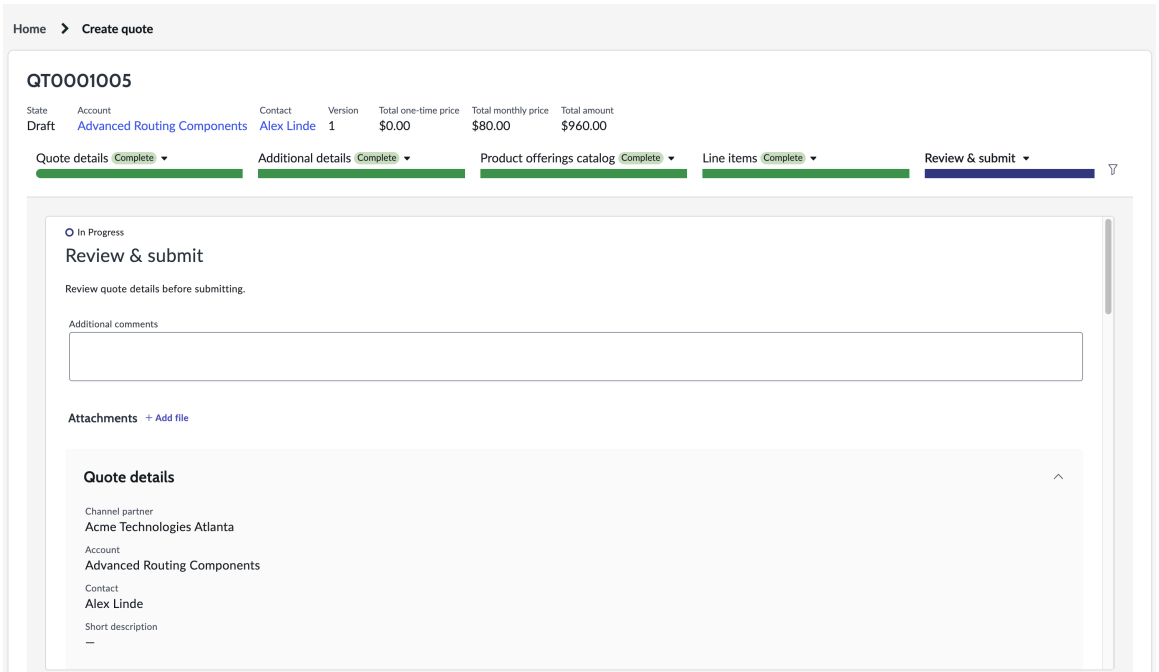



- **Line items** tab: Confirm selected products and quantities.

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- **Review and submit** tab: Review the complete quote details before submission.

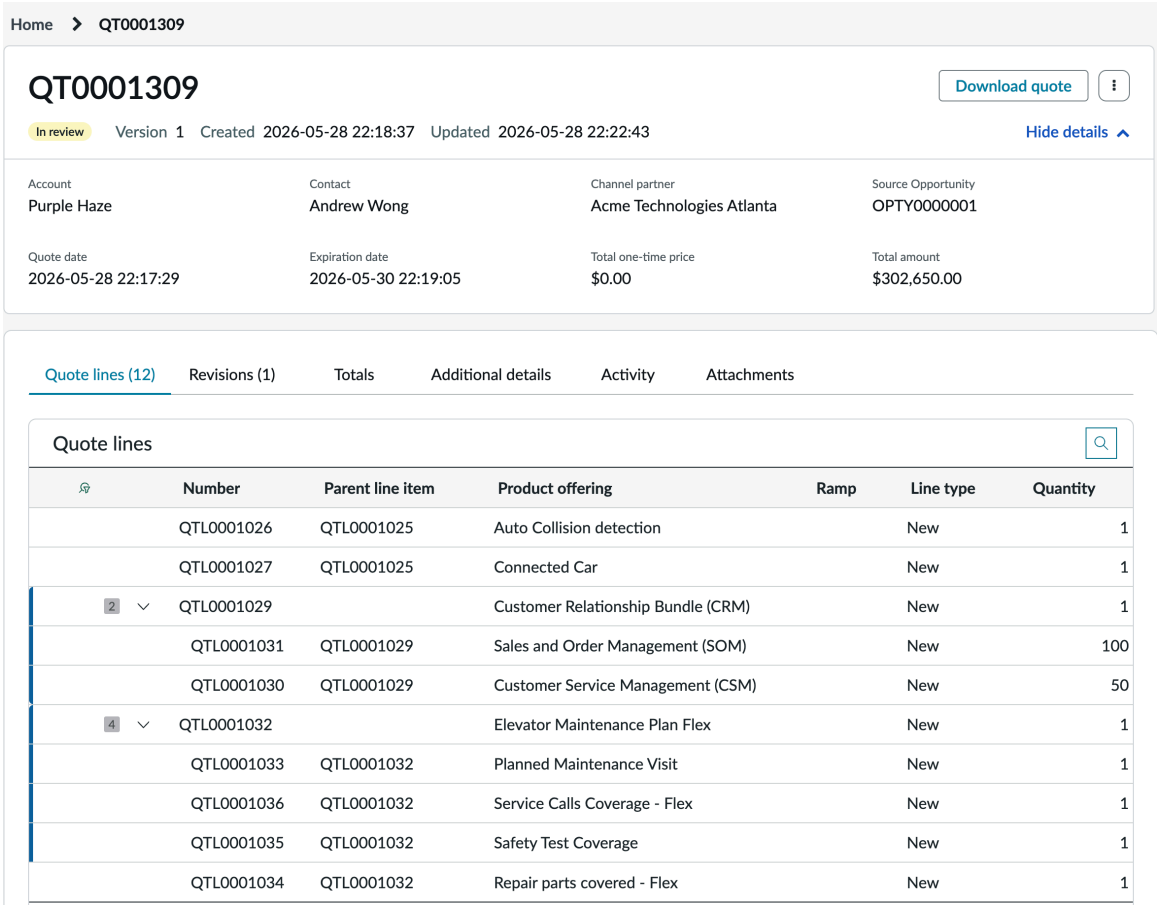



For field descriptions and additional information about the quote creation form, see Quote creation via Self-Service fields for Channel Partners.

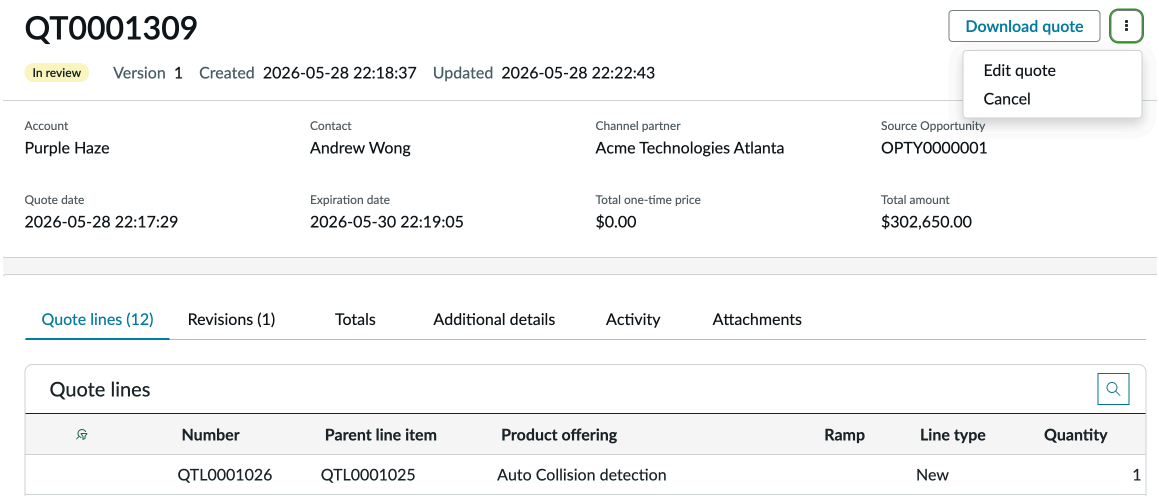
4. On the **Review and Submit** tab, verify the quote details, then select **Review and Submit**.

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The system creates the quote with your associated account or consumer information, channel partner details, and selected line items. A confirmation screen displays.




5. **Download the quote**, or select **Edit quote** to reopen it for further editing.




6. After creating a quote, use the overflow menu (#) to perform any of the following actions:
   - Edit a quote
   - Submit a quote for review
   - Download a quote
   - Create a revision of a quote

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- Cancel a quote
- Delete a quote

### Result

You can view the list of all quotes, along with quotes in **Draft** and **Submitted** states, on the Partner portal home page.

The Partner portal displays quotes in the following states: **Draft**, **In review**, **Completed**, and **Accepted**.

### Related topics

Quote creation via Self-Service

Using Partner Relationship Management

## View opportunity analytics on Partner portal

View detailed analytics related to the opportunities accessible to you on the Partner portal.

### Before you begin

Role required: sn_prm_opptym.oppty.parnter_ui

### Procedure

1. Navigate to the Partner portal.
2. From the portal header, select **Sales** > **Opportunities**.
3. In the **Opportunity analytics** you can view an overview of all the opportunities by stage and revenue.

**Opportunity analytics**

| Analytics | Description |
|---|---|
| Estimated total revenue | The total value of all active opportunities. |
| Opportunities by stage | Breakdown of opportunities across sales stages and the number of deals at each stage. |
| Opportunities past estimated closed date | The number of opportunities that are past the estimated closed date. |
| Active opportunities | Number of active opportunities that are not yet closed or lost. |
| Stalled opportunities | Opportunities with no significant activity or progress for a defined period, indicating potential risk. |
| Opportunities created from deal registrations | Number of opportunities that are converted from a deal registration. |
| 5 highest-value active opportunities | The top 5 opportunities filtered by highest amount value. |

To learn more about the fields on the Opportunity list, see Add and view the details of an opportunity.

4. View all the opportunities that the user has access to from the **All opportunities** tab.

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### Related topics

- Configure Partner Relationship Management
- Partner Relationship Management

## View quote analytics on Partner portal

View detailed analytics related to all the quotes associated to a channel partner on the Partner portal.

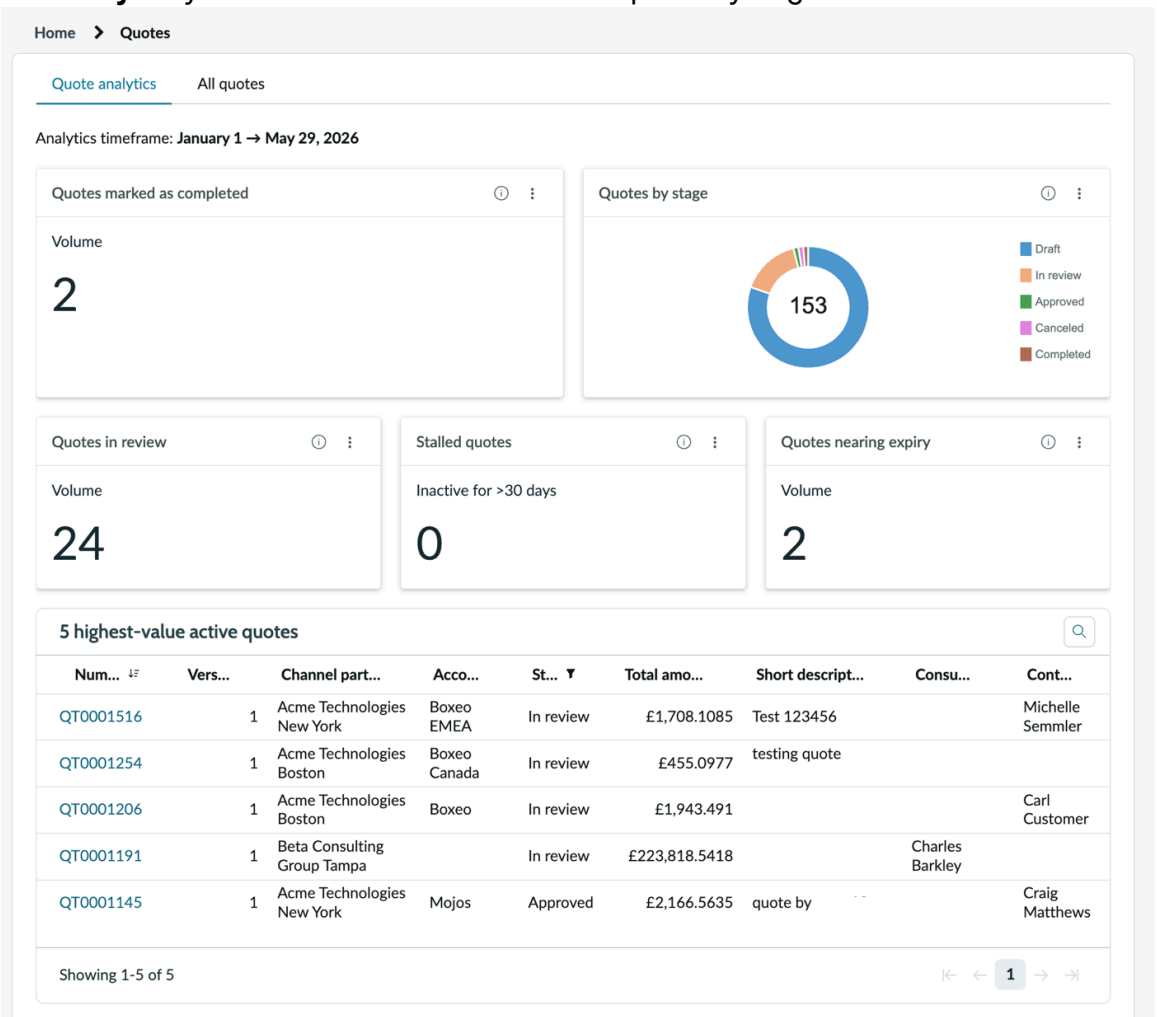
### Before you begin

Role required: sn_prm_qm.quote_partner_ui along with and one of the following roles:

- sn_prm.external_partner_manager
- sn_prm.partner_sales_manager
- sn_prm_sales.partner_b2b_sales_rep
- sn_prm_sales.partner_b2c_sales_rep

### Procedure

1. Navigate to the Partner portal.
2. From the portal header, select **Sales** > **Quotes**.
3. In the **Quote Analytics** you can view an overview of all the quotes by stage and revenue.




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**Quote Analytics**

| Analytics | Description |
|---|---|
| Quotes marked as completed | Total volume of quotes that have reached a completed state within the selected timeframe. |
| Quotes by stage | Distribution of active quotes across their current stages.<br>○ Draft<br>○ In review<br>○ Completed<br>○ Accepted |
| Quotes in review | Displays the total volume of quotes currently in the **In review** stage, awaiting enterprise partner action or approval. |
| Stalled quotes | Quotes with no significant activity or progress for a defined period, indicating potential risk. |
| Quotes nearing expiry | Displays the total volume of quotes approaching their expiration date. |
| 5 highest-value active quotes | The top 5 quotes filtered by highest amount value. |

4. You can also view all the active quotes from highest to lowest in quote amount. To learn more about the fields on the Quotes list, see Quote details forms.
5. View all the quotes that the user has access to from the **All Quotes** tab.

## Using lead-to-cash foundation applications

Learn how to use lead-to-cash foundation applications.

**Related topics**

Configuring the lead-to-cash foundation applications

Lead-to-cash foundation

### Using product catalogs

The product catalog provides a visual display of the available product offerings that can be added to a Sales Customer Relationship Management transaction, such as an opportunity, quote, or order. Use the catalog interface to add simple products and complex products that can be further customized.

Agents use the Catalog tab (related list) for a transaction in the CRM Workspace to open the product catalog. Customers engaged in self-service transactions such as placing orders, use the product catalog in the Business Portal.

**Note:** When you start a lead, the Catalog tab displays only simple products that can be added and do not require further customization.

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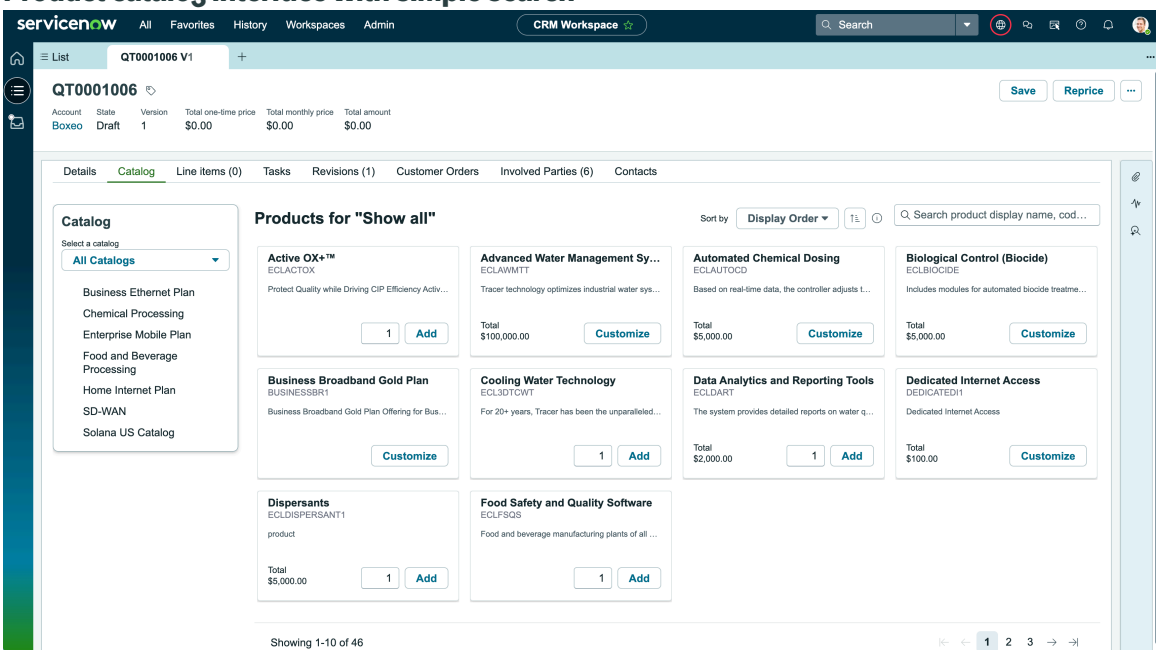
In test or pre-production environments, you can view and configure product offerings that are in the In Test and Staged states, if your admin has enabled the extended life cycle states. For more information, see Validating product offerings before publishing.

Starting with the Product Catalog Management Core v17.0.0 release, the product catalog interface supports semantic search queries powered by AI Search, in addition to keyword searches.

## Product catalog interface with simple search

The product catalog interface helps agents and customers find product offerings by navigating product catalogs and categories. Or, they can use the search bar to match by product name, code, or description.

**Product catalog interface with simple search**




The catalog view has the following features for selecting products:

- **Catalog navigation tree**: Catalog and a list of its categories used to organize product offerings. Selecting a category filters the display and shows only the product tiles for that category.
- **Search bar**: Option for finding product offerings using simple searches by product name, code, or description. The search feature displays the product tiles that match the product name, code, or search string (description).
- **Product tiles**: Cards that depict each product, which has a brief description, optional image, and an option to add or customize the product offer. The **Add** option displays when the product is a simple (fixed) product offering. The **Customize** option displays for configurable product offerings that have different options and attributes that can be selected. Selecting **Customize** opens the product configurator for configuring the product offering.

  When a product offering is a derived product, the product tile displays a message indicating that the product is derived.

- **Sort by**: Organize how search results are returned. Select *Display Order* to sort by the display order that's configured for catalogs, categories, or product offerings, or select an option such as name to sort alphabetically.

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## Product catalog interface with AI Search

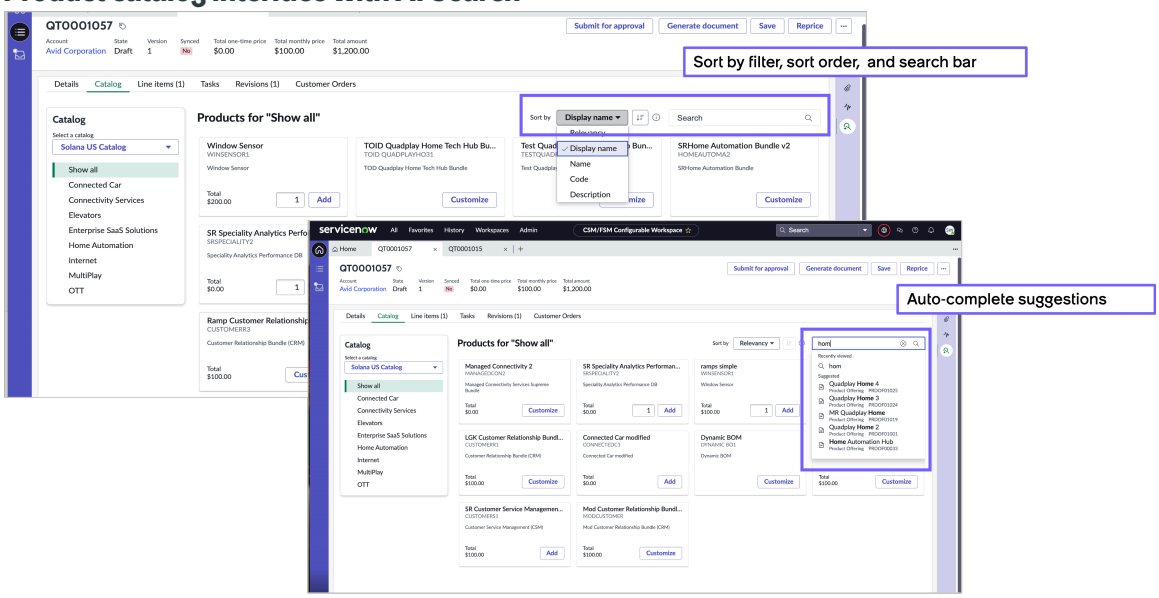
AI Search in the product catalog interface helps agents and customers find relevant product offerings by using semantic search queries, in addition to keyword searches.

Entering a query term or phrase in the search bar, for example `sedan`, finds all catalog items that contain that term as a characteristic, any parent products containing child products with this characteristic, and related products that have semantic similarity. In AI Search, semantic similarity means that the context of the query, such as the user, the catalog selected, and the terms entered, are evaluated to return the most useful catalog items first.

AI Search provides other features to enhance the search process:

- **Search query language options**: Use Boolean operators, wildcards, and multi-term and quoted phrases in queries to broaden or narrow search results.
- **Auto-complete suggestions:** When you start entering text in the search bar, AI Search displays auto-complete suggestions to help you get directly to the results you need. Suggestions may include recent search queries, recently viewed search results, or search queries or results that match the terms that you're typing into the search bar.
- **Auto-corrections of misspelled or incomplete words**: If your queries contain misspelled words or are incomplete, AI Search automatically replaces those search query terms with correct spellings, based on the search sources (product offerings and service specifications). Typo corrections are shown before search results.
- *Relevancy* sort option: Sort search results by relevancy. This option appears only when AI Search is turned on.

### Product catalog interface with AI Search




For more information on search queries and the search query language that you can use to find catalog items, see Use AI Search in product catalogs.

**Note:** Check your entitlements to determine if you have access to this feature.

### Related topics

Configuring the lead-to-cash foundation applications

Lead-to-cash foundation

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### Use AI Search in product catalogs

As an agent or customer, use AI Search queries in the product catalog to find relevant product offerings or service specifications. For example, you can search by product offering characteristics or other attributes, when adding products in Sales Customer Relationship Management transactions.

## Before you begin

Role required: sales agent, order agent, customer

## About this task

With AI Search, you can use semantic queries to find relevant product offerings or service specifications for a transaction. Your queries can contain terms or phrases to find catalog items. AI Search considers the context for your search, such as the user intent, to return appropriate results. As you enter your query, AI Search provides various features to make your search more efficient.

- Auto-complete suggestions: When you start entering text in the search bar, AI Search displays auto-complete suggestions to help you get directly to the results you need. Suggestions might include recent search queries, recently viewed search results, or queries that match the terms you're entering in the search bar. Select one of the suggestions to display the product offering.
- Auto-correction: If your queries are incomplete or misspelled, AI Search automatically replaces misspelled search query terms with spellings found in indexed content. Typo corrections are displayed above search results.
- Search result order: You can use **Sort by filter** to organize your results by Relevancy, Display name, Code, or Description.

## Procedure

1. Access the product catalog through a Sales Customer Relationship Management transaction, such as a quote created in the CRM Workspace or an order created in the Business Portal.
2. Select the **Catalog** tab and choose the catalog.
3. In the sort filter, select the order for your search results:
   - **Relevancy**: Lists the most relevant records first, based on rank and order. This option is selected by default.
   - **Display name**: Lists results by the display names for each product offering.
   - **Code**: Lists products by a code that is assigned to each offering, either system-created or set by the product catalog admin when the product offering is created.
   - **Description**: Lists results by the description for each product offering.

   You can use the ascending or descending filter to further order the results by Display name, Code, or Description.
4. Enter a search term in the search bar, then press **Return** to generate the search results.
   As you're entering a query, auto-complete suggestions are displayed if your query matches any indexed terms. You can select one of the suggestions to display the product offering.
   The following table lists examples of terms, phrases, and operators that you can enter in your queries.

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**Search query language**

| Search query | Description |
|---|---|
| Search by query term | Specify terms and quoted phrases in the search query to find products that contain the same terms or phrases.<br>○ Single-term search: Enter a specific term to find all catalog items that contain the term. For example, `sedan` returns any products that contain this characteristic, parent products containing child products with this characteristic, and related products that have semantic similarity to this search term or results.<br>○ Multi-term search: Enter multiple words in a phrase to find catalog items that contain any of the terms in a phrase. For example, `connected car` returns catalog items that contain the terms `connected` and `car`.<br>○ Quoted phrase search: Use double quotes to return catalog items for a specific phrase, such as `"connected car"`.<br>**Note:** AI Search ignores letter case for search query terms and phrases. |
| Search using Boolean operators | Separate query terms and phrases with Boolean operators to override the default matching logic for the search query:<br>○ OR: Enter this Boolean disjunction operator to find products that contain any of the terms or phrases separated by OR.<br>○ `-` (hyphen): Enter this Boolean negation operator to exclude products containing the term or phrase that immediately follows the hyphen. |
| Search using wildcards | Use wildcard operators to find records that contain indexed terms matching a wildcard pattern:<br>○ `%`: Enter this single-character wildcard operator in a search query term to match any one character in an indexed term. For example, `fib%r` finds all products with the word `fiber`.<br>○ `*`: Enter this string wildcard operator in a search query term to match any string of zero or more characters in an indexed term.<br>○ `***`: Enter this universal wildcard operator to find all indexed terms.<br>**Note:** The `%` and `*` operators must follow at least three non-wildcard characters to get appropriate results. Otherwise the search returns only the catalog items that are an exact match. |

5. Do one of the following:
   - If the search results returned a product that you are adding, select the product offering so that it can be added as a line item to the transaction. If the product that you select is customizable, the configurator opens so that you can configure the offering.
   - If you're continuing with another query, select **Clear** to remove the current search and sort option, then enter a new query in the search bar. The sort option is reset to Relevancy, which is the default value.

### Related topics

AI Search query language

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# Using Business Portal for self-service workflows in Sales CRM

Business-to-business (B2B) customers can use the Business Portal to browse product catalogs, create orders, create and view order cases, manage invoice and invoice cases, and request for quotes.

**Related topics**

- Configuring the Business Portal
- Customer self-service for Sales Customer Relationship Management

## Access the Business Portal

Customers can access the Business Portal from their instance to browse products and create orders.

### Before you begin

Role required: sn_customerservice.customer

### Procedure

1. Go to your instance and select the URL.
2. Edit the instance URL and append **/business_portal** to the end after the com.
   The Business Portals opens.

**Related topics**

- Configuring the Business Portal
- Customer self-service for Sales Customer Relationship Management

## Self-service order management using Business Portal

The Business Portal uses the product catalog to enable B2B customers to browse and configure products. Customers can build orders and submit them for fulfillment, and also view order history.

### Create orders from the Business Portal

Browse products in a product catalog and create orders in Order Management.

### Before you begin

Role required: sn_customerservice.customer

### About this task

The following illustration describes the process to create orders from the Business Portal:

**Self-service order checkout process**

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### Procedure

1. Log in to the Business Portal.
2. Browse the product catalog, select products, and add them to the cart.

   a. Select **Product Catalog**.
   If you are a contact of an account with an active sales agreement, only the products listed in the sales agreement are displayed.

   b. Browse the products in the catalog.

   c. If a product you want to order has specific configurations, select **Customize** and select the product options.

   d. Enter the quantity of the item you want to order in the **Quantity** field.

   e. Select **Add** to add products to the cart.

3. Review the cart contents.

   a. Select the Cart icon .
   The information listed in the following table is displayed.

   **My cart fields**

| Field | Description |
|---|---|
| Number | Unique cart ID. |
| State | State of the cart. |
| Created | Cart creation timestamp. |
| Qty | Product quantity. |
| Unit list price | Price of a single item. |
| Cumulative monthly price | Total cost of a product and its child items, if any, over a month. |
| Cumulative one time price | One-time price of the product and its child items, if any. |

   b. If you need to modify the quantity or customization for a product in the cart, select the Edit icon  and modify the details.

   c. If you want to delete an item, select the Delete icon .

4. **Optional:** Add instructions for your order in the **Instructions** field.
5. **Optional:** Save a copy of your cart in PDF format by selecting **Download**.
   The default filename contains the cart ID. The PDF content and format is based on the Sales Cart Demo Template document template.
6. Check out.

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a. Select **Proceed to Checkout**.

b. On the Terms and conditions page, select the confirmation checkbox after reading the terms and conditions of the seller and select **Continue**.
The terms and conditions are fetched from the Sales Cart Terms and Conditions Default document template.

c. On the Shipping details page, review the shipping and billing addresses and modify them if necessary by selecting the Edit icon .

**Note:** The address that you specify while checking out is only used for that order. It doesn't change your stored address in the seller's system.

d. Select **Continue**.

e. Verify the details on the Review page and select **Submit**.

### Result
The order is created and you're redirected to the Order details page. You can view your account details, order amount, order lines, and so on.

### Related topics

View an order on the Business Portal

Modify terms and conditions for the sales cart

### View an order on the Business Portal

Customers can view their orders using the Business Portal.

### Before you begin
Role required: sn_customerservice.customer

### Procedure

1. Log in to the Business Portal.
2. Select **Requests** > **View submitted request** > **View orders**.
The View order window has the following controls.
   - To search for orders - use the search option.
   - To sort, and filter orders - use the filter.
   - To export as a PDF, Excel, or CSV - use the Action icon .
   - To open an order - select the order number.
   - To navigate back to the main window - use the breadcrumbs.

### Related topics

Create orders from the Business Portal

## Managing request for quotes (RFQs) using Business Portal

Request quotes for products or services you're interested in via the Business Portal. Specify budget and pricing preferences, and submit quote requests without engaging a sales agent.

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Simplify the RFQ life cycle from submission and internal review to quote generation and customer acceptance, ensuring faster turnaround times and improved transparency.

Customers can browse the product catalog, configure and add products to the sales cart, and submit a request for quote. The agents review the RFQs in the CRM Workspace, approve, and convert them into quotes. You can then view quotes from the Business Portal.

### Submit a request for quote from the Business Portal

Browse products and submit a request for quote (RFQ) based on your budget and pricing preferences for those products directly through the Business Portal, eliminating the need to engage a sales agent.

#### Before you begin

Role required: sn_customerservice.customer

#### Procedure

1. Log in to the Business Portal.
2. Browse the product catalog, select products, and add them to the cart.
   a. Select **Product Catalog**.
   If you are a contact of an account with an active sales agreement, only the products listed in the sales agreement are displayed.
   b. Browse the products in the catalog.
   c. If a product you want to order has specific configurations, select **Customize** and select the product options.
   d. In the **Quantity** field, enter the quantity of the item you want to order.
   e. Select **Add** to add products to the cart.
3. Review the cart contents.
   a. Select the Cart icon .
   The information listed in the following table is displayed.

**My cart fields**

| Field | Description |
|---|---|
| Number | Unique cart ID. |
| State | State of the cart. For more information, see Request for quote (RFQ) states. |
| Created | Cart creation timestamp. |
| Qty | Product quantity. |
| Unit list price | Price of a single unit of product or service before adjustments. |
| Cumulative monthly price | Total cost of a product and its child items, if any, over a month. |

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| Field | Description |
|---|---|
| Cumulative one time price | One-time price of the product and its child items, if any. |

**b.** If you need to modify the quantity or customization for a product in the cart, select the Edit icon and modify the details.

**c.** If you want to delete an item, select the Delete icon.

**4.** Create the Request for quote.

**a.** Select **Request for quote**.
A request for quote record is created in the Draft state starting with the prefix RFQ.

**b.** On the Details form, fill in the fields.

**Create request for quote - Details form**

| Field | Description |
|---|---|
| Quote required by | Date and time by which you require the quote from the seller. |
| Overall budget | Allocated spend capacity for purchasing the selected products in US dollars (USD). |
| Short description | Note to the seller about your quote request. |

**c.** Select **Continue**.

**d.** On the Selected products page, review the products that you've added to the quote request.

**e. Optional:** Specify a cumulative target price to propose the total amount you'd like to pay for each top-level product.

**i.** Select the Edit icon.

**ii.** In the **Cumulative target price** field, enter a value.

**iii.** Select **Update**.

**5.** Verify the details on the Review page.

**6.** Select **Submit**.

### Result

The state of the quote request changes to Submitted.

The RFQ is submitted for further processing and you're redirected to the Request for quotes details page that displays the list of your submitted quote requests.

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### What to do next

View the quote details on the Business Portal after the sales agent reviews and generates a quote for your request. For more information, see View requests for quotes (RFQs) on the Business Portal.

### Related topics

View quotes from the Business Portal

## View requests for quotes (RFQs) on the Business Portal

Access, review, and track all your submitted quote requests directly from the Business Portal without having to contact a sales agent.

### Before you begin

Role required: sn_customerservice.customer

### Procedure

1. Log in to the Business Portal.
2. Navigate to **Requests** > **View submitted requests** > **View request for quotes**.
3. Select an RFQ record to view its details.
4. View the pricing information, product offering, quantity ordered, and other details by selecting the **Request for quote lines** tab.
5. View the order instructions, billing, and shipping details by selecting the **Other information** tab.
6. Check the status of your quote request in the **State** field in the RFQ header section. For more information, see Request for quote (RFQ) states.
7. If the agent has converted the RFQ to a quote, a **View quote** button is available for you to view the quote details.

### Related topics

View quotes from the Business Portal

## View quotes from the Business Portal

View quotes generated for your account directly from the Business Portal. The list includes quotes generated from requests for quotes (RFQs) submitted by you and quotes created offline by a sales agent via the CRM Workspace.

### Before you begin

Role required: sn_customerservice.customer

### Procedure

1. Log in to the Business Portal.
2. Navigate to **Requests** > **View submitted requests** > **View quotes**.
   The following table provides the details displayed on the list view.

#### Quotes list view on the Business Portal

| Column | Description |
|---|---|
| Number | Unique, system-generated quote ID starting with the prefix QT. |
| Short description | Brief description about your quote request. |

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| Column | Description |
|---|---|
| Contact | Primary contact person for the account. |
| Quote date | Date on which the quote was created. |
| Expiration date | Date on which the validity of the quote ends. |
| Term (months) | Duration of the contract or subscription expressed in months. |
| State | Status of the quote. For more information, see Request for quote (RFQ) states. |
| Contract start date | Date when the contract becomes effective. |
| Contract end date | Date when the contract ends. |
| Total one-time price | Aggregate of all one-time charges across quote lines. |
| Total monthly price | Sum of all monthly recurring charges for the quote. |
| Total annual price | Sum of all annual recurring charges for the quote. |
| Total amount | Overall deal value, including all one-time and recurring charges. |

3. Select a quote record number to view its details.

**Related topics**

Configuring the Business Portal

Customer self-service for Sales Customer Relationship Management

### Create quotes from request for quotes (RFQs)

Create quotes from RFQ requests submitted by your customers via the Business Portal so you can share the quote with them and expedite the quote-to-order process.

## Before you begin

Role required: sn_sales_common.sales_agent

## About this task

To create a quote from an RFQ, you must first assign an RFQ record to an agent and change its state to In review.

## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon .
3. Navigate to **Request for Quotes** > **All**.
4. Select the RFQ record.
5. Assign the RFQ to an agent.
   a. Select the Search for Record icon of the **Assignment group** field and select an assignment group.
   b. Select the Search for Record icon of the **Assign to** field and select the agent's name.

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6. In the **Status** field, select **In review** from the drop-down menu.
7. Select **Save**.
   The **Convert to quote** button becomes available.
8. Review the RFQ details such as address, pricing information, notes, and RFQ line item details.
9. After you've verified the information, select **Convert to quote** to generate a quote.
   A quote record is created in the Draft state starting with the prefix QT. A success message containing a link to the quote ID is displayed. Your customers can view the quote from the RFQ record via the Business Portal.
10. **Optional:** View the generated quote in one of the following ways:
    - Select **View quote**.
    - Select the quote ID hyperlink from the success message that's displayed.

    The latest revision of the quote is displayed.

### What to do next

View quotes, generate PDFs share to share quotes with customers for acceptance, create sales agreements, or convert quotes to orders to continue the sales process. For more information, see Using Quote Management.

### Related topics

View requests for quotes (RFQs) on the Business Portal

## Order case management using Business Portal

Business Portal enables customers to create and view order cases for orders or order line items. They can request changes to unfulfilled orders from the ServiceNow Otto Virtual Agent panel using chat and voice channels.

### Request updates for one or more orders

Request changes to the expected order fulfillment date and shipping location for one or more orders or to draw attention to an issue by creating an order case from the Business Portal.

### Before you begin

Role required: sn_customerservice.customer

### Procedure

1. Log in to the Business Portal.
2. Select **Requests** > **Submit a request** > **Submit a case** > **Submit an order case**.
3. Create a new order case.

   a. On the form, fill in the fields.

#### Create New Order Case form

| Field | Description |
|---|---|
| Account | The account for which you're creating the case. |
| Contact | The name of the customer contact for this case. |
| Scope of request | This option should be set to **Order header details, multiple orders** to create a case for one or more orders. |
| Priority | The available assigned priorities are: |

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| Field | Description |
|---|---|
| | ▪ 1 - Critical<br>▪ 2 - High<br>▪ 3 - Moderate<br>▪ 4 - Low (default) |
| Short description | Optional brief description. |

**b.** Select **Next**.
An order case is created with its State as Draft.

**4.** Select the orders that you want to add to the order case.

**a.** On the Add and specify changes form on the order case page, select **Add**.

**b.** On the Add orders to case window, select one or more orders and select **Add**.
Order case lines are created corresponding to the order records.

**c.** Select the order case lines you want to edit and select **Edit**.

Select a single order case line to make specific changes to a specific order. Select multiple order case lines to make the same changes for all orders.

**Note:**

If you no longer want to make changes to an order case line item, select it, select the drop-down button next to **Edit**, and select **Delete** to remove it from the list of items to be modified.

**d.** Modify any or all of the values in the Edit item dialog box.

| Field | Description |
|---|---|
| Requested expected date | The date you want your order to be fulfilled. |
| Requested shipping location | The location to which you want your order to be shipped. |

**e.** Select **Update**.

**f.** Select **Next** on the Add and specify changes form.

**5.** Verify the requested changes and submit the order case on the Review and submit page.

- If you need to make more changes, navigate to the required page from the Activities section and repeat the modification process.
- If the changes are accurate, select **Submit**.

### Result

The order case is created with the order case lines corresponding to the orders you updated, and the state of the order case changes to New.

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### Related topics

Configuring the Business Portal

Customer self-service for Sales Customer Relationship Management

## Request updates for items in a single order

Request changes for the expected order fulfillment date, shipping location, or quantity for specific items in an order by creating an order case from the Business Portal.

### Before you begin

Role required: sn_customerservice.customer

### Procedure

1. Log in to the Business Portal.
2. Select **Requests** > **Submit a request** > **Submit a case** > **Submit an order case**.
3. Create a new order case.
   a. On the form, fill in the fields.

**Create New Order Case form**

| Field | Description |
|---|---|
| Account | The account for which you're creating the case. |
| Contact | The name of the customer contact for this case. |
| Scope of request | This option should be set to **Specific order lines, single order** to create a case for specific order line items in a single order. |
| Order number | The order for which you want to create the case. |
| Priority | The available assigned priorities are:<br>▪ 1 - Critical<br>▪ 2 - High<br>▪ 3 - Moderate<br>▪ 4 - Low (default) |
| Short description | Optional brief description. |

   b. Select **Next**.
   An order case is created with its State as Draft.
4. Select specific order items that you want to add to the order case.
   a. Select **Add** on the Add and specify changes form on the order case page.
   b. On the Add orders line items to case window, select the order items for which you want to create a case and select **Add**.
   Order case lines are created corresponding to the order items you selected.
   c. Select the order case lines you want to edit and select **Edit**.

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If you no longer want to make changes to an order case line item, select it, select the drop-down button next to **Edit** and select **Delete** to remove it from the list of items to be modified.

**d.** Modify one or more of the values on the Edit item dialog box.

| Field | Description |
|---|---|
| Requested expected date | The date you want your order to be fulfilled. |
| Requested shipping location | The location to which you want your order to be shipped. |
| Requested quantity | The quantity of the item you want to purchase. |

**e.** Select **Update**.

**f.** Select **Next** on the Add and specify changes form.

**5.** Verify the requested changes and submit the order case on the Review and submit page.

- If you need to make more changes, navigate to the required page from the Activities section and repeat the modification process.
- If the changes are accurate, select **Submit**.

### Result

The order case is created with the order case line items corresponding to the order line items you updated, and the state of the order case changes to New.

### Related topics

Configuring the Business Portal

Customer self-service for Sales Customer Relationship Management

## View order case details

View the list of order cases and their state from the Business Portal.

### Before you begin

Role required: sn_customerservice.customer

### Procedure

**1.** Log in to the Business Portal.

**2.** Select **Requests** > **View submitted requests** > **View cases & tasks**.

**3.** Select **My Order Cases** from the Categories menu to view order cases.

**4.** Select a case to view its state and other details.

#### Order case states

| State | Description |
|---|---|
| New | A new order case that is submitted. |
| Draft | The order case that has not yet been submitted. |

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| State | Description |
|---|---|
| | Order case lines in the Draft state can still be modified. |
| Work in Progress | The order case is being handled by the sales agent. |

**Related topics**

Configuring the Business Portal

Customer self-service for Sales Customer Relationship Management

### Request order changes using ServiceNow Otto Virtual Agent

Request an expedited delivery, a quantity change, or a shipping location change for your order in natural language using the ServiceNow Otto Virtual Agent on the Business Portal.

## Before you begin

The following applications must be installed and configured on your ServiceNow instance:

- ServiceNow Otto for Platform (sn_genai_platform)
- ServiceNow Otto for Order Management (sn_now_assist_om)
- Order Case Self Service (sn_ord_case_ss)

The scripted extension points that the chat assistant uses to validate order exception requests such as delivery availability, quantity, shipping location, and quote threshold must be configured. For more information, see Configure scripted extension points for the manage order operations AI agent.

Role required: sn_customerservice.customer

## About this task

When you submit a request through the Virtual Agent, the AI agent performs the following actions behind the scenes to help you quickly and efficiently:

- Checks account information and order history.
- Validates the intent of the request, which can be an expedited delivery, a quantity change, or a shipping location change. For example, if you enter `expedite`, `change quantity`, or `ship to a different location` in the Virtual Agent, the AI agent confirms the request type for your open orders.
- Confirms the order number and your change request.
- After you confirm all the requested changes, creates an order case in the ServiceNow CRM and stamps the requested changes on the requested fields of the order case lines.
- Calls the configured scripted extension points to validate inventory availability, quantity feasibility, shipping location feasibility, and quote thresholds for the request. For example, the AI agent calls orderExceptionCheckEP to check whether the ordered item is in stock for early delivery, or ThresholdCheckForQuote to determine whether a quantity change requires a quote. If you approve the validation results, the AI agent stamps the approved values on the approved fields of the order case lines.
- Posts the summary of the conversation as a work note in the order case, which can only be viewed by the agents from the CRM Workspace.

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### Procedure

1. Log in to the Business Portal.
2. Launch the ServiceNow Otto chat panel by selecting the ServiceNow Otto icon .
3. In natural language, submit a request that you would like for your order.

   **Example**
   For example, enter `Expedite my order`, `Increase the quantity on my order`, or `Change the shipping location for my order`.
4. If the AI agent interprets your request correctly, provide your confirmation.

   **Example**
   You can enter `That's correct` in the response.
5. Verify the order details that are displayed and specify an order that you're requesting changes for.
6. Select the order line item that you want to change or enter the product name.

   If the selected line item is part of a bundle, the AI agent automatically includes the parent, child, and sibling lines of the bundle in your request. If the selected line item is independent, the AI agent applies the request only to that line.

   You can request multiple exception types (an expedited delivery, a quantity change, and a shipping location change) on the same order line.
7. Specify the details of your change when prompted.
   - Revised delivery date for expedited delivery
   - New quantity for a quantity change
   - New shipping address for a shipping location change

   The manage order operations AI agent validates feasibility for your request by calling the configured scripted extension points. For an expedited delivery, the agent fetches the earliest possible delivery date. For a quantity change, the agent validates the requested quantity and determines whether the change requires a quote. For a shipping location change, the agent validates whether the new location is serviceable.
   After you confirm the requested changes, the AI agent creates an order case with a system-generated number starting with the prefix ORDCS and stamps the requested changes on the requested fields of the order case lines. You receive an email confirming that your order case has been opened and is under review.
8. When asked about the feasible options, accept or reject the proposal in natural language.
   If you approve the validation results, the AI agent stamps the approved values on the approved fields of the order case lines and posts a summary of the conversation as a work note on the case. The AI agent provides the order case link so that you can view the case details on the Business Portal. If you reject the validation results, the AI agent offers to connect you to a live agent and the order case remains in progress.
9. If the AI agent prompts you for a quote, indicate whether you need a quote for your change.
   The AI agent prompts you for a quote when the requested change exceeds the configured price threshold. If you decline the quote, the AI agent offers to connect you to a live agent and the order case remains in progress.
10. If a quote is created, review the proposed quote and accept or reject it.

    If you accept the quote, the quote moves to the Accepted state, the order case is closed, and the order case lines are moved to the Resolved Accepted state. The quote details are recorded

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in the resolution code and resolution note. You receive a confirmation email with the order case resolution and quote details.

If you reject the quote, the AI agent offers to connect you to a live agent and the order case remains in progress.

### Request order changes via calls

Use the AI voice agents to expedite delivery, change quantity, or change the shipping location for an order by using voice calls. The voice agent captures your request and creates an order case for an order case agent to resolve.

## Before you begin

Role required: sn_customerservice.customer

## About this task

Using the order exception AI voice agent, you can do the following:

- Submit order exception requests for orders that are not in the Draft state, including expedited delivery, a quantity change, or a shipping location change
- Use generic keywords such as Expedite delivery, Faster delivery, Change quantity, or Ship to a different location and get responses from an agent in the context of your questions

## Procedure

1. Call the customer support number of the Business-to-business (B2B) seller.
2. When connected to the AI voice agent, state your intent for the order change, which can be to expedite delivery, change the quantity, or change the shipping location.

   **Example**
   For example, say "I need to request expedited shipping for my order", "I need to change the quantity on my order", or "I need to ship my order to a different address".
3. Verify your identity when prompted by entering your phone number on the phone keypad, followed by the pound key.
4. Enter your soft PIN on the phone keypad, followed by the pound key.
5. Provide the order number that you want to change when prompted.

   **Example**
   For example, say "I need to expedite order ORD0000523", "I need to change the quantity on order ORD0000523", or "I need to change the shipping location for order ORD0000523".
6. Specify the details of your change when prompted, which could include the revised delivery date for expedited delivery, the new quantity for a quantity change, or the new shipping address for a shipping location change.

   **Example**
   For example, say "I need it delivered by the end of this week", "I need to increase the quantity to 50 units", or "Ship it to my Boston warehouse instead".
   The AI voice agent captures your request without performing inventory, quantity, or quote validation, and then offers to create an order case for an order case agent to resolve in the CRM Workspace.
7. Confirm when the agent asks whether you want to create a case for your order change request.

   **Example**
   For example, say "Yes, please go ahead and create the case".

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### Result
The AI voice agent creates an order case for your request, with a system-generated number starting with the prefix ORDCS, and provides you with the case number over the call. Make a note of the case number, because no email confirmation is sent for order cases that are created through the voice channel.

#### View customer context for an order exception chat

View the customer's account and contact details on the interaction record and the AI-generated chat summary in the Active Chat panel when the order exception AI agent hands off a chat to a live agent in the CSM/FSM Configurable Workspace.

### Before you begin
Chat Summarization must be configured by your admin to enable the AI summarization and recommendation features in Active Chat. For more information, see Configure chat summarization.

Role required: sn_order_case.order_agent, awa_agent, and now_assist_panel_user

### About this task
When a customer's chat for an order exception is escalated to a live agent, the agent can accept the chat from the CRM Workspace Inbox. After the agent accepts the chat, the Active Chat panel opens with an AI-generated summary of the conversation between the order exception AI agent and the customer, and the associated interaction record opens alongside with the customer's account and contact details already populated.

### Procedure
1. Navigate to **Workspaces** > *CRM Workspace*.
2. Accept the order exception chat from the Inbox.
   a. Select the Inbox icon.
   b. Change the status to **Available** so that you can accept the live chat.
   c. Join the chat by selecting **Accept**.
   The Active Chat panel opens with an AI-generated summary of the conversation between the order exception AI agent and the customer. The associated interaction record opens alongside, with the customer's **Account** and **Contact** fields populated from the chat that the customer initiated on the Business Portal.
3. Review the AI-generated chat summary in the Active Chat panel to understand the customer's request and what the order exception AI agent has done so far.

#### Related topics
Order Operations Case Management

## Invoice and invoice case management using Business Portal

Business Portal enables customers to view invoices, dispute discrepancies across single or multiple invoices using self-service playbooks, and track resolution. Billing specialists can resolve disputes using an agentic workflow that validates claims and automates resolution actions.

**For customers**

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From the Business Portal, customers can view their invoices and invoice line details, including quantities, billing and shipping locations, and product information. If they notice a discrepancy such as a quantity mismatch, incorrect part number, or wrong billing or shipping location, they can submit a dispute using the self-service playbook, which guides them through the process step by step. They can dispute multiple line items on a single invoice, or raise issues across multiple invoices at once.

Customers can also chat with an AI assistant or use voice commands to report discrepancies conversationally. For eligible quantity disputes, the AI assistant can validate their claim and resolve it on the spot by issuing a credit note or replacement order. If an issue needs further review, customers are seamlessly connected to a billing specialist with full context already in hand.

**For billing specialists (agent persona)**

ServiceNow Otto for Order Management includes the invoice dispute assist agentic workflow. Billing specialists can invoke the invoice dispute assist agentic workflow from the ServiceNow Otto panel to review the invoice case, validate the dispute, view similar cases, and complete resolution actions using a guided experience. Using an agentic workflow helps reduce manual investigation, improves consistency, and helps agents resolve invoice disputes efficiently while keeping customers informed throughout the process.

Email notifications are sent to the customer when an invoice case is created or closed, but only for cases initiated through the ServiceNow Otto Virtual Agent in the Business Portal. Notifications are triggered for the following closure outcomes: Credit note issued or replacement order placed. Case closure can be performed either by the customer using the ServiceNow Otto Virtual Agent in the Business Portal, or by a billing specialist from the ServiceNow Otto in the CRM Workspace.

### View invoices on the Business Portal

Access your invoices and invoice line details from the Business Portal to track billing information and identify discrepancies.

## Before you begin

Role required: sn_customerservice.customer

## Procedure

1. Log in to the Business Portal.
2. Navigate to **Requests** > **View submitted requests** > **View invoices**.
   The following table provides the details displayed on the list view.

### Invoices list view on the Business Portal

| Column | Description |
|---|---|
| Number | Unique, system-generated invoice ID starting with the prefix ARINV. |
| Short description | Brief description about your invoice. |
| Invoice date | Date on which the invoice was created. |
| Due date | Date on which the invoice is due for payment. |
| Account | Name of the customer or business entity in the business-to-business (B2B) model. |

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| Column | Description |
|---|---|
| Customer contact | Primary contact for your account. |
| Billing location | The billing address that appears on the original invoice. |
| Shipping to location | Reference to the location to which the order on the invoice is shipped. |

3. Select an invoice record number to view its details.

**Related topics**

Dispute a specific line item on an invoice against your account using the Business Portal

Dispute multiple invoices against your account using the Business Portal

View invoice case details in the Business Portal

### Dispute invoice issues using ServiceNow Otto Virtual Agent

Dispute invoice issues such as quantity discrepancies in a guided conversational flow using ServiceNow Otto Virtual Agent from the Business Portal, without needing to contact support.

## Before you begin

The following applications must be installed and configured on your ServiceNow instance:

- ServiceNow Otto for Platform (sn_genai_platform)
- ServiceNow Otto for Order Management (sn_now_assist_om)
- Invoice Case Self Service (sn_invoice_case_ss)

Role required: sn_customerservice.customer

## About this task

When you describe your issue on the ServiceNow Otto panel, the AI agent validates the dispute using an Available-to-Promise (ATP) API call and presents resolution options, such as a credit note or fulfillment of outstanding items.

If you express dissatisfaction or explicitly request human assistance at any point, the AI agent transfers the conversation to a human agent.

## Procedure

1. Log in to the Business Portal.
2. Launch the ServiceNow Otto chat panel by selecting the ServiceNow Otto icon .
   ServiceNow Otto uses the context of the current page to tailor its responses and offer support. For example, launching it from an invoice details page offers help in the context of that invoice.
3. In natural language, describe the invoice issue you want to dispute.

   **Example**
   For example, enter `I want to dispute an invoice for incorrect quantity`.
   A list of invoices related to your account is displayed.
4. If the invoice you want to dispute is listed, confirm by responding affirmatively.

   **Example**
   For example, select **Proceed with ARINV0001003**.

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Alternatively, you can provide a different invoice number or enter product name or invoice date to help identify your invoice.
The AI agent validates and fetches the invoice details along with the invoice lines.

5. Select the invoice line you want to dispute.
   The AI agent validates the invoice line details and displays the following information:
   - Invoice line number
   - Product
   - Quantity
6. If the invoice line you want to dispute is correct, select **Yes**.
7. Describe the issue when prompted.

   **Example**
   For example, to dispute quantity mismatch, you can enter `I ordered 10 items, but received only 9`.
   The AI agent validates the dispute by triggering an ATP API call. Depending on the outcome, one of the following happens:
   - Validated: An invoice case is created with the state set to Work in Progress and the agent presents resolution options for the quantity discrepancy. You also receive an email notification with the case details.
   - Not validated: The agent notifies you that the dispute could not be confirmed. If you disagree with the outcome, you can request to chat with a human agent.
8. If the dispute is not validated, select one of the following options.
   - Upload a delivery note as additional proof of your claim.
   - Connect with a live agent for further assistance.
9. If you opted to upload a delivery note, upload the document when prompted.
   Supported formats include PDF, JPG, and PNG. The maximum file size is 5 MB.

   The AI agent uses extracts the following details from the uploaded document:
   - Invoice number
   - Order number, if available
   - Description
   - Product offer or sold product
   - Quantity

   The AI agent compares the received quantity on the delivery note against the invoiced quantity.
10. If the dispute is validated, select a resolution option for the quantity discrepancy.

| Option | Description |
|---|---|
| **Receive a credit note for the missing quanti ty** | Request a credit for the disputed quantity |
| **Receive or order the remaining quantity** | Request delivery of the remaining items |

If you're not satisfied with the resolution options, you can request to be transferred to a human agent. The AI agent uses sentiment analysis to detect dissatisfaction. You can also explicitly

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ask to chat with a human agent. For example, you can enter `I'd like to speak with an agent` or select **Connect with a live agent**.
Depending on the resolution option you select, a credit note is issued or an order for the outstanding items is created. The invoice case state is updated to Closed.

### Result
When the dispute is resolved, an email notification is sent to you with a summary and a hyperlink to the case.

#### Related topics

Resolve invoice disputes using agentic workflow

## Dispute invoice cases via calls

Use the AI voice agents to create and manage cases for invoice-related issues such as disputing order quantity with voice calls.

### Before you begin
Role required: sn_customerservice.customer

### Procedure

1. Call the customer support number of the B2B seller.
2. When connected to the Voice AI agent, state your intent to dispute an invoice.

   **Example**
   For example, say I want to dispute an invoice or I have an issue with the quantity in my invoice.
3. Provide the invoice number associated with the issue when the agent asks for it.
4. State the dispute reason when prompted.

   **Example**
   For example, say The quantity on the invoice is higher than what we received.
5. Confirm the invoice line or lines affected by the dispute.
6. Review the dispute summary read back by the agent and confirm that the details are correct.

   **Example**
   For example, say Yes, that's correct to confirm.

### Result
The AI voice agent then creates an invoice case corresponding to the disputed invoice, and provides the invoice case number to the customer over the phone call.

## Dispute a specific line item on an invoice against your account using the Business Portal

Challenge discrepancies in invoiced quantity, part number, billing location, or shipping location for a single invoice line item via the Business Portal using the playbook experience.

### Before you begin
Role required: sn_customerservice.customer

### About this task
This task describes how to create an invoice case using the playbook experience in the Business Portal. The playbook experience enables you to dispute various invoice discrepancies depending on the scope you select, including quantity, part number, billing location, and shipping location issues.

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Creating invoice cases using the ServiceNow Otto panel limits disputes to quantity issues only. For more information, see Dispute invoice issues using ServiceNow Otto Virtual Agent.

### Procedure

1. Log in to the Business Portal.
2. Navigate to **Requests** > **Submit a request** > **Submit a case** > **Submit an invoice case**.
3. Create a new invoice case.
   a. On the form, fill in the fields.

**Create New Invoice Case form**

| Field | Description |
|---|---|
| Account | The account for which you're creating the case. |
| Request source | This option should be set to **Specific invoice lines, single invoice** to dispute one or more invoice lines from a single invoice. |
| Contact | The name of the customer contact for this case. |
| Invoice | The invoice you want to dispute. |
| Priority | The urgency level assigned to the invoice case. The available priorities are:<br>▪ 1 - Critical<br>▪ 2 - High<br>▪ 3 - Moderate<br>▪ 4 - Low (default) |
| Short description | Optional brief description. |

   b. Review the details before proceeding to the next step.
   All fields become read-only after once you select **Next** and go to the Add and specify changes page.

   c. Select **Next**.
   An invoice case is created with its State as Draft.

4. Select the invoice lines that you want to add to the invoice case.
   a. On the Add and specify changes form on the Create invoice case page, select **Add**.

   b. On the Add invoice line item to case window, select one or more invoice lines and select **Add**.
   For a description of the Add invoice line items to case list view, see Invoice line item details on Business Portal.
   Invoice case lines are created corresponding to the invoice records.

   c. Select the invoice case lines that you want to edit and select **Edit**.

   Select a single invoice case line to make specific changes to a specific invoice. Select multiple invoice case lines to make the same changes for all invoices.

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**Note:**

If you no longer want to change an invoice case line item, select it, select the drop-down button next to **Edit**, and select **Delete** to remove it from the list of items to be modified.

**d.** Modify any or all of the values in the Edit item dialog box.

| Field | Description |
|---|---|
| Disputed quantity | The quantity you believe should have been invoiced instead of the amount shown in Invoiced quantity. |
| Disputed part number | The correct part number if the Invoiced part number is incorrect. |
| Disputed billing location | The correct billing location if the Invoiced billing location is incorrect. |
| Disputed shipping location | The correct shipping location if the Invoiced shipping location is incorrect. |

**e.** Select **Update**.

**f.** Select **Next** on the Add and specify changes form.

**5.** Verify the requested changes and submit the invoice case on the Review and submit page.

- If you need to make more changes, navigate to the required page from the Activities section and repeat the modification process.
- If the changes are accurate, select **Submit**.

### Result

The invoice case is created with the invoice case lines corresponding to the invoices you updated, and the state of the invoice case changes to New.

### What to do next

Track the status of your invoice case. For more information, see View invoice case details in the Business Portal.

Follow up on your invoice case. For more information, see Communicate and share supporting documents for an invoice case from Business Portal.

#### Related topics

Invoice case details on the Business Portal

## Dispute multiple invoices against your account using the Business Portal

Challenge discrepancies in billing or shipping locations that affect multiple invoices via the Business Portal using the playbook experience.

### Before you begin

Role required: sn_customerservice.customer

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### About this task

This task describes how to create an invoice case using the playbook experience in the Business Portal. The playbook experience enables you to dispute various invoice discrepancies depending on the scope you select. For multiple invoices, you can report billing location and shipping location issues.

Creating invoice cases using the ServiceNow Otto panel limits disputes to quantity issues only. For more information, see Dispute invoice issues using ServiceNow Otto Virtual Agent.

### Procedure

1. Log in to the Business Portal.
2. Navigate to **Requests** > **Submit a request** > **Submit a case** > **Submit an invoice case**.
3. Create an invoice case.
   a. On the form, fill in the fields.

**Create New Invoice Case form**

| Field | Description |
|---|---|
| Account | The account for which you're creating the case. |
| Request source | This option should be set to **Invoice header details, multiple invoices** to dispute multiple invoices against your account. |
| Contact | The name of the customer contact for this case. |
| Priority | The urgency level assigned to the invoice case. The available priorities are:<br>▪ 1 - Critical<br>▪ 2 - High<br>▪ 3 - Moderate<br>▪ 4 - Low (default) |
| Short description | Optional brief description. |

   b. Select **Next**.
   An invoice case is created with its state as Draft.
4. Select the invoices that you want to add to the invoice case.
   a. Select **Add** on the Add and specify changes form on the invoice case page.
   b. On the Add invoices to case window, select the invoices for which you want to create a case and select **Add**.
   For a description of the Add invoices to case list view, see Add invoices to case list.
   Invoice case lines are created corresponding to the invoices that you selected.
   c. Select the invoice case lines that you want to edit and select **Edit**.

   If you no longer want to change an invoice case line item, select it, select the drop-down button next to **Edit** and select **Delete** to remove it from the list of items to be modified.
   d. Modify the billing or shipping location, or both, on the Edit item dialog box.

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| Field | Description |
| --- | --- |
| Disputed billing location | The correct billing location if the Invoiced billing location is incorrect. |
| Disputed shipping location | The correct shipping location if the Invoiced shipping location is incorrect. |

e. Select **Update**.

f. Select **Next** on the Add and specify changes form.

5. Verify the requested changes and submit the invoice case on the Review and submit page.
   - If you need to make more changes, navigate to the required page from the Activities section and repeat the modification process.
   - If the changes are accurate, select **Submit**.

### Result
The invoice case is created with the invoice case line items corresponding to the invoices you updated, and the state of the invoice case changes to New.

### What to do next
Track the status of your invoice case. For more information, see View invoice case details in the Business Portal.

Follow up on your invoice case. For more information, see Communicate and share supporting documents for an invoice case from Business Portal.

## Resume an invoice case in Business Portal

Pick up an invoice case where you left off by resuming draft invoice cases from Business Portal.

### Before you begin
Role required: sn_customerservice.customer

### Procedure
1. Log in to the Business Portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks**.
3. From the Categories list, select **My Invoice Cases**.
4. Select the invoice case to resume.

   **Note:** Invoice cases must be in the Draft state to edit and submit.

5. Select the **Process** tab.
6. Submit your invoice case using the invoice creation playbook.
   - Dispute a specific line item on an invoice against your account using the Business Portal
   - Dispute multiple invoices against your account using the Business Portal

### Result
The invoice case is created and its state changes to **New**.

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### What to do next

Track the status of your invoice case. For more information, see View invoice case details in the Business Portal.

Follow up on your invoice case. For more information, see Communicate and share supporting documents for an invoice case from Business Portal.

#### Related topics

- Configuring the Business Portal
- Customer self-service for Sales Customer Relationship Management

## View invoice case details in the Business Portal

View invoice case details, status, activity history, and attachments from the Business Portal.

### Before you begin

Role required: sn_customerservice.customer

### Procedure

1. Log in to the Business Portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks**.
3. Select **My invoice cases** from the Categories menu to view invoice cases.
4. Select a case to view its state and other details.

   For a description of the Invoice case lines list view, see Invoice case details on the Business Portal.

   For more information about invoice states, see Invoice case states on Business Portal.

### What to do next

Communicate and share supporting documents for an invoice case from Business Portal

#### Related topics

- Configuring the Business Portal
- Customer self-service for Sales Customer Relationship Management

## Resolve invoice disputes using agentic workflow

Resolve invoice dispute cases using ServiceNow Otto directly from the CRM Workspace.

### Before you begin

The invoice dispute assist agentic workflow must be made available on the ServiceNow Otto panel. For more information, see Make the invoice dispute assist workflow available in the ServiceNow Otto panel.

ServiceNow Otto for CSM must be installed to enable generative AI capabilities in the CRM Workspace. For more information, see Install ServiceNow Otto for Customer Service Management (CSM).

Chat Summarization must be configured to use the summarization and recommendation features. For more information, see Configure chat summarization.

Role required: awa_agent, sn_csm_invoice.agent, sn_otc.accounts_receivable_agent, and now_assist_panel_user

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### About this task

When a customer escalates an invoice dispute to a human agent either through a Virtual Agent handoff or by contacting support directly, you can launch the ServiceNow Otto panel from the CRM Workspace to help accelerate resolution. The invoice dispute assist agentic workflow fetches the invoice case details, finds similar resolved cases, validates the dispute using an API call, and guides you through closing the case with the appropriate resolution.

When a customer is transferred from the Virtual Agent, the interaction record opens automatically with a conversation summary, giving you full context of the dispute discussed on the Virtual Agent side.

You can also use the summarize and chat recommendation features in the Active Chat to improve productivity. For more information, see Summarize a chat conversation by using ServiceNow Otto for Customer Service Management (CSM) and Generate a chat reply recommendation by using ServiceNow Otto for Customer Service Management (CSM).

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. If you're assisting a customer via the live chat, accept the chat.
   a. Select the Inbox icon.
   b. Change the status to **Available** to be able to accept the live chat.
   c. Join the chat by selecting **Accept**.
   The Active Chat panel opens with an AI-generated summary of the conversation between the AI agent and the customer, including the disputed invoice number and the issue described by the customer. The associated interaction record opens alongside.
   d. Access the invoice case details by selecting the **Related Tasks** tab.
   The case number, priority, state, and short description details are displayed for the associated invoice case.
3. Launch the ServiceNow Otto chat panel by selecting the ServiceNow Otto icon.
   The ServiceNow Otto panel is context-aware. When you launch it from an open interaction record or invoice case record, it tailors its responses to that record.
4. Launch the invoice dispute assist agentic workflow using either methods.
   - Select the **Invoice Dispute Assist** pill in the ServiceNow Otto panel.
   - Type your query in natural language, for example, `Help me resolve this invoice dispute`.

   The invoice dispute assist agentic workflow invokes the invoice dispute support assistant AI agent. The AI agent fetches the invoice case and prompts you to confirm if it's valid.
5. If the invoice case fetched by the AI agent is correct, select **Yes**.
   Otherwise, enter the invoice case you need help with.
   The AI agent validates the invoice case and then provides you the options for resolving the case.
6. Select **Find similar cases** to view previously resolved cases with a similar dispute pattern.
   The AI agent lists similar cases from the same account, matched by common dispute types and resolution patterns, such as credit note or replacement order, to help you determine the appropriate course of action.
7. Select **Validate invoice dispute** to verify the customer's claim.

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The AI agent triggers an ATP API call to cross-check the claimed quantity against delivery records and returns a validation status. If delivery records are unavailable, the AI agent validates the dispute against the original order line quantity. If validated, the invoiced and delivered quantities are displayed for your review.

8. **Optional:** Select **View invoice details** to review the invoice number, status, account, and associated invoice lines before closing the case.
9. If everything looks good, select **Close the case** and choose a resolution option.
   - Select **Issue a credit note for the missing quantity** to generate a credit for the disputed quantity.
   - Select **Place an order for the remaining quantity** to fulfill the outstanding items.
   - Select **Close the case as invalid dispute** if the validation confirms that the customer's claim is invalid or not supported.

   The invoice case State is changed to Closed and the Resolution code is auto-populated depending on the resolution. Based on the selection, credit note number or order details are posted to the Resolution notes and Work notes of the invoice case.

## Result

When the dispute is resolved, the invoice case is closed with the resolution details documented in the case notes, and an email notification is sent to the customer with a summary and a hyperlink to the case.

### Related topics

Using ServiceNow Otto for Customer Service Management (CSM)

Summarize a chat conversation by using ServiceNow Otto for Customer Service Management (CSM)

### Communicate and share supporting documents for an invoice case from Business Portal

Stay engaged on your invoice dispute case by communicating with a billing specialist and uploading supporting documents, such as proof of delivery or receipts, directly from the Business Portal to help expedite resolution.

## Before you begin

Role required: sn_customerservice.customer

## About this task

After an invoice case is created either through the ServiceNow Otto Virtual Agent or manually via the playbook experience, you can use the invoice case record in the Business Portal to stay engaged throughout the resolution process. View case history or send messages to the billing specialist handling your case and respond to any requests they raise using the Activity tab. Upload supporting documents, such as proof of delivery, goods receipt notes, or any other evidence relevant to your dispute, using the Attachments tab.

You can use these tabs proactively without waiting to be contacted, for example, to share additional context or upload documents immediately after your case is created.

## Procedure

1. Log in to the Business Portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks**.
3. Select **My invoice cases** from the Categories menu to view invoice cases.
4. Select a case for which you want to provide information.
   For a description of the field values, see Invoice case details on the Business Portal.

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5. **Optional:** View the case history and add comments from the **Activity** tab.
6. **Optional:** Upload supporting documents using the **Attachments** tab.

   You can drag files or use the Add attachments icon  to browse and upload files from your system.

**Related topics**

Configuring the Business Portal

Customer self-service for Sales Customer Relationship Management

## View contracts and entitlements on the Business Portal

Customers can view contracts and entitlements associated with their accounts on the Business Portal.

From the Business Portal, customers can view their all their contracts and entitlements. They can select a contract or entitlement and view all the related information like Contract number, Product offer, Customer Contract Line, Start date, End date, and so on.

**Related topics**

View contracts on the Business Portal

View entitlements on the Business Portal

### View contracts on the Business Portal

Customers can view contracts associated with their accounts on the Business Portal, including contract details and contract line items.

#### Before you begin

Role required: sn_customerservice.customer

#### Procedure

1. Log in to the Business Portal.
2. Select **My hub** > **Manage contracts**.
   A list of contracts available for all your accounts is displayed.
3. To view contract details, select a contract from the list.
   The contract details page opens and displays the following information:
   - List of contract line items
   - Contract number
   - Contract administrator
   - Total contract value
   - Start and end dates
   - Account information
   - Location
4. Select any contract line item to view the details.
   The contract line items table displays the following information for each line item:
   - Child contract lines of that line item
   - Line item number
   - Contract number

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- Start and end dates
- Term (in months)
- Pricing and quantity details
- Product offer

5. To view related information, select any of the available tabs.
   - Select the **Child contract lines** tab to view child contract line details.
   - Select the **Products covered** tab to view products and installed base items covered.
   - Select the **Renewal history** tab to view renewal information.
   - Select the **Consolidation history** tab to view consolidation information.
   - Select the **Characteristics** tab to view contract line characteristics.
   - Select the **Usage** tab to view usage information.
   - Select the **Pricing** tab to view pricing details.

### Related topics

View entitlements on the Business Portal

## View entitlements on the Business Portal

Customers can view entitlements associated with their accounts on the Business Portal, including entitlement details and related information.

### Before you begin

Role required: sn_customerservice.customer

### Procedure

1. Log in to the Business Portal.
2. Select **My hub** > **Manage entitlements**.
   A list of entitlements for all your accounts is displayed.
3. To view entitlement details, select an entitlement from the list.
   The entitlement details page opens and displays the following information:
   - Contract number
   - Product offer
   - Customer Contract Line
   - Start date
   - End date
   - Term (in months)
   - Quantity
4. To view related information, select any of the available tabs.
   - Select the **Products covered** tab to view the products covered by the entitlement, including the sold product, install base item, date added, and date removed.
   - Select the **Characteristics** tab to view entitlement characteristics.
   - Select the **Usage** tab to view entitlement usage information.
   - Select the **Pricing** tab to view entitlement pricing information.

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**Related topics**

View contracts on the Business Portal

## Sales CRM Mobile Application

Sales CRM Mobile is a mobile application that lets sales representatives and managers view and manage the Sales CRM application on their mobile phones from anywhere.

Sales CRM Mobile is available to users with the *sales_mobile_user* role. When you download the Now Agent mobile app and log in, you can see the Sales CRM Mobile interface. The Sales CRM Mobile plugin must be installed to use Sales CRM Mobile.

Users can perform the following actions on the Sales CRM Mobile application.

- View your day on Sales CRM Mobile

  View your meetings, tasks, and priority opportunities for the day, and access Quick Access shortcuts.

- Manage sales records on Sales CRM Mobile

  View Account, Consumer, and Contact records from Sales hub.

- Manage sales records on Sales CRM Mobile

  View, create, and manage your opportunities from Sales hub.

- Use ServiceNow Otto on Sales CRM Mobile

  Get AI-powered assistance from ServiceNow Otto AI interface.

**Related topics**

Mobile experience for Sales CRM

Configure Sales CRM Mobile Application

## View your day on Sales CRM Mobile

View your meetings, tasks, and priority opportunities for the day on the My Day tab of Sales CRM Mobile.

### Before you begin

Role required: *sales_mobile_user*

### About this task

### Procedure

1. Open Sales CRM Mobile and tap **My Day**.

   The **My Day** tab shows the following sections:

   - **Today's meetings**: your scheduled meetings for the day.
   - **Tasks due**: tasks assigned to you, such as lead and opportunity tasks.
   - **Opportunities in focus**: a summary of your critical and at-risk opportunities.

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2. Select the search icon on the **My Day** tab to search your records using AI Search.

   You can search for the following records and their line items:

   - Opportunities
   - Leads
   - Accounts
   - Contacts

   You can also use voice search. For more information, see Enable voice search.

   **Note:** AI Search is not available in offline mode.

3. Scroll to the bottom of the **My Day** tab to access **Quick Access**.
4. The Quick Access tab shows the following sections:
   - Tasks: View the list of tasks accessible to you and the status of those tasks. You can select a task to view more details.
   - Calendar: You can view the scheduled meetings.

### What to do next

Visit the Sales Hub tab to manage your accounts, contacts, leads and opportunities.

### Related topics

Sales CRM Mobile Application

Manage sales records on Sales CRM Mobile

Configure Sales CRM Mobile Application

## Manage sales records on Sales CRM Mobile

View and manage your accounts, leads, opportunities, and contact details from Sales hub on Sales CRM Mobile application.

### Before you begin

Role required: *sales_mobile_user*

### About this task

### Procedure

1. Open Sales CRM Mobile and select **Sales hub**.

   The **Sales** section displays a tile for Opportunity, Account, Lead, and Contacts.

2. Select the **Opportunity** tile.

   The **My Opportunities** tab displays the list of current opportunities assigned to you and their status. The **All** tab displays all the opportunities in the system that are visible to you.

   a. Select an opportunity to view its record.

      The record displays the **Overview**, **Details**, **Related**, and **Activities** tabs.

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b. Select the **Related** tab to view the tasks, meetings, and other details related to that opportunity.

c. Select the **Activities** tab to add more information to the opportunity.

d. Select **Add Comment** to add a work note to the record.

e. Select **Document** to attach a document to the record.

f. Select **Image** to attach an image to the record.

g. Select **Camera** to take a photo and attach it to the record.

3. Select the **Account** tile.

   The **Account** tab displays all the accounts assigned to you. Select any account to view its complete details.

4. Select the **Lead** tile.

   The **My Leads** tab displays the list of leads assigned to you and their status. The **All** tab displays all the leads in the system that are visible to you.

   a. Select a lead to view its record.

      The record displays the **Overview**, **Details**, **Related**, and **Activities** tabs.

   b. Select the **Related** tab to view the tasks, meetings, and other details related to that lead.

   c. Select the **Activities** tab add more information to the lead.

   d. Select **Add Comment** to add a work note to the record.

   e. Select **Document** to attach a document to the record.

   f. Select **Image** to attach an image to the record.

   g. Select **Camera** to take a photo and attach it to the record.

5. Select the **Contact** tile.

   View all the contacts that you have and select any contact to view more details about them.

6. Under the Pipeline health section, view all the statistics of the opportunities and the assets.

### What to do next

Access ServiceNow Otto AI interface to know more about your current records and view their summary.

### Related topics

Sales CRM Mobile Application

Configure Sales CRM Mobile Application

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## Use ServiceNow Otto on Sales CRM Mobile

Use ServiceNow Otto AI interface on Sales CRM Mobile to chat, view AI generated summary, and manage your sales records.

### Before you begin

Role required: *sales_mobile_user*

### About this task

ServiceNow Otto on Sales CRM Mobile provides the following capabilities:

- A chat experience that understands the context of the record you are viewing.
- Conversational questions about your Opportunities, Accounts, Contacts, and Leads.
- Review AI-generated win probability scores and contextual insights for an opportunity to assess deal health without opening individual activity, contact, or deal records. Use this to prioritize pipeline opportunities and identify risks.
- Creating and cloning opportunities from a natural language request.

### Procedure

1. Select the ServiceNow Otto icon on the bottom navigation bar on the Sales CRM Mobile application.
2. Enter a natural language to have a conversation with ServiceNow Otto describing what you want to do.

   For example:

   **Create an opportunity**

   "Create an opportunity for Acme Corp for $50,000, closing on September 30."

   **Clone an opportunity**

   "Clone opportunity OPTY0010023 as a renewal, closing next quarter."

3. Provide any additional information that ServiceNow Otto ask and then review and confirm the record.

   ServiceNow Otto asks for any missing mandatory fields one at a time, and offers to create the account if it doesn't already exist. When cloning an opportunity, if there is more than one matching record, ServiceNow Otto shows you the matching candidates to choose from.

   **Note:** Cloning an opportunity copies the opportunity record only. Related records, such as tasks, touchpoints, contacts, competitors, and line items, are not copied.

   A confirmation card with the record details is displayed. Confirm to create or clone the opportunity. You can perform more actions and extract more information interacting with ServiceNow Otto. For more info, see Manage opportunity records using an AI interface and View opportunity scores and insights.

### Related topics

Sales CRM Mobile Application

Enable offline mode on Sales CRM Mobile

## Enable offline mode on Sales CRM Mobile

Enable offline mode on Sales CRM Mobile to access your sales records when you don't have an internet connection.

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### Before you begin
Role required: *sales_mobile_user*

### About this task
Download the Sales CRM Mobile data to the application cache while you have an internet connection so that the app has data available when you lose connectivity. For more information, see Offline mode.

### Procedure
1. On the Sales CRM Mobile, navigate to **Settings** > **Offline**.
2. Select **Download Cache**.

   The application downloads the cached data.
3. Turn on the **Offline mode** toggle.
   You can now use the Sales CRM Mobile application in the offline mode with the cached data of the current records.

   **Note:** ServiceNow Otto AI interface and editing records are not available in offline mode.

### Related topics
Sales CRM Mobile Application

Use ServiceNow Otto on Sales CRM Mobile

# Extending Order Management with ServiceNow applications and integrations

You can use various ServiceNow store applications and integrations to further extend the capabilities of Order Management.

**Applications and integrations for extending Order Management**

| Application or integration | Description |
|---|---|
| Order Management for providers with Service Exchange | Enable service providers and their customers to use Order Management to place and fulfill complex orders, including certain types of MACD orders, over Service Exchange. |
| Order Management integration with Field Service Management | Create field service work order requests automatically with Order Management, and track them in Field Service Management. |
| Order Management integration with Service Portfolio Management | Provide project oversight of complex, long-running orders and order tasks in Order Management, and manage them in Service Portfolio Management. |

## Order Management for providers with Service Exchange

The Service Exchange Order Management for Providers application enables service providers to use Order Management to create product offerings and service specifications that Service

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Exchange consumers can order from service catalogs in their ServiceNow instances. Order agents and fulfillers can then complete the orders and requests on the provider instance.

## Overview of Order Management for providers with Service Exchange

The Service Exchange Order Management for Providers application supports the sales order and fulfillment process over Service Exchange. Published product offers and service specifications generate remote record producers (RRPs). These remote record producers create the remote catalog items that your consumers can order from the Service Portal on their instance.

The workflow for generating these remote record producers involves these basic steps:

- Product catalog admin or manager creates the product offerings and service specifications on a provider instance, specifying the distribution channel as Service Exchange and indicating that product offers are sellable items. When the offerings and service specifications are published, remote record producers (RRPs) are generated automatically to create the remote catalog items.
- Service Exchange admin associates consumer criteria to the remote record producers.
- Service Exchange admin reviews and activates the remote record producers on the provider instance. These remote record producers publish the remote catalog items to the service catalog on a consumer instance.
- Consumers request services using the remote catalog items on the service portal in their consumer instance. The requests automatically create a provider task for fulfilling the requests on the provider instance.
- On the provider instance, the order and order lines are created for order managers to approve and agents to fulfill.
- On the consumer instance, consumers receive updates on the order state and worknote comments from order agents.

## Features

- Support simple and bundled product offerings with composite specifications.
- Support service specifications.
- Support quantity orders for order line items and selection of optional products and services.
- Synchronize product and service inventory records, which can be viewed by consumers in their instance.
- Allow consumers to:
  - Suspend, resume, and disconnect orders
  - Cancel an order from the consumer instance if the order hasn't reached the point of no return (PONR).

## Benefits

- Automates the generation of remote record producers that publish offerings and service specifications to a remote catalog.
- Enables faster order fulfillment on the provider instance and improves order accuracy.
- Facilitates communication by updating comments between the provider and customer instance as well as sharing frequent order status updates.

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## Order state mapping

During order processing, note that order status states correspond to certain provider task states.

### Order and provider task states

| Order state | Provider task state |
|---|---|
| Draft | Received |
| Submitted | Received |
| Enrichment in progress | Received |
| Enrichment on hold | Received |
| New | Received |
| Acknowledged | Work in Progress |
| Scheduled | Work in Progress |
| Rejected | Awaiting info |
| In progress | Work in progress |
| Revision in progress | Received |
| Awaiting information | Awaiting info |
| On hold | Awaiting info |
| Assessing cancellation | Cancelled |
| Cancellation in progress | Work in Progress |
| Cancelled | Cancelled |
| Completed | Closed |

## Next step

As a Service Exchange admin, review the setup tasks in Configuring Service Exchange Order Management for Providers.

# Configuring Service Exchange Order Management for Providers

Configure the Service Exchange Order Management for Providers application, which enables providers to use Order Management to create and fulfill product orders over Service Exchange. Providers publish the product offerings and service specifications as remote catalog items so that consumers can order from the Service Catalog on their own instance.

## Configuration overview

Follow these tasks to set up the Service Exchange Order Management for Providers application, which uses Order Management to create product offerings and service specification and publish them ServiceNow in your provider instance as remote record producers. Service Exchange admins can then activate these remote record producers to make the products and services available from the Service Catalog on consumer instances.

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### Setting up the Service Exchange Order Management for Providers application

| Configuration step | Description | Role |
|---|---|---|
| Install Service Exchange for Providers | Install the Service Exchange for Providers application from the ServiceNow Store. For more information on configuring this application, see Configure Service Exchange for Providers. | Admin |
| Install Service Exchange for Consumers | Install the Service Exchange for Consumers application from theServiceNow Store. For details on configuring this application, see Configure Service Exchange for Consumers. | Admin |
| Install Service Exchange Order Management for Providers | Install the Service Exchange Order Management for Providers application from the ServiceNow Store. | Admin |
| Create a product offering for a remote catalog item | In the provider instance, create the product offerings to be added as remote catalog item to the service catalog for your consumers. | Product catalog admin or manager |
| Create a service specification for a remote catalog item | In the provider instance, create the service specification for a service to be added as a remote catalog item to the service catalog for your consumers. | Product catalog admin or manager |
| Associate consumer criteria to a remote record producer | In the provider instance, review the remote record producer and associate the customer criteria that entitles the catalog item for eligible Service Bridge consumers. | Service Exchange provider admin |
| Associate consumer criteria to the remote record producer for managing inventory. | Review the remote record producer for managing inventory and associate the customer criteria. | |
| Activate the remote record producer | In the consumer instance, activate entitlements for the remote record producers. | Service Exchange consumer admin |
| Retire a remote catalog item | Retire a product offering or service specification used in a remote catalog, which automatically retires the corresponding remote record producer and removes the | Product catalog admin or manager |

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**Setting up the Service Exchange Order Management for Providers application (continued)**

| Configuration step | Description | Role |
|---|---|---|
| | item from the service catalog on the consumer instance. | |

### Install Service Exchange Order Management for Providers

You can install the Service Exchange Order Management for Providers application (sn_sb_pro) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they're not already installed.

## Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application .
- Review the Service Exchange Order Management for Providers application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

## About this task

The following items are installed with Service Exchange Order Management for Providers:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Find components installed with an application . .

## Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Service Exchange Order Management for Providers application ((sn_sb_pro)) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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

6. Select **Install**.

### Create a product offering for a remote catalog item

Create a product offering in a Service Exchange provider instance. When you publish the product offering, a remote record producer is created for the remote catalog item.

## Before you begin

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_catalog_manager

## About this task

When you're creating the product offering, use the **Distribution channel** field to set the channel to Service Exchange.

## Procedure

1. In the CRM Workspace on the provider instance, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings**.
3. Select **New**.
   On the Details tab, fill in the fields.

**Create New Product Offering form**

| Field | Description |
|---|---|
| Number | System-assigned number for the product offering. |
| Name | Alternative name for the product offering to help differentiate it from similar product names. |
| Display name | Name of the product offering that is added. |
| Offering type | Offering entity. Select one of the following types:<br>○ Product: A product entity that an agent can add to an order using the CRM Workspace.<br>○ Entitlement: An entity such as a warranty or subscription that can be added to an order by an agent. |
| Offering sub-type | Type of entitlement:<br>○ Warranty<br>○ Extended warranty<br>○ License<br>○ Subscription |
| Sellable | Option indicating that the product offering can be sold as a standalone item. If not selected, the product offering can be sold as part of bundle but not as a standalone item.<br>**Note:** If you're using the Service Exchange Order Management for Providers application, select this option for a product offering. Only sellable product offers create remote catalog items. Offers with bundled configurations are not supported. |

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| Field | Description |
| --- | --- |
| Description | Short description of the product offering. The description helps the order agent understand the product when placing an order. |
| Start date | Date and time that the product offering is available for Sales Customer Relationship Management applications. Select the Calendar icon to choose the start date and time, then select **OK**. |
| End date | Date and time that the product offering is deleted from Sales Customer Relationship Management applications. Select the Calendar icon to choose the end date and time, then select **OK**. |
| State | State of the product offering. States include In Draft, Published, Retired, and Archived. You can update product offerings In Draft state. |
| Distribution channel | Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels.<br>**Note:** If you're using the Service Exchange Order Management for Providers application, enter Service Exchange as the channel. |
| Owner | Person responsible for the product offering. |
| Code | System-generated alphanumeric number based on the product name. Although system generated, you can edit the code to represent a SKU or any other industry specific product codes. |
| Product specification | Product specification to associate with the product offering. It provides a functional view of a product offering that drives order fulfillment.<br>**Note:** Only published specifications appear. |
| Product model | Name of the product model. |
| Copy child specification characteristics | Option that when selected copies all child specification characteristics in a specification hierarchy. For example, if the product offer has an associated product specification, selecting this option indicates that the characteristics are inherited from the child specifications in addition to the parent specification. |
| Pricing method | Pricing method for the product:<br>○ One-time: A single fee for the product.<br>○ Recurring: A fee that occurs at scheduled intervals. You can set the periodicity for a recurring fee. |

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| Field | Description |
| --- | --- |
| | **Note:** Pricing information is not visible on the consumer instance. If a default or other price list is configured for an offer, the price is calculated and updated only on the provider instance. |
| Periodicity | Recurring pricing: Monthly or annually. |
| Monthly recurring charges | Charges that recur every month. Monthly recurring charges are supported for backward compatibility. Use price lists to define prices. |
| Non recurring charges | Charges that are applied once. Supported for backward compatibility. Use price lists to define prices. |
| Create contract | Option that indicates to agents that entitlement contracts can be added to the product order. If selected, service contracts are created after order fulfillment. Used when entitlements are managed as contracts. |
| Contract term | Length of the contract:<br>○ 12 months<br>○ 24 months<br>○ 36 months<br>○ 48 months<br>○ 60 months |
| Version | Version number that is assigned to this product offering version. |
| Initial version | Name of the product offering at the time you created the initial version. |
| Previous version | Name of the previous version of the product offering, For example:<br>○ When you create the initial version of the product offering (for example, version 1), this field is empty.<br>○ When you create a version (version 2) with a slightly different name, the name of the product offering at its initial creation appears here.<br>○ When you create a subsequent version (version 3), the name of the product offering as it was at version 2 appears here.<br>You can't change this field. |

4. Select **Save**.
5. Add additional characteristics to your product offering, if needed.
6. **Optional:** Add product visuals to your product offering.

   a. In the Product Visuals tab, select **New**.

   b. Enter a name for the visual.

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**c.** To select an image file to upload, select **Click to add**.

**d.** To set your image as the primary image for the product, select **Set Primary**

> **Note:** You can add multiple images for products, but the service catalog only supports one image per product when it is published to the service catalog.

**7.** When you finish creating the product offering version, select one of the following actions.

| Action | Description |
|---|---|
| **Publish** | Publish the draft product offering so that you can use it in a product catalog:<br>○ When you publish it, its state changes from Draft to Published.<br>○ After you publish a product offering, you can't change or delete it, unless you create a version for it. |
| **Update** | Update the product offering with the new data that you added, but don't publish it for use in a product catalog. |
| **Copy** | Copy the data in this product offering so that you can create a product offering from it.<br>For example, you can use the Copy function if you want to create a base version product offering that is similar to Premium SD-WAN Of fering v3, but with a separate version track.<br>When you use the Copy function, it creates a base version product offering and sets the val ues in these fields:<br>○ **Version**: 1 (base version)<br>○ **Initial Version**: Premium SD-WAN Offering v3<br>○ **Previous Version**: blank |

### What to do next

Associate consumer criteria to a remote record producer for this remote catalog item.

## Create a service specification for a remote catalog item

Create a service specification on a Service Exchange provider instance. When you publish the service specification, a remote record producer creates the remote catalog item for the service specification.

### Before you begin

Define the characteristics, characteristic options, and specification categories before you create a service specification.

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_catalog_manager

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### About this task

When you create a service specification for a service request, use the **Distribution channel** field to set the channel to Service Exchange. When the service specification is published, a remote record producer is created for the specification.

### Procedure

1. In the CRM Workspace, select the **List** view.
2. Navigate to **Specifications** > **Service specifications** and select **New**.
   On the Details tab, fill in the form.

**Service Specification**

| Field | Description |
|---|---|
| Number | Auto-generated ID for the service specification. |
| Name | Name of the service specification. |
| Version | Version number that is assigned to a specification:<br>○ When you create the initial version, 1 appears in this field, and can't be changed.<br>○ When you create subsequent versions of the specification, the next incremental number appears in this field after you select **Create New Version**. For example, 4 appears in this field if 3 was the previous version number. |
| Display name | Display name that appears for the specification when this version of the specification is in effect.<br>○ When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field.<br>○ When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten. For example, SD-WAN Edge Device v2 appears in this field when:<br>▪ SD-WAN Edge Device is the name of the specification.<br>▪ Version 2 is the current version of the specification. |
| Category | Specification category that the service specification belongs to. |

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| Field | Description |
| --- | --- |
| | ○ If the selected category that belongs to 5G services doesn't have any matching slice templates, the system checks for existing templates.<br>○ If the selected category has multiple templates mapped to it, the systems chooses the latest published template to the specification. |
| Type | Type of service specification:<br>**Customer Facing**<br>Customers can create a ticket or a case for the service. When you select this type, the **Distribution channel** field is displayed to specify how the service is provided, for example web.<br>**Note:** Only Customer Facing Service specifications are eligible for remote catalog creation.<br>**Resource Facing**<br>Services are required for a resource to function properly.<br>**Not Applicable**<br>Service specification is not customer facing or resource facing. |
| Sub type | Sub-type of the specification. Choose **Slice** to define 5G network service specifications.<br>**Note:**<br>○ When you select Slice as the sub type, the templates are automatically selected based on the mapping of templates with the specification categories of service specifications in the decision table.<br>○ If you select None as the sub type, you can manually specify a template. |
| Start date | Date that the specification is valid from. Use this field when you create a version to indicate when it takes effect. It's informational only and isn't used for actual processing. |
| End date | Date up until which the specification is valid. Use this field when you create a version to indicate when it's no longer in effect. It is |

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| Field | Description |
| --- | --- |
| | informational only and isn't used for actual processing. |
| Template | Templates that you've defined if you're using 5G services.<br><br>**Note:** When you change a template, it deletes all the specification characteristics that are marked as true and are associated with the old template and re-associates the specification characteristics as per the new template that you've selected. |
| Description | Description for the service specification. |
| State | State of the service specification.<br><br>**Draft**<br>Unpublished draft service specification that is assigned when you first create the specification record.<br><br>**Published**<br>Published service specification that is assigned when you formally publish it for use in a product offering.<br><br>**Retired**<br>Service specification that is retired and can no longer be used to create another specification version.<br><br>**Archived**<br>Service specification is no longer used in the ordering or fulfillment process. |
| Distribution channel | Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels.<br><br>**Note:** If you're using the Service Exchange Order Management for Providers application, enter Service Exchange as distribution channel. |
| External code | Service code of the specification. |
| Line | Service line of the specification. |

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| Field | Description |
|---|---|
| Cost to company | Cost to the company for this service specification. This field is for profit-calculation purposes only. |
| Composite | Option indicating that the service specification is a parent specification composed of multiple child specifications. |
| Installation required | Option indicating that someone must install the service on site. |
| Location specific | Option indicating that this service specification requires the location details for fulfillment and installation. |
| Initial version | Name of the base version of the specification that appears but can't be changed. |
| Previous version | Name of the previous version of the specification. For example:<br>○ When you create the initial version of the specification (for example, version 1), this field is empty.<br>○ When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here.<br>○ When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here.<br>You can't change this field. |

3. Select **Save** and then **Publish**.
   A remote record producer creates the remote catalog item for the specification.

### What to do next

Associate consumer criteria to a remote record producer for this remote catalog item.

#### Associate consumer criteria to a remote record producer

In the provider instance, associate the appropriate consumer criteria to the remote record producer created for a remote catalog item. The consumer criteria determines which consumers are entitled to the catalog item. Service Exchange automatically generates the entitlement records that are replicated to eligible consumer instances.

### Before you begin

By default remote record producers are available to all consumers. If you have specific criteria for certain users, define the consumer criteria for Service Exchange users. For more information, see Creating entitlements in Service Exchange for Providers.

Role required: sn_sb.admin or admin

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### Procedure

1. In your provider instance, navigate to **All** > **Service Exchange Provider** > **Administration** > **Remote Catalog Items**.
2. Select the remote record producer for the product offering or service specification that your product catalog admin or manager created.
   Review the record to validate that it was created as expected.

   **Note:** A remote record producer, Manage Inventory, is created automatically when a product offering or service specification for a remote catalog item is published. You must associate the consumer criteria to this remote record producer so that your consumers can manage the product or service inventory from the service catalog on a consumer instance.

3. Navigate to the **Consumer Criterias** tab.
4. In the record for the Active criteria, under the **Remote consumer criteria** column, select and save the criteria to be associated to the catalog item.
5. Select **Publish**.
   Service Exchange automatically generates the entitlement records that are replicated to eligible consumer instances.

### What to do next

Activate the entitlements for the remote record producer.

## Activate the remote record producer

Activate the remote record producer in a Service Exchange consumer instance.

### Before you begin

Role required: sn_sb.admin or admin

### Procedure

1. In the consumer instance, navigate to **All** > **Service Exchange Consumer** > **Provider Connections**.
2. Select the Number link to navigate to the Provider connection record.
3. In the Remote record producers tab (related list), select the remote record producer to be activated.
4. In the Remote record producer page, select **Activate**.
   The product offering or service specification is now available in the Service Catalog in remote record producer format.

## Retire a remote catalog item

Retire a product offering or service specification used in a remote catalog, which automatically retires the corresponding remote record producer. When the remote record producer is retired, the remote catalog item is removed automatically from the service catalog on the consumer instance.

### Before you begin

Role required: sn_prd_pm.product_catalog_admin and sn_prd_pm.product_catalog_manager

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### Procedure

1. In the CRM Workspace on the provider instance, select the **List** view.
2. Navigate to the published product offering or service specification to be retired.
   - To retire a product offering, navigate to **Offerings** > **Product Offerings** and select the product offering to be retired.
   - To retire a service specification, navigate to **Specifications** > **Service specifications** and select the service specification to be retired.
3. Select **Retire**.
   The product offering or service specification is set to the Retired state. The state of the associated record producer for the item changes from Published to Retired, and the product catalog item is deleted automatically from the service catalog.

## Creating orders from Service Portal catalog items

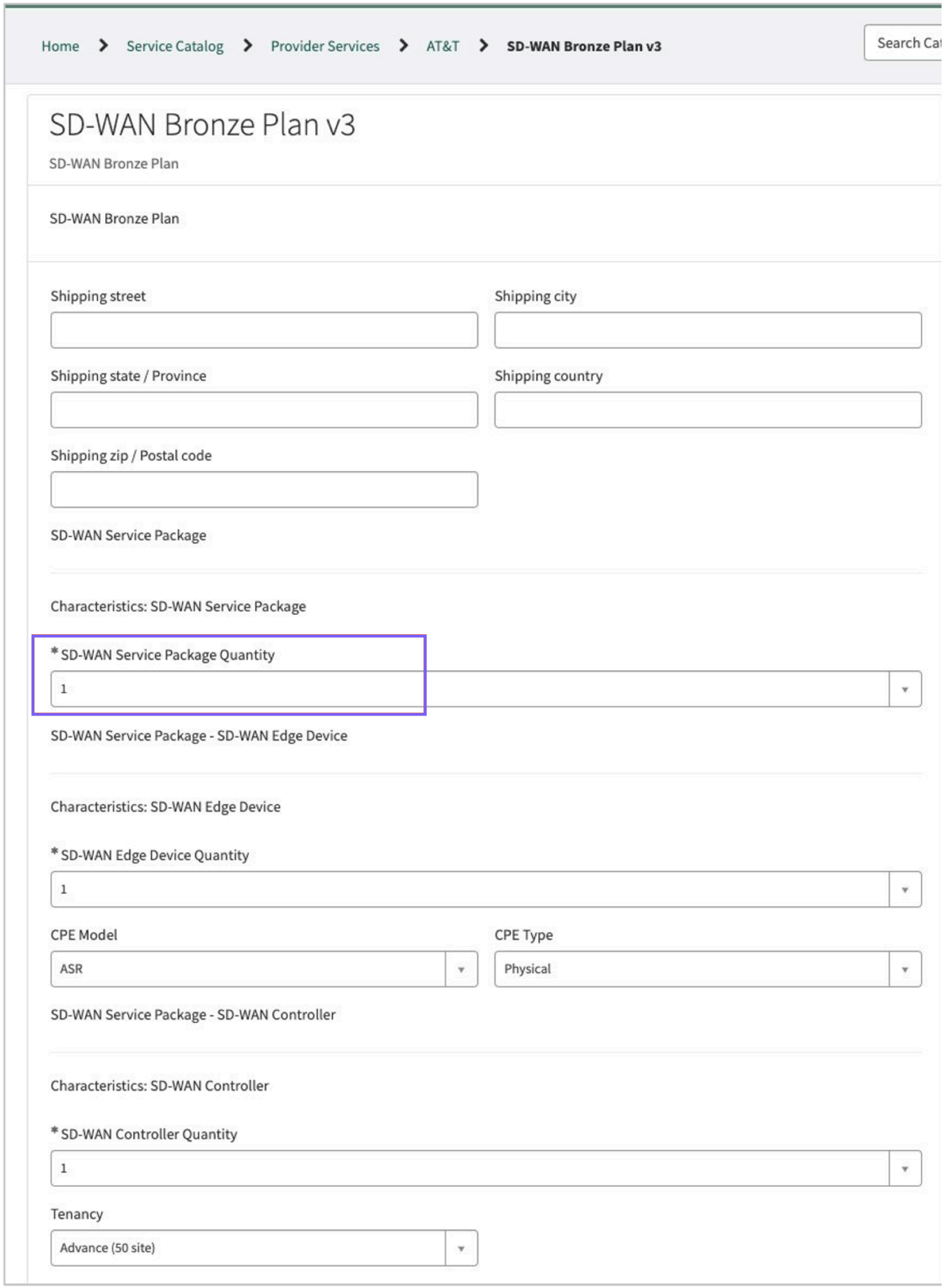
When consumers use the Service Portal on their instance, they can place orders for catalog items that have bundled product specifications. They can also cancel an order, and review and manage product and service inventory.

## Orders for bundled products

Service Exchange remote catalog items can include bundled products that have composite components with different characteristic options that can be selected, including quantity.

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### Example bundled product in service catalog




## Cancelling an order

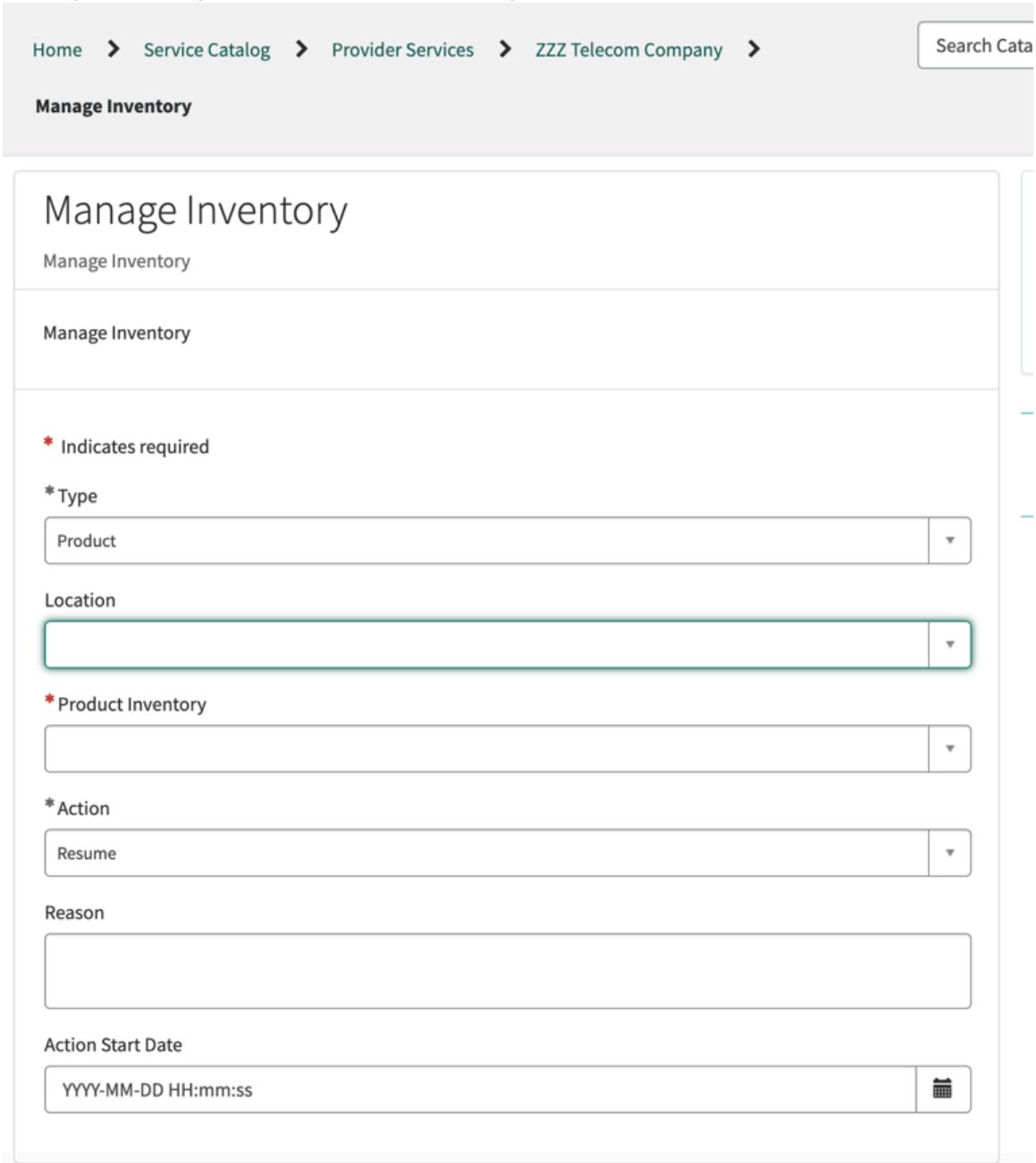
Consumers can cancel an order, if the order hasn't reached the point of no return (PONR). If the PONR has been reached, the consumer receives a status message indicating that the order can't be cancelled.

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### Managing product or service inventory

Consumers can view and manage the product or service inventory for products and services. They can use the **Location** field to filter the **Inventory** view by particular location. Consumers can also perform disconnect, suspend, or resume actions.

#### Manage inventory example in service catalog




## Order Management integration with Field Service Management

Provides an integration between the Order Management and the Field Service Management applications. This integration is available to all ServiceNow customers with the Order Management (com.sn_ind_tmt_orm) plugin, Field Service Management Configurable Workspace (com.snc.uib.fsm_agent_workspace) plugin, and Field Service Management (com.snc.work_management) plugin.

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## Order Management-FSM integration overview

This integration enables automatic and manual creation of work orders from the Order Management application to the Field Service Management application. This integration ensures collaboration between the Order Management and the Field Service Management applications to support the end-to-end order fulfillment process. Work orders are created for an order that requires field service work by field agents. The order fulfillment agents and managers can more efficiently manage order tasks and work order dependencies.

## Key features

- Automation of work order creation, updates, and tracking.
- UI-based manual triggering of work order to Field Service Management. Schedule field service work and communicate work note updates to field service dispatchers and agents.
- Synchronization of information between Order Management and Field Service Management for status, work note, customer details, and other updates.
- Tracking and managing the end-to-end workflow of orders and associated work orders in the fulfillment process.

## Configuring automatic creation of work orders

You can enable automatic creation of work orders from Order Management for Telecommunications, Media, and Technology to Field Service Management. Work orders are created for domain orders and order tasks. To configure the automatic creation of work orders, configure the decision tables in the decision builder.

Customer orders have multiple order line items that have multiple domain orders, such as product orders, service orders, resource orders, and order tasks. For automatic creation of work orders for a domain order, the conditions are specified in the Work Order Policy for Domain Order decision table. For the automatic creation of work orders for order tasks, the conditions are defined in the Work Order Policy for Order Task decision table.

After an order is approved by the manager, a work order is automatically created if the conditions that are defined in the decision builder are met. If required, the manager can also select **Create Work Order** to create a work order manually. The work order template in the decision table pre-populates the fields of the automatically created work order.

### Configure work order creation for a domain order

Add a condition in the decision tree for automatic creation of work orders for domain order. The conditions are specified in the Work Order Policy for Domain Order decision table.

#### Before you begin

Role required: admin

#### About this task

Customer Orders have multiple order line items that have multiple domain orders, such as product orders, service orders, resource orders, and order tasks. For automatic creation of work orders for a domain order, the conditions are specified in the Work Order Policy for Domain Order decision table. For conditions not defined in the decision table, the manager can select **Create Work Order** to create a work order manually. The work order template in the decision table pre-populates the fields of the automatically created work order.

#### Procedure

1. Navigate to **All** > **Decision Builder**.
   You can view all the decision tables.

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2. Select the **Work Order Policy for Domain Order** decision table.
3. In the **Specification** column of the conditions section, select the service package to set a condition.
4. Select an action from the Domain Order Action list.
5. Select a template for the condition in the **WO Template** column.
6. Select **Save**.

### Result

A condition is added in the decision table. If this condition in the decision table is met, a work order is automatically created for a domain order. For more information on decision tables, see Use decision tables.

#### Configure work order creation for order task

Add a condition in the decision tree for automatic creation of work orders for order tasks. The conditions are specified in the Work Order Policy for Order Task decision table.

### Before you begin

Role required: administrator

### About this task

For the automatic creation of work orders for order tasks, the conditions are defined in the Work Order Policy for Order Task decision table. After an order is approved by the manager, a work order is automatically created if the conditions are met that are defined in the decision builder.

### Procedure

1. Navigate to **All** > **Decision Builder**.
   You can view all the decision tables.
2. Select the **Work Order Policy for Order Task** decision table.
3. In the **Specification** column of the conditions section, select the service package to set a condition.
4. Select **Add** for Domain Order Action.
5. Select a Request type for the order task in the **Request Type** column.
6. Select a template for the service package in the **WO Template** column.
7. Select **Save**.

### Result

A condition is added in the decision table. If this condition in the decision tree is met, a work order is automatically created for an order task. For information, see Decision Builder user interface.

## Synchronization of information between Order Management and Field Service Management - Workflow scenario

The integration between Order Management and Field Service Management provides support for the end-to-end order fulfillment process. The following scenario shows the seamless synchronization of data, customer information, status, and other updates between Order Management and Field Service Management.

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### Scenario

After the order fulfillment manager approves the order in Order Management, work orders are automatically created in Field Service Management for conditions that are specified in the decision tree. As the field service agents work on those work orders, the order fulfillment agent can see the updates in the Work Notes section of that Domain Order. An agent cannot close a domain order unless all the work orders associated with it are closed. This workflow shows synchronization of information between Order Management and Field Service Management.

1. An order fulfillment agent creates a new customer order in the Order Management workspace.
2. The agent then selects the location for which the order needs to be placed. For multiple locations, multiple order line items are created.
3. The agent then reviews and places the order.
4. The order fulfillment manager approves the order. The order line items have domain orders as part of the order fulfillment flow. According to the configurations in the decision table, work orders are automatically created in Field Service Management.
5. The agent can view the work orders created for the domain orders in the **Details** tab. In the Activity section, the agent tracks all the updates for the work orders in the work notes.
   - When the status of a work order changes in Field Service Management, the details are displayed in the work notes of the Order Management workspace.
   - If a work order is canceled, the work order status is displayed in the Order Management work notes section.
   - In case of inflight changes, the work order is automatically updated. The current status and the updated information are displayed in the work notes section.
6. The agent can edit an order line item if required. If the agent selects the **PONR** (Point of No Return) option, no changes can be made to the order line item in the workflow anymore.
7. After all the work orders are closed, the order fulfillment manager can review the all the work orders and close the domain order.

> **Note:** The agent cannot close a domain order unless all the work orders associated with that domain order are closed.

## Order Management integration with Strategic Portfolio Management

The Order Management application provides an integration with the ServiceNow® Strategic Portfolio Management (SPM) application enables project oversight of complex order fulfillment tasks.

Use this integration to handle order line items, planned order tasks as projects, create project at the order level, create program, reuse program, create site project and reuse site project in the SPM.

### Features

- Automates the creation of SPM programs, site projects, and projects based on program and project oversight rules, enabling project managers to track order fulfillment activities within a project in SPM.
- Enable fulfillment agents, managers, and project managers to view related lists that show the relationship between an order line item and project, site locations and site projects, domain order and project task, and order task and project task.

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- Supports tracking and synchronization of one or more order tasks.
- Supports staggered/in-flight orders for new tasks created as part of staggered decomposition or in-flight changes. Uses predefined planned order tasks that enable synchronization between order fulfillment and project tasks.
- Closes project tasks automatically when child tasks and associated order tasks or domain orders are completed or canceled.
- Supports an agent to create project at the order level to manage large projects.
- Maps the project specification tasks to the order tasks.
- Supports creation of a single program at customer order level, single site projects at site level to manage site workflow across different products on that site and sub projects for top line items with the ability to reuse a single program across multiple customer orders.
- Automates the creation of site projects for different location or product combination. Define a mapping to auto create program, site project and sub projects for customer order, site and product.
- Synchronizes status and updates between project tasks and Order Management tasks, giving project managers real-time visibility through state changes, notes, and comments.

## Benefits

- Gives project managers end-to-end project oversight of complicated orders, such as long-running orders that require delivery to a specific customer account with multiple locations.
- Manages risks by identifying issues that affect project dependencies and timely order fulfillment.
- Eliminates manual tracking of order status between SPM and Order Management applications. Reduces inefficient communication between project managers, fulfillment agents and managers, and other project stakeholders.
- Unifying orders by creating site projects as a parent projects for projects created for the same location.
- Manage large projects at an order level and not at individual line items.
- Supports site projects that can be across different products on a customer site and sub-projects for each product.
- Enables to see the details of project task and status for domain orders and order tasks.
- Configurable mapping to auto-generate programs, site projects, and sub-projects from customer orders, sites, and products.

## Strategic Portfolio Management integration workflow

The workflow shows how the Strategic Portfolio Management integration works.

## How the SPM integration works

The Order Management integration with Strategic Portfolio Management uses the Project Portfolio Management (PPM) standard application in SPM to track fulfillment tasks as projects in your organization. This integration also works with the Customer Project Management application if you want to track customer order fulfillment tasks as customer projects automatically.

### Configuration

Admins set up the SPM integration by configuring these items:

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- Project templates: Create the PPM project and site project templates that are used to generate the SPM projects automatically for orders requiring project oversight. Project templates also define the planned tasks for order delivery.
- Order Management project oversight conditions and rules: Set the conditions and decision rules that determine the orders that qualify for project oversight and the project templates used to create those projects. You use different Project Management Oversight decision tables to specify the conditions and rules for order lines, site locations, domain orders, and order tasks and the appropriate project template to be used.
- Field mapping in CSM table maps: Associate Order Management fields to SPM project fields by configuring the field mapping in the CSM table maps.
- Property for automatic closure of project tasks: Control the automatic closure of project tasks when associated child tasks are completed by using the *sn_ind_tmt_orm.project.task.auto.closure* system property.
- Property for program and site project reuse: Use the system property *sn_ind_tmt_orm.reuse_existing_program_and_project_enabled* to reuse the program and site project for the following conditions:
  - If the program is created for the same account.
  - If the site project is already created for the same location.

  Set the property to true to reuse the program and site project.

  If the property is set to false, a new program and site project will be created for the new order.

### SPM integration flow

After an order line is created and approved, Order Management performs the following processing steps.

- Project oversight determination: Qualifies the order line for project oversight.
  - Checks that the order line is valid and that the PPM Standard application is installed.
  - Reviews the project oversight conditions and decision rules for order lines.
  - If the order line matches the conditions, automatically creates the project and project tasks using the specified project template.

  **Note:** If multiple order lines are eligible for oversight, the system creates multiple projects.

- One-time synchronization: Synchronizes the order line with the project, establishing the relationship between the order line and the project.
- Site project oversight determination: Qualifies the site location for site project oversight.
  - Checks that at least one order line project should be created.
  - Reviews the site project oversight conditions and decision rules for site location.
  - If the offering and site location matches the conditions, automatically creates the site project and site project tasks using the specified site project template.

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  - Site projects are created on *pm_project table*.
  - Establishing the relationship between the site project and site location in the relationship table.

  To configure site project oversight for product offering, see Configure project oversight for Product offering.
- Project task oversight determination: After Order Management decomposes the order line item into domain orders and order tasks, it does the following:
  - Checks the project oversight conditions for domain orders. If a domain order meets the project oversight conditions, create the associated project and planned tasks using the project template task specified.
  - Checks the project oversight conditions for order tasks. If order tasks meet the project oversight conditions, create the associated project and planned tasks using the project template task specified.
  - Links domain orders and order tasks back to the parent project, synchronizing attributes from the domain orders and order tasks to the project tasks.
- Order task state changes: As order task states change in Order Management, synchronizes the state and status with corresponding project tasks in SPM so that project managers and other project stakeholders can view the changes in real time.
- Updates to project notes and comments: Use the task relationship table **task_rel_task** to synchronize between the order task and project task. Automatically updates project notes and project task notes when fulfillment managers or agents post work notes and comments in order line items, domain orders, and order tasks.
- Synchronization: Use the **csm_table_map** table to synchronize the work note fields between order task, domain order, and project task. It is possible to configure synchronization for fields such as name, work notes, description, and others as required.
- Project task closure: Automatically closes project tasks for order tasks, including child tasks, that have been completed in Order Management.

## Plugins activated for the Strategic Portfolio Management (SPM) integration

The Strategic Portfolio Management (SPM) integration is included with the Order Management application.

The integration requires the following plugins, which are activated by users with the admin role:

**Strategic Portfolio Management plugins**

| Plugin | Description |
|---|---|
| PPM Standard plugin (com.snc.financial_planning_pmo) | Activates the Project Portfolio Management Standard application, which installs Financial Management and the Project Portfolio Suite. The suite includes various applications for handling projects in your organization, such as Program Management, Project Management, and Demand Management. For more information on the Project Portfolio Suite, see Project Portfolio Suite with Financials. |

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**Strategic Portfolio Management plugins (continued)**

| Plugin | Description |
|---|---|
| Customer Project Management plugin(com.snc.csm_ppm) | Activates the Customer Project Management integration with the PPM Standard application. This integration enables customer project managers to create and manage complex projects with multiple tasks. This integration also provides end users with visibility into those projects. For details on Customer Project Management, see Integrating with Customer Project Management. |

## Access controls in the SPM integration

The SPM integration supports certain access controls for users with the following roles.

**SPM integration access controls**

| Role | Access controls in SPM integration | Contains roles |
|---|---|---|
| • Order fulfillment agent [sn_ind_tmt_orm.order-fulfillment_agent]<br>• Service order agent [sn_ind_tmt_orm.service_order_agent] | Order fulfillment agents have read access to product orders, product order tasks, service orders, and resource orders. Service order agents have read access to service order requests, service orders, resource orders, and related fulfillment tasks.<br>Agents have access to the following project information:<br>• Read access to the Project form fields.<br>• Read access to the Order Line Item to Project Relationship table.<br>• Read access to the Order Line Item and Order Task related lists in PPM.<br>• Read access to the Order task to Project Task related list in Order Management. | • it_project_user<br>• sn_customerservice.projectmanager (if using Customer Project Management) |
| • Order fulfillment manager [sn_ind_tmt_orm.order_fulfillment_manager]<br>• Service order manager [sn_ind_tmt_orm.service_order_manager] | Order fulfillment managers receive orders, review order line items, verify that orders are ready for fulfillment, and then approves orders. Service order managers ensure that service orders are ready for fulfillment and then approve them.<br>Managers can: | sn_ind_tmt_orm.order_creator |

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**SPM integration access controls (continued)**

| Role | Access controls in SPM integration | Contains roles |
|---|---|---|
| | • Post notes and comments on order lines and order tasks to communicate with the project manager.<br>• View the relationship between a project and an order line item, project tasks, and order tasks. Managers have the following access to project information:<br>  ○ Read access to the Order Line Item to Project Relationship table.<br>  ○ Read access to the Order Line Item and Order Task related lists in PPM.<br>  ○ Read access to the Order task to Project Task related list in Order Management. | |
| IT project user [it_project_user] | • Read access to the Project form fields.<br>• Read access to the Order Line Item to Project Relationship table.<br>• Read access to the Order Line Item and Order Task related lists in PPM.<br>• Read access to the Order task to Project Task related list in Order Management.<br>• Read access to the Project Template Creation table. | sn_ind_tmt_orm.order_viewer |
| IT project administrator [it_project_admin] | • Configure access to all Project Management features.<br>• Read and write access to the Project Template Creation table.<br>• Read and write access to the Order Line Item related list in PPM.<br>• Write access to the Order Task related list in PPM. | • it_project_user<br>• sn_ind_tmt_orm.order_creator |

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**SPM integration access controls (continued)**

| Role | Access controls in SPM integration | Contains roles |
|---|---|---|
| | • Read access to the Order Line Item to Project Relationship table.<br>• Write access to the Order task to Project Task related list in Order Management. | |
| Administrator [admin] | • Creates the PPM project templates used to generate the projects for orders that require project oversight automatically.<br>• Configures the mapping between order tasks and planned project tasks associated with project templates<br>• Specifies the conditions and decision rules for determining project oversight and the project templates used to create those projects.<br>• Controls automatic closure of project tasks | |

## Configuring the Strategic Portfolio Management integration

Configure the Strategic Portfolio Management integration so that order delivery tasks in Order Management can be tracked as planned project tasks in SPM.

As an admin, follow these tasks to set up the SPM integration.

| Configuration step | Description |
|---|---|
| Activate PPM Standard (Project Portfolio Management) | Install the PPM Standard (com.snc.financial_planning_pmo) plugin.<br><br>If you're tracking customer projects, you must also activate the Customer Project Management (com.snc.csm_ppm) plugin. For information on setting up Customer Project Management, see Integrate with Customer Project Management using Guided Setup. |

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| Configuration step | Description |
| --- | --- |
| | **Note:** If you installed the Order Management application before activating the PPM Standard or Customer Project Management plugins, you must repair the Order Management (com.sn_ind_tmt_orm) plugin to get the plugin-dependent updates and demo data for the SPM integration. |
| Create project templates and project template tasks | Use the Project Portfolio Management application to create the project templates for order lines and project template tasks for domain orders and order tasks. |
| Configure field mapping between orders and projects | Configure the CSM table maps to associate fields in order lines, domain orders, and order tasks to projects and programs in SPM. |
| Set up project oversight conditions and decision rules | Configure the conditions and decision rules for determining the order lines, domain orders, and order tasks that qualify for project management and order tasks that qualify for project management oversight. You also specify the project templates to be used to create those projects. |
| Control the automatic closure of project tasks | Manage the automatic closure of project tasks when related child tasks are completed or cancelled. |

### Creating project templates and project template tasks

You create the project templates and project template tasks that Order Management uses to instantiate projects for order lines and associated domain orders and order tasks.

In the SPM integration, project templates define the structure of a project for order lines and the project planned tasks that map to the order fulfillment tasks for the order line. You specify project templates and project template tasks in the project oversight decision rules. Order Management uses these rules to determine which order items require oversight and the project template or project template tasks used to create the projects.

As an admin or user with the it_project_manager role, you create project templates and the project template tasks in Project Portfolio Management. For more information, see Project templates and Create a project template. The demo data with the Order Management application includes project templates that you can copy and change as needed.

**Note:** When you create project template tasks for domain orders and order tasks, be sure to anticipate inflight changes that may require additional planned tasks. Define those potential planned tasks in the template tasks so that the system can synchronize the planned tasks with the additional order tasks resulting from inflight changes in Order Management.

## Before creating project templates and project template tasks

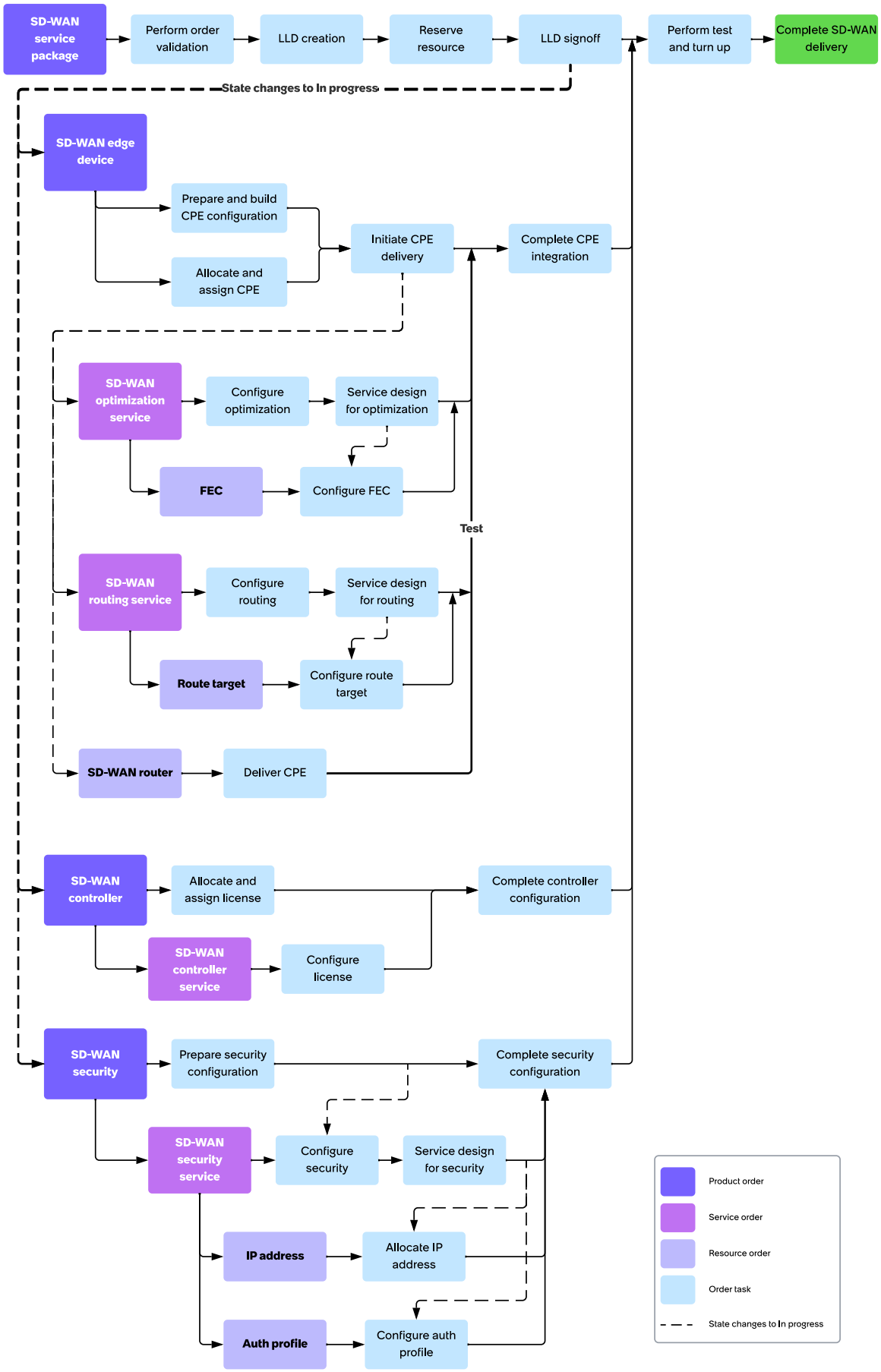
Before you create your project template and project task templates for the SPM integration, consider the level of project oversight required for customer orders to be fulfilled. For example, in the following SD-WAN fulfillment flow, the top order line is SD-WAN Service Package, which

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defines the order line project to be created. Next, identify the domain orders and then the order tasks that require project task oversight.

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## SD-WAN fulfillment flow




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### Setting up project oversight conditions and decision rules

As an admin, you create and maintain the conditions and decision rules that determine whether an order item qualifies as a project that can be tracked in Strategic Portfolio Management. You also specify the project template that Order Management uses to create that project for the order item.

Set the conditions and decision rules for project oversight of order lines and associated domain orders and order tasks by using Decision Builder forms for order lines, domain orders, and order tasks. These forms have a decision table for specifying the conditions and rules to be applied when Order Management determines eligibility for project oversight. These conditions include Specification, Account, Location, and Offering that an order line must match.

For example, in the Project Oversight Management for Order Line Item form, you use the decision table to add or change condition columns. You also specify the decision rules, including the project template, to be applied.

For more information on adding or changing conditions in decision tables, see Decision Builder user interface.

**Note:** If Order Management demo data is installed, the decision table for each project oversight form displays the condition columns and the decision rows added for demo data. You can add, change, or delete the condition columns and decision rows as needed.

### Configure project oversight for order lines

Specify the conditions and decision rules that qualify an order line for project oversight. You also specify the project template used by Order Management to create the project for the order line.

#### Before you begin

Role required: admin

#### About this task

Use the Project Management Oversight for Order Line Item Decision Builder to add or change the conditions and decision rules that must be met for an order line to be tracked as a project. For example, if you want projects to be created for order lines that have a particular product, customer account, and location, you can add condition columns for **Specification**, **Account**, and **Location**.

#### Procedure

1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Project Management Oversight for Order Line Item** decision table.
   The Order Line Item is displayed in the **Inputs** and the **Project Template** column in the **Results**.
3. Add a condition that an order line must match.
   a. Select **Add Condition column**.
   b. On the form, fill in the fields.

**New Condition Column form**

| Field | Description |
|---|---|
| Condition column label | Label for the column. |
| Description | Brief overview of the condition. |

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| Field | Description |
|---|---|
| Input | Input linked to the condition column.<br><br>To evaluate multiple fields, you can add multiple conditions with the Reference input type. |
| Table | If the data type is Reference, the name of the reference table is displayed.<br><br>For order line items, the table is Order Line Item [sn_ind_tmt_orm_order_line_item]. |
| Data to evaluate | For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table.<br><br>To evaluate a particular field, select **Field** and choose a field from the Order Line Item table, such as **Account**, to specify a customer account. |
| Condition type | Data type selected for the condition column. |
| Default operator | How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False. |

   **c.** Select **Save**.

   **d.** Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.
   **a.** Select the **Add** action and enter the conditions that the order line must match and the project template for creating the project.
   **b.** Select **Save**.
   **c.** Repeat steps 4a through 4c for each decision rule to be added.

### Result
The system uses the specified project template to create projects for order lines that match the conditions and decision rules defined in the Project Oversight for Order Line Items decision table.

### Configure project oversight for domain orders

Specify the conditions and decision rules that qualify domain orders for project oversight. You also specify the project template task used by Order Management to create the project for domain orders.

### Before you begin
Role required: admin

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### About this task

Use the Project Management Oversight for Domain Order Decision Builder to add or change the conditions and decision rules that a domain order must meet to be tracked as a project. For example, if you want projects to be created for domain orders for a particular product, you can add a condition column for **Specification**.

### Procedure

1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Project Management Oversight for Domain Order** decision table.
   The Domain Order item is displayed in the **Inputs** and the **Project Template Task** column in the **Results**.
3. Add a condition that a domain order must match.

   a. Select **Add Condition column**.

   b. On the form, fill in the fields.

**New Condition Column form**

| Field | Description |
|---|---|
| Condition column label | Label for the column. |
| Description | Brief overview of the condition. |
| Input | Input linked to the condition column.<br><br>To evaluate multiple fields, you can add multiple conditions with the Reference input type. |
| Table | If the data type is Reference, the name of the reference table is displayed.<br><br>For domain items, the table is Domain Order [sn_ind_tmt_orm_domain_order]. |
| Data to evaluate | For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table.<br><br>To evaluate a particular field, select **Field** and choose a field from the Domain Order table, such as **Specification** (Domain Order.specification) to specify a product. |
| Condition type | Data type selected for the condition column. |
| Default operator | How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False. |

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c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.

a. Select the **Add** action and enter the conditions and project template task to be used.

> **Note:** If there are duplicate project template tasks that have the same **Short description**, it may be difficult to identify and select the appropriate project template tasks. For details on differentiating between similar project template tasks, see Choosing a project template task when duplicates exist.

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

### Result
The system uses the specified project template task to create projects for domain orders that match the conditions and decision rules defined in the Project Oversight for Domain Order decision table.

## Configure project oversight for order tasks

Specify the conditions and decision rules that qualify order tasks for project oversight. You also specify the project template task used by Order Management to create the project for order tasks. The project template task defines the project tasks for the order tasks.

### Before you begin
Role required: admin

### About this task
Use the Project Management Oversight for Order Task Decision Builder to add or change the conditions and decision rules that an order task must meet to be tracked as a project. For example, if you want projects to be created for order tasks for a particular request type, you can add a condition column for **Type**.

### Procedure

1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Project Management Oversight for Domain Order** decision table.
   The Order Task item is displayed in the **Inputs** and the **Project Template Task** column in the **Results**.
3. Add a condition that a domain order must match.

a. Select **Add Condition column**.

b. On the form, fill in the fields.

**New Condition Column form**

| Field | Description |
|---|---|
| Condition column label | Label for the column. |

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| Field | Description |
|---|---|
| Description | Brief overview of the condition. |
| Input | Input linked to the condition column.<br><br>To evaluate multiple fields, you can add multiple conditions with the Reference input type. |
| Table | If the data type is Reference, the name of the reference table is displayed.<br><br>For domain items, the table is Order Task [sn_ind_tmt_orm_order_task]. |
| Data to evaluate | For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table.<br><br>To evaluate a particular field, select **Field** and choose a field from the Order Task table, such as **Request Type** (Order Task.request_type) to specify a request type. |
| Condition type | Data type selected for the condition column. |
| Default operator | How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False. |

**c.** Select **Save**.

**d.** Repeat steps 3a through 3c for each condition to be added.

**4.** Enter a decision rule by selecting **Add new decision row**.

**a.** Select the **Add** action and enter the conditions and project template task to be used.

> **Note:** If there are duplicate project template tasks that have the same **Short description**, it may be difficult to identify and select the appropriate project template task. For details on differentiating between similar project template tasks, see Choosing a project template task when duplicates exist.

**b.** Select **Save**.

**c.** Repeat steps 4a through 4c for each decision rule to be added.

### Result

The system uses the specified project template task to create projects for order tasks that match the conditions and decisions rules defined in the Project Oversight for Order Task decision table.

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### Configure project oversight for Product offering

Specify the conditions and decision rules that qualify the product offering for site project oversight. You also specify the project template task used by Order Management to create the project for product offerings.

## Before you begin

Role required: admin

## About this task

Use the Site project management oversight for product offering Decision Builder to add or change the conditions and decision rules that a product offering and location must meet to be tracked as a site project.

For example, if you want site projects to be created for a specific location, you can add Specific Location in the result section.

## Procedure

1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Site Project Management Oversight for Product Offerings** decision table.
   The Product Offering item is displayed in the **Inputs** and the **Project Template Task** and Location columns in the **Results**.
3. Add a condition that a Product Offering must match.

   a. Select **Add Condition column**.

   b. On the form, fill in the fields.

**New Condition Column form**

| Field | Description |
|---|---|
| Condition column label | Label for the column. |
| Description | Brief overview of the condition. |
| Input | Input linked to the condition column.<br><br>To evaluate multiple fields, you can add multiple conditions with the Reference input type. |
| Table | If the data type is Reference, the name of the reference table is displayed.<br><br>For Product Offerings, the table is Product Offering [sn_prd_pm_product_offering]. |
| Data to evaluate | For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table.<br><br>To evaluate a particular field, select **Field** and choose a field from the Product Offering table, such as **Specification** (Product Offering.specification) to specify a product. |

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| Field | Description |
| --- | --- |
| Condition type | Data type selected for the condition column. |
| Default operator | How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False. |

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.

a. Select the **Add** action and enter the conditions, Site Project template, and location.

> **Note:** The location doesn't has to be the full location. If the full location isn't found, it looks for the parent location.

b. Select **Save**.

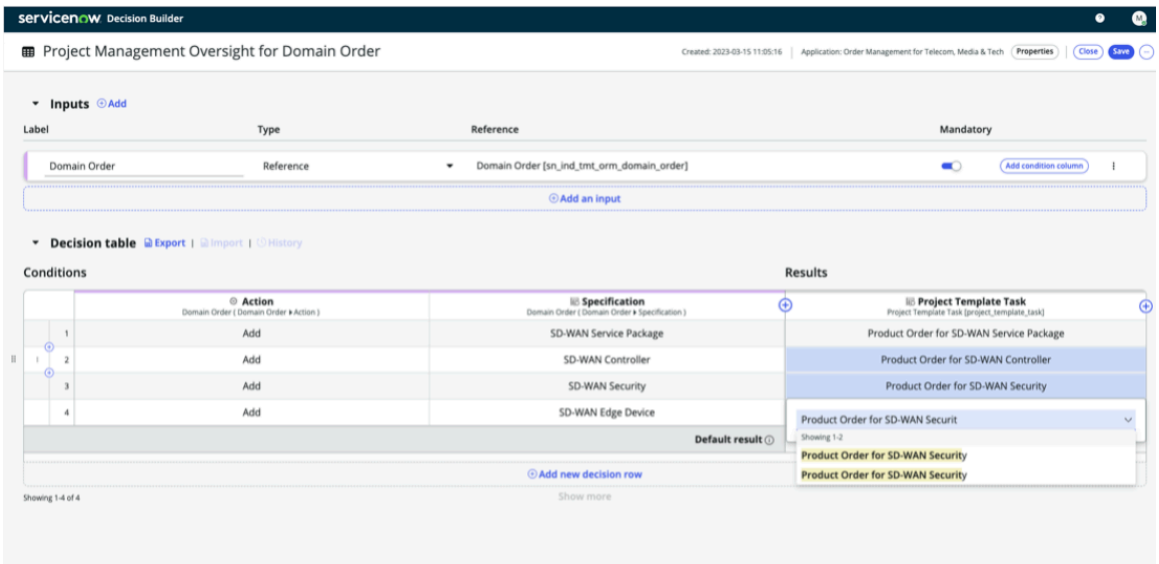
c. Repeat steps 4a through 4c for each decision rule to be added.

### Choosing a project template task when duplicates exist

As an admin, when you're configuring the decision rules for domain orders and order tasks, you may find that there are multiple project template tasks with the same Short description. It may be difficult to determine the correct project template task to select.

For example, the following decision table for Project Oversight for Domain Order shows two options with the same name for the project template task: Product Order for SD-WAN Security. This project template task has the same **Short description** for two different project template tasks, one for SD-WAN Package and the other for SD-WAN Customer Product Bundle.

#### Duplicate project template tasks in Project Management Oversight for Domain Order




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You can determine the appropriate project template task by finding and verifying the sys_id of the project template task to be used. For more information, see Verify the sys_id of a project task template.

### Verify the sys_id of a project task template

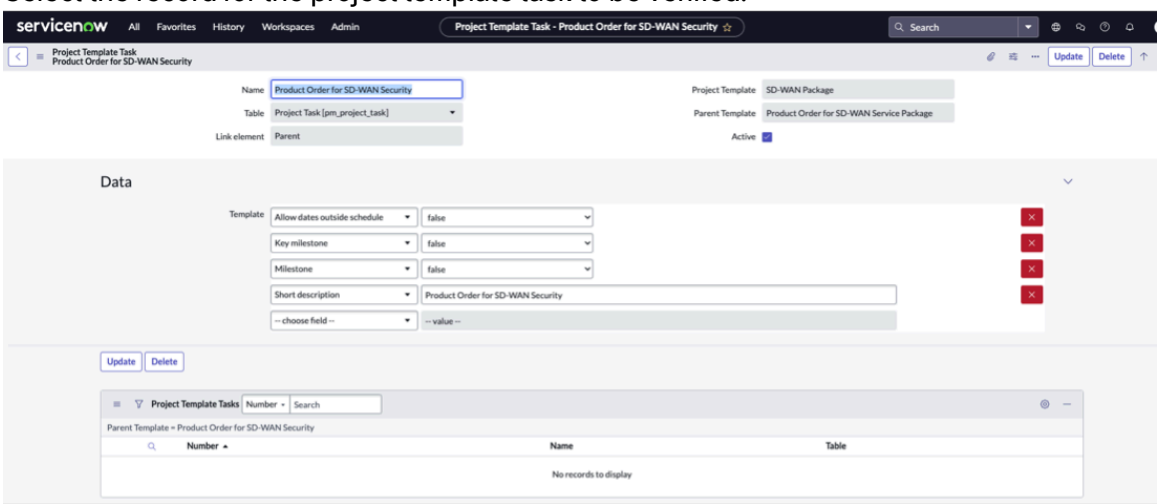
Determine if you're using the correct project task template for domain orders or order tasks by checking the sys_id of the project template task.

## Before you begin

Role required: admin

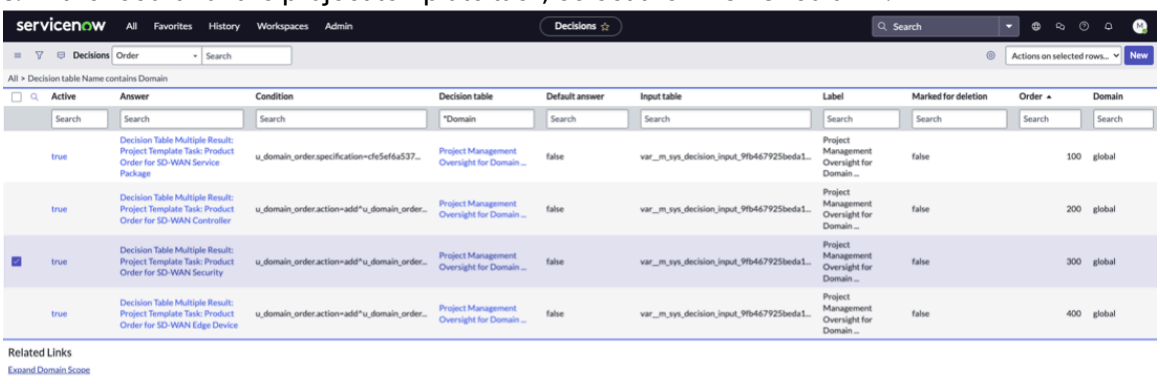
## Procedure

1. Navigate to **All**, and in the filter enter `project_template_task.list`.
2. Select the record for the project template task to be verified.




For example, in the Project Template Task record for Product Order for SD-WAN Security, which belongs to the SD-WAN Package project template, the sys_id is 183910354fcd2110c5ff2624b2ce0b49.

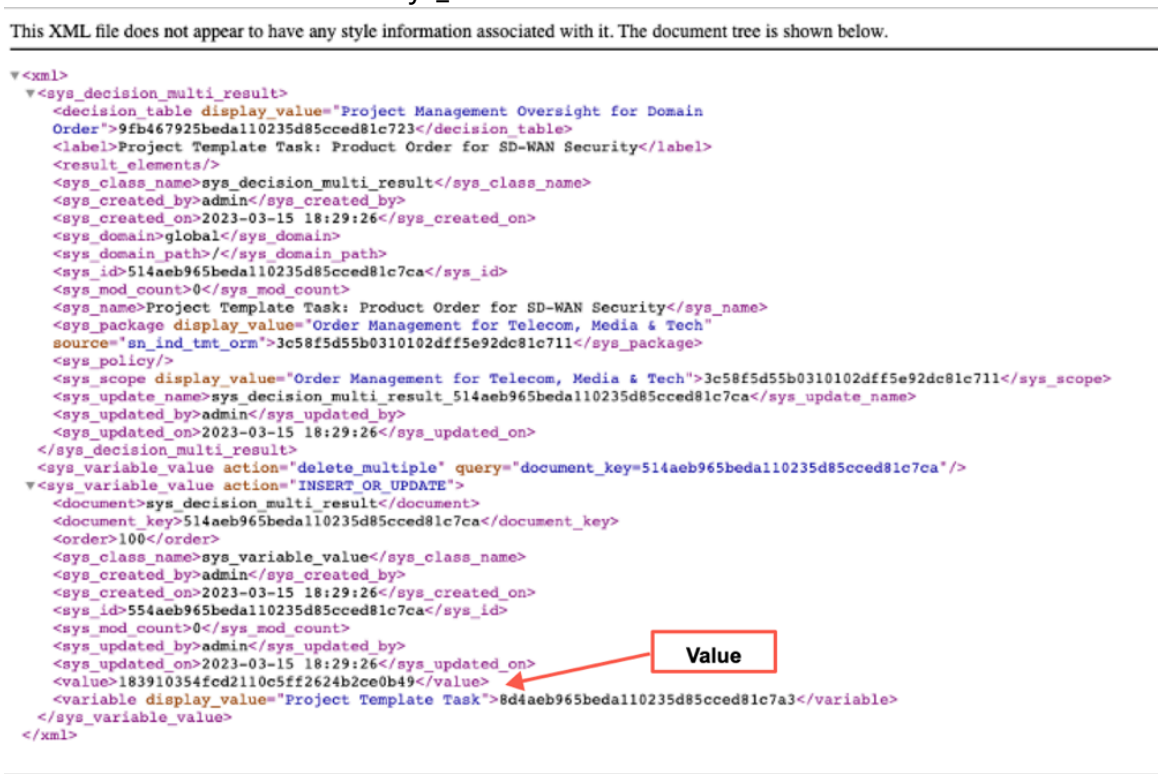
3. Check the value of the sys_id in the associated Decisions table entry.
   a. Navigate to **All** and in the filter, enter `sys_decision_question.list`.
   b. In the Decisions [sys_decision_question] table, locate the record of the corresponding decision table entry, for example Project Management Oversight for Domain Order.
   c. In the record for the project template task, select the **Answer** column.




The resulting record for the **Answer** field opens.

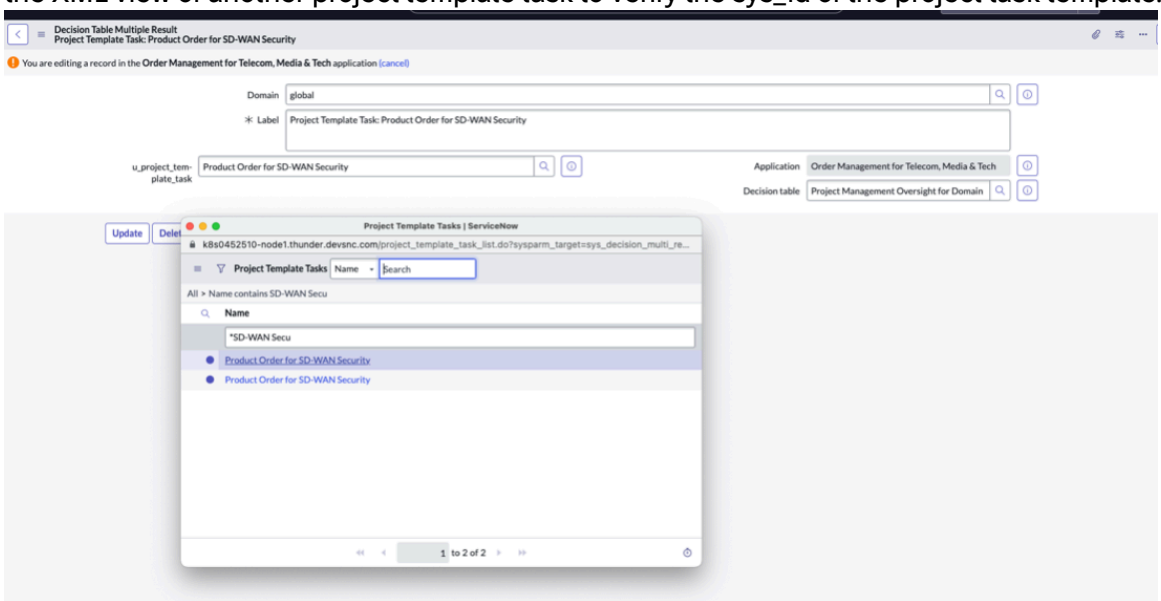
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4. In the resulting record for the Decision Table Multiple Result, view the XML output by right-clicking the header bar of the record and selecting **Show XML**.
5. Review the XML and locate the sys_id value in the file.




The sys_id value should match the sys_id of the project template task determined in Step 1. If the sys_id doesn't match, proceed to the next step.

6. In the Decision Table Multiple Result record, select the **u_project_template_task** and check the XML view of another project template task to verify the sys_id of the project task template.




## Configure field mappings

Configure the CSM table maps to associate fields in order lines, domain orders, and order tasks to projects in Service Portfolio Management.

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### Before you begin
Role required: admin

### About this task
Order Management provides Customer Service Management table maps for associating order line items, domain orders, and order tasks to projects and project tasks in SPM. The tables that you configure depend on whether you're using the PPM Standard application to track projects in your organization or the Customer Project Management integration to track customer projects.

- If you're using PPM, configure the field mapping for these CSM table maps:

**Table maps for PPM**

| Table map | Source table | Target table |
|---|---|---|
| Order Line Item to Project | Order Line Item [sn_ind_tmt_orm_order_line_item] | Project [pm_project] |
| Domain Order to Project Task | Domain Order [sn_ind_tmt_orm_domain_order] | Project Task [pm_project_task] |
| Order Task to Project Task | Order Task [sn_ind_tmt_orm_order_task] | Project Task [pm_project_task] |

- If you're using Customer Project Management, configure the field mapping for these CSM table maps:

**Table maps for Customer Project Management**

| Table map | Source table | Target table |
|---|---|---|
| Order Line Item to Customer Project | Order Line Item [sn_ind_tmt_orm_order_line_item] | Customer Project [customer_project] |
| Domain Order to Customer Project Task | Domain Order [sn_ind_tmt_orm_domain_order] | Customer Project Task [customer_project_task] |
| Order Task to Customer Project Task | Order Task [sn_ind_tmt_orm_order_task] | Customer Project Task [customer_project_task] |

The source and target tables in each table map are pre-populated.

**Note:** If you installed demo data for Order Management, the field mapping for the **Source Field** and **Target Field** display the values used for demo data. You can use the existing field mapping or change it as needed.

### Procedure
1. Navigate to **All** and in the filter enter `csm_table_map.list`.
2. Do one of the following:
   - If you're using PPM, select the Order Line Item to Project table map.
   - If you're using Customer Project Management, select the Order Line Item to Customer Project table map.
3. Go to the **Basic Field Mapping** related list and define a field mapping.

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**Note:** If Order Management demo data is installed, the **Source Field** and **Target Field** values in the Basic Field Mapping related list display the mapping for demo data. You can use the mapping or change it as needed.

| Option | Steps |
|---|---|
| **Define a new field mapping** | **a.** Select **New**.<br>**b.** In the **Source Field**, select an item from the source table.<br>For example, select an item such as **work_notes** from the Order Line Item [sn_ind_tmt_orm_order_line_item] table.<br>**c.** In the **Target Field**, select an item from the Project [pm_project] table, such as **Project Name**.<br>**d.** In the **Active**,select **True**.<br>**e.** Select **Submit**.<br>In this example, the order line **Short De scription** is used as the **Project Name** in SPM. |
| **Change an existing field mapping** | **a.** Select the field mapping record.<br>**b.** In the **Source Field**, select a different item from the Order Line Item source table, as needed.<br>**c.** In the **Target Field**, select a different item from the Project target table, as needed.<br>**d.** Select **Update**. |

4. Do one of the following:
   - If you're using PPM, select the Domain Order to Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.
   - if you're using Customer Project Management, select the Domain Order to Customer Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.

   For example, you can select the **Short Description** field in the Domain Order source table and map it to the **Short Description** field in the Project Task target table.

5. Do one of the following:
   - If you're using PPM, select the Order Task to Project table map if and repeat Step 3 to define a new field mapping or update an existing mapping.
   - If you're using Customer Project Management, select the Order Task to Customer Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.

   For example, you can select the **Short Description** field in the Order Task source table and map it to the **Short Description** field in the Project Task target table.

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### Result
The fields in the Order Management source tables are mapped to the fields in the SPM target table.

Changes made to a synchronized field in order task or domain order will automatically be reflected in the corresponding synchronized field in project task.

#### Control automatic closure of project tasks

Manage the automatic closure of projects in the SPM integration by using the *sn_ind_tmt_orm.project.task.auto.closure* system property.

### Before you begin
Role required: admin

### About this task
In the SPM integration, Order Management closes project tasks automatically when all associated order tasks are completed and there are no open child tasks that have project task dependencies. If a project task has open child tasks, Order Management doesn't automatically close the project task. You can use the *sn_ind_tmt_orm.project.task.auto.closure* property to suppress or reactivate the automatic closure of project tasks.

### Procedure
1. Navigate to **All** and in the filter, enter `sys_properties.list` and press **Enter**.
2. Search for and open the *sn_ind_tmt_orm.project.task.auto.closure* property.
3. In the **Value** field, set the value for the property.
   - To suppress automatic project task closure, enter `false`.
   - To reactivate automatic project task closure, enter `true`.
4. Select **Update**.
   Automatic project task closure in the SPM integration is immediately suppressed or reactivated based on the value that you entered. If automatic closure is suppressed, any order task-to-project task updates occur only when order tasks are in an in-progress state.

#### Managing inflight order for site projects

Manage how your organization receives changes for customer orders, service orders or individual line items that are still being orchestrated and fulfilled.

When you create an inflight order with a new site and new product offering, it creates new site project and new sub-projects for the offerings using the same program.

When you create an inflight order with new product offering for existing site project using the same program, it creates new sub-project for the new product offering. An existing site project is reused and it will not create new site project. The site project tasks and templates may be updated to reflect newly added products.

## Cancel order for site project

When a product offering on an inflight customer order is canceled, the corresponding sub-project and all associated tasks must be automatically closed.

If all product offerings (or all related sub-projects) under a parent project are closed, the main parent project must also be automatically transitioned to a terminal state. In such cases, its status much be updated to **Closed Skipped**.

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If the parent site project is canceled, all linked child projects and associated product offerings under that site project are closed automatically.

All records moved to a terminal state are set to **Closed Skipped**.

Does not delete any records as part of this process.

## Tracking order tasks and associated projects

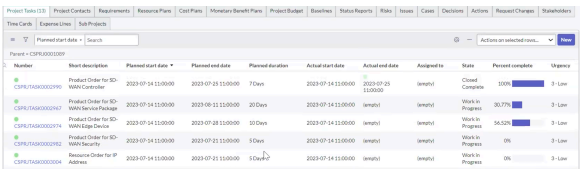
With the SPM integration, project managers and fulfillment agents or managers can track projects in Strategic Portfolio Management that have associated order tasks in Order Management.

## Tracking projects for planned order tasks in SPM

As a project manager, you can review and update projects that have been created for tracking planned order tasks using the Project Portfolio Management application in SPM. When fulfillment managers and agents update or complete order tasks, Order Management automatically synchronizes project states between SPM and order line items, task and domain order states, and project task and order task states as fulfillment managers and agents complete order tasks.

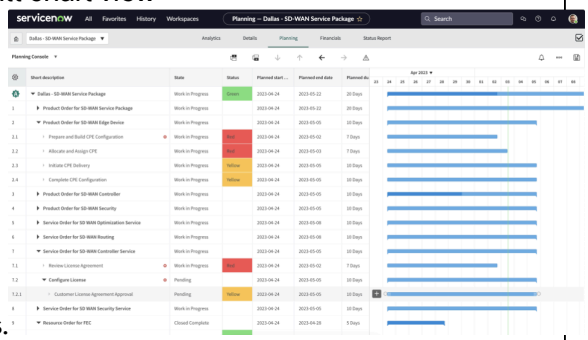
A project manager has the it_project_manager role for tracking and updating projects.

### Project manager tasks

| Task | Details |
|---|---|
| Review an order fulfillment project and state | **1.** Navigate to **All** > **Projects** > **Project Workspace**.<br>**2.** Select the project for the order item.<br>**Note:** The **Project Name** is the name assigned when Order Management created the project using the specified project template.<br>**3.** Select the **Details** tab then scroll down to the **Project Tasks** tab to review project tasks, State, and Percent complete,<br> |
| Review the project state and project task state to assess the project status | **1.** Navigate to **All** > **Projects** > **Project Workspace**.<br>**2.** Select the project for the order item. |

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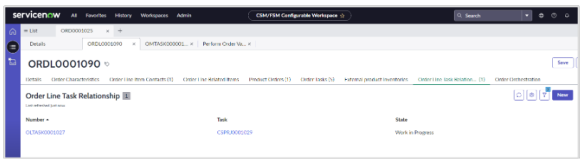
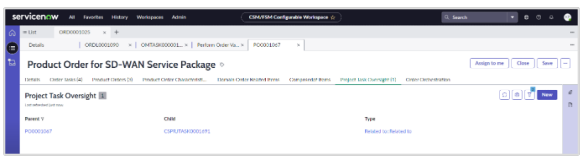
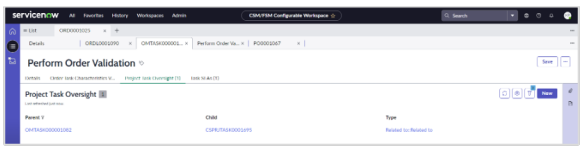
### Project manager tasks (continued)

| Task | Details |
|---|---|
| | **3.** Select the **Planning** tab.<br><br>The Gantt chart view  displays. |
| Review notes and comments on order tasks from fulfillment agents and managers | **1.** Navigate to **All** > **Projects** > **Project Workspace**.<br>**2.** Select the project for the order item.<br>**3.** Go to the **Notes** tab and view the comments and status updates from Order Management. |

## Tracking fulfillment tasks that have associated projects in Order Management

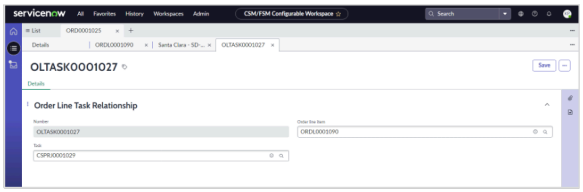
As a fulfillment agent or manager, you can view the relationship between a project and order line item, project tasks, and order task in the Configurable Workspace. You can also post notes and additional comments on order lines and order tasks to communicate with the project manager responsible for project oversight of the order management tasks.

### Fulfillment agent or manager tasks

| Task | Example |
|---|---|
| View order line-to-project relationship in order line item form |  |
| View project task-to-domain order relationship in domain form |  |
| View order task-to-project task relationship in order task from |  |

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**Fulfillment agent or manager tasks (continued)**

| Task | Example |
| --- | --- |
| View **Details** tab in order task relationship to see task number, project number, and order line item number relationship |  |



# Order Management diagnostics capability

Agents can use ServiceNow® Order Management diagnostics capability to diagnose and resolve service issues related to order tasks and domain orders.

Install these plugins:

- Sales Customer Relationship Management plugin
- Service test management plugin

  For more information about service test management, see Setting up a test group and Setting up test definitions.

## Diagnose and resolve an order task

As a customer service agent, review, diagnose, and resolve, and close an order task for the service-related issue experienced by the customer.

### Before you begin

Role required: admin

To enable the display of the **Diagnose** tab and **Run diagnostics** in the conceptual panel, **Test and turn up** must be selected in the request type.

The decision table enables the Test and turn up to configure the trigger for any request definition. This default feature is shipped only for Test and turn up task.

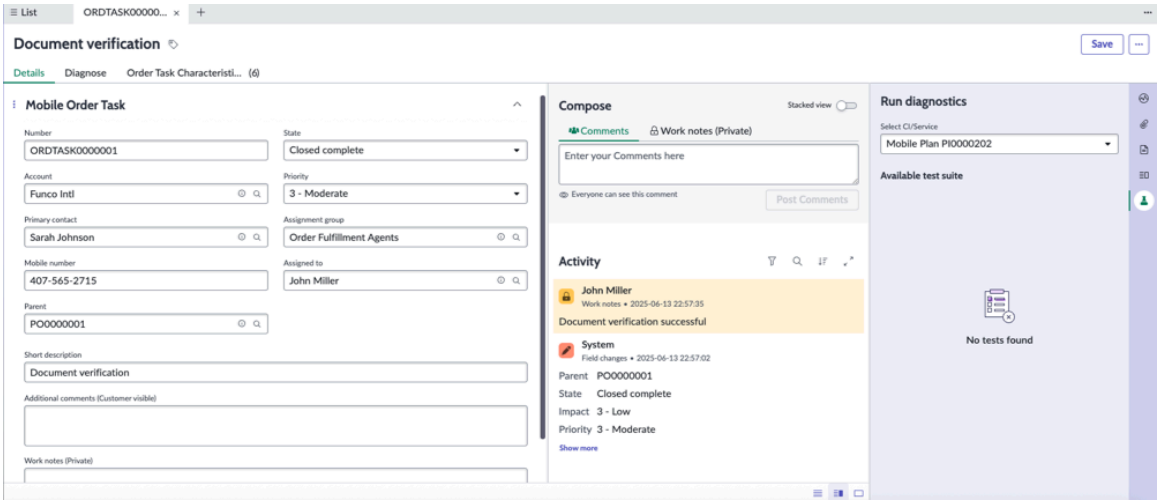
### About this task

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

### Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to **Order Tasks** > **All**.
4. Open an order task that is in the New or Open state.

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5. Review and verify the order task.
   a. In the **Details** tab, review and verify the general details for the order task.
6. Diagnose the order task to identify the root-cause of the problem.

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

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

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

      The drop-down list shows the current product inventory linked to the parent record of order task.

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

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

   e. Select **Configure**.

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

   g. **Optional:** In the test, select an option either to **Run test** now or to **Schedule test** for later.

   h. Select **Run test**.

   i. In the diagnose tab **Test results** section, select **Refresh list** icon.

   j. In the diagnose tab, expand the **Test results** and review the results of the tests conducted in the previous step, checking whether each test is passed or failed.

      The failed tests indicate that the issues causing the order task to be identified and need repair.

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

k. **Optional:** Select the **View Details** icon for a specific test result to review its details.

l. **Optional:** Select the **Rerun test** icon for a specific test result to run it again.

m. Select **Continue**.

7. Repair the order task by creating a new or automated repair task.
   - Select **Generate automated task** to automatically create a repair task.
   - Select **Create repair task** to manually create a customize repair task.

   A Repair task is created for all failed test cases related to the diagnosed order task.
   a. Select the repair task that you want to work on.
   b. In the Resolution task form, review the task details to identify the failed test and then work on those tests to fix the order task.
   c. In the **Select** field, select an appropriate state from the list to update or close the repair task, such as Closed complete.
   d. Select **Save** and close the resolution task.
   e. Select **Continue**.
8. To view the characteristics values of the order task, select the **Order Task Characteristics Values** tab.

## Diagnose and resolve a domain order

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

### Before you begin

Role required: admin

To enable the display of the **Diagnose** tab and **Run diagnostics** in the conceptual panel, the **Test and Turn up** must be selected in the **Stage**.

The decision table enables the Test and turn up to configure the trigger for any request definition. This out-of-the-box feature is shipped only for Test and turn up task.

### About this task

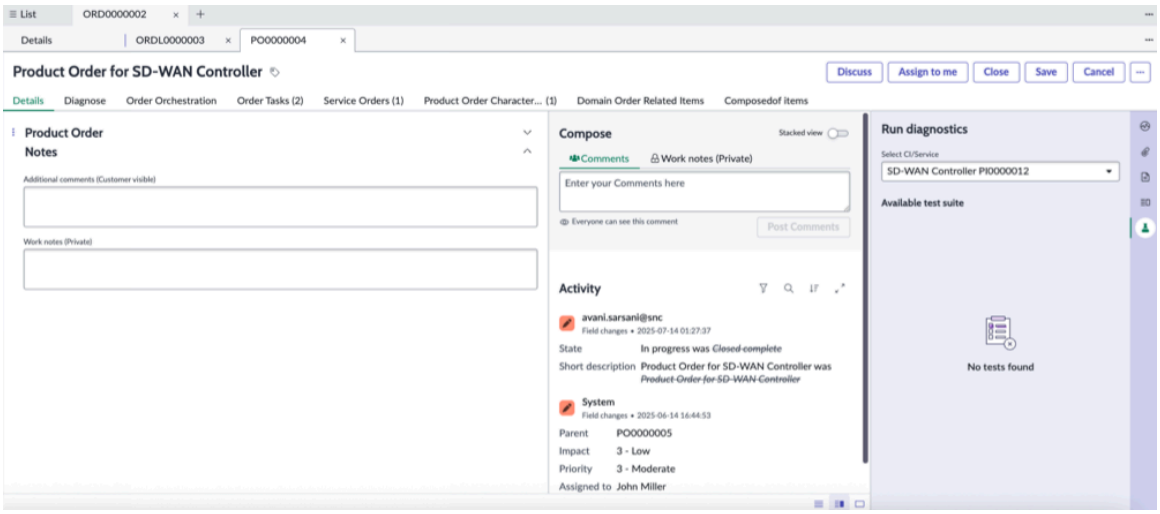
The domain order progresses through several stages from start to closure. It begins with a customer service agent reviewing and verifying the problem. Next is the diagnosis stage, where system-specified tests are executed to identify the root cause. After the tests, the agent moves to the repair, creating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

This task is applicable for product order, services, and resources.

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## Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Select the List icon.
3. Navigate to **Customer Orders** > **All**.
4. In the **Product Orders** tab, open the product order record.




5. Review and verify the domain order.
   a. In the **Details** tab, expand the Product Order task and then review and verify the general details for the domain order.
   b. If necessary, in the Notes section, add **Additional comments** and **Work notes**.
6. Diagnose the domain order to identify the root-cause of the problem.

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

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

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

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

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

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

   e. Select **Configure**.

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

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

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h. Select **Run test**.

i. In the diagnose tab **Test results** section, select **Refresh list** icon.

j. In the diagnose tab, expand the **Test results** and review the results of the tests conducted in the previous step, checking whether each test is passed or failed.

The failed tests indicate that the issues causing the order task to be identified and need repair.

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

k. **Optional:** Select the **View Details** icon for a specific test result to review its details.

l. **Optional:** Select the **Rerun test** icon for a specific test result to run it again.

m. Select **Continue**.

7. Repair the order task by creating a new or automated repair task.
   - Select **Generate automated task** to automatically create a repair task.
   - Select **Create repair task** to manually create a customize repair task.

   A Repair task is created for all failed test cases related to the diagnosed order task.
   a. Select the repair task that you want to work on.
   b. In the Resolution task form, review the task details to identify the failed test and then work on those tests to fix the order task.
   c. In the **Select** field, select an appropriate state from the list to update or close the repair task, such as Closed complete.
   d. Select **Save** and close the resolution task.
   e. Select **Continue**.
8. To view the Orchestration of the domain order, select the **Order Orchestration** tab.
9. To view the tasks of the domain order, select the **Order Tasks** tab.
10. To view the characteristics values of the domain order, select the **Product Order Characteristics Values** tab.
11. To view the details of the service order, select the **Service Orders** tab.
12. To view the details of the domain order related items, select the **Domain Order Related Items** tab.
13. To view the composed of items, select the **Composed of items** tab.

## Integrating CPQ

Learn how CPQ connects with downstream systems and UI frameworks—visualization engines (CDS, kBridge, Threekit), eCommerce storefronts (Shopify, headless), and Salesforce (CPQ, B2B Commerce, Base Package)—to deliver real-time, guided configuration, pricing, and ordering at scale.

With integrations, you can:

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- Visualize configurations in real time using 2D/3D viewers (CDS, kBridge, Threekit).
- Transact in your commerce stack via Shopify or headless storefronts with draft orders or add-to-cart flows.
- Sell through Salesforce with CPQ/B2B Commerce, launch the CPQ Configurator from Product2, and persist configuration data to Salesforce objects for quoting and amendments.

## Integration categories at a glance

### Integration categories

| Category | Primary purpose | Where it's configured | Typical data flow |
|---|---|---|---|
| Visualization (CDS, kBridge, Threekit) | Show 2D/3D product visuals that react to user selections | Blueprint → Layout (CSV/Editor) | CPQ fields/sets → viewer (1-way); optional viewer → CPQ (2-way) |
| eCommerce (Shopify, Headless) | Embed configurator on product/content pages; create carts or draft orders | Shopify app + CPQ runtime client | Storefront → CPQ → cart/draft order |
| Salesforce (Base, CPQ, B2B Commerce) | Launch/configure from Product2, write BOM/field data, amendments | Salesforce package + CPQ Settings | Quote/Cart ↔ CPQ runtime; optional persistence to CLI/CFD |

Limits and behaviors (visualization):

- Sets and product pickers: up to 25 indices/options sent to the viewer
- Active set index: can be published to the viewer when using set repeaters
- Two-way sync: supported for CDS and kBridge (fields; sets require a listener field + parsing rule)
- Threekit supports one-way from CPQ; pair with set repeater guidance where applicable

**Related topics**

Integrating CPQ with visualization tools

CPQ integration with Salesforce B2B Commerce

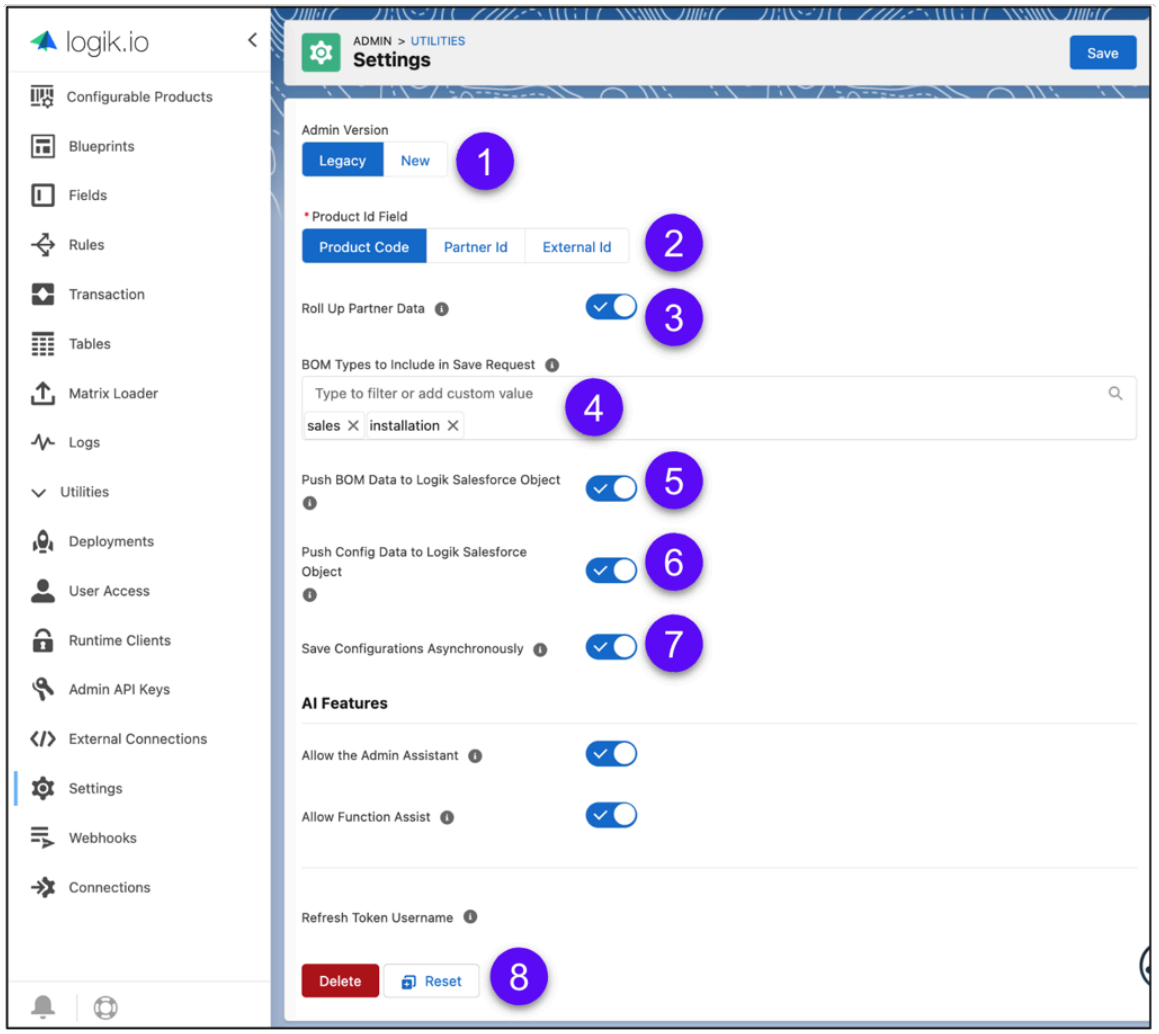
Request provisioning of an SFDC org with a CPQ environment

## CPQ admin settings

Explore the admin settings in CPQ.

Several settings in CPQ control how CPQ interacts with the rest of your application. To get to the Settings page in CPQ, navigate to the CPQ Admin screen, select the arrow to expand the Utilities section, and then select the **Settings** tab near the bottom of the menu.

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1. Admin Version: Determines which UI theme is used for the Admin interface. The setting is maintained at the user level; each administrator can select their preference. If your CPQ environment contains both Configuration Manager and ServiceNow Quote Experience, we highly recommend you use the new Admin UI.
   - The new Admin UI introduces top-level navigation and color theming that helps administrators easily identify and access different administration areas.
   - The Legacy setting retains the administration platform UI used since the application's inception.
2. Product Id Field: Determines the field that CPQ uses to match products when using product rules. Select one of the following:
   - Product Code: Corresponds to the `Product2.ProductCode` field in Salesforce
   - Partner Id: Corresponds to the `Product2.Id` field in Salesforce

     **Note:** the value of this field will change between environments, such as a Salesforce sandbox org and a production org. For ease of migration across environments, consider using either Product Code or External Id.

   - External Id: Corresponds to the `Product2.ExternalId` field in Salesforce
3. Roll Up Partner Data: When enabled, this option combines and averages the price for all items with the same partner ID when responding with easyXDM. This makes each line unique in the payload instead of representing the information individually.

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4. BOM Types to Include in Save Request: Choose BOM types to include in API request when saving the configuration. Select from the menu or type to enter custom BOM types. The default options are Sales and Manufacturing.

   The following video explains how to include multiple BOM types in API requests: Multi BOM Enhancements

5. Push BOM Data to CPQ Salesforce Object: When enabled, CPQ creates records in Salesforce of the LGK `ConfigurationLineItem_c` object containing the BOM data when saving a configuration.
6. Push Config Data to CPQ Salesforce Object: When enabled, CPQ creates records in Salesforce of the LGK `ConfigurationFieldData_c` object that contains the config data when saving a configuration.
7. Save Configurations Asynchronously: When disabled, CPQ waits until the configuration is saved in the database before closing the session. When enabled, CPQ starts the save process and immediately closes the session. In most cases, enabling this setting leads to faster workflows, but if a high volume of configurations is being edited simultaneously, disabling this setting ensures that all configurations are saved when returning.
8. Refresh Token Username: This is the user name that CPQ uses for API syncing of configuration line data, configuration data, and to populate the caches for Product2, pricebook, and pricebook entries.

   Salesforce objects are synchronized every thirty minutes. If you have an issue synchronizing product, pricebook, or pricebook entries, reset the user name and wait thirty minutes to see whether the issue has been resolved.

### Set up a runtime client

Configure a runtime client. Doing so creates a token that you can use to authenticate runtime calls. This can be useful when CPQ is embedded in a VisualForce page.

#### Before you begin
Role required: admin

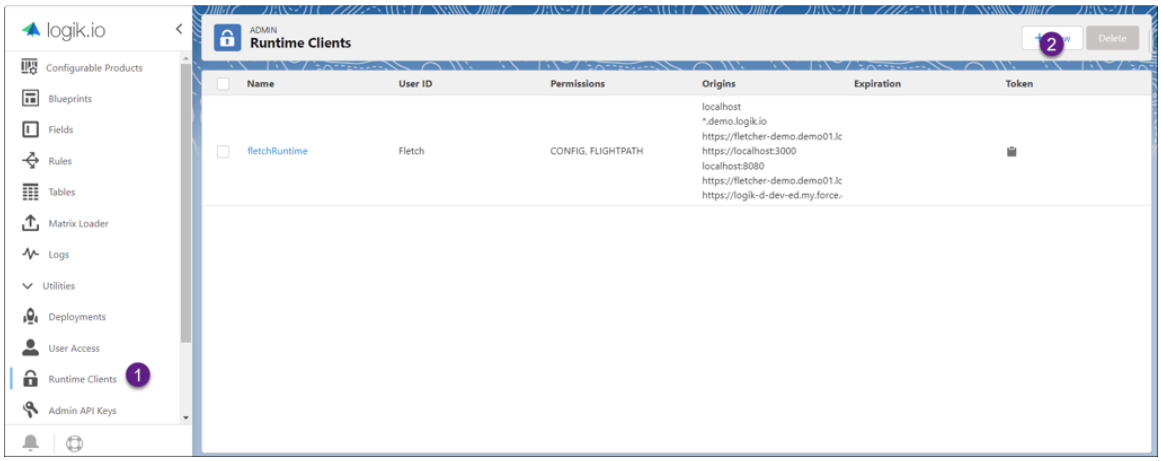
#### About this task
Runtime clients can be set up that provide a token for authentication of runtime calls when launching CPQ outside of the regular workflow. For example, CPQ may be started through a quote in Salesforce when embedding CPQ in a Visualforce page, Lightning web component, or HTML page.

**Note:** This authentication can be used only by end users launching a CPQ configuration in runtime. To authenticate admin calls, users should leverage Admin API Keys.

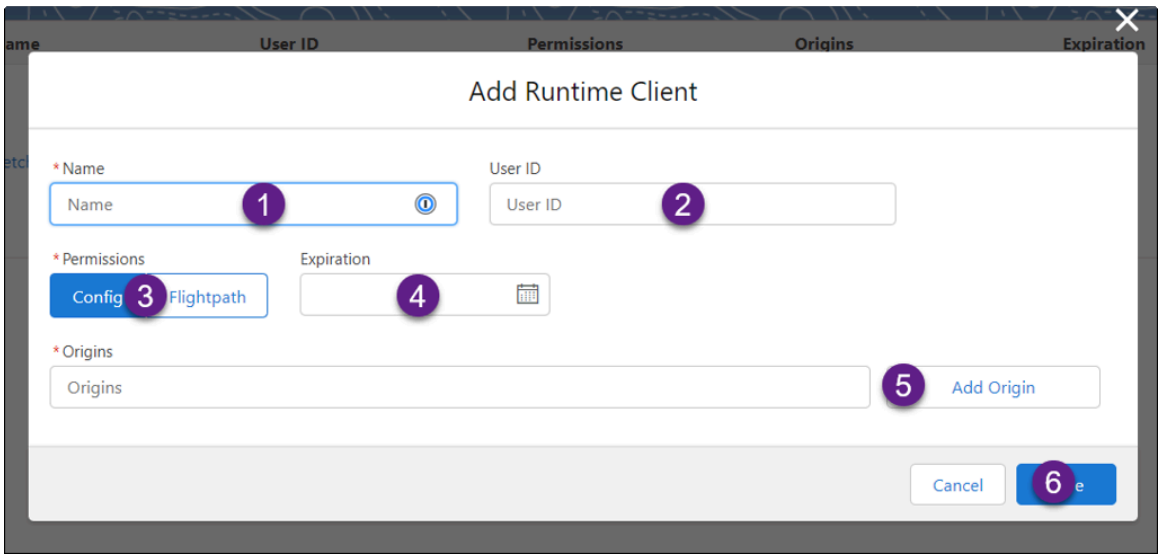
#### Procedure

1. In the Utilities tab of the navigation pane, click **Runtime clients**.
2. Click **New**.

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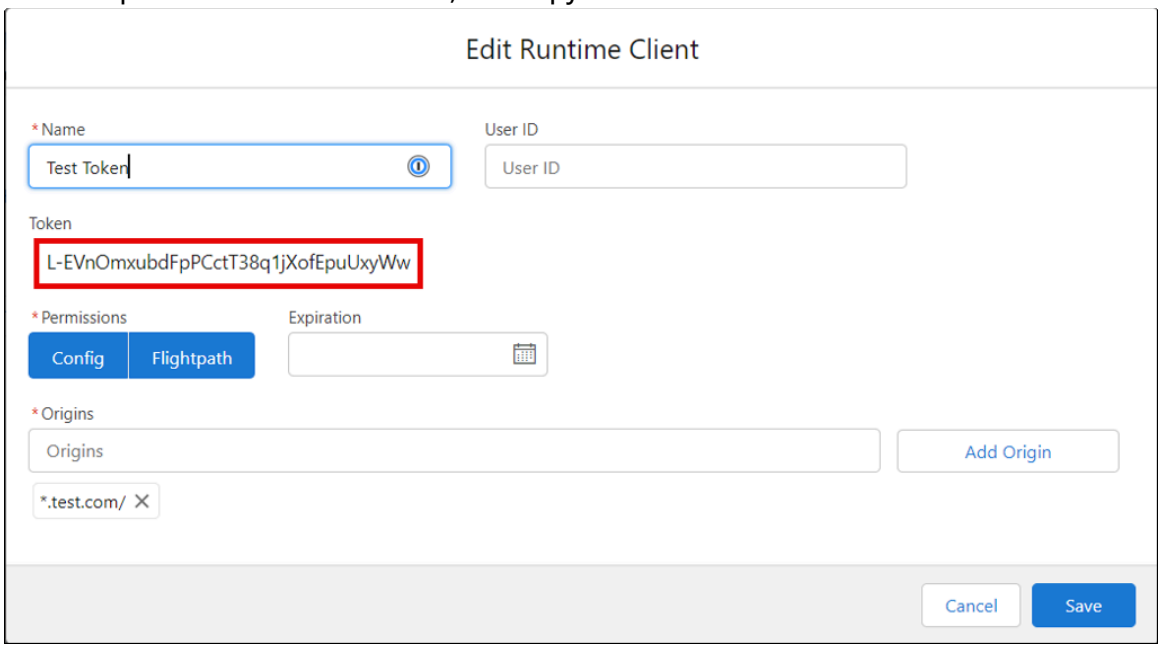

3. Name the runtime client.




4. Set the user ID.
   Setting the user ID attaches the ID to all calls authenticated by this client. This can help track the origin of the calls.
5. Set whether the permissions apply to Config or Config and Flightpath.
   Config enables launching configurations. Flightpath helps with debugging by allowing for accessing the flightpath data of the configuration.
6. Set an expiration date for the runtime client (optional).
   The expiration date can be changed to extend or shorten the time frame during which this token can be used.
7. Add a URL, such as `https://<yourLogikUrlName>.<sector>.logik.io` or `*.salesforce.com`, and then click `Add Origin`.
   Users must specify the origin of calls made using this token to authenticate. Make sure that the URL has no trailing slash. For example, use *.salesforce.com and not `*.salesforce.com/`.
   You can continue adding origins by repeating this step. When all the origins have been entered, click **Save** (6).

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8. Click to open the new runtime client, and copy the token.




**Related topics**

Use case: Embed CPQ UI in a Salesforce VisualForce page

### CPQ: User Access Control

View access types, access areas, and user roles that can be managed via the User Access utility.

**Note:** This feature must be enabled by support request. Create a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

Use the User Access utility to manage access to CPQ Admin. Admin users have full admin access unless their access level is modified via CSV import.

For basic user access in CPQ, see User access.

## Access levels

- NONE
- READ
- EDIT
- ADMIN

## Access areas

- END_USER
- CONFIG

  Users with ADMIN can use the Matrix Loader, including product filters and the catalog enrichment script MANAGED_TABLES.

- TRANSACTION

  Users with ADMIN can use the Matrix Loader.

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- MANAGED_TABLES
- TABLE

  Applies permissions for an individual table listed in addition to any MANAGED_TABLES access level. Examples:

  - EX: MANAGED_TABLES: NONE + TABLE “myTable” Edit = ability to edit “myTable” only
  - EX: MANAGED_TABLES: READ + TABLE “myTable” Edit = ability to read all tables and edit "myTable"
- DEPLOY
  - Applies all blueprint, transaction, product catalog enrichment, and product filter deploys
  - Roles are either NONE or ADMIN UTILITIES
- UTILITIES
  - Logs, user access, runtime clients, admin API keys, external connections, settings, webhooks, connections
  - Products (for Ecommerce tenants)

### Tables

User access can be limited to specific tables via CSV or API.

**Note:** These are additive permissions with the overall tables permission set, so if the user has read access for all tables, the individual permission of NONE would have no effect.

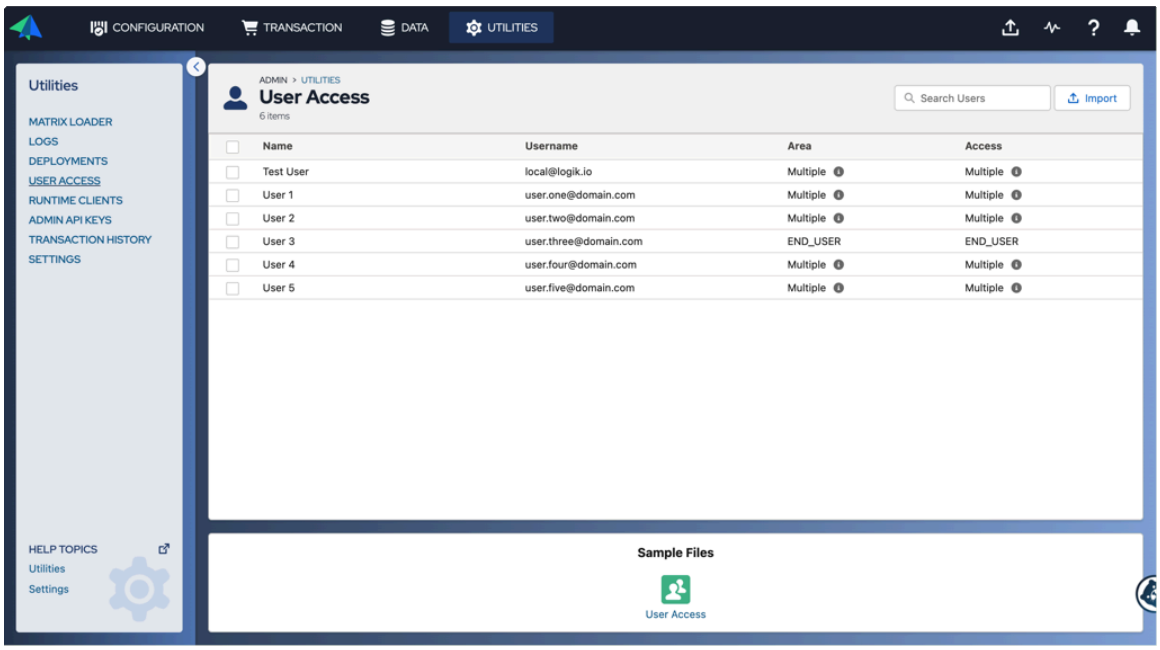
### User roles

- END_USER: This is the only permission for the runtime
- CONFIG_NONE / CONFIG_READ / CONFIG_EDIT / CONFIG_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- TRANSACTION_NONE / TRANSACTION_READ / TRANSACTION_EDIT / TRANSACTION_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- MANAGED_TABLES_NONE / MANAGED_TABLES_READ / MANAGED_TABLES_EDIT / MANAGED_TABLES_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- DEPLOY_NONE / DEPLOY_ADMIN (no EDIT or READ): ADMIN everything deployment related, including Product Filter Rules and Product Catalog Enrichment Deployments
- UTILITIES_NONE / UTILITIES_READ / UTILITIES_ADMIN (no EDIT)
  - READ correlates to GET endpoints
  - ADMIN correlates to everything else

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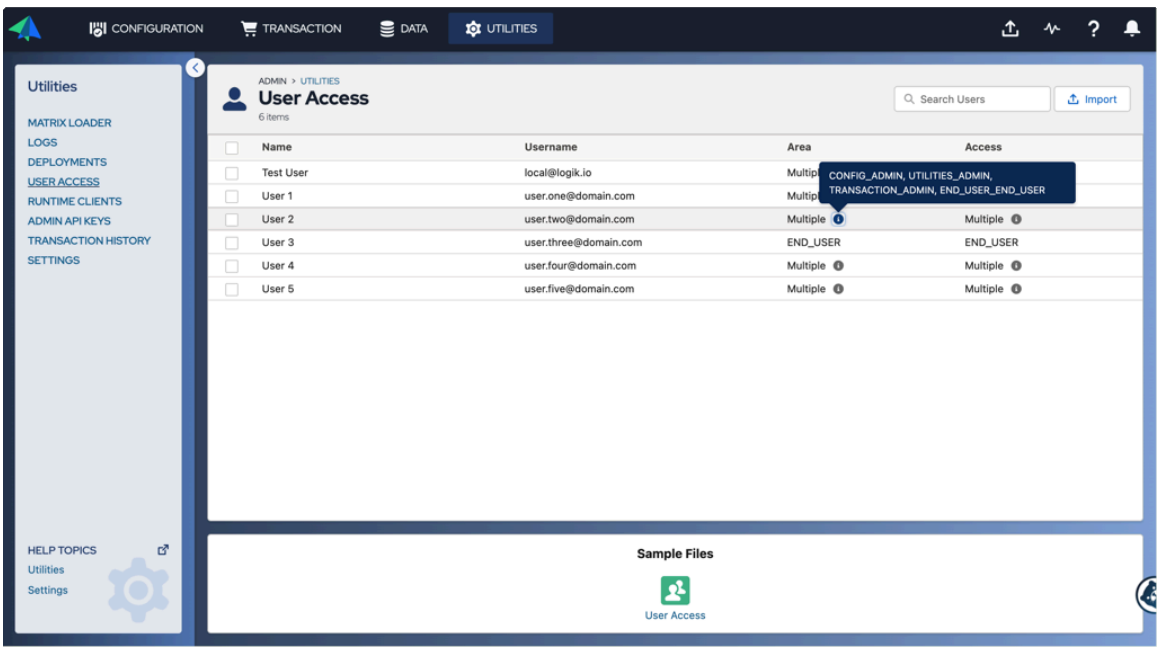
## Modifying access controls

Admin users can modify access via CSV upload (Admin > Utilities > User Access). The User Access list shows existing users.



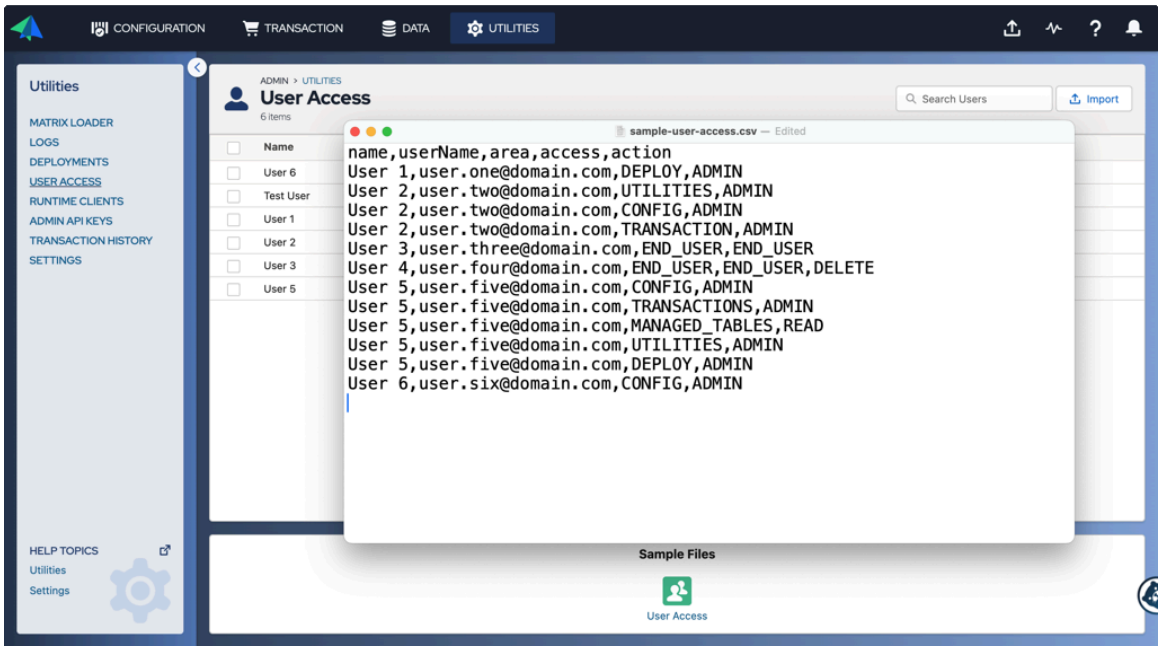

Steps:

1. Hover a tooltip to view a user's access.

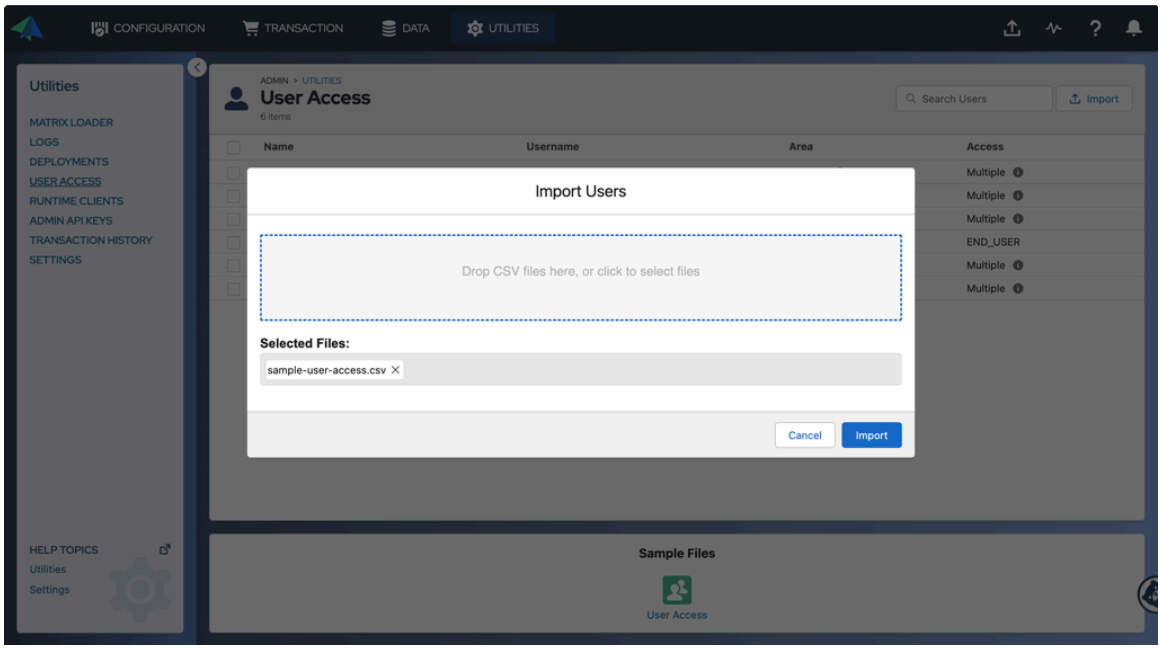



2. Create a CSV file to add users, make changes to users, or delete users. (See below for sample CSV files.)

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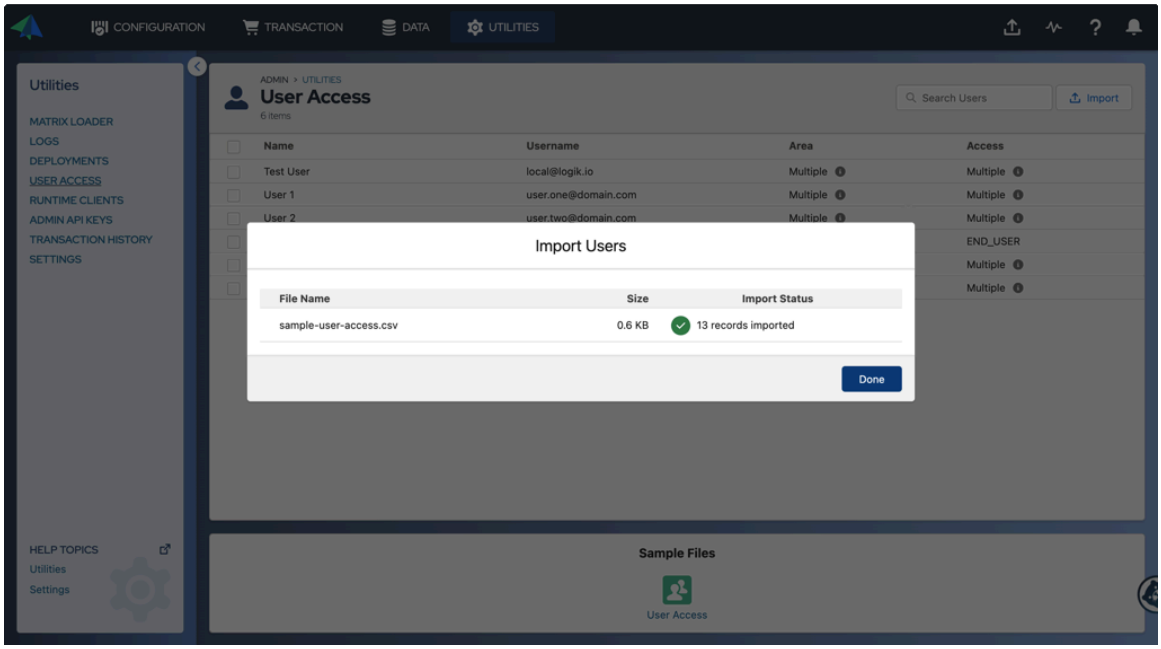



**3.** Import the CSV file.

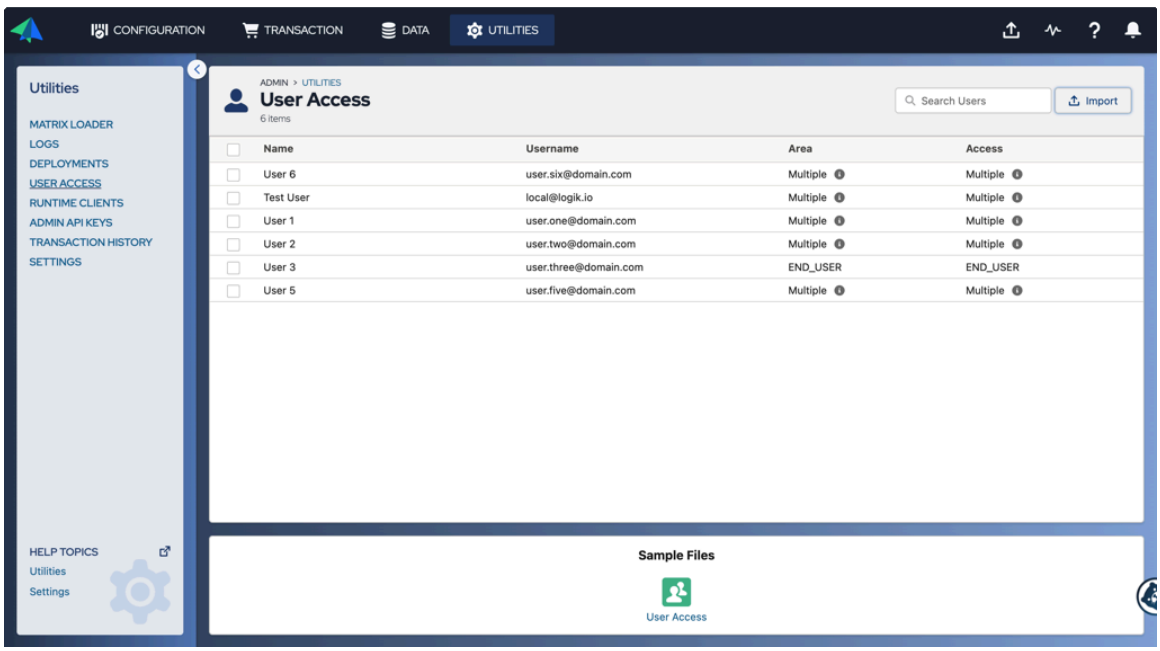



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You will receive a message confirming success or failure.




Changes to user list are now made.




## Sample CSVs

Default all-access admin CSV:

```
name,userName,area,access,action
User,email@example.com,DEPLOY,ADMIN,
User,email@example.com,UTILITIES,ADMIN,
User,email@example.com,CONFIG,ADMIN,
User,email@example.com,TRANSACTION,ADMIN,
User,email@example.com,MANAGED_TABLES,ADMIN,
```

Example complex-access CSV:

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```
name,userName,area,access,action
User 1,user.one@example.com,DEPLOY,ADMIN
User 2,user.two@example.com,UTILITIES,ADMIN
User 2,user.two@example.com,CONFIG,ADMIN
User 2,user.two@example.com,TRANSACTION,ADMIN
User 3,user.three@example.com,END_USER,END_USER
User 4,user.four@example.com,END_USER,END_USER,DELETE
User 5,user.five@example.com,CONFIG,ADMIN
User 5,user.five@example.com,TRANSACTIONS,ADMIN
User 5,user.five@example.com,MANAGED_TABLES,READ
User 5,user.five@example.com,UTILITIES,ADMIN
User 5,user.five@example.com,DEPLOY,ADMIN
User 6,user.six@example.com,CONFIG,ADMIN
```

CSV adding user to the table "sampleTable":

```
name,userName,area,access,variableName,action
John Smith,john.smith@example.com,CONFIG,ADMIN,,UPSERT
John Smith,john.smith@example.com,TRANSACTIONS,ADMIN,,UPSERT
John
 Smith,john.smith@example.com,TABLE,ADMIN,sampleTableName,UPSERT
Jane Doe,jane.doe@example.com,MANAGED_TABLES,READ,,DELETE
Jane Doe,jane.doe@example.com,UTILITIES,,NONE
```

### Using CPQ user access management

Manage access to the CPQ Admin interface. Grant or remove admin rights and troubleshoot access issues.

The User Access utility allows managing access to selected areas of CPQ Admin. Admin users have full admin access unless their access level is modified via CSV import.

**Note:** The User Access utility is enabled via a support request. Open a ticket by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

CPQ Admins can control access to the CPQ Admin interface by granting admin access only to specific users. All existing users have admin access, which can be adjusted to end-user access as needed. New users automatically receive end-user access and need to be explicitly granted admin access by a user with admin access.

**Note:** If a message appears that says "An unknown error occurred" when you try to access CPQ Admin, admin access may not be toggled on. If you encounter this message, contact a user with CPQ admin access to enable your access.

## Setting up user access

Admin users can modify access via CSV upload (Admin > Utilities > User Access)

The User Access window displays the users currently in the system. To view a user's access, move the cursor over the user. The access is displayed in a tooltip.

To add, change, or delete users, create a CSV file and import the file into Admin Assist.

- Username: Email address of the user, click to open a modal window for editing access. See 'Edit User' section, below.
- Access: Level of access a user has, can be END_USER or ADMIN,END_USER

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  - END_USER: Can create configurations using CPQ. This is for sales users, partners, and similar roles.
  - ADMIN: Can access the administrative side of CPQ to create and modify blueprints, fields, rules, and other items.
- Toggle Admin Access: Select one or more users using the check box. Toggle Admin Access adds or removes admin access for the selected users, depending on their current access level.
- Import: At the bottom of the user access page is an exportable sample user access file. After making the necessary modifications to the exported file, you can import it using the **Import** button.

## Editing a user

Individual users can be edited by clicking their username in the table, which launches an Edit User window.

- Username: email address of the user being edited.
- Enable Admin Access: Toggle for controlling access to the Admin features of CPQ. The toggle to the right indicates that the user has Admin privileges.
- Save / Cancel: Confirm any changes made or cancel to not save.

## Additional considerations

Users are created and show up on the User screen in CPQ the first time they access a CPQ instance and go through the authorization provider.

All existing users of a CPQ instance have END_USER and ADMIN access. Admin access can be removed from users that do not require it.

Newly created users have END_USER permissions only. The access level can be changed by an administrator following the above steps.

## Troubleshooting

- Once granted access, new users may need to do one or more of the following:
  - Restart the browser
  - Clear the browser cache
  - Remove CPQ session cookies before accessing CPQ Admin
- If users experience login issues after a CSV import, verify that the user names in the CSV match the case used in the user records. If CPQ is integrated with Salesforce, user names should be all lowercase to align with system requirements, as Salesforce does not allow user names to be uppercase.

  If necessary, edit the CSV so that user names are in lowercase, and import the user again.

### Related topics

User access

User Access Control reference

### User Access Control reference

Control Admin access levels using CSV imports. Assign NONE, READ, EDIT, or ADMIN permissions to specific areas.

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**Note:** The User Access utility is enabled via a support request. Open a ticket by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

## Access levels

- NONE
- READ
- EDIT
- ADMIN

## Access areas

- END_USER
- CONFIG

  Users with ADMIN can use the Matrix Loader.

- TRANSACTION

  Users with ADMIN can use the Matrix Loader, including product filters and the catalog enrichment script.

- MANAGED_TABLES
- TABLE

  Applies permissions for an individual table listed in addition to any MANAGED_TABLES access level. Examples:

  - MANAGED_TABLES: NONE + TABLE “myTable” Edit = ability to edit “myTable” only
  - MANAGED_TABLES: READ + TABLE “myTable” Edit = ability to read all tables and edit "myTable"

- DEPLOY
  - Applies all blueprint, transaction, product catalog enrichment, and product filter deploys
  - Roles are either NONE or ADMIN
- UTILITIES
  - Logs, user access, runtime clients, admin API keys, external connections, settings, webhooks, connections
  - Products (for Ecommerce tenants)
- Access to specific resources

  Tables: Users can be limited to specific tables they have access to. This is done via CSV as well as API.

## User roles

- END_USER: This is the only permission for the runtime
- CONFIG_NONE / CONFIG_READ / CONFIG_EDIT / CONFIG_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints

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- TRANSACTION_NONE / TRANSACTION_READ / TRANSACTION_EDIT / TRANSACTION_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- MANAGED_TABLES_NONE / MANAGED_TABLES_READ / MANAGED_TABLES_EDIT / MANAGED_TABLES_ADMIN
  - READ correlates to GET endpoints
  - EDIT additionally correlates to POST PUT PATCH DELETE endpoints
  - ADMIN additionally correlates to Matrix Loader endpoints
- DEPLOY_NONE / DEPLOY_ADMIN (no EDIT or READ): ADMIN everything deployment related, including Product Filter Rules and Product Catalog Enrichment Deployments
- UTILITIES_NONE / UTILITIES_READ / UTILITIES_ADMIN (no EDIT)
  - READ correlates to GET endpoints
  - ADMIN correlates to everything else

**Related topics**

Using CPQ user access management

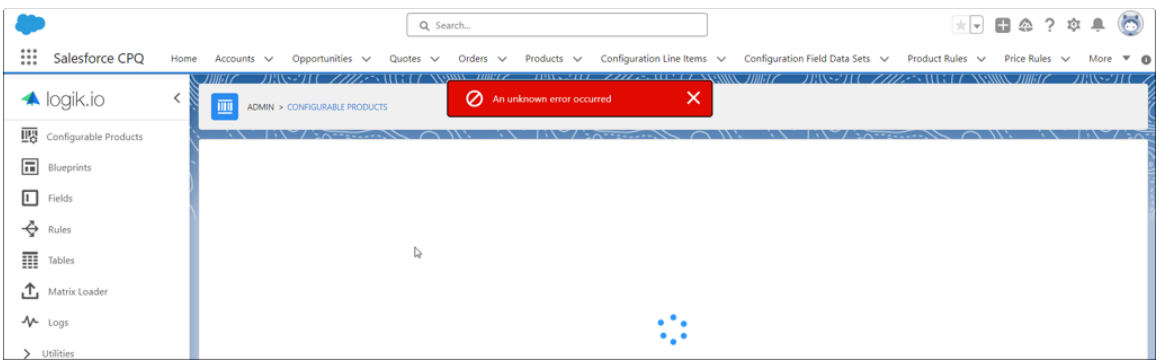
User access

### User access

Learn how to grant or revoke admin access for a user. Existing users have admin access by default, while new users have only end-user access.

CPQ Admins can control access to the Admin interface by granting admin access only to specific users. All existing users have admin access, which can be adjusted to end-user access as needed. New users automatically receive end-user access and need to be explicitly granted admin access by a user with admin access.

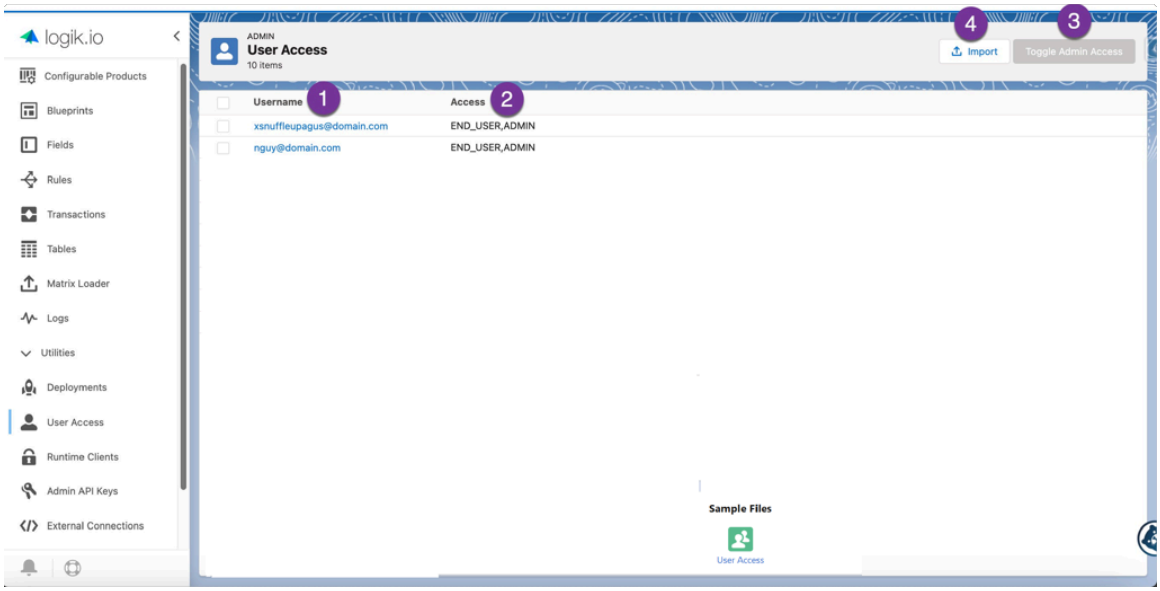
**Note:** If you try to access CPQ Admin without admin access enabled, you receive the message "An unknown error occurred." If you encounter this message, ask a user who has admin access to enable your access.




## Managing user access

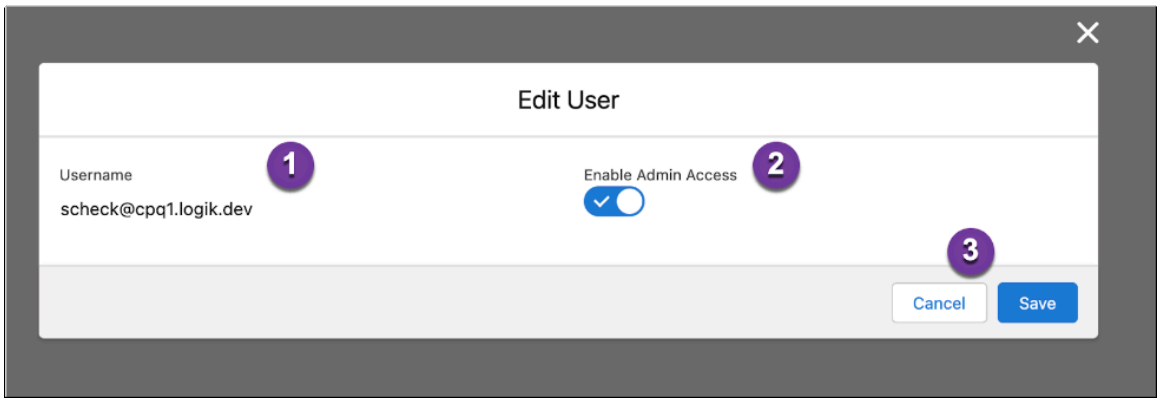
Configure user access by visiting Utilities > User Access.

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1. Username: Email address of the user. Click to edit (see below)
2. Access: The level of access a user has (END_USER or ADMIN)
   - END_USER: Can create configurations using CPQ. Typical for sales users, partners, and so on
   - ADMIN: Can access the administrative side of CPQ to create and modify blueprints, fields, rules, and other objects
3. Toggle Admin Access: Select one or more users using the checkbox. Toggle Admin Access adds or removes admin access for the selected users, depending on their current access level
4. Import: At the bottom of the user access page is a sample user access file that can be exported. After making the necessary modifications to the exported file, you can import it using the "Import" button

To edit a user, click a username in the table.




1. Username: email address of the user being edited
2. Enable Admin Access: Toggle for controlling access to the Admin features of CPQ. The toggle to the right indicates that the user has Admin privileges
3. Save / Cancel – Confirm changes or cancel

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**Note:**

- Users are created and show up on the User screen in CPQ the first time they access a CPQ instance and go through the authorization provider.
- All existing users of a CPQ instance have END_USER and ADMIN access. Admin access can be removed from users that do not require it.
- Newly created users have END_USER permissions only. The access level can be changed by an administrator following the above steps.
- If you need additional assistance, open a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

**Related topics**

Using CPQ user access management

User Access Control reference

## Request provisioning of an SFDC org with a CPQ environment

Learn how to submit a request through CPQ Support for environment setup.

### Before you begin

Role required: admin

### Procedure

1. Install Salesforce CPQ version 244 or later.
2. Provide the email address associated with a user in the org who will serve as the first Admin user.
   This user will grant other users access after they appear in the User Access list of users after attempting to log in.
3. Create a user in the desired SFDC org for CPQ provisioning.
   Set the user's email to provisioning@logik.io. This user should have permissions to install packages. If a CPQ user cannot be created, provide the My Domain URL of the org as well.
4. Log a case by using the Support Center or by sending an email message to support@logik.io with the subject "New Environment Request." Provide the following details:
   - The SFDC org ID (Setup → Settings → Company Settings → Company Information → Salesforce.com Organization ID)
   - A short note explaining that you created a user with email provisioning@logik.io and that we need to retrieve these credentials
   - The My Domain URL of the org and the org ID, if a CPQ user cannot be created

   CPQ Support and DevOps will notify you when the work is complete.

## Integrating CPQ with visualization tools

Learn how CPQ connects to third-party visualization engines—CDS, kBridge, and Threekit—to render 2D/3D product views that respond to configuration inputs in real time.

You can perform the following:

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- Show live visuals as users configure: colors, dimensions, options, and bundles can update the viewer instantly.
- Coordinate UI + visual states: publish field values, set rows, and selected products to the renderer.
- (Optional) Write back from the viewer: for supported vendors, user actions in the canvas can update fields.

## Supported vendors at a glance

### List of vendors

| Vendor | Direction | What you can send | What can be written back | Notes |
|---|---|---|---|---|
| CDS | 1-way and 2-way | Fields, Sets (first 25 rows), product pickers (first 25 options), Active Set Index | Fields; Sets via listener field JSON + rule parsing | Good for CAD/2D/3D; flexible mapping objects |
| kBridge | 1-way and 2-way | Fields, Sets (first 25 rows), product pickers (first 25 options), Active Set Index | Fields; Sets via listener field JSON + rule parsing | Real-time 3D with rich event & listener model |
| Threekit | 1-way | Fields, Asset Id (static or via field), Active Set Index (visual focus only) | Not supported (viewer → CPQ) | Use for high-fidelity visuals; map fields and asset selection |

**Note:** When sending sets or product pickers, CPQ publishes up to 25 rows/options. Indices and options beyond 25 are not transmitted. When using set repeaters, you can publish an Active Set Index trigger so the viewer shows the row the user is editing.

## How the integration works

1. The layout component in the blueprint defines the visualization panel's position and size.
2. Connection settings authorize and route traffic (for example, the script or app URL, the auth token, and the subdomain).
3. The mapping block selects what CPQ data to send:
   - `eventFields` — field variable names and their viewer keys
   - `eventSets` — set variable names (first 25 rows published as an array of objects)
   - `eventProductPickers` — selected options (first 25) as an array of objects
   - `setActiveTriggers` — Boolean fields that indicate the active index in a set repeater
4. (Two-way only) A listener field (CPQ text field) receives JSON from the viewer.
   - Add a determination rule (or enrichment) to parse that JSON and update fields or set rows.
   - If a listener field is present, only mappings explicitly configured for two-way will write back.

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**Visualization tool feature support**

| Viz vendor | 1-way communication | | | 2-way communication | | |
|---|---|---|---|---|---|---|
| | Field | Set | Set repeater: active index | Product picker | Field | Set |
| CDS | Supported | Supported | Supported | Supported | Supported | Supported through implementation. See vendor-specific implementation article. |
| kBridge | Supported | Supported | Supported | Supported | Supported | Supported through implementation. See vendor-specific implementation article. |
| Threekit | Supported | Not supported | Supported | Not supported | Not supported | Not supported |

## Data exchanged

- Fields: Scalar values (text, number, Boolean, picklist selection).
- Sets: Array of row objects (first 25). Use the Active Set Index to keep the visual in sync with the row being edited in a repeater.
- Product pickers: Array of selected option objects (first 25).
- Assets (Threekit): Provide a static `assetId` or an asset-ID field in CPQ to enable dynamic asset selection.

## Security and environments

- Auth and origin: Use vendor tokens and URLs appropriate to prod vs non-prod. Ensure your CPQ Runtime Client origins match calling domains.
- CSP (Content Security Policy): Allow vendor script or app hosts for embedding and messaging. Coordinate with your security team and CPQ support to add domains.
- Separation of concerns: Keep vendor credentials and tokens out of shared layouts across environments. Swap tokens when promoting.

## When to choose which tool

- If you need bidirectional edits in the canvas, choose kBridge or CDS and implement a listener field and parsing rules.
- If you need high-fidelity 3D with asset management and one-way updates, choose Threekit with an assetId or assetId field strategy.
- If you have a heavy set-driven UX, prefer CDS or kBridge for two-way set JSON handling and Active Set Index synchronization.

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## General guidelines

- Map only what you need: Limit `eventFields`, `eventSets`, and `eventProductPickers` to essential data for performance.
- Design for the 25-item cap: If users may exceed 25 set rows or product picker selections, add guardrails (such as validation, paging, or summarization).
- Normalize for two-way: Define a stable JSON schema for listener payloads and centralize parsing logic in a managed rule or enrichment.
- Promote safely: Externalize environment-specific values such as tokens and URLs. Verify visuals in test before production promotion.
- Troubleshoot systematically:
  - Check admin logs for runtime or script errors.
  - Verify CSP and network access to vendor domains.
  - Use the viewer's console/devtools and CPQ debugger inputs to reproduce states.

**Related topics**

Integrating kBridge visualization

Integrating CDS or other third-party visualization tools

Integrating Threekit visualization

### Integrating kBridge visualization

Integrate kBridge for real-time 3D visualization. Sync configuration inputs with visual updates to enhance user experience.

CPQ supports several different 3D visualization options in the end-user configuration experience. CPQ can be implemented to use kBridge as a visualization component. The component is updated in real time in the CPQ UI as the user changes configuration inputs (one-way communication). In addition, bidirectional (two-way) communication may be defined so that user manipulations of the graphic update CPQ configuration fields.

The following video shows how to integrate CPQ with kBridge for real-time updates:

KBridge Integration Setup Demo

The integration between CPQ and kBridge is set up in the CPQ blueprint layout definition. The layout definition:

- defines where the kBridge visualization component will be rendered on the CPQ UI
- specifies the kBridge connection
- identifies the CPQ field or set data to be sent

To create a kBridge component, the `kbridge` layout component type can be added in the "type" column of the layout CSV file. Additional properties for the integration are set in the "value" column.

This sample layout CSV file demonstrates the use of the kBridge component and parameter inputs. See row 12.

kBridge_setsv2-layoutCSV

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### JSON value template

```
scriptUrl: string,
appUrl: string,
token: string,
sessionStartup: object
eventFields: object
eventSets: object
eventProductPickers: object
setActiveTriggers: array
listenerFields: object
height: number
width: number
```

### kBridge connection

- scriptUrl: URL for kBridge script
- appUrl: URL for kBridge app
- token: Auth token from kBridge
- sessionStartup: Additional kBridge startup information; work with kBridge, your implementer or kBridge administrator to determine the appropriate values to pass in this parameter for your kBridge setup

### CPQ data

- `eventFields`: Mapping of CPQ fields to kBridge
- `eventSets`: Mapping of CPQ sets to kBridge
- `eventProductPickers`: Mapping of CPQ product pickers to kBridge
- `setActiveTriggers`: CPQ set triggers
- `listenerFields`: For two-way data communication involving one or more CPQ sets, this object specifies the CPQ text field variable name to which a JSON representation of the set(s), manipulated in the kBridge visualization by the user, will be returned to CPQ. The Admin must define a rule that parses the content of the listenerFields and populates the appropriate set inputs.

**Note:**

- If a blueprint/layout has `eventFields` but not `listenerFields`, every event field has two-way communication.
- If a listener field is added to the blueprint or layout, all event fields will communicate only from CPQ to kBridge.
- Event sets and event product pickers pass information only from CPQ to kBridge, and not from kBridge to CPQ.
- From a data standpoint, event sets and event product pickers data are passed the same way to kBridge (in an array of objects).

### Layout size

- `height`: element height in layout, value is in pixels
- `width`: element width in layout, value is in pixels

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### Example JSON values

```
{
  scriptUrl: 'http://script.location';,
  appUrl: 'http://app.script.location';,
  token: 'abc-123-def-456',
  sessionStartup: {
    type: 'model',
    revisionId: '1234-5678-90'
  },
  eventFields: {
    field1: { name: 'field-1', refChain:
 'world.application.model' },
    field2: { name: 'field-2', refChain:
 'world.application.model' },
    field3: { name: 'field-3', refChain:
 'world.application.model' }
  },
  eventSets: {
    set1: { name: 'set-1', refChain:
 'world.application.model' },
  },
  eventProductPickers: {
    picker1: { name: 'picker-1', refChain:
 'world.application.model' },
  },
  setActiveTriggers: ['set.set2.triggerBoolean'],
  listenerFields: {
    listenerFieldName: { name: 'logikTestSet', refChain:
 'world.application.model' }
  },
  height: 800,
  width: 1200,
}
```

- `name` corresponds to the field or rule name in kBridge.
- `refChain` corresponds to the model path of this object in kBridge.

## Reference

For a discussion of features available among supported visualization applications in integration with CPQ, see Visualization Integrations: An Overview.

### Integrating Threekit visualization

Integrate Threekit for visualization. Sync configuration inputs with visual updates to enhance user experience.

CPQ can share field values with Threekit so that Threekit visualization is updated in real time as the user changes CPQ configuration inputs.

Integration between CPQ and Threekit is accomplished in the blueprint layout definition. The following layout CSV file contains a sample of how the CPQ administrator defines where the Threekit visualization will be rendered in the UI, specifies the Threekit environment authorization token, and identifies the CPQ field data to be sent.

Layout_ThreeKit_in_sidebar [Google Sheet]

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Notes:

- In the layout definition sample, the Threekit rendering displays in a sidebar BasicContainer positioned on the upper right of the UI.
- The JSON provided in the `value` column of the ThreeKit element row contains the following syntax:

```
{
  "authToken": "3KIT_AUTH_TOKEN",
  "assetIdField": "<LGK field that holds 3KIT Asset ID",
  "apiSubdomain": "exampleThreekitSubdomain"
  "eventFields": {
    "LGK_FIELD1_VARNAME": "3KIT_FIELD1_VARNAME",
    "LGK_FIELD2_VARNAME": "3KIT_FIELD2_VARNAME",
    "LGK_FIELD3_VARNAME": "3KIT_FIELD3_VARNAME"
  }
}
```

- `authToken`: an authorization token provided by the Threekit application environment.

  **Important:** The authToken is how Threekit determines which of its environments will serve the visual asset: production or non-production. Therefore, be sure that the production CPQ environment passes the Threekit production authToken; nonproduction CPQ environments must pass the Threekit non-production authToken.

  When copying a layout from one CPQ environment to another, be aware that this manual edit must be made. Otherwise, non-production Threekit assets may be inadvertently displayed in CPQ production layouts.

- `assetIdField` defines the name of the CPQ text field that holds the Threekit asset IDs, as provided by Threekit. In this way, CPQ can pass a dynamic Threekit asset ID. This helps Threekit optimize image load times. This feature provides flexibility, should the Threekit model need to be broken into two or more asset definitions to facilitate a better user experience.

  **Note:** If your CPQ blueprint only passes one static Threekit asset ID, you can replace the `assetIdField` parameter with `assetId: <hard-coded Threekit Asset ID>`.

- `apiSubdomain`: The subdomain of your Threekit environment URL.
- `eventFields` contains key-value pairs where each key is the variable names of the CPQ field passed to Threekit. The corresponding values are the variable names, as defined in Threekit.

To learn more about the use of Threekit visualization with a set repeater, see Use case: Pairing set repeaters and visualization components

For a discussion of the features available in supported visualization applications in integration with CPQ, see Integrating CPQ with visualization tools.

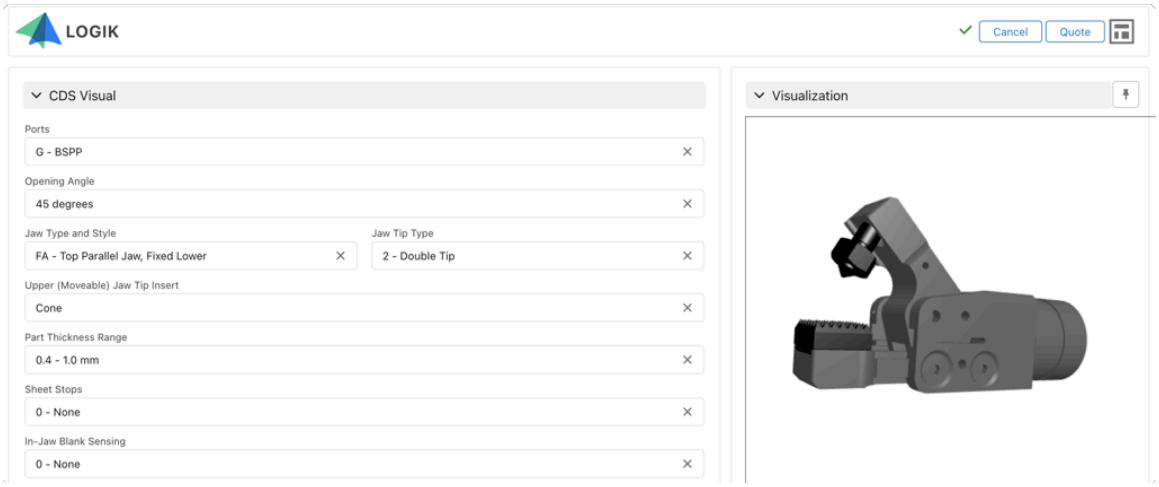
### Integrating CDS or other third-party visualization tools

Integrate CDS Visual or other third-party tools for technical visualization. Sync configuration inputs with visual updates to enhance user experience.

CPQ can be implemented to share field values with third-party visualization tools so that visualization is updated in real time as the user changes configuration inputs. This article

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discusses integrating the CDS Visual tool as an example. Depending on the CDS model setup, the visualization may render as CAD drawings, 2D images and 3D interactive images.




The integration between CPQ and CDS is accomplished in the Blueprint layout definition. The following layout CSV file contains a sample of how the CPQ administrator defines where the CDS visualization will be rendered. It also specifies the CDS environment and CPQ field data to be sent.

Layout_CDS_in_sidebar [Google Sheet]

## Step-by-step guide

This article can help you decide how to add the CDS configuration.

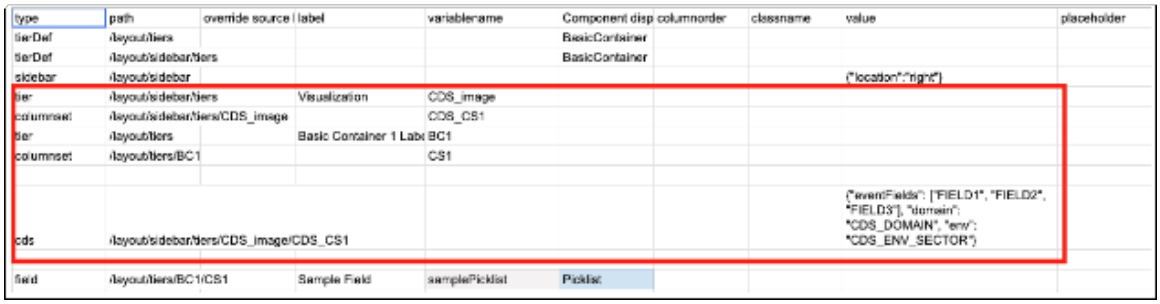
1. Open the layout editor in your CPQ configurator.
2. Download your CSV layout file.
3. Open your CSV layout file, and add the CDS layout element fields (highlighted in detail below).
4. Re-upload your CSV layout file to CPQ. Your CDS layout element should now be present in the layout.
5. Open the configuration options for your CDS layout element and add in the necessary JSON data lines.

## Technical configuration options

The integration between CPQ and CDS is accomplished in the Blueprint layout definition. The following layout CSV file helps demonstrate how the administrator defines where in the UI the CDS visualization will be rendered. It also specifies the CDS environment and the CPQ field data to be sent.

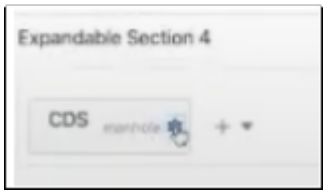
The layout can be updated directly in the layout editor. In the layout editor, create a new section named CDS in your CSV file using the fields highlighted in red below, and upload the new file to layout.

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| type | path | override source | label | variablename | Component disp | columnorder | classname | value | placeholder |
|---|---|---|---|---|---|---|---|---|---|
| tierDef | /layout/tiers | | | | BasicContainer | | | | |
| tierDef | /layout/sidebar/tiers | | | | BasicContainer | | | | |
| sidebar | /layout/sidebar | | | | | | | {"location":"right"} | |
| tier | /layout/sidebar/tiers | | Visualization | CDS_image | | | | | |
| columnset | /layout/sidebar/tiers/CDS_image | | | CDS_CS1 | | | | | |
| tier | /layout/tiers | | Basic Container 1 Labe | BC1 | | | | | |
| columnset | /layout/tiers/BC1 | | | CS1 | | | | | |
| cds | /layout/sidebar/tiers/CDS_image/CDS_CS1 | | | | | | | {"eventFields": ["FIELD1", "FIELD2", "FIELDS"], "domain": "CDS_DOMAIN", "env": "CDS_ENV_SECTOR"} | |
| field | /layout/tiers/BC1/CS1 | | Sample Field | samplePicklist | Picklist | | | | |

From here, you can open the settings for this layout element, and configure the following fields using the CDS Properties JSON editor:




These properties can be configured in this element. The following table provides the name and description for each element.

### Properties of the CDS layout element

| Property name | Required | Description |
|---|---|---|
| eventFields | no | Array or object of fields to send to CDS.<br><br>An array will assume the contained strings are both CPQ variable names, and CDS variable names.<br><br>An object will have key:value pairs. The Key is the CPQ variable name, and the value is the CDS variable name.<br><br>Set fields are allowed to be defined here, using the format:<br><br>`set.{setVariableName}.{fieldVariableName}` |
| eventSets | no | Array or object of sets to send to CDS.<br><br>An array will assume the contained strings are both CPQ variable names, and CDS variable names.<br><br>An object will have key:value pairs. The Key is the CPQ |

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**Properties of the CDS layout element (continued)**

| Property name | Required | Description |
|---|---|---|
| | | variable name, and the value is the CDS variable name.<br><br>The set will be sent as a whole, up to 25 indexes long:<br>`setVariableName: [ { field1: 'value', field2: 'value' } { field1: 'value', field2: 'value' } ]` |
| eventProductPickers | no | Sends the entire product picker's data as an array of objects to CDS.<br><br>An array will assume the contained strings are both CPQ variable names, and CDS variable names.<br><br>An object will have key:value pairs. The Key is the CPQ variable name, and the value is the CDS variable name.<br><br>The product picker will be sent as a whole, up to 25 indexes long.<br><br>Option #1:<br>`{ "eventProductPickers": [ "productPicker1", "productPicker2" ] }`<br><br>Option #2:<br>`{ "eventProductPickers": {` |

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**Properties of the CDS layout element (continued)**

| Property name | Required | Description |
|---|---|---|
| | | <pre>"logikProductPicker1": "cdsProductPickerName1",<br>"logikProductPicker2": "cdsProductPickerName2" }<br>}</pre> |
| domain | yes | Domain of CDS visualization |
| env | no | Defaults to"qa" if not provided |
| setActiveTriggers | no | An array of variable names corresponding to a boolean field in a set. The listed fields will serve as a trigger for denoting which index of the set is active when being used in a set repeater.<br>These are required if using a Basic Container or Expandable Section as the repeated tier type |
| height | no | Height of the visualization window in px - defaults to 500 |
| width | no | Width of the visualization window in px - defaults to 500 |

## JSON string formatting

The final JSON string formatting should resemble the following:

```
{
"domain": "exampleDomain", "env": "qa"
"eventFields": ["field1", "field2", "field3"]
}
```

## Notes

- In the layout definition sample, the CDS rendering will display in a BasicContainer sidebar positioned in the upper right.
  - CDS can pass CPQ a JSON object to a text field.
  - Use advanced rules to parse the JSON responses from CDS.

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- The JSON provided in the 'value' column (column l) of the CDS element row contains the following syntax:

```
{
"eventFields": [ "FIELD1",
"FIELD2", "FIELD3"
],
"domain": "CDS_DOMAIN", "env": "CDS_ENV_SECTOR"
}
```

`domain`: the name of the domain serving your project, as provided by CDS.

`env`: the name of the environment service for your project, as provided by CDS. Example: "qa".

The eventFields array contains the variable names of the CPQ fields that are passed to CDS. In the past, the norm has been that CDS will match their variables to the CPQ variable names. Confirm that this is the case for your implementation with CDS.

`eventFields` must contain all fields that will be communicated between CPQ and CDS (that is, both CPQ fields that control the CDS visual and fields that are passed back to CPQ based on changes made in the CDS visualization).

- Sets can also be passed to CDS, although only the first 25 indexes can be sent. This mirrors the above process except the property name is `eventSets` instead of `eventFields`.
- Array or object of sets to send to CDS:
  - An array will assume the contained strings are both CPQ variable name and CDS variable names.
  - An object will have key:value pairs. The key is the CPQ variable name, and the value is the CDS variable name.
  - This will be sent as a whole, up to 25 indexes long using the following syntax:

```
setVariableName: [
{
field1: 'value', field2: 'value'
},
{
field1: 'value', field2: 'value'
},
]
```

- Product pickers can also be passed to CDS with a restriction of only the first 25 indexes being able to be sent. This mirrors the above process, except the property name is `eventProductPickers` instead of `eventFields` or `setFields`. The following two syntaxes work:

```
{
  "eventProductPickers": ["productPicker1", "productPicker2"]
}
```

```
{
  "eventProductPickers": {
    "logikProductPicker1": "cdsProductPickerName1",
    "logikProductPicker2": "cdsProductPickerName2"
  }
}
```

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- CDS can be set up for two-way communication. One-way communication updates the CDS graphic when the user updates relevant CPQ fields. The second mode allows the user to manipulate the CDS graphic, and CDS will update the relevant CPQ field inputs. For standard fields, CDS writes back to the mapped CPQ field. If CPQ sets are being used in a two-way communication setup, CPQ and CDS administrators will need to coordinate the following setup:
  - The CPQ Admin will define a distinct event field to which set data will be written from CDS.
  - The CDS admin will specify this field as the destination for set data.
  - The CPQ Admin will define determination rules that parse the field and populate the set.

## Integrating CPQ with Shopify

The CPQ app for Shopify enables stores to seamlessly manage and sell configurable products using CPQ advanced CPQ (Configure, Price, Quote) features. Installation and setup are streamlined, and robust Admin options are provided for both technical and non-technical users.

The CPQ app for Shopify is a fully featured connector for a Shopify store. The app ensures the entire product catalog is available in CPQ for use with a CPQ blueprint. The app also includes an app block to add a configurator to any page on a storefront without the need to create a dedicated UI. The configurator app block is fully functional out of the box which means customers can start adding configurable products to their cart as soon as the storefront changes are published.

- The CPQ app brings your entire Shopify product catalog into CPQ, allowing complex configurations for B2C and B2B sales.
- Features an app block to easily add a product configurator to any storefront page—no custom code required.
- Provides live catalog sync from Shopify to CPQ every fifteen minutes (one-way sync).
- Enables Shopify B2B Pricing by deferring to Shopify catalog prices for B2B users.

The CPQ app for Shopify is free to download on the Shopify app store:

Product Configuration

## Setup

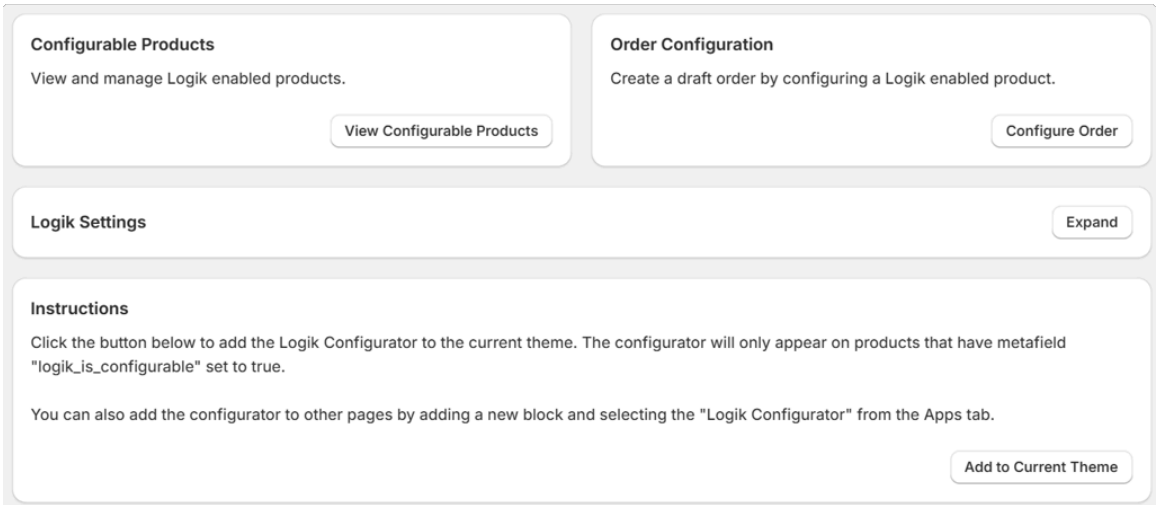
After downloading the CPQ app it will automatically appear in the Apps section of the store.

To start using the app, the CPQ environment details and a token must be entered in the CPQ settings section of the app landing screen. For more information about creating a CPQ token, see Set up a runtime client.

**Note:** Confirm the storefront and the Admin URLs are added as an origin for the token. All stores should also include the following static URL to their list of origins: https://shpfy-connect.ecommerce.logik.io.

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## CPQ app Admin screen overview




- **ServiceNow CPQ Settings**: CPQ environment settings which is required in order for the configurator to display
- Instructions: This block summarizes at a high level what is needed for a configurable product. The 'Add to Current Theme' button will also automatically place the app block on the product page template.
- Configurable Products: Redirects to a page for **ServiceNow CPQ enabled products** in the store catalog
- Order Configuration: Redirects to a CPQ specific create order page so that an Admin can add a CPQ configurable product to an order

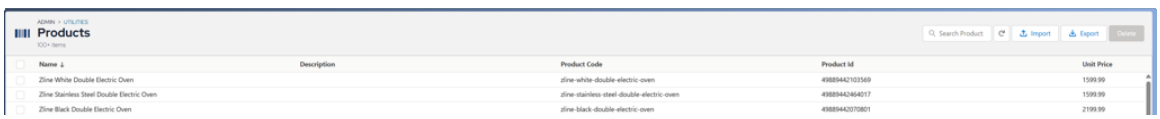
## Managing products

When the app is installed and the **ServiceNow CPQ settings** have been successfully saved, an automated catalog sync begins. The custom CPQ attribute is added to the product details Admin page.

## Product catalog synchronization

Products are synced down from Shopify to CPQ every fifteen minutes. All products in the store catalog will be synced to CPQ. Changes will be synced the next time the job runs.

Products from Shopify will appear on the Products and Configurable Products table. The Shopify GID is automatically mapped to the Product ID field on the table.




**Note:** The product syncs are one way. Changes to the product table will not be reflected in the Shopify catalog.

## Configurable products

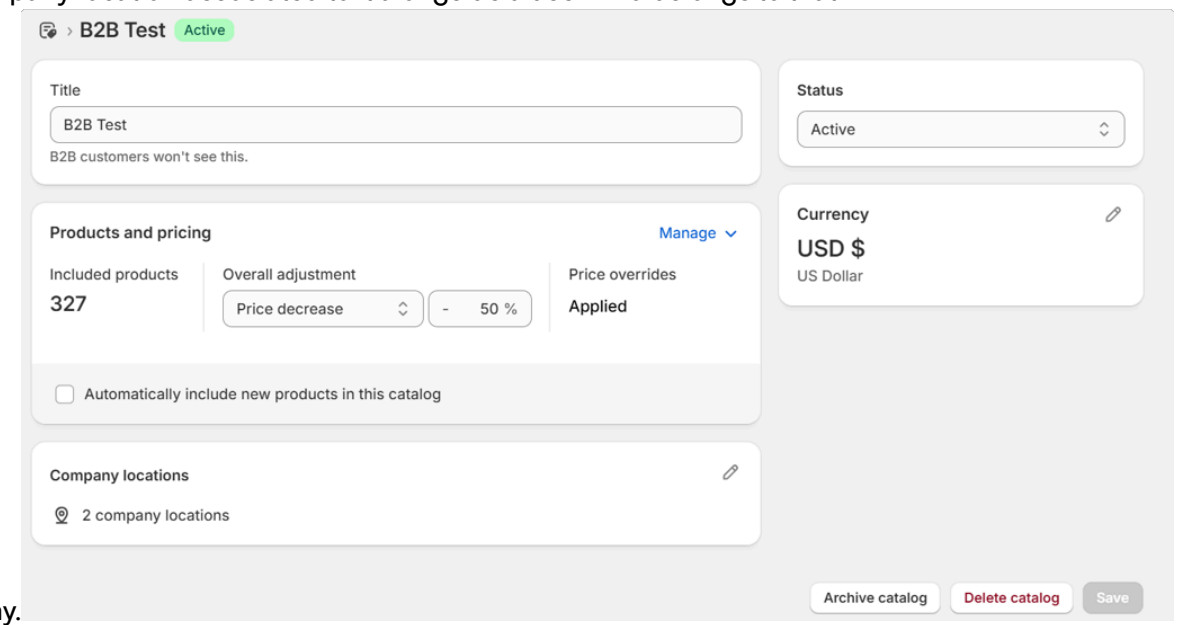
In order for a product to appear on the Configurable Products table as well the configurator to display, a product must have **ServiceNow CPQ is Configurable** attribute set to True.

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## Using Shopify B2B pricing

In order to use Shopify B2B Pricing, all products associated to a CPQ Blueprint must be present in a catalog. The catalog must also have at lease one company location associated to it alongside a user who belongs to that company.




When a user is logged in from an included company location, CPQ pricing will default to the Shopify catalog price. This will overwrite any CPQ price rules for these products. It is recommended that B2B specific blueprints are created to avoid any confusion around pricing in this scenario.

## Adding a configurator to a page

The CPQ Configurator can be added to any page via an included app block through the page editor. The app block is automatically added to your store when the app is installed. You can find the block under apps when adding a new page section.

The look and feel of the **ServiceNow CPQ configurator** is managed in CPQ Admin through use of the layout editor. However, there are additional options in the CPQ app block. If you encounter issues where the Font is too small or large, that can be modified in the app block settings along with spacing.

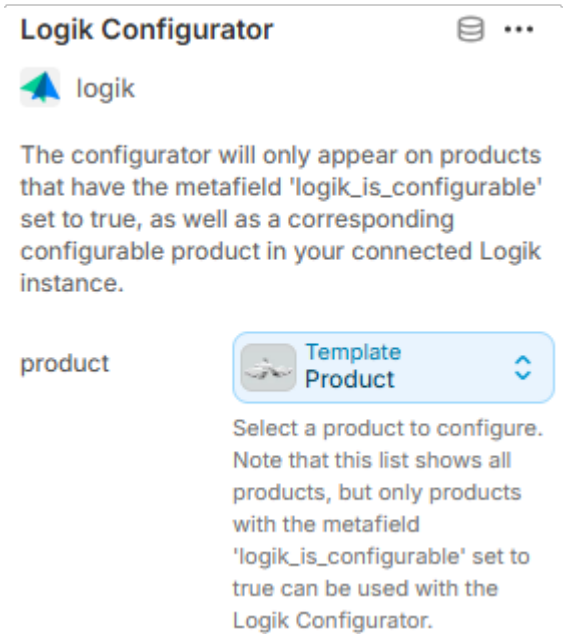
## Product Pages

For product pages, the CPQ app landing page has a shortcut to directly add the app block to the product page template.

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The default behavior on a product page is to use the current product as the configurable product. If the product is **ServiceNow CPQ configurable**, the configurator will display. If not, the app block will remain hidden.

However, it is better to create a specific template for a **ServiceNow CPQ enabled product** page, since modifications to the page content besides the app block could be needed.



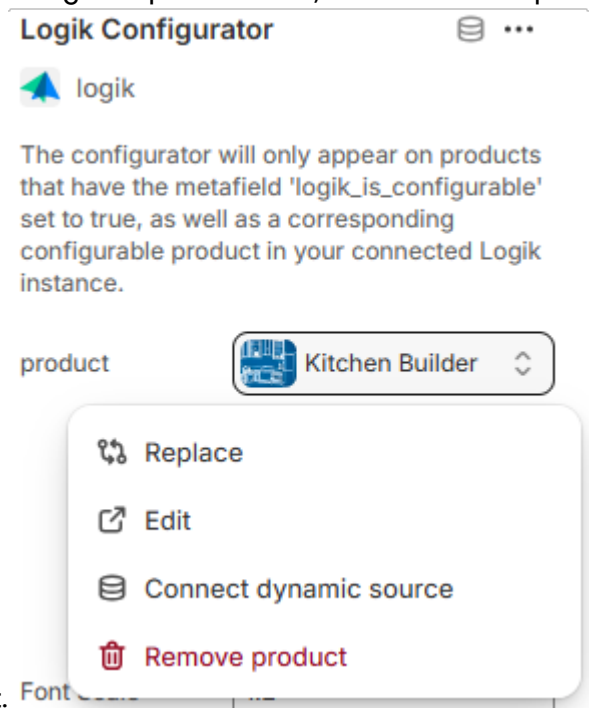

## Content pages

When adding a **ServiceNow CPQ configurator** to a non-product page, a specific product must be selected for use.

By default, a select option will be displayed. When clicked, a list of all products will be shown. Either click a product or enter a search term. Once selected, the product will be displayed in the app block settings.

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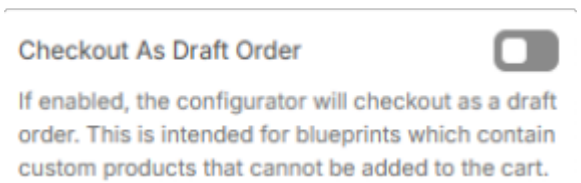
To change the product used, click the current product then click ‘Replace’ to reopen the product list.




## Add to Cart vs Add to Order

The **ServiceNow CPQ configurator** app block provides two options for how it will function. Either the app will add the configuration to the customer’s cart directly, or a draft order of the configuration can be created for the customer. To control the behavior of the configurator on the page, the option ‘Checkout As Draft Order’ can be enabled or disabled.

When enabled, a customer will need to be logged in. If the customer is currently logged out, the configurator will not be shown and instead a message to inform the customer to login is displayed. Once logged in, the customer can complete the configuration as usual. After completing the configuration, the configurator will close and display a success message. This configuration will then show as a draft order in the Shopify orders screen in the Admin. The customer’s email used to login will be included in the order.




If the setting is disabled, once the configuration is completed. All items included in the configuration are added directly to the customer’s cart and the customer is redirected to the cart page.

## Managing configurable products in Shopify Admin

Configurable Products List:

On the CPQ app landing page, once the CPQ credentials have been saved, a configurable product section is shown.

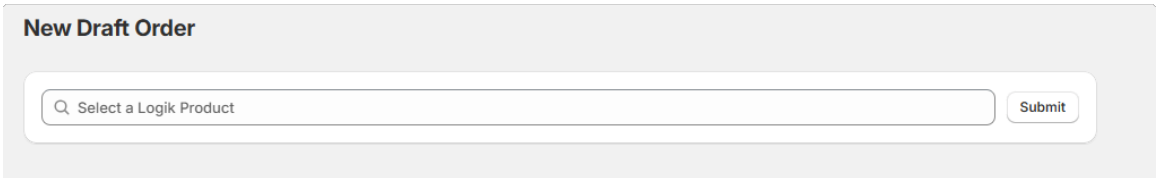
Clicking into the page will display a list of all products that are **ServiceNow CPQ configurable** and any variants.

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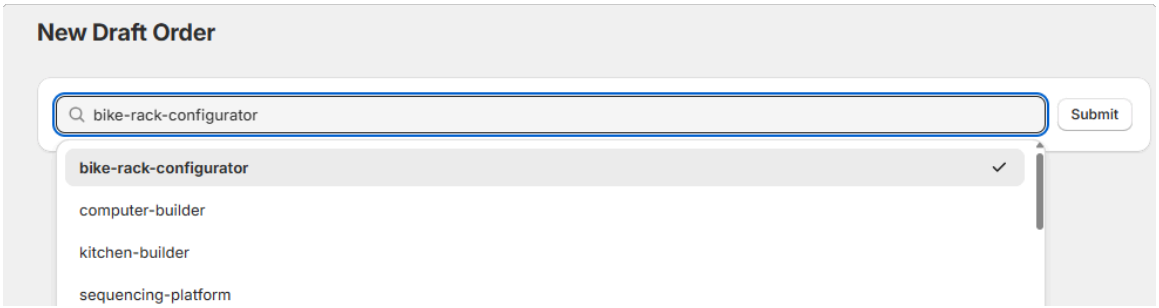
On the Configurable Products page, each product has two buttons. The details button redirects the Shopify user to that product's details page in the Shopify Admin so they can edit any product details.

The order button will redirect the Shopify user to the Create Draft Order page and open the configurator for the selected product.

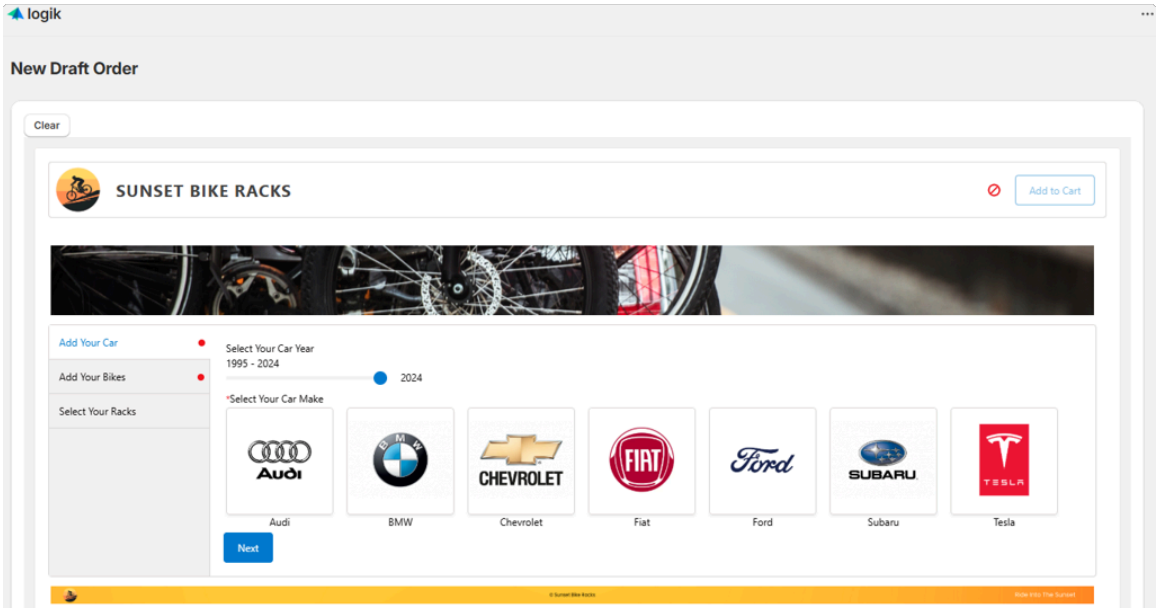
## Creating a draft order




On the Create Draft Order page, a Shopify user can select a CPQ configurable product to launch it's configurator. Once a product is selected and the submit button is clicked, the associated blueprint is displayed.




Once the configurator has been loaded, the Shopify user can complete a configuration just like a customer. Once complete, all items in the configuration are added to a new draft order and the user is redirect to that order's page.

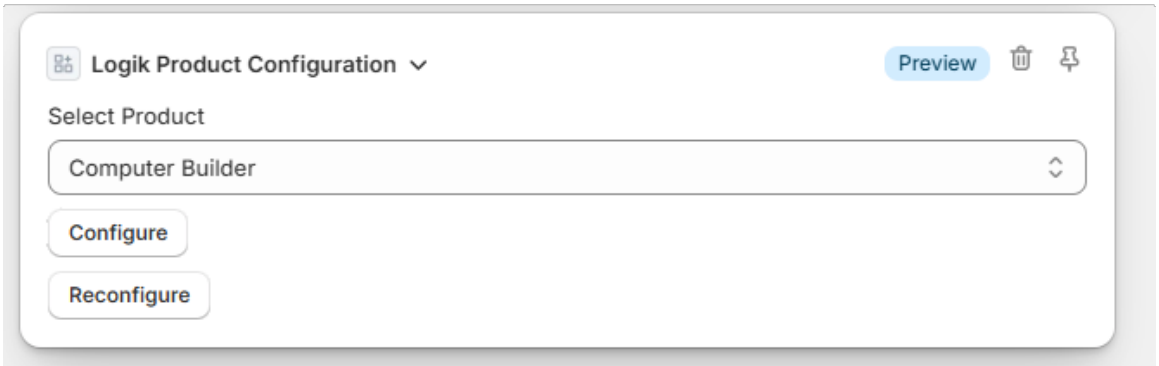



From the order page, the user can complete the order like any other Shopify order.

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## Editing a Configurable Product in a draft order

On the draft order page, a Shopify user can edit a CPQ configurable product that is included in the order. The user will select the product from the dropdown then click the ‘Reconfigure’ button, which will redirect to the create draft order page.




The existing configuration will automatically load on the page and the user will then have the ability to make any changes before saving. Once saved, the user will be redirected to the order.

## Using the app with headless implementations

The CPQ Shopify app is not required for users who wish to integrate CPQ with their Shopify storefront. However, the app is designed with headless implementations in mind.

Here are some considerations when using the app for your headless implementation:

The app streamlines the setup with CPQ and reduces the overall need for custom middleware. It provides a product sync between platforms, a custom CPQ Configurable product attribute, and Draft Order functionality.

A Custom UI can be used in place of the CPQ app block which is completely optional.

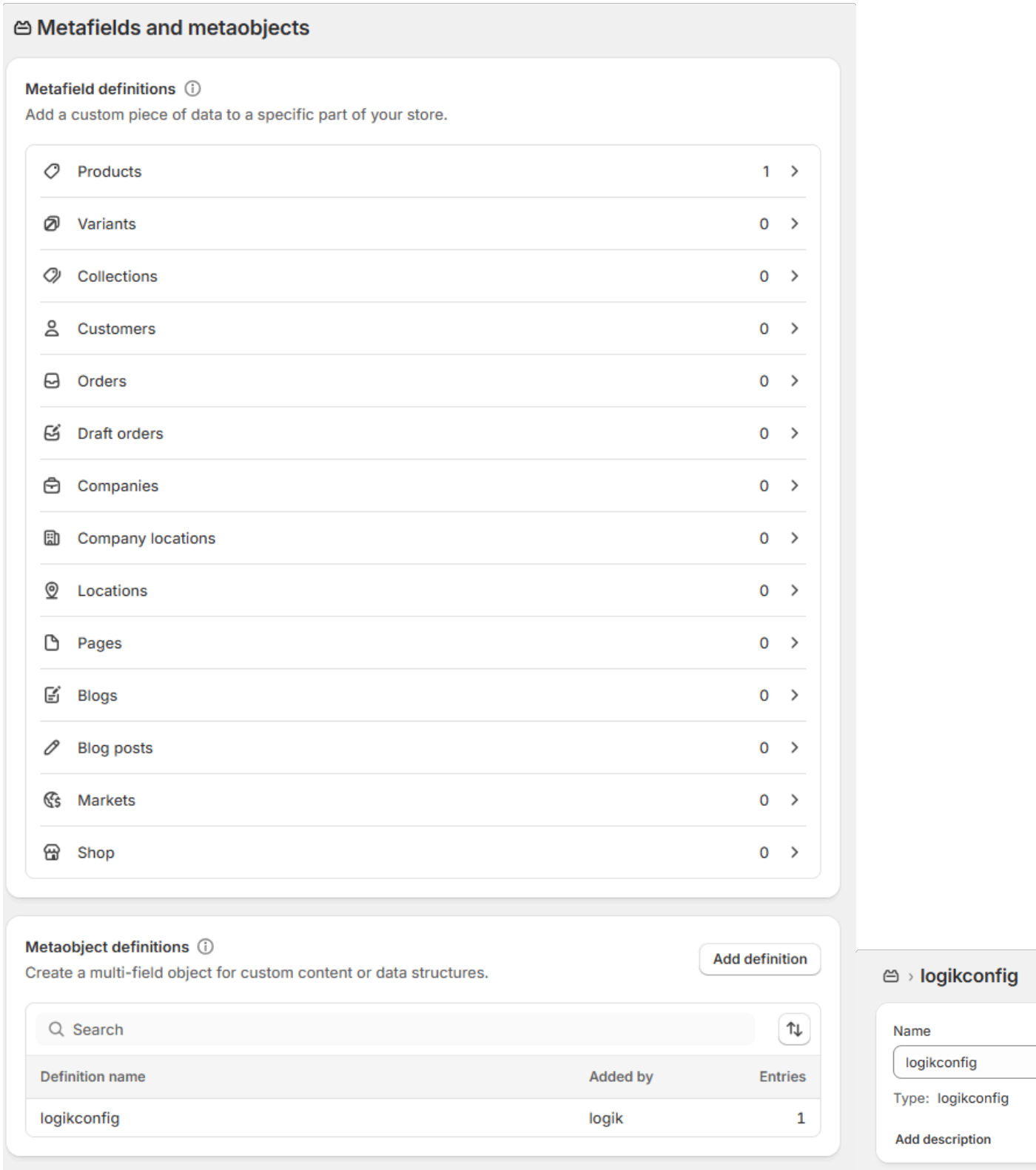
Saving a configuration automatically triggers the CPQ add to cart function, which facilitates dynamic pricing and attributes. You can disable automated add to cart on save through a DevOps request.

## Clearing app settings

In any case where you need to clear the app settings, they can be manually deleted in your Shopify store settings: Go to the Metafields and metaobjects page and select **ServiceNow CPQconfig**.

Click the ‘More Actions’ drop down menu and click ‘Delete metaobject’.

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## Configuring CPQ for SalesForce RLM

Install and configure the Salesforce Revenue Lifecycle Management package for CPQ (v0.3 or later).

## Prerequisites

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Salesforce (SF) environment:

- Your Salesforce environment has Revenue Lifecycle Management (RLM) license(s) provisioned.
- The setup steps described in Salesforce RLM documentation are complete:
  - Enable RLM features in your SF org
  - Enable Product Configurator
  - Set up your user permissions set licenses and permission set groups for Admin user

Note that Salesforce Development states that its RLM and CPQ apps are incompatible. Therefore, follow these steps:

- Uninstall the CPQ app, if it is installed.
- Uninstall any Salesforce CPQ for CPQ package that may be installed on the Salesforce environment.
- If the CPQ environment previously had a Salesforce Subscription Management for CPQ package installed on it, this must be uninstalled. Some Subscription Management package elements conflict with the elements installed by the Salesforce Revenue Lifecycle Management for CPQ package.

CPQ base package: Salesforce for CPQ Base package v2.2, or greater installed.

## Set up CPQ Configuration for SalesForce RLM

This guide walks you through the installation and setup of the Salesforce Revenue Lifecycle Management package for CPQ v0.3 or later. (This guide does not discuss NGP setup. It will be added in a later version.)

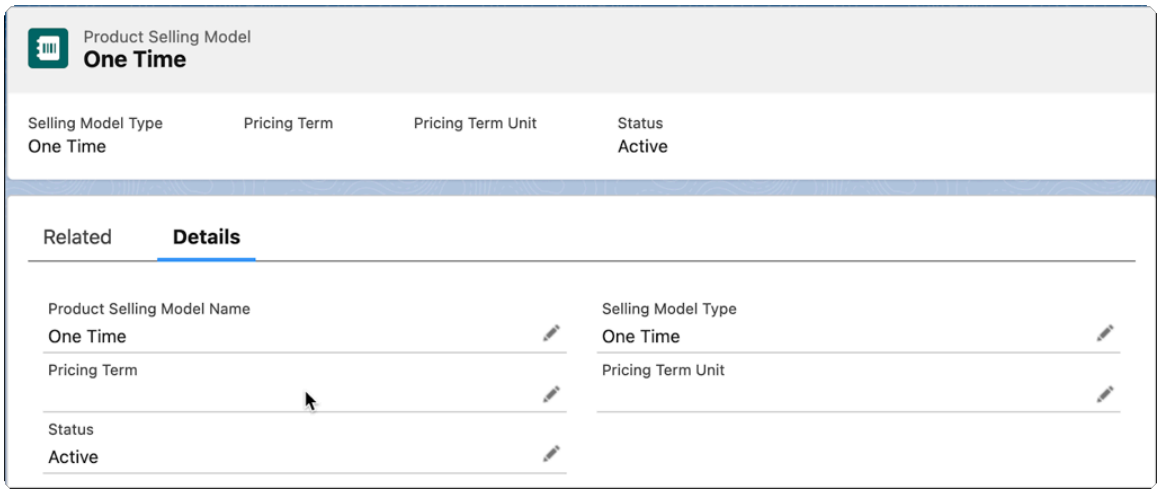
As the current package is unmanaged, you will be required to uninstall v0.3 to install future releases of this package.

## Salesforce Product Catalog Management (PCM) → Setup Configurable Product Bundle

1. App Launcher → Price Books: Activate "Standard Price Book"
2. App Launcher → Product Selling Models: Create a new Product Selling Model (PSM)
   - PSM Name: "One Time"
   - Selling Model Type: "One Time"

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- Status: "Active"




3. Setup → Object Manager → Price Book Entry → Page Layouts → "Price Book Entry Layout": Add "Product Selling Model" field to the layout
4. Setup → Object Manager → Product → Page Layouts → "Product Layout": Add the following fields to the layout
   - Configure During Sale - makes the product configurable or not
   - Based On - associates a product to a class
   - Display URL - used for product images
   - Product Type
   - Tax Policy
5. Add the following related lists to the Product Layout
   - Product Selling Model Options
   - Overridden Inherited Attributes
   - Child Components
   - Inherited Attributes
   - Product Component Group
6. App Launcher → Product Catalog Management → Product Classification: Create a new Product Classification
   - Name: “Server Racks”
   - Code: “RACK”
   - Status: Active
7. App Launcher → Product Catalog Management → Products: Create a new Product
   - Product Name: “Product Warranty - 1 Year”
   - Active: true
   - Product Code: “WARRANTY”
   - Configure During Sale: “Not Allowed”
   - Product Type: “— None —"
   - Description: “Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt.”

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On the related list of the product, add a new Product Selling Model Option named "One Time."

Click "Add Price Book Entry" in the Price Books related list, and use the following options:

- Product Selling Model: "One time"
- List Price: 2000
- Active: True
- Price Book: Standard Price Book

8. App Launcher → Product Catalog Management → Products: Create another new Product
   - Name: “Server Rack”
   - Active: True
   - Product Code: “RACK“
   - Configure During Sale: “Allowed”
   - Based On: “Server Racks”
   - Product Type: “Bundle”
   - Display URL: https://someimage.jpg
   - Product Description: “Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt.”

   On the related list of the product, add a new Product Selling Model Option named "One Time."

   Click "Add Price Book Entry" in the Price Books related list, and use the following options:

   - Product Selling Model: "One time"
   - List Price: 150000
   - Active: True
   - Price Book: Standard Price Book

   On the related list of the product, create a new Product Componnent Group with the following options:

   - Product Component Group Name: “Warranties”
   - Code: “WARRANTY”
   - Sequence: 0
   - Min Bundle Components: 0
   - Max Bundle Components: 2
   - Description: “Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt.”

   On the related list of the "Server Rack" product, click "Add" on the Child Components related list, and add "Product Warranty - 1 Year" as a child component with the following options:

   - Sequence: 0
   - Quantity: 1
   - Group: “Warranties”
   - Allow quantity changes: true
   - Price includes component: false

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- Include component by default: true
- Min Quantity: 1
- Max Quantity: 3
- Product Relationship Type: "Bundle to Bundle Component Relationship"

Notes:

- You need to search this and type it - the dropdown is not automatic.
- After manually opening the Bundle-to-Bundle Component Relationship record from App Launcher → Product Relationship Types, the record appears in this menu:

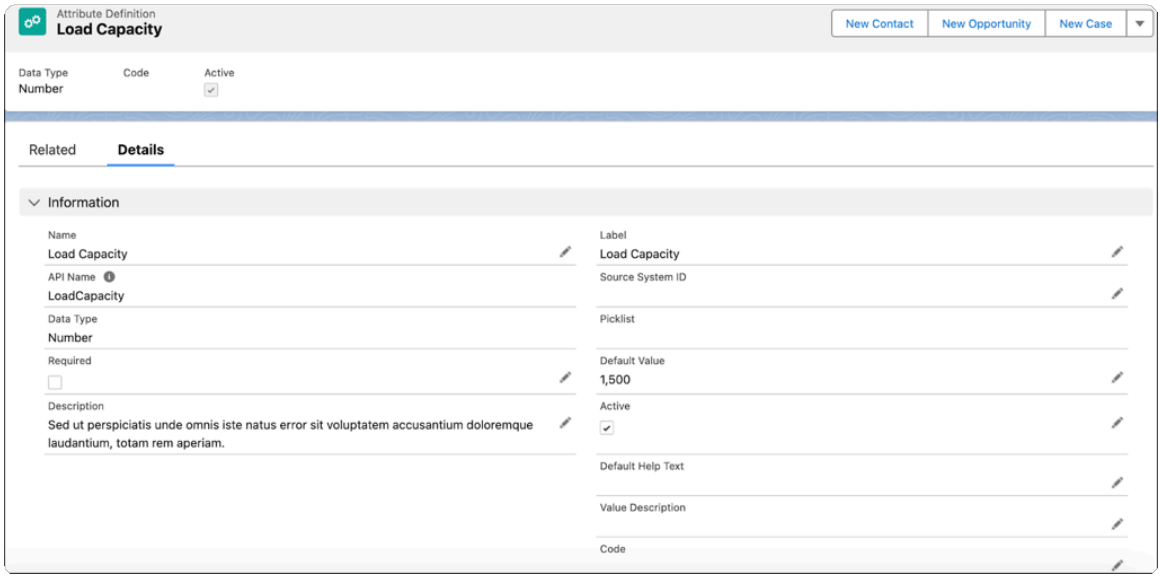
  App Launcher → Product Relationship Types → Bundle to Bundle Component Relationship.

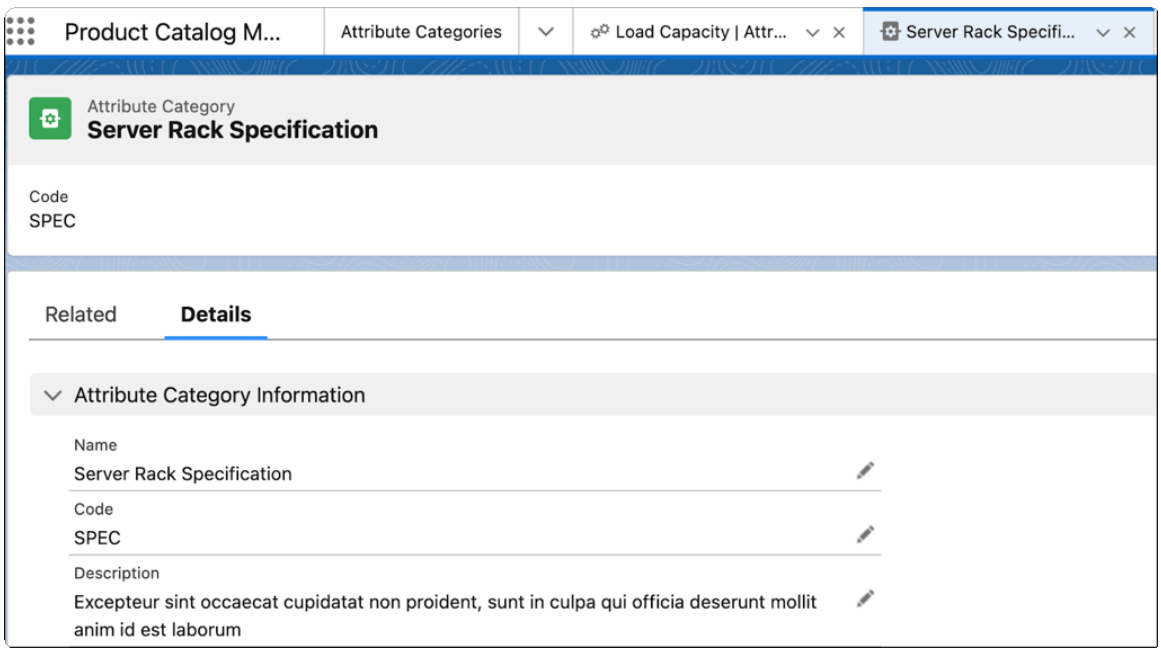
  If you don't see it, you must manually create it by navigating to App Launcher → Product Relationship Types → New, and setting the following options:

  - Product Relationship Type Name: "Bundle to Bundle Component Relationship"
  - Associated Product Role Category: "Bundle Component"
  - Main Product Role Category: "Bundle Parent"

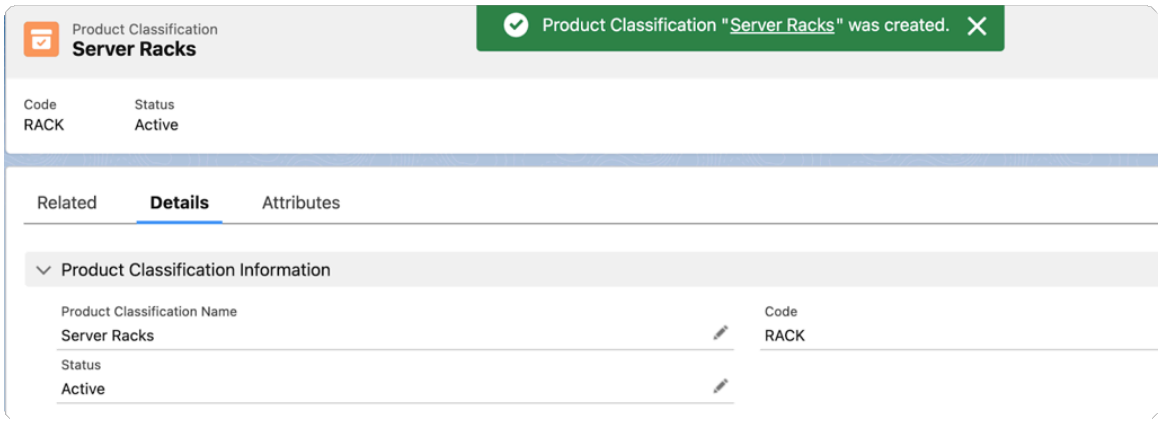
9. Create a new Attribute Category (App Launcher → Product Catalog Management → Attribute Categories) with the following options:
   - Name: "Server Rack Specifications"
   - Code: "SPEC"
   - Description: "Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."
10. Create a new Attribute Definition (App Launcher → Product Catalog Management → Attributes) with the following options:
    - Name: "Load Capacity"
    - Label: "Load Capacity"
    - API Name: "LoadCapacity"
    - Data Type: "Number"
    - Default Value: 1500
    - Active: true
    - Code: "CAP"
    - Description: "Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam."
11. Return to the related list of the new "Server Rack Specifications" attribute category you created, and in its related list, under "Attributes", click "Assign" and add the "Load Capacity" attribute to it.
12. App Launcher → Product Catalog Management → Product Classifications → "Server Racks" → "Attributes" tab: Click "Assign" → "Assign individual attributes" → add the "Load Capacity" attribute.

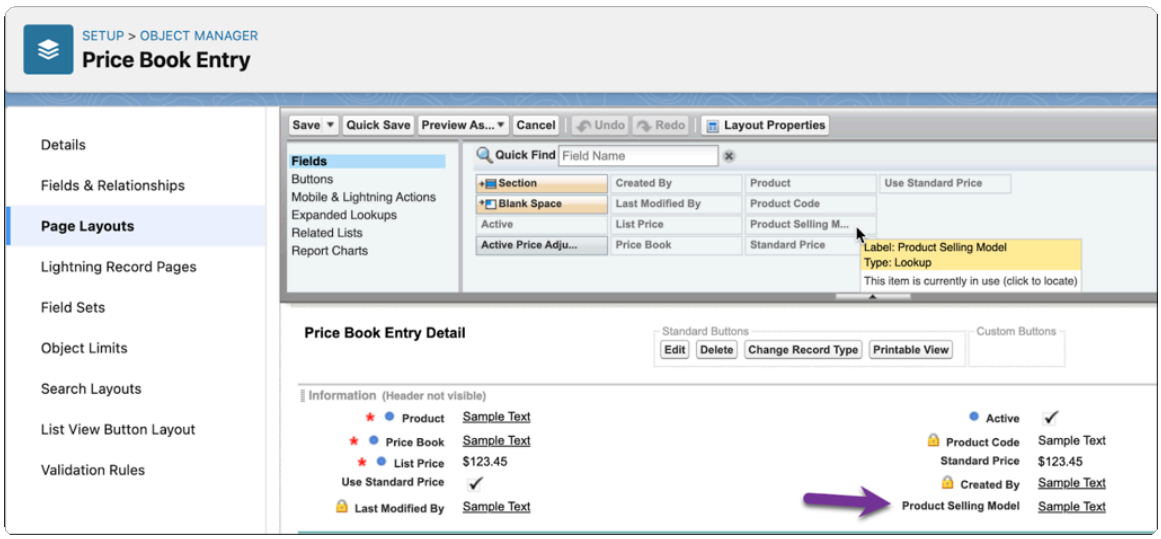
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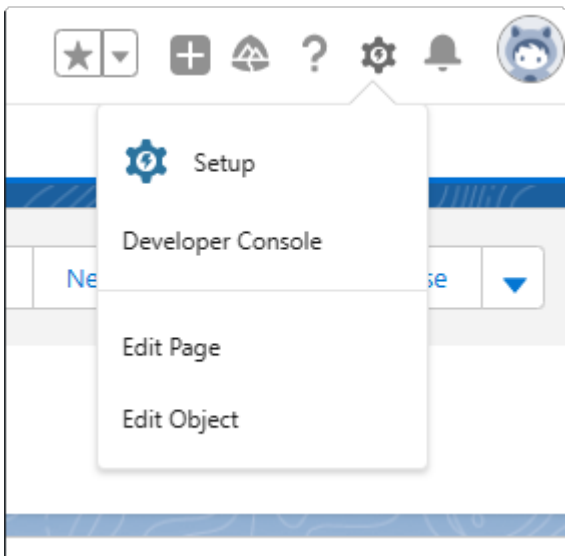



## Salesforce Transaction Line Editor Setup

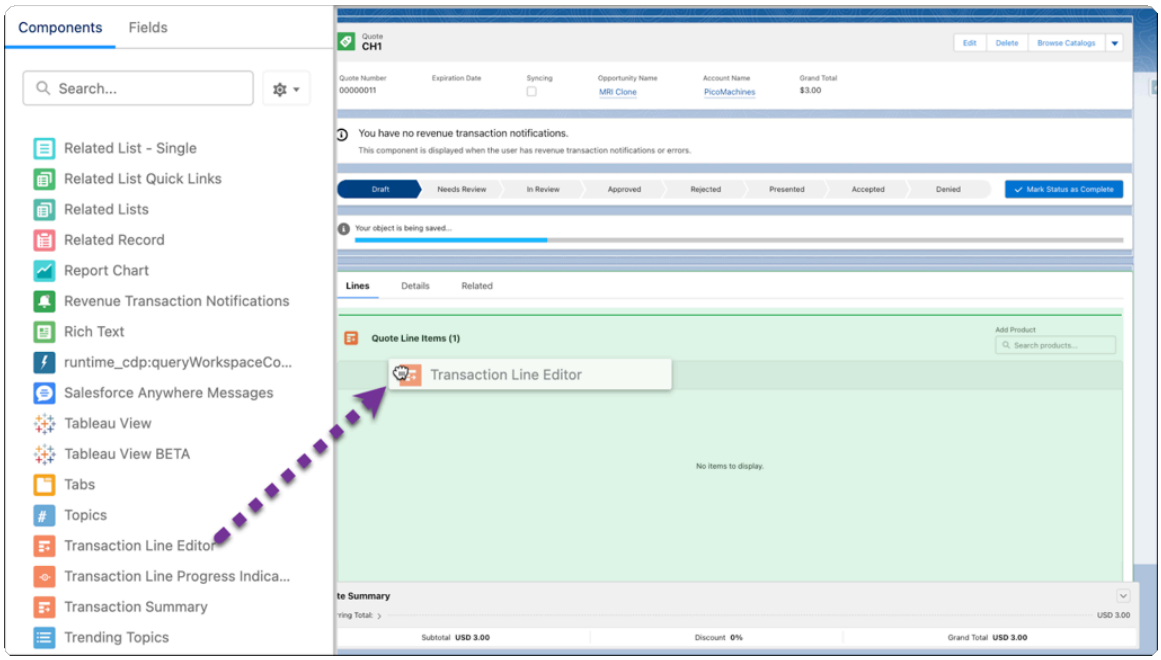
A Lightning Web Component is available to perform configure/reconfigure and view the Quote Line Items in their bundled/hierarchical view. To add this component to the layout:

1. App Launcher → Sales → Quotes → open a quote.
2. Press the gear icon on the top-right corner of the page and select "Edit Page".




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3. From left menu, drag Transaction Line Editor component onto the layout.



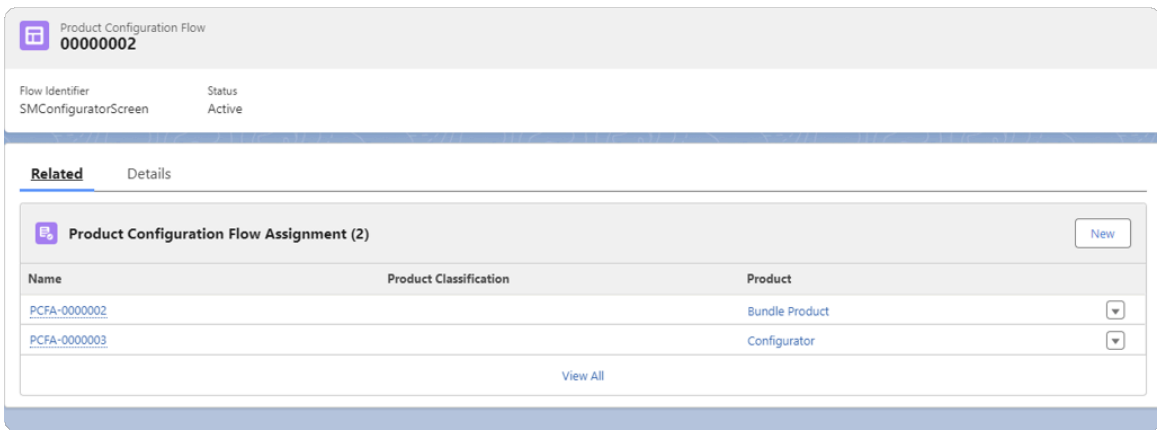

4. Save and Activate.

## Salesforce Product Configuration Flows Setup

Instead of assigning a Configurator at the org level, a new object determines which configurator to launch per product.

1. Search for and open the sObject, "Product Configuration Flow"
2. Create a new Config Flow record and set the Flow Identifier as "RLMConfiguratorScreen". If you're only using one configurator, make this the Default as well.

If there are multiple config flows being used, the flow can be assigned to individual products or product classifications through the Related records.

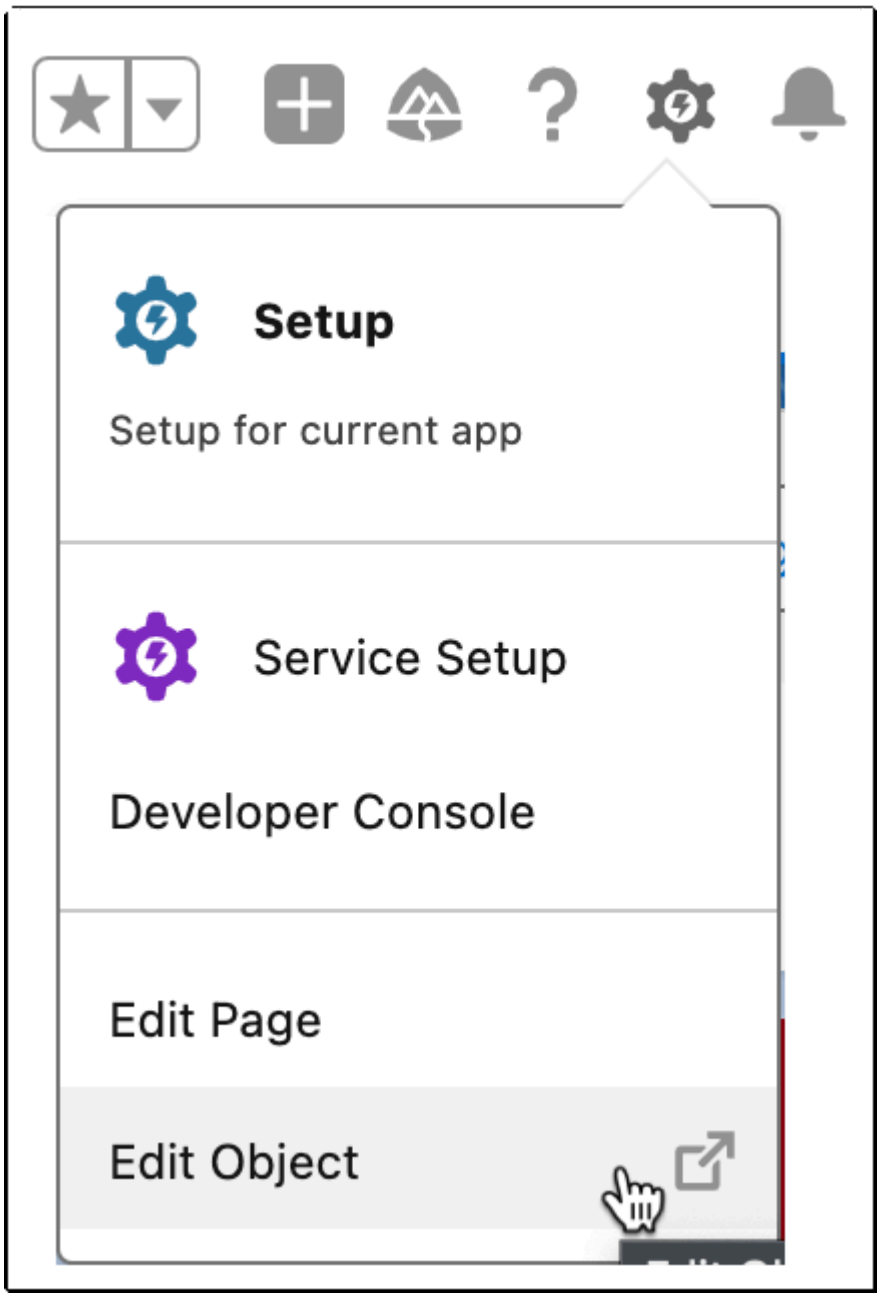



## Salesforce Product Discovery Setup

Configure from Quote: With Product Discovery, products can be configured before being added as a quote line.

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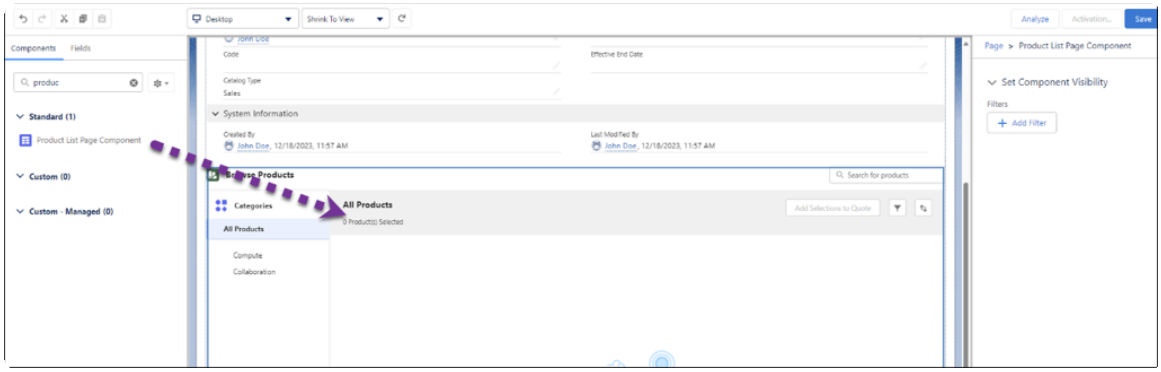
1. App Launcher → Sales → Quotes → open a quote.
2. Press the gear icon on the top-right corner of the page and select "Edit Object".
3. Go to Page Layouts; for the layouts being used, add the “Browse Catalog” action to the layout and save.




Configure from account is not currently supported. In the future, the user will be able to configure without reference to a quote. For instance, this could be used to launch product discovery from the account page.

1. From a Catalog page, open the Admin gears and click “Edit Page”.
2. Under Components, search for and add the "Product List Page Component" onto the page.

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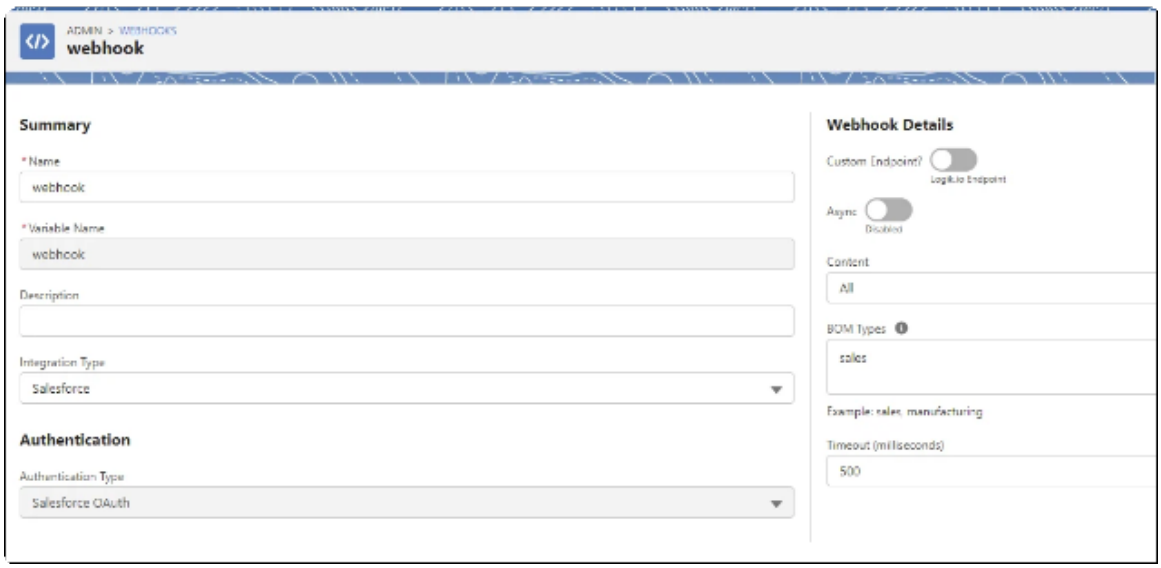
3. Save, and if needed, Activate and assign as default.

## CPQ Webhook Setup

1. If Webhooks are not enabled on your CPQ environment, create a Support case and request Webhooks be turned on in the environment.

   To create a support case, use the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

2. When Webhooks are enabled, navigate to CPQ Admin Home → Utilities → Webhooks, and create a new Webhook with the following settings:
   - Integration Type: Salesforce
   - Async: false
   - Content: Either "All" or "BOM and System Fields"
   - BOM Types: "sales" (others can optionally be added, but "sales" is required)

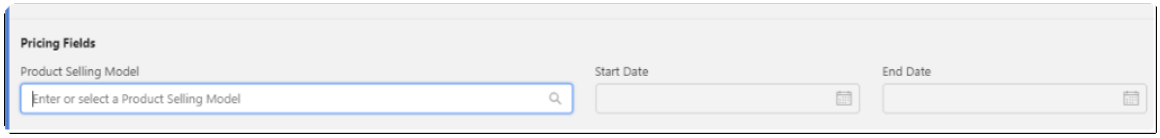



## CPQ Product Selling Models Setup

In a product action, pricing fields for Revenue Lifecycle Management can be set, similar to extended info. These are available in both simple and advanced product actions.

Example of simple product action setup:

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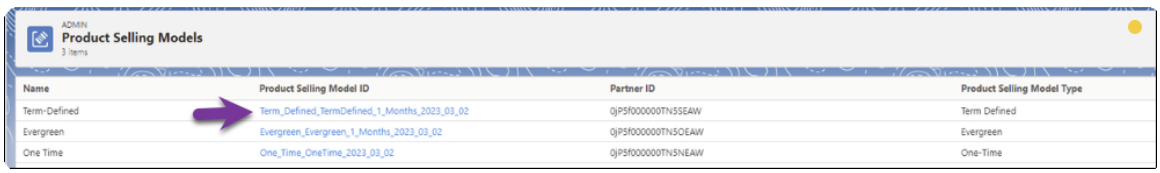



Available pricing map (ProductList.pricing) fields are:

- productSellingModelId
- startDate
- endDate

Assuming Product Selling Models have been created in Salesforce, the productSellingModelId can be found in a subpage of Utilities and will automatically be suggested in the simple product action UI.

Example productSellingModelId based on this image would be "Term_Defined_TermDefined_1_Months_2023_03_02"

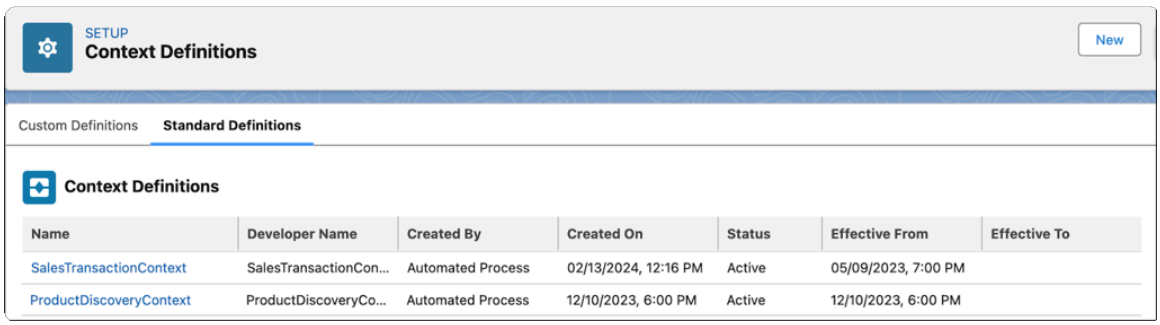



## Salesforce: Enable Context Service

1. Setup → Feature Settings → Context Service → Context Service Settings: Set “Context Definitions” to "On"
2. Refresh the page. If you don’t see the next step, wait 10 seconds and try again.

   If you still don’t see the next step, wait 20 seconds and try again. This is an asynchronous process.

3. Setup → Feature Settings → Context Service → Context Definitions: Confirm that under “Standard Definitions”, the “Sales Transaction Context” is present and is “Active”.
   a. Open dropdown menu for "SalesTransactionContext__stdctx" and press 'Extend'.
   b. Populate the new Context Definition and Save.
   c. Go to the Custom Definitions tab. Open the dropdown menu for the newly created Context Definition and press 'Activate'.




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## Salesforce: Enable Business Rules Engine (BRE) for Qualification

1. Setup → Feature Settings → Business Rules Engine → Business Rules Engine Settings: Toggle on the switch to enable “Industries Cloud Common Decision Tables Access”
2. Setup → Context Service → Context Definition: Create a new custom context definition named “BrowseContextdefinition” (this name must match exactly). Don't set any other fields.
3. Click “Next”
4. Add the following context nodes:
   - Name: “PriceBook”
   - Name: “Account”
   - Name: “Catalog”
5. Under “Catalog”, add a child node of ”Category“
6. Under “Category”, add child nodes of “CategoryProduct” and “PricingProduct”
7. Under “CategoryProduct” add a child node of “Message”, and click Next.
8. Under “PriceBook”, click “Add Attributes” and add the PricebookID attribute:
   - AttributeName: “PricebookId”
   - Type: “INPUT”
   - Data Type: “STRING”
9. Under “Account”, click “Add Attributes” and add attributes with the following AttributeNames, a type of INPUT, and a data type of STRING:
   - Id
   - contactId
   - AccountCity__c
   - SLA__c
   - CurrencyIsoCode
   - Region__c
10. Under “Catalog”, click “Add Attributes” and add attributes with the following AttributeNames, a type of INPUT, and a data type of STRING:
    - Id
    - CurrentDate
11. Under “Category”, click “Add Attributes” and add the following attributes with a data type of STRING and the type as specified:
    - CategoryId (Type: INPUT)
    - IsCategoryQualified (Type: OUTPUT)
    - CategoryDisqualifiedReason (Type: OUTPUT)
12. Under "CategoryProduct", click "Add Attributes" and add attributes with the following AttributeNames, a type of INPUT, and a data type of STRING, unless otherwise specified:
    - Id
    - ProductId
    - RootProductId
    - ParentProductId
    - CategoryId

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- CatalogId
- Name
- Code
- MaxQuantity (Data Type: NUMBER)
- MinQuantity (Data Type: NUMBER)
- Quantity (Data Type: NUMBER)
- IsQualified (Type: OUTPUT; Data Type: NUMBER)
- Reason (Type: Output: Data Type: STRING)

13. Under "Message", click "Add Attributes" and add the following attributes with a type of OUTPUT and a data type of STRING:
    - Name
    - Value
14. Under "PricingProduct", click "Add Attributes" and add the following attributes:
    - PricingId
        - Type: INPUT
        - Data Type: STRING
    - PricingProductId
        - Type: INPUT
        - Data Type: STRING
    - ProductSellingModelId
        - Type: INPUT
        - Data Type: STRING
    - ProductQuantity
        - Type: INPUT
        - Data Type: NUMBER
    - UnitPrice
        - Type: OUTPUT
        - Data Type: CURRENCY
    - NetUnitPrice
        - Type: OUTPUT
        - Data Type: CURRENCY
    - PriceWaterFall
        - Type: OUTPUT
        - Data Type: STRING
    - PricingErrorMessage
        - Type: OUTPUT
        - Data Type: STRING
15. Click Next.
16. For each of the following nodes, add node tags that exactly match the name of the node:

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- PriceBook
- Account
- Catalog
- Category
- CategoryProduct
- PricingProduct

17. For each of the following attributes, add the specified attribute tags:
    - (For PriceBook:) PriceBookId: PriceBookId
    - For Account:
        - AccountCity_c: AccountCity
        - SLA_c: SLA
        - CurrencyIsoCode: CurrencyCode
    - (For Catalog:) CurrentDate: CurrentDate
    - For Category, give each attribute a tag that exactly matches the name:
        - CategoryId
        - IsCategoryQualified
        - CategoryDisqualifiedReason
    - For CategoryProduct, give each attribute a tag that exactly matches the name:
        - ProductId
        - RootProductId
        - ParentProductId
        - IsQualified
        - Reason
    - For PricingProduct, give each attribute a tag that exactly matches the name:
        - PricingProductId
        - ProductSellingModelId
        - ProductQuantity
        - PricingId
        - UnitPrice
        - NetUnitPrice
        - PricingErrorMessage

      For PriceWaterFall, assign a tag of price_water_fall. Click Save.
18. Open your newly created "BrowseContextDefinition" → click "Map Data" tab → click "Add Mapping":
    - Mapping Name: "BrowseOperation"
    - Description: "Browse Operation"
    - Mapping Type (select both):

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        - "Automatic Input Schema Mapping"
        - "Automatic sObject Mapping"
    - Mark as Default: TRUE

19. Setup → Context Service → Context Definitions: in "BrowseContextDefinition" menu, click "Activate"
20. App Launcher → Business Rules Engine → Lookup Tables: Click “New” and select “Decision Table”
    - Name: “ProductQualificationDT”
    - Description: “Qualification Rules decision table”
    - API Name: “ProductQualificationDT”
    - Source Object: “Product Qualification”
    - Filter Result By: “Any Value”
    - Usage Type: “Product Qualification”

    On the next screen, because we’re going for the simplest qualification rule, we have only a single input and output (i.e. “Given a Product ID, tell me if its qualified or not”)
21. Next to “ProductId” set “Don’t Use” to “Optional input”
22. Next to “IsQualified” set “Don’t Use” to “Output”
23. Click “Next” and “Save"
24. Click the “Activate” button in the upper right corner to activate the decision table
25. App Launcher → Business Rules Engine → Expression Sets: Click "New" to create a new Expression Set
    - Name: “QualificationProcedure”
    - Usage Type: “Product Qualification"
    - Context Definition: “BrowseContextdefinition”
26. In the newly created expression set record home, see the “Expression Set Versions” table and click the first row to launch the Expression Set Builder.
27. In the expression set builder, click the “+” button in the middle of the screen and select “Evaluate Qualification”
    - Lookup Table Details: “ProductQualificationDT”
    - ProductId: “ProductId”
    - IsQualified: “IsQualified”
    - Reason: “Reason”
28. In the sidebar in the expression set builder, click the cog icon and set the “Rank” equal to 1
29. Click the Element Details tab and select “Include in Output”
30. Click “Save As”, wait for the full-page refresh, and then click “Activate”

    At this point, your BRE Qualification Rules should be setup correctly. To end, we will simulate the configuration to verify that it is working correctly.
31. In the Expression Set Editor, click the “Simulate button”
32. Select “Advanced” for the input and populate the ProductId field with your Cisco Server Rack NX44 product ID

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Leave the IsQualified and Reason fields as empty strings.

33. Click “Simulate”

Inspect the Output JSON to see if your product returns. "IsQualified" will be "null" and "Reason" will be an empty string.

### Salesforce: Pricing Procedure

1. App Launcher → search for and open "Pricing Procedures" → open the "Revenue Management Default Pricing Procedure" → open the active Pricing Procedure and deactivate it.
2. Return to the Revenue Management Default Pricing Procedure. Edit it.

   Change the Context Definition to the custom definition that was extended from "SalesTransactionContext__stdctx". Save.
3. Reactivate the Pricing Procedure Version.

### Troubleshooting

Issue: The CPQ blueprint was loaded into the RLM org, but no products show in the product catalog during quoting.

Diagnosis: This could mean that there's an issue with the Product Discovery settings (see the Salesforce: Enable Context Service section and beyond).

- Setup → Feature Settings → Decision Tables. Open both the ProductQualification and Price Book Entries tables and perform the 'Refresh' action on each.
- If the refresh doesn't solved the problem, view the following Salesforce documentation:
  - RLM Product
  - Discovery Setup

Issue: At runtime, the user receives the following error in RLM:
`System.IllegalArgumentException: Looks like you don't have access to the place quote service. Salesforce Customer Support can help with that`

Diagnosis: This is a permission set issue. Make sure that the following three RLM permission sets are assigned to the integration user that facilitates the CPQ integration.

- Product Catalog Management Designer
- ProductAndPriceConfiguration API
- Product Catalog Management Viewer

## CPQ integration with Salesforce B2B Commerce

Learn how to configure CPQ to work with Salesforce B2B Commerce.

### Prerequisites

This guide assumes the following:

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- Commerce is enabled in Salesforce
- The CPQ Base Managed Package is installed
- System Administrator or similar access is available to perform the steps listed

## Install files to Salesforce

1. If it isn't already installed, download and install the Salesforce Command Line Interface (CLI) using the instructions here:

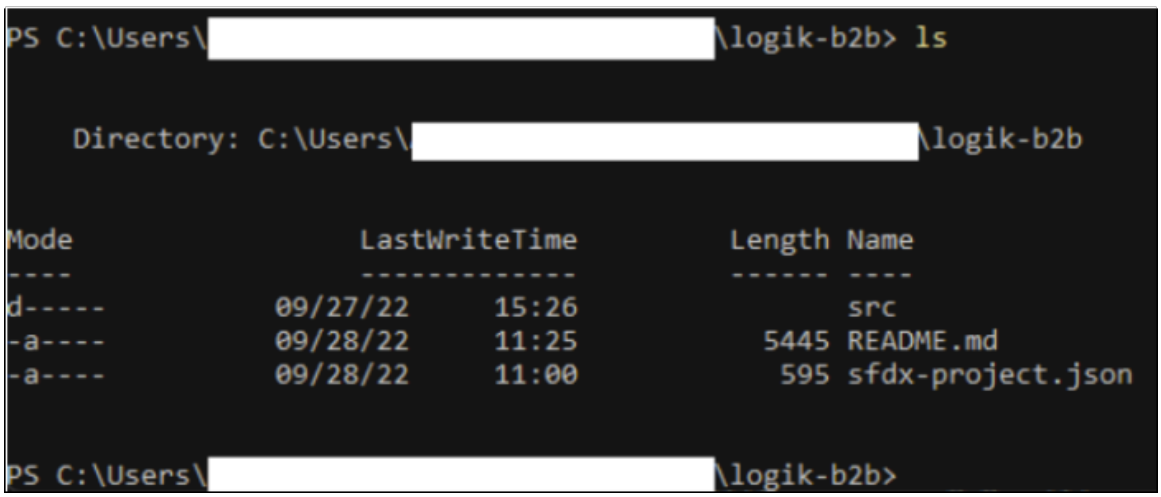
   Install Salesforce CLI

2. Download and extract the cpq-b2b.zip file, which contains the components used for the B2B integration, from github.com.
   - On Mac, double-click the file. Its contents will be extracted automatically in the same location.
   - On Windows, right-click and select Extract All". Follow the prompts that appear on screen.

   a. refer the following:

3. Start Terminal (Mac or Linux) or Powershell (Windows).
4. Navigate to the directory containing the extracted files. For example, if the files were extracted in the Downloads folder, type and enter the command `cd Downloads/logik.io-b2b`.
5. Run the `ls` command to see a list of files and folders in that directory.

   You should see `src` and `sfdx-project.json`, and a plain text copy of this guide.




6. Run the following command, making the changes indicated just below:

```
sfdx auth:web:login --setalias myOrg -r
 https://example-dev-ed.my .salesforce.com
```

   - Replace the URL following `-r` with the one that the CPQ - B2B integration will be set up on.
   - The text following `--setalias` is a nickname that is used to identify and reference the correct Salesforce org. The example `myOrg` will be used for the purposes of this guide. Be sure to use your own alias in the following steps.

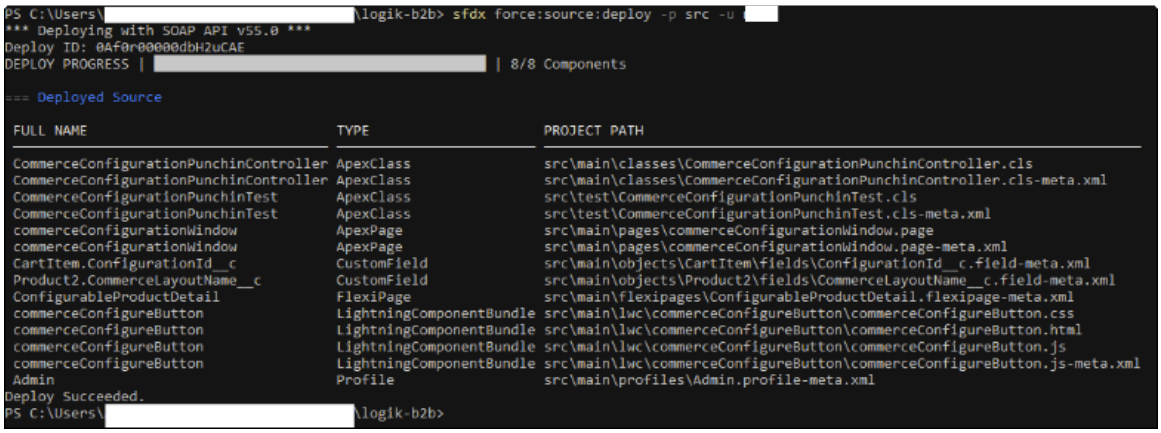
   The URL specified in the previous login command will be opened in the default browser.

7. Log in and authorize the "Salesforce CLI" connected app.

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8. In the command line, run the command `sfdx force:source:deploy -p src -u myOrg`.

   After a few moments, the command line will return a confirmation message, "Deploy Succeeded."



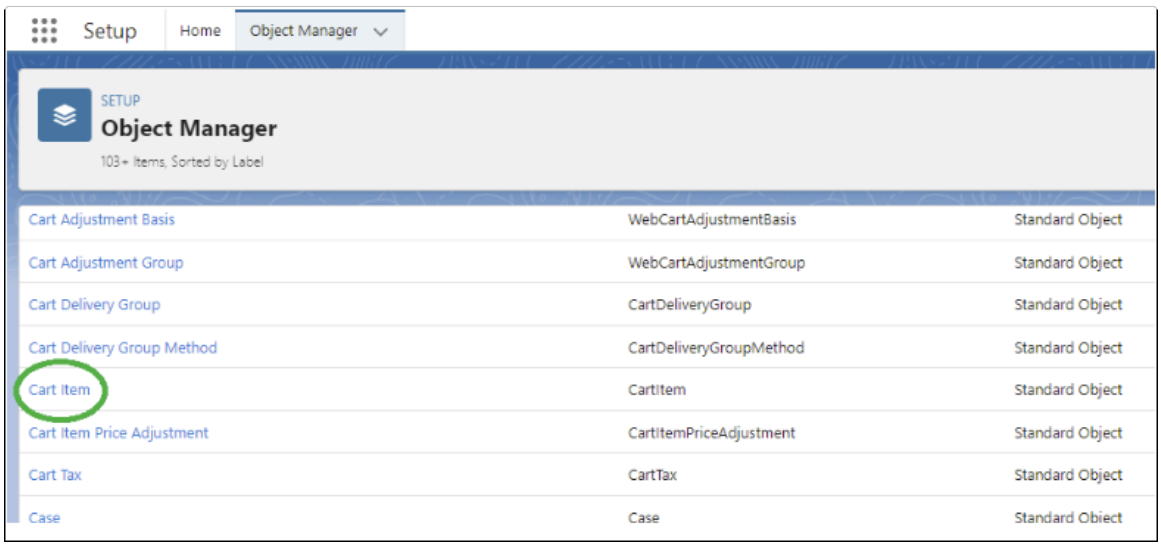

   If the Salesforce org isn't already open in a browser, it can be opened by running the command `sfdx force:org:open -u myOrg`.

## Post-installation setup in Salesforce

You must complete the following steps after installing the components to Salesforce.

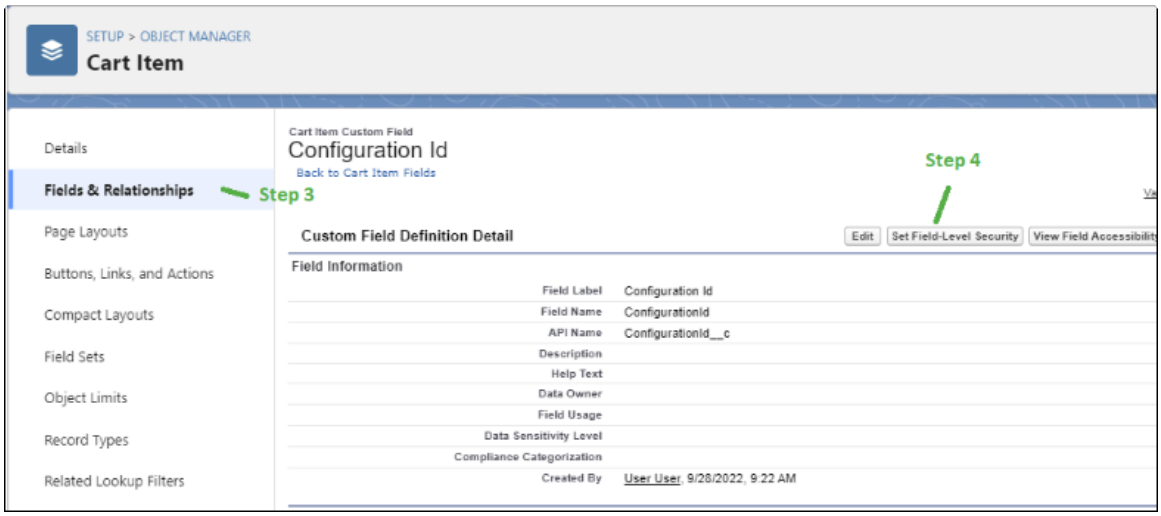
Setting Field Level Security:

1. From Setup Home, go to the Object Manager tab, or navigate to Objects and Fields > Object Manager.
2. From Object Manager, search for and open Cart Item (CartItem).

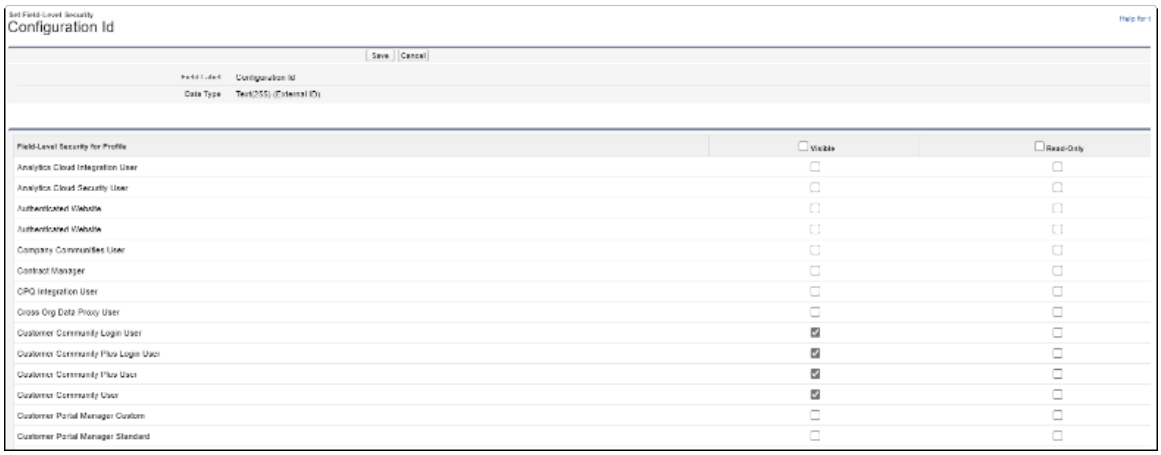



3. Go to Fields & Relationships. Search for and open the field Configuration Id (ConfigurationId__c).
4. Click **Set Field-Level Security**.

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5. Make sure the Visible option is selected and Read-Only is not selected for profiles that will be configuring products in Commerce, and then click **Save**.




A similar set of steps need to be followed for a Product2 field.

1. From Object Manager, search for and open Product (Product2).
2. Go to Fields & Relationships. Open the field CPQ Enabled (LGK__IsConfigurable__c).
3. Click “Set Field-Level Security”. Make sure the Visible option is selected for any shopper profiles. Read-Only can either be enabled or disabled.
4. Save.

More field level security permissions are required if using the Add to Cart API. First, from Object Managed, search for and open Configuration Line Item (LGK ConfigurationLineItem c). Then, make sure shopper profiles have Field-Level Security to Visible for the following fields:

- Quantity
- ProductId
- Price
- ConfigurationId
- Type

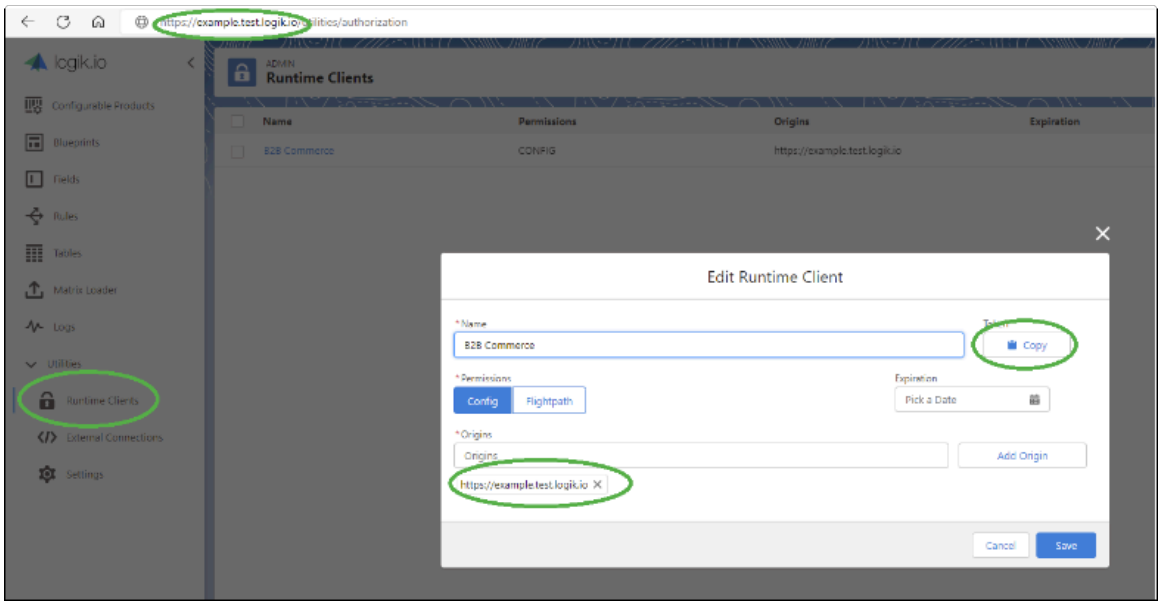
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In addition, the following CartItem fields will need to be set to Visible (Read-Only must not be checked):

- ConfigurationId (this should already be done for the UI integration)
- Quantity
- ProductId
- Price
- Type

## Obtaining and applying the runtime token

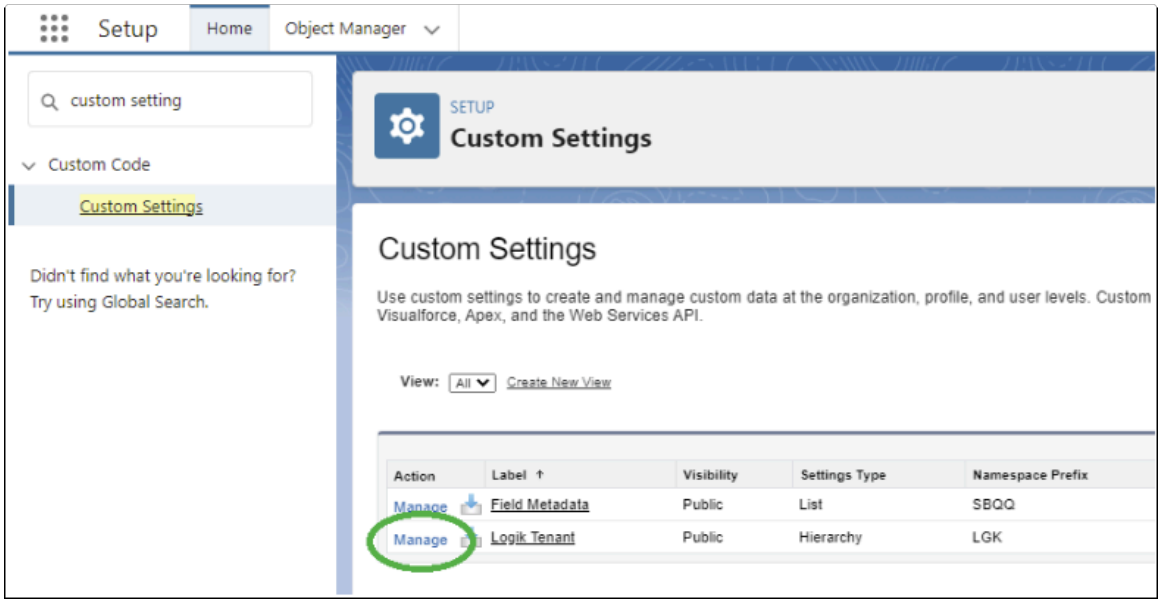
1. In CPQ, create a Runtime Client, with an Origin matching the CPQ base URL. Click **Copy** to get the client token.



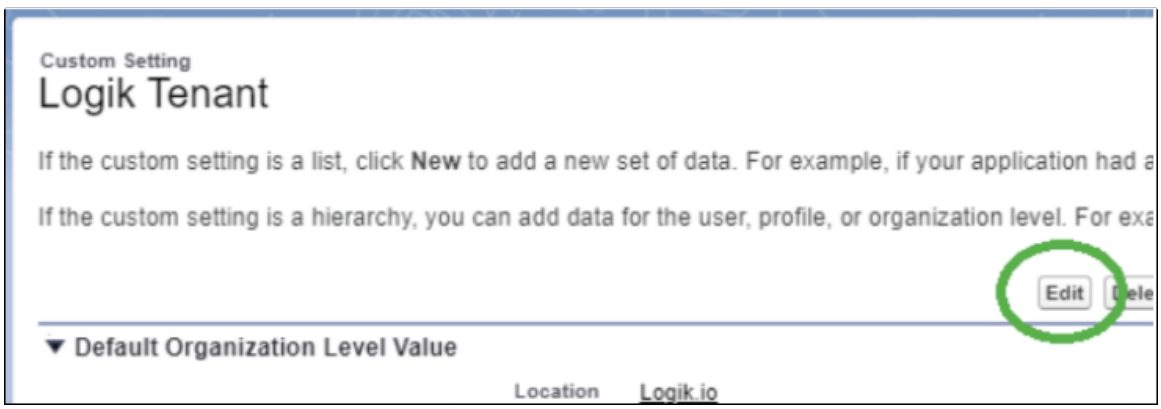

2. In Salesforce, from Setup home, go to Custom Code > Custom Settings.

3. For CPQ Tenant, click `Manage`.

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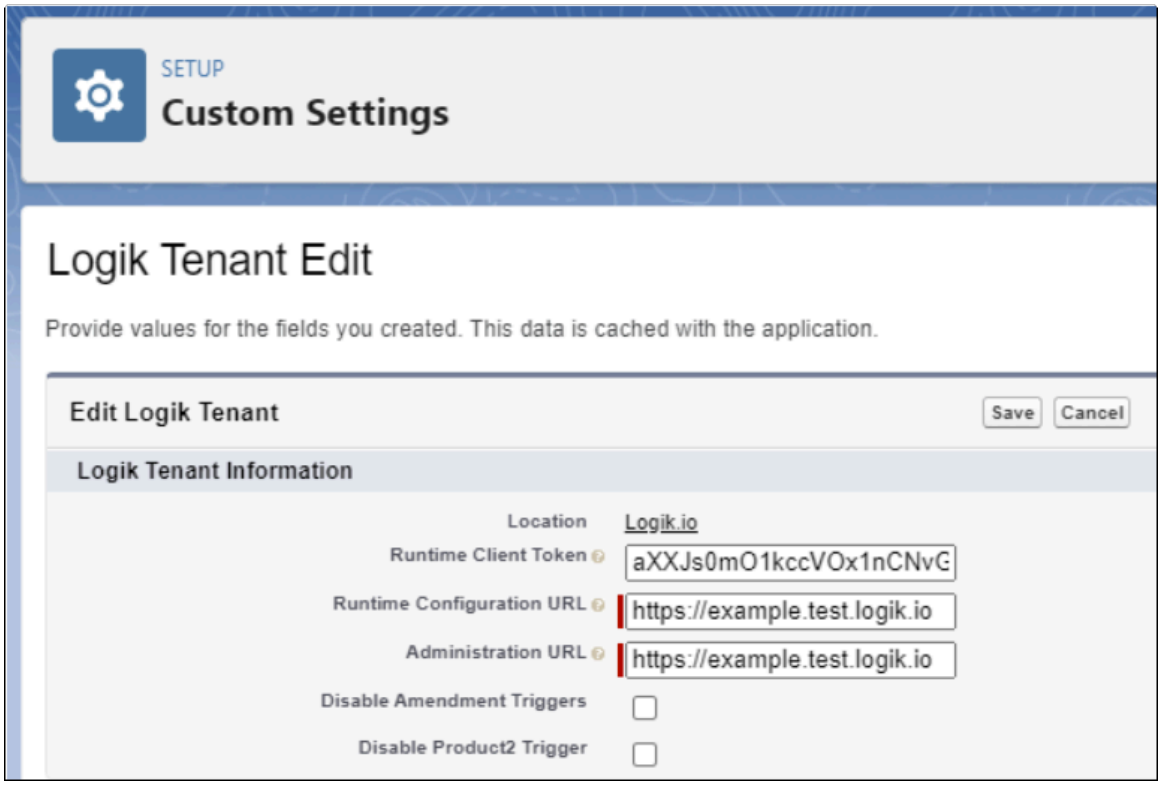



**4.** If settings already exist, click “Edit”. Otherwise, click “New” above the “Default Organization Level Value” header.




**5.** For the Runtime Client Token field, paste the copied token for the runtime client. Make sure the URL field(s) are set to the same URL as one of the runtime client’s Origins in CPQ Admin.

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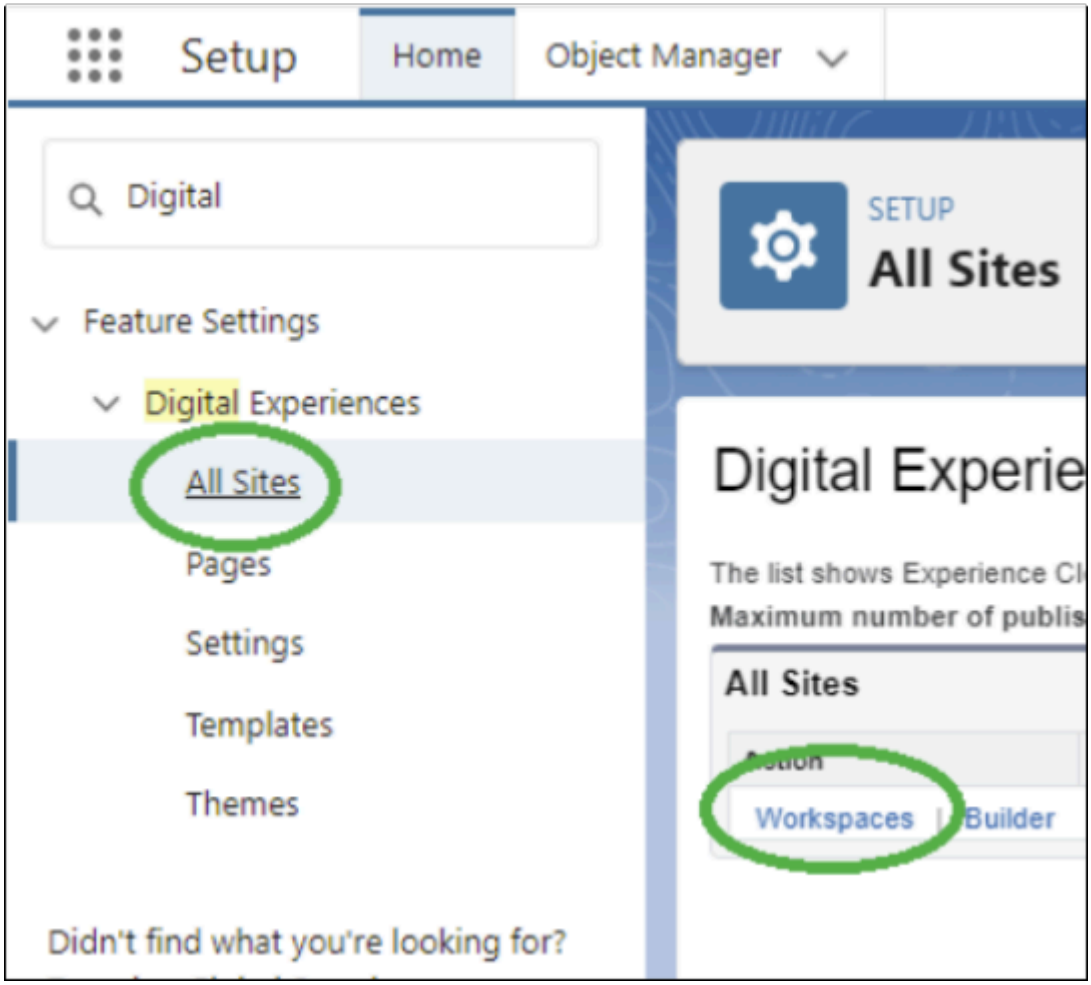

6. Save.

## Setting Visualforce page access

1. From Setup home, go to Feature Settings > Digital Experiences > All Sites.

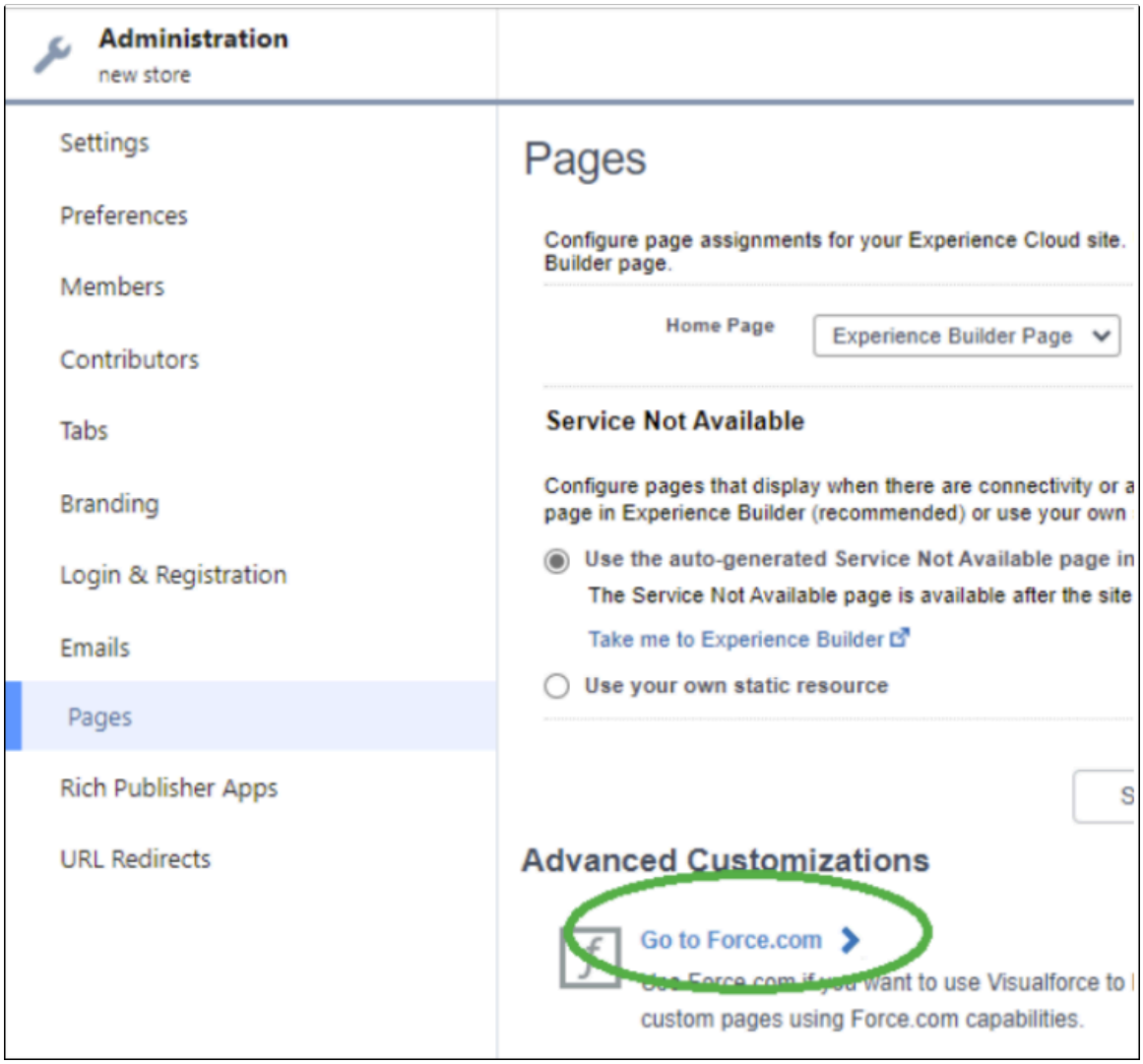
2. For your store, click `Workspaces`.

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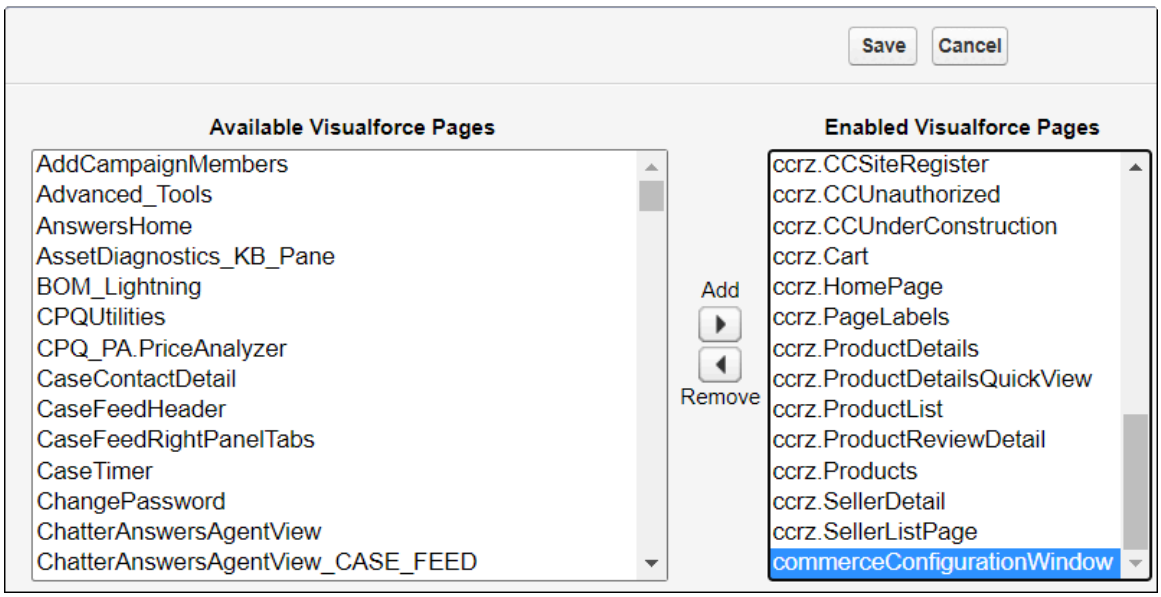

**3.** Go to Administration > Pages > Go to Salesforce Platform for Application Development.

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4. Under "Site Visualforce Pages", click `Edit`.

5. Move `commerceConfigurationWindow` from Available to Enabled and save.

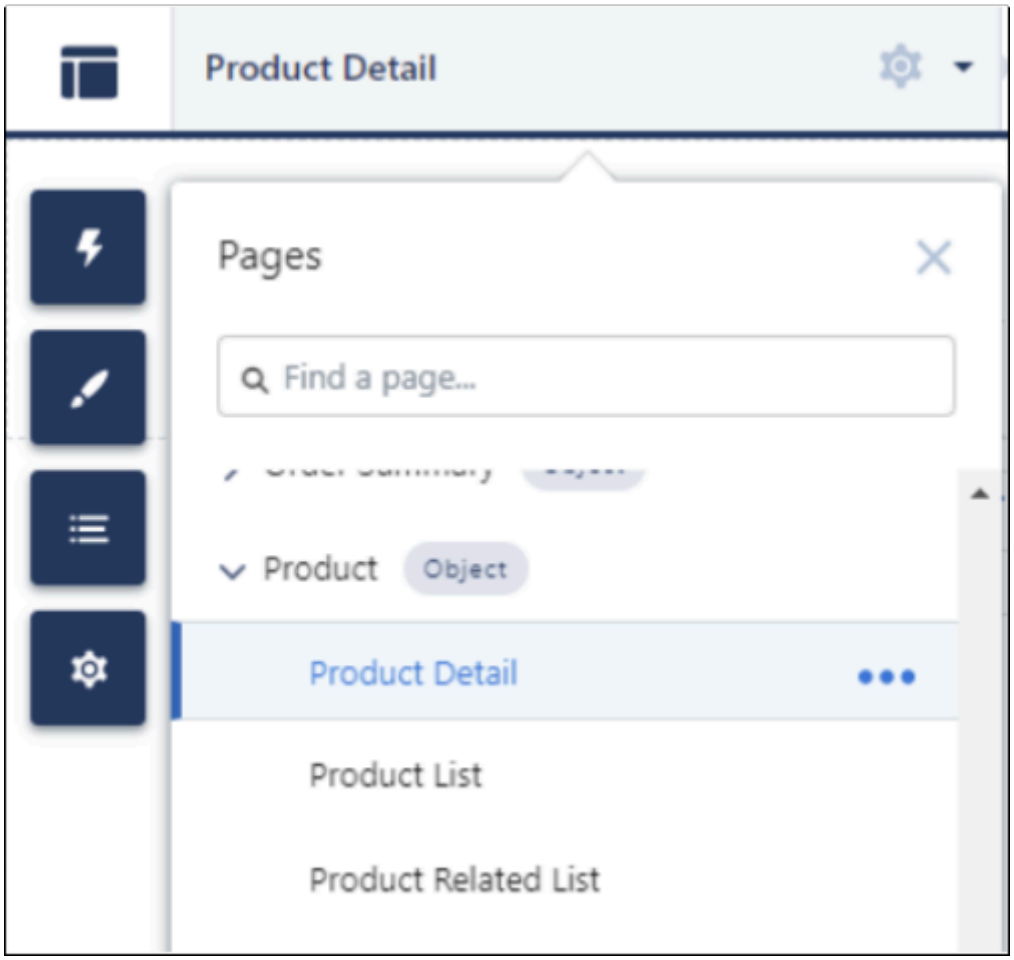



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## Configuring the Experience Builder

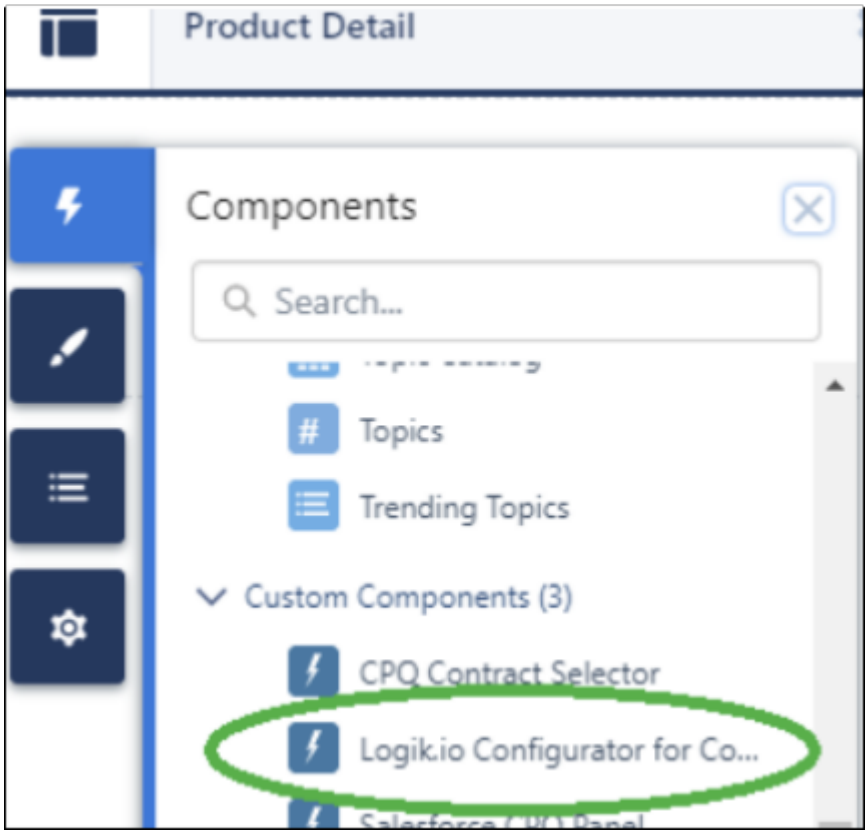
1. From the Commerce home page, open Experience Builder.

2. Click **Home** on the top left to open the list of pages. Search or navigate to Product and click **Product Detail**. Either add the custom CPQ button to the existing Product Detail page, or use the packaged page as a variation.



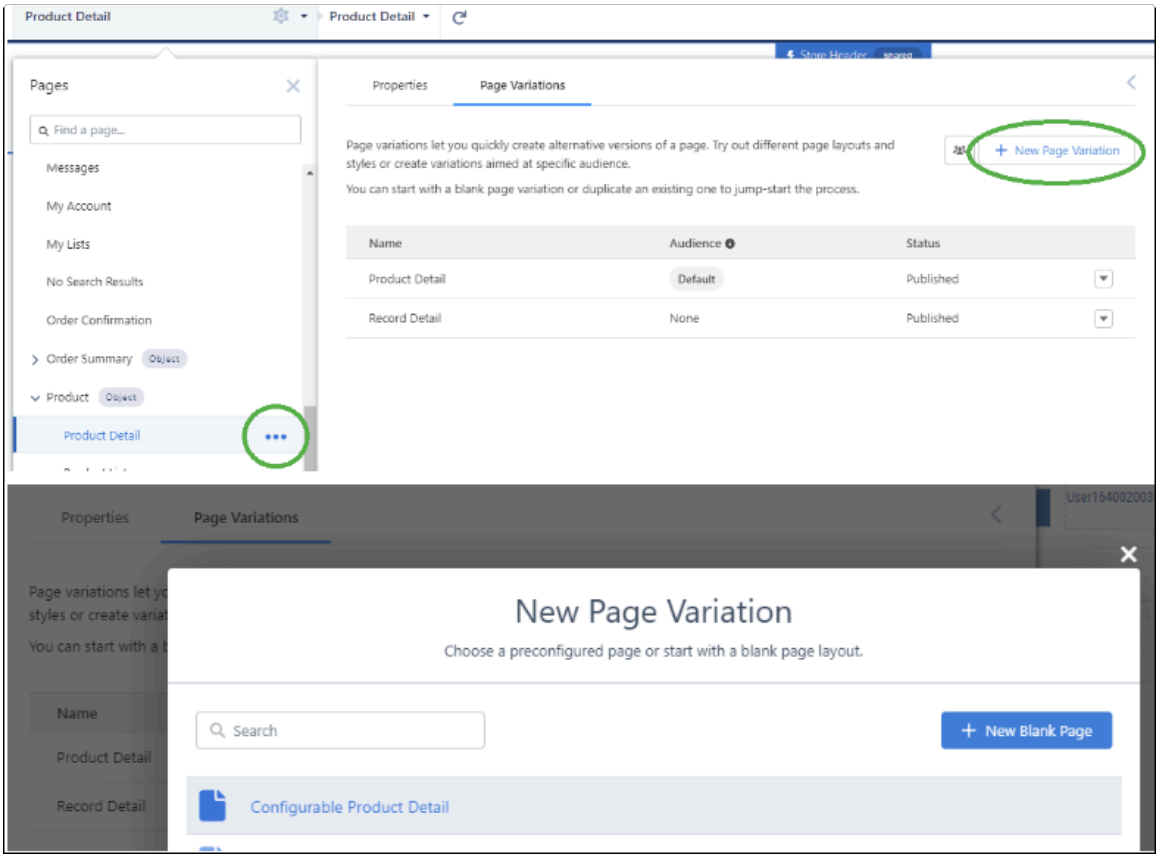

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- To add the button to an existing page:
  - **a.** Click the lightning bolt on the left and go to Custom Components (the last section in the list).
  - **b.** Drag the Configurator from the list and move it to where you want it in the layout.




- To use the packaged page as a variation:
  - **a.** Reopen the page navigation menu on the top left.
  - **b.** On the Product Detail option, click the three dots and go to the Page Variations tab.
  - **c.** Click New Page Variation and choose “Configurable Product Detail” as the layout.

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**d.** Give the variation a name and click **Create**.

## Add to Cart API

Endpoint: `/services/apexrest/add-to-cart`

Methods: Receives and returns `application/json`

POST: Use to add items to the currently active cart. (If a cart is not active, a cart is created.) Requires the following:

- `configurableProductId`
- `configurationId`
- `webstoreId`
- `effectiveAccountId`

**Note:** `webstoreId` and `effectiveAccountId` are part of Salesforce Commerce#s standard APIs, so that information should be readily available to users.

`configurableProductId` and `configurationId` must correspond to the same configurable product.

PATCH: Use to add items to a specified cart. Requires the following:

- `configurableProductId`
- `configurationId`
- `cartId`

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Response: an array of cart item (CartItem) records.

Example request (create new quote):

```
{
 "configurableProductId": "01t8a0000061GQPAA2",
 "configurationId": "7e45beb9-790c-46ef-a05f-9195718bcda7",
 "effectiveAccountId": "0018a00001nsFoNAAU",
 "webstoreId": "0ZE8a000000XwckGAC"
}
```

Example request (add to existing quote):

```
{
 "configurableProductId": "01t8a0000061GQPAA2",
 "configurationId": "7e45beb9-790c-46ef-a05f-9195718bcda7",
 "cartId": "0a68a000000kXQeAAM"
}
```

Example response:

```
[
 {
  "attributes": {
   "type": "CartItem",
   "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtlAAE"
  },
  "CartId": "0a68a000000kXDsAAM",
  "Product2Id": "01t8a0000061GQPAA2",
  "Type": "Product",
  "CartDeliveryGroupId": "0a78a000000kWwxAAE",
  "SalesPrice": 10000.00,
  "UnitAdjustedPrice": 10000.00,
  "TotalLineAmount": 10000.00,
  "TotalPrice": 10000.00,
  "TotalPriceAfterAllAdjustments": 10000.00,
  "LGK__ConfigurationId__c":
"7e45beb9-790c-46ef-a05f-9195718bcda7",
  "Name": "LGK Machine",
  "Id": "0a98a000000kWtlAAE"
 },
 {
  "attributes": {
   "type": "CartItem",
   "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtkAAE"
  },
  "CartId": "0a68a000000kXDsAAM",
  "Product2Id": "01t8a0000061GQOAA2",
  "Type": "Product",
  "CartDeliveryGroupId": "0a78a000000kWwxAAE",
  "Quantity": 1.00,
  "SalesPrice": 0.00,
  "UnitAdjustedPrice": 0.00,
  "TotalLineAmount": 0.00,
  "TotalPrice": 0.00,
  "TotalPriceAfterAllAdjustments": 0.00,
```

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```
 "Name": "Warranty",
 "Id": "0a98a000000kWtkAAE"
},
{
 "attributes": {
  "type": "CartItem",
  "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtjAAE"
 },
 "CartId": "0a68a000000kXDsAAM",
 "Product2Id": "01t8a0000061GQKAA2",
 "Type": "Product",
 "CartDeliveryGroupId": "0a78a000000kWwxAAE",
 "Quantity": 1.00,
 "SalesPrice": 0.00,
 "UnitAdjustedPrice": 0.00,
 "TotalLineAmount": 0.00,
 "TotalPrice": 0.00,
 "TotalPriceAfterAllAdjustments": 0.00,
 "Name": "1.5T Magnet",
 "Id": "0a98a000000kWtjAAE"
},
{
 "attributes": {
  "type": "CartItem",
  "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtiAAE"
 },
 "CartId": "0a68a000000kXDsAAM",
 "Product2Id": "01t8a0000061GQGAA2",
 "Type": "Product",
 "CartDeliveryGroupId": "0a78a000000kWwxAAE",
 "Quantity": 1.00,
 "SalesPrice": 1.50,
 "UnitAdjustedPrice": 1.50,
 "TotalLineAmount": 1.50,
 "TotalPrice": 1.50,
 "TotalPriceAfterAllAdjustments": 1.50,
 "Name": "MRI Platform Table",
 "Id": "0a98a000000kWtiAAE"
},
{
 "attributes": {
  "type": "CartItem",
  "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWthAAE"
 },
 "CartId": "0a68a000000kXDsAAM",
 "Product2Id": "01t8a0000061GQLAA2",
 "Type": "Product",
 "CartDeliveryGroupId": "0a78a000000kWwxAAE",
 "Quantity": 1.00,
 "SalesPrice": 2.50,
 "UnitAdjustedPrice": 2.50,
 "TotalLineAmount": 2.50,
 "TotalPrice": 2.50,
 "TotalPriceAfterAllAdjustments": 2.50,
```


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```
  "Name": "MRI Scanner",
  "Id": "0a98a000000kWthAAE"
 },
 {
  "attributes": {
   "type": "CartItem",
   "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtgAAE"
  },
  "CartId": "0a68a000000kXDsAAM",
  "Product2Id": "01t8a0000061GQRAA2",
  "Type": "Product",
  "CartDeliveryGroupId": "0a78a000000kWwxAAE",
  "Quantity": 25.00,
  "SalesPrice": 1.00,
  "UnitAdjustedPrice": 1.00,
  "TotalLineAmount": 1.00,
  "TotalPrice": 1.00,
  "TotalPriceAfterAllAdjustments": 1.00,
  "Name": "MRI Gradient Coils",
  "Id": "0a98a000000kWtgAAE"
 },
 {
  "attributes": {
   "type": "CartItem",
   "url":
"/services/data/v56.0/sobjects/CartItem/0a98a000000kWtfAAE"
  },
  "CartId": "0a68a000000kXDsAAM",
  "Product2Id": "01t8a0000061GQHAA2",
  "Type": "Product",
  "CartDeliveryGroupId": "0a78a000000kWwxAAE",
  "Quantity": 25.00,
  "SalesPrice": 3.00,
  "UnitAdjustedPrice": 3.00,
  "TotalLineAmount": 3.00,
  "TotalPrice": 3.00,
  "TotalPriceAfterAllAdjustments": 3.00,
  "Name": "MRI Radio Frequency Coils",
  "Id": "0a98a000000kWtfAAE"
 }
]
```


**Related topics**

- Runtime APIs
- Salesforce amendments and CPQ
- CPQ and Salesforce managed packages

### Salesforce amendments and CPQ

A brief look at the CPQ amendments feature, which adds and updates fields in existing objects.

The CPQ amendments feature follows the standard CPQ amendment model by adding additional fields to existing objects as well as triggers to update these fields appropriately.

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## Prerequisites

The CPQ Extension for Salesforce CPQ must be installed in the org.

## How the amendments feature works

When an amendment is created from a contract, generating a CPQ quote and CPQ quote lines, a CPQ trigger on the CPQ quote line automatically populates the Committed Configuration ID from the related subscription record and sets the Action Context to Amend.

When a reconfiguration of the quote line is saved, the configuration line item includes the prior quantity and price.

When the standard Salesforce CPQ amendment process is completed, the contract is updated with subscriptions using the new quantities and terms as expected.

The following fields are added to facilitate this functionality.

| Object | Field |
|---|---|
| ConfigurationLineItem c | LGK CommittedConfigurationId c |
| ConfigurationLineItem c | LGK PriorQuantity c |
| ConfigurationLineItem c | LGK PriorPrice c |
| ConfigurationLineItem c | LGK ActionContext c |
| SBQQ QuoteLine c | LGK CommittedConfigurationId c |
| SBQQ QuoteLine c | LGK ActionContext c |
| SBQQ Subscription c | LGK ConfigurationId c |
| SBQQ Subscription c | LGK BomData c |

You can disable this functionality in Setup > Custom Settings > Manage CPQ Tenant > Edit > Disable Amendment Triggers.

### Common Salesforce integration issues

Learn how to solve problems you may have integrating CPQ with Salesforce.

When Salesforce CPQ is a host for CPQ configurations, integrating the two sites my lead to some common errors. Here is a list of known issues with their solutions and what to check.

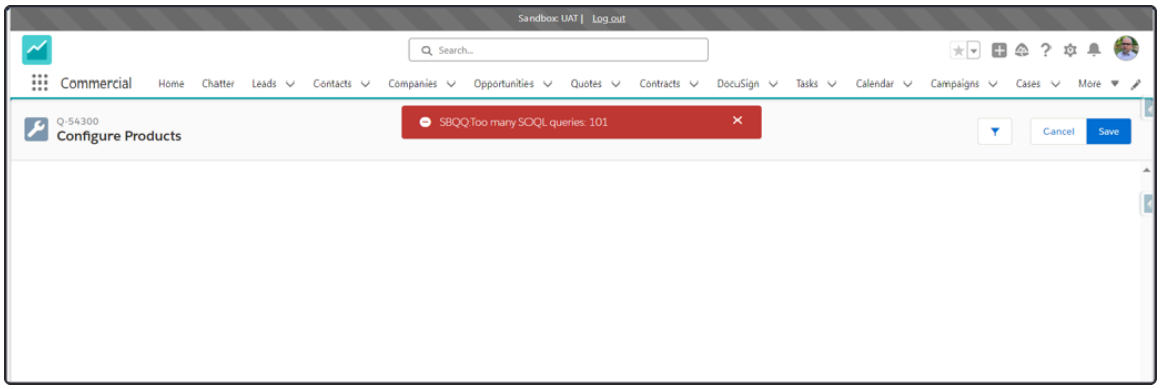
In general, when you see an error generated by Salesforce, you can use the Salesforce debug logs to find where that error is being triggered.

Another worthwhile step when investigating any integration issue is to confirm that the steps in the Set up environments linked to Salesforce orgs were correctly completed.

**Note:** If partner users are experiencing any of these issues, or you utilize RFQ APIs, first see the Partner users/RFQ API sharing settings section at the end of this topic.

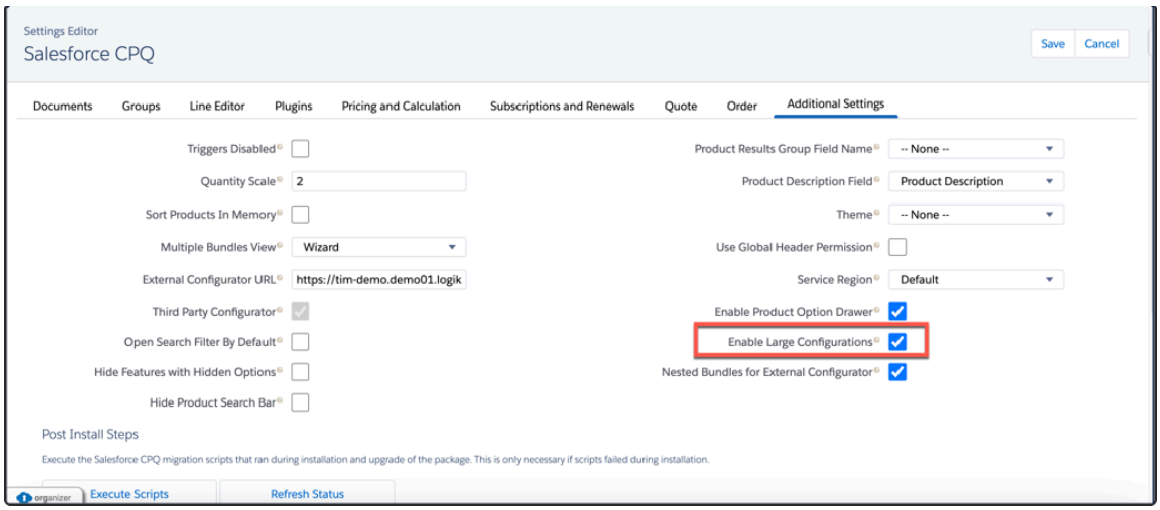
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## Salesforce: “SBQQ: Too many SOQL queries: 101”




This error happens usually when a user creates a BOM that has more than 100 items, clicks **Quote** in CPQ, and there are too many quote lines being created for the default Salesforce CPQ behavior to handle.

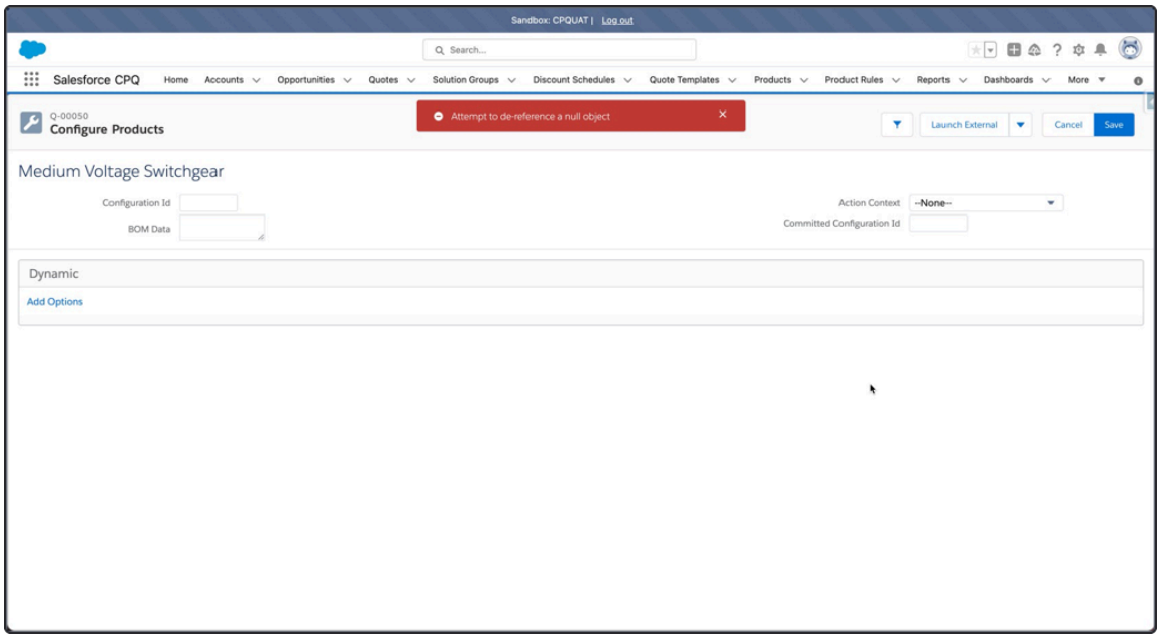
Solution: confirm that Enable Large Configurations is set in the Salesforce CPQ Package Settings.




This setting decreases the likelihood of hitting governor limits when your sales reps configure a large bundle, but performs slower overall. To read more about this setting, see Enable Large Configurations.

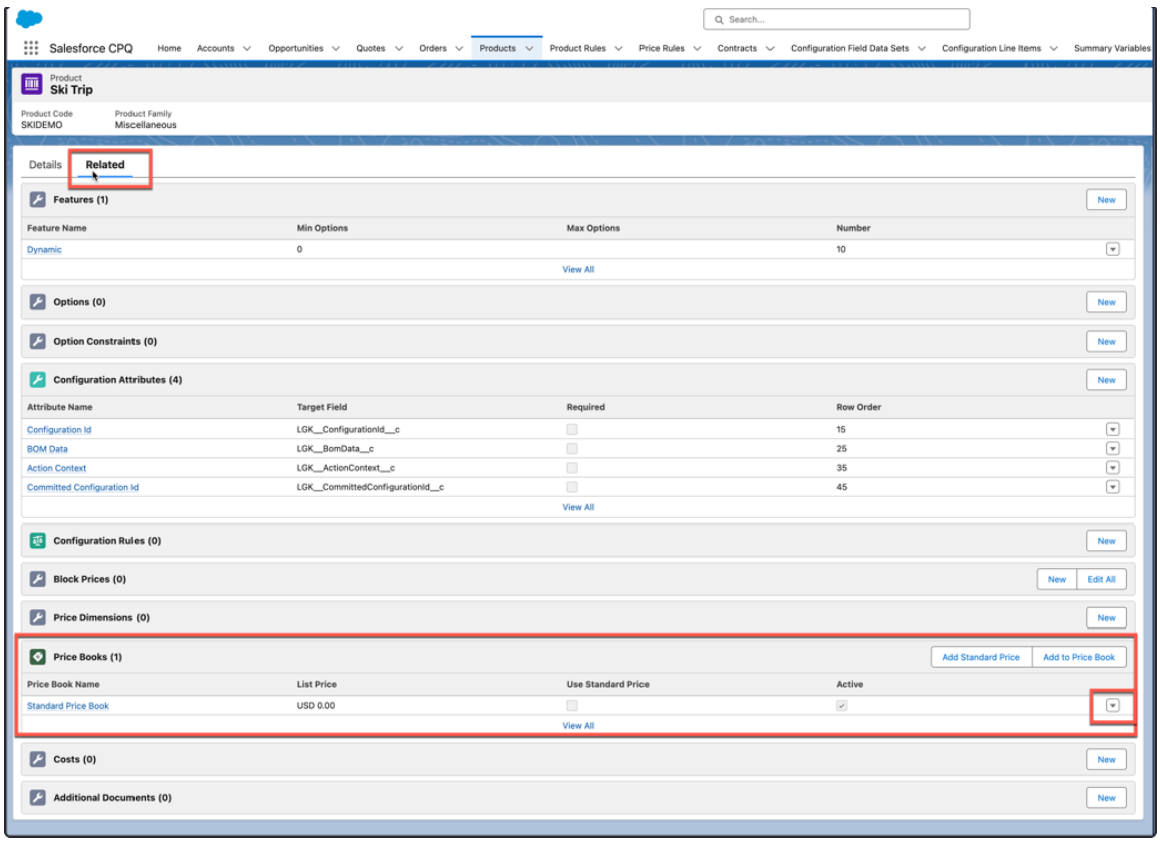
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## Salesforce: “Attempt to de-reference a null object”

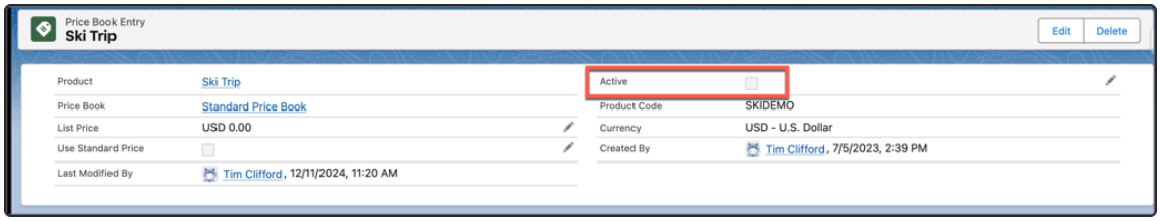



This error usually happens when an end user saves the quote in CPQ and before they return to the QLE. It speaks to either a missing or inactive Pricebook entry for affected items, or an issue with nested bundling.

Solution (no nested bundling): The Pricebook entry for the product is missing or inactive.




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Check all of the product's Pricebook entries. This error occurs if any of the following are true:

- A returned product is missing a Pricebook entry
- A returned product has an inactive Pricebook entry
- A returned product's related Pricebook is inactive
- The standard Pricebook is used by default but is inactive

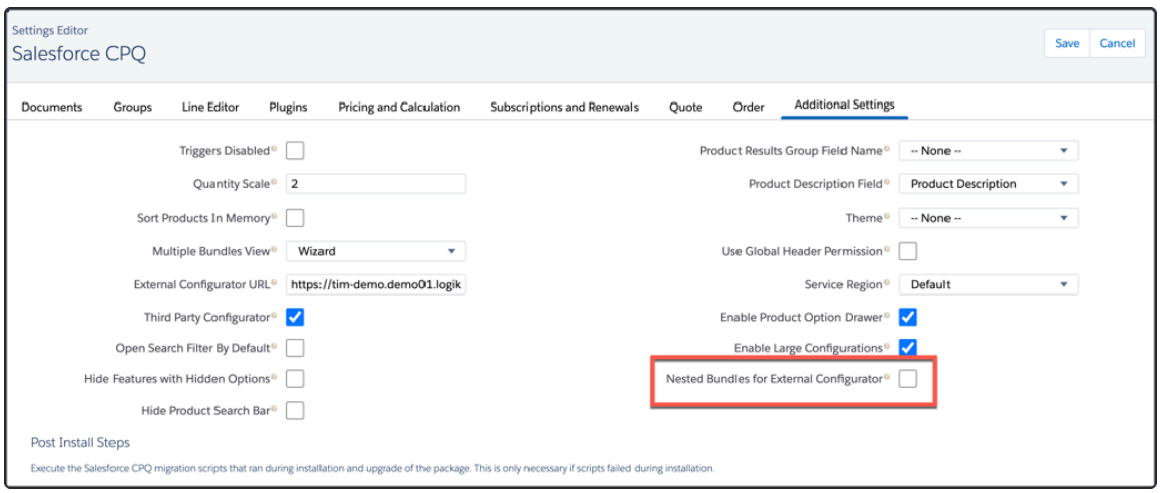
Solution (nested bundling): If you have nested bundling enabled and your configuration has products configurations that match the following structure, there is no direct solution. You can either design your configurations to not encounter this Salesforce issue, or turn off nested bundling.

```
Parent product
 Nested child 1
  Product X
 Nested child 2
  Product X
```

To learn more about this issue, see the following Salesforce.com topic:

Adding the Same product to Two Different Dynamic Nested Bundles via External Configurator Throws an "Attempt to de-reference a null object" Error

If you decide to disable nested bundling, you can do so in SFDC through Setup > Installed Packages > Salesforce CPQ > Additional Settings > Nested Bundles for External Configurator.




Please also submit a support ticket so that we can send this request to our DevOps team to turn off this feature from the CPQ side. You will continue to encounter the issue until we turn off this feature.

**Note:** Submit a support ticket by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

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## Not generating configuration line items or configuration field data sets

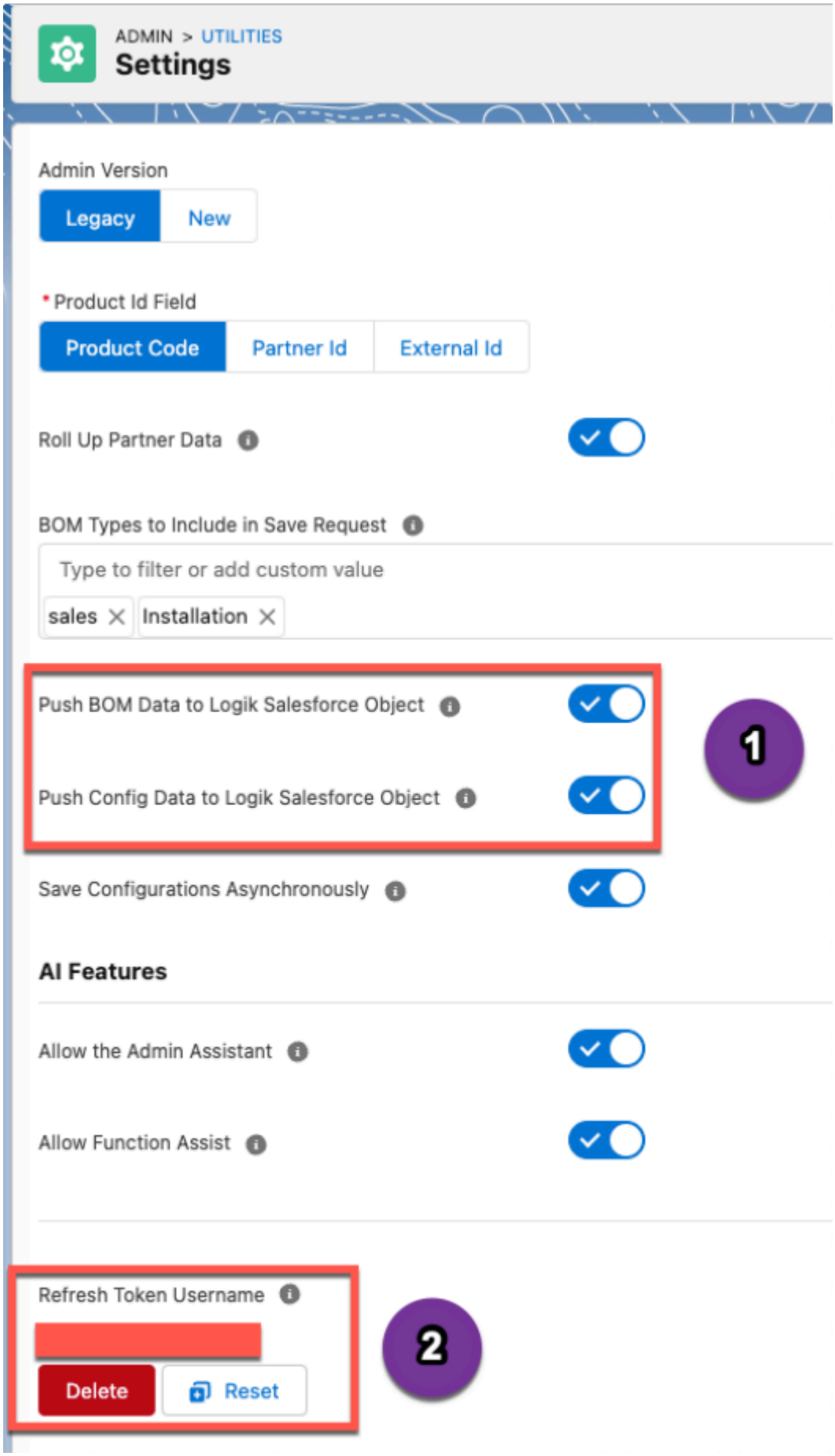
This functionality is not used by many implementations, but when it is, it is paramount that the expected Salesforce Objects are created. Configuration line items (CLIs) and configuration field data sets (CFDSs) are Salesforce objects that are managed by our base managed package, and their creation is asynchronous with the data that is pushed to the quote line.

The moment that a user saves the configuration from CPQ, the process to create these objects begins, regardless of whether you save the final quote lines created in the QLE. When this occurs, there is usually only one place to check.

Solution: The creation of these objects depends on the following settings being enabled.

- (For CLIs) The Push BOM Data to CPQ Salesforce Object CPQ Admin setting
- (For CFDSs) The Push Config Data to CPQ Salesforce Object CPQ Admin setting
- The SFDC permissions of Refresh Token username

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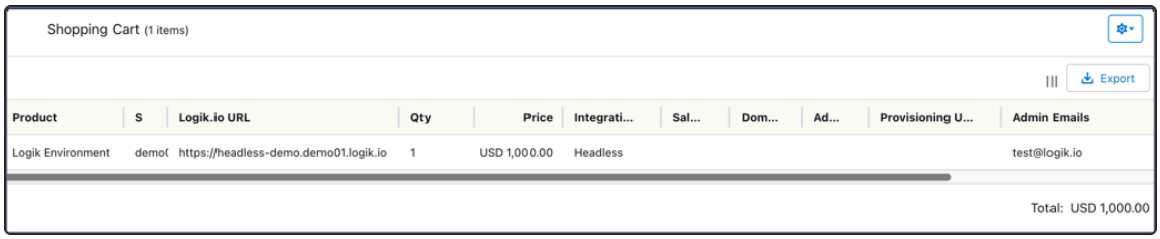

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If these settings are not enabled, these objects will not be created when the user clicks Save.

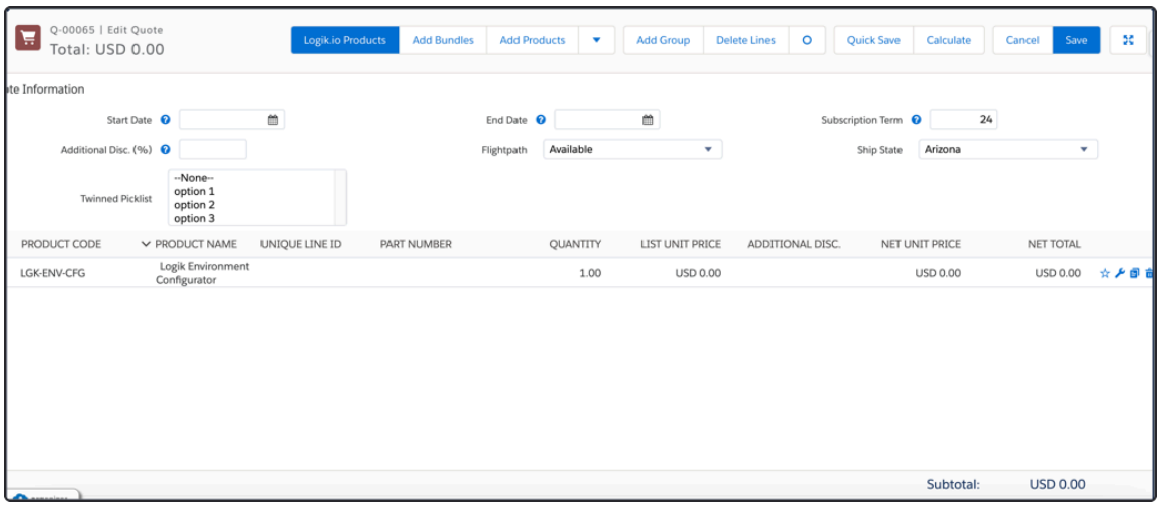
If these settings are enabled, and you still do not see CLIs or CFDSs (or Extended Information Field Mapping is not working), try the following:

- Check the logs to see whether the error “Salesforce syncing of LGK__ConfigurationLineItem__c object for configuration [******] did not complete successfully” appears. There may be more information in the “Paused And Failed Flow Interviews” page in your Salesforce Setup.
- Check the permissions of the integration user against the list in Required permissions for the integration user.

## Saving does not create child quote lines




CPQ BOM has the product CPQ environment.




Saving to Salesforce has only the parent Configurable product, not the CPQ environment.

We only create quote line items when a BOM item fits these conditions:

- The BOM type of the item is specified in the “BOM Types to Include in Save Request” setting
- The product exists in our database from our product sync with Salesforce

This issue occurs when the user clicks Save from CPQ and they are met with only the parent Configurable product that they launched the configuration from, and no child quote lines that were created in the CPQ configurator. This usually means that there is a disconnect between the product Object in Salesforce and the BOM item created in CPQ.

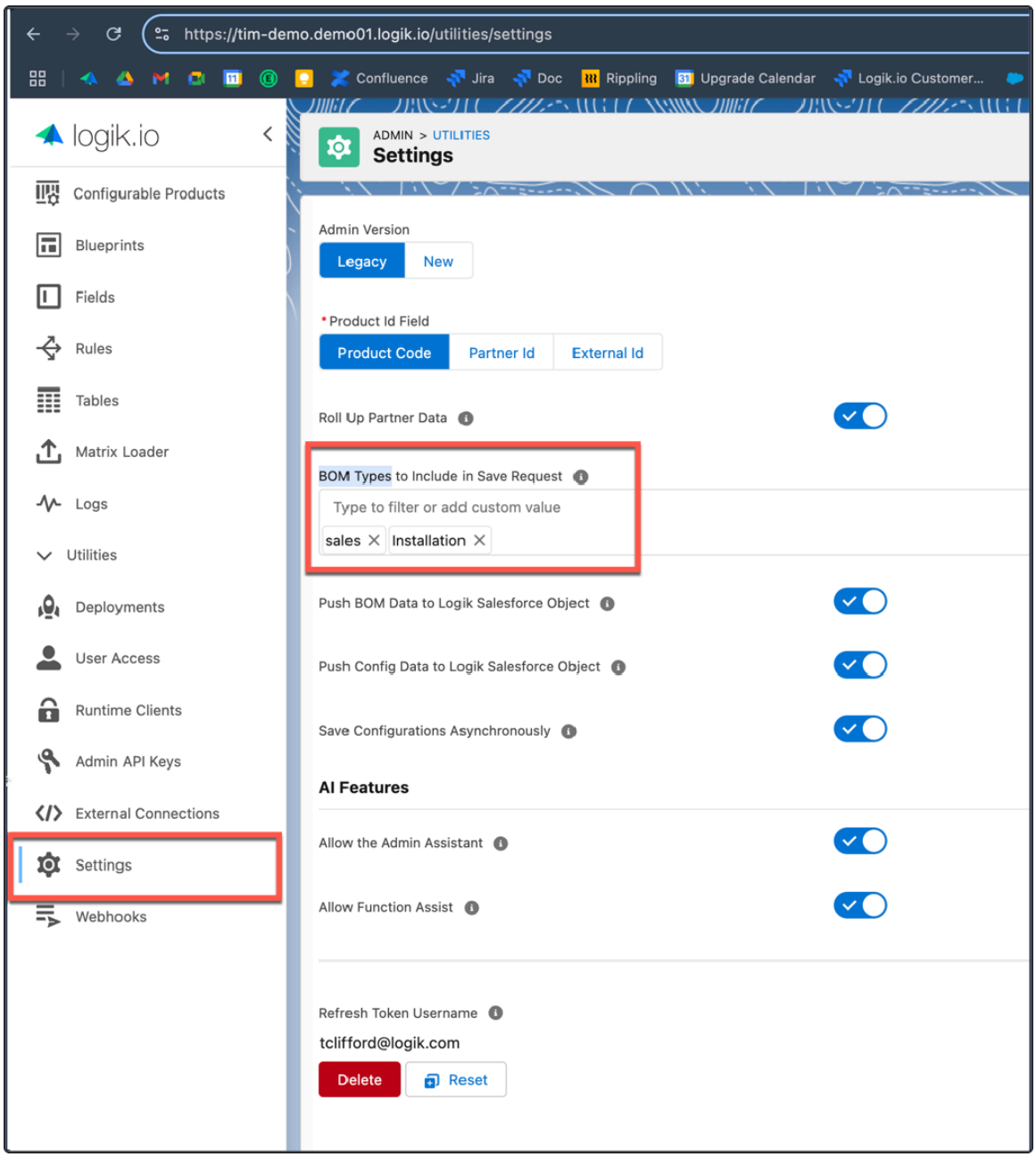
Solutions:

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- Check whether the products exist in your Salesforce Site with the same product IDs that are determined by your product rules. If the products exist, try updating a field in the product record (such as “Active”), saving, reverting it, waiting 30 minutes, and then trying again.

  Our product record sync relies on the Last Modified Date of the product2 records to speed up performance. If your environment was repointed from another one, products that did not exist in your last environment may now exist here and have a date that is older than the reconnect. Wait for the product sync to complete every 30 minutes, and try to save the configuration again.

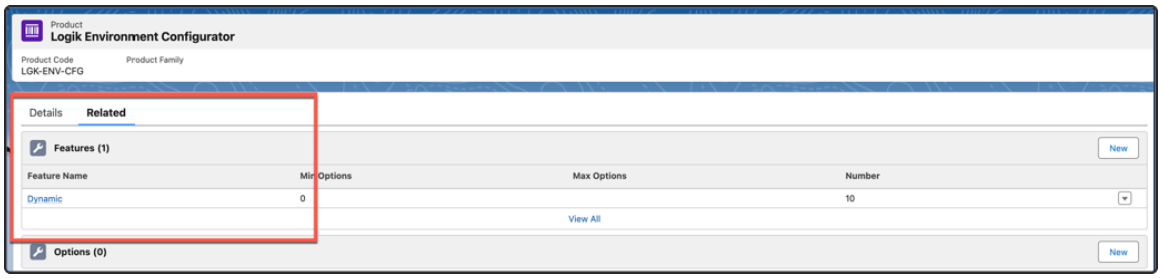
- Confirm that the BOM items have the correct BOM types as defined in CPQ Admin:



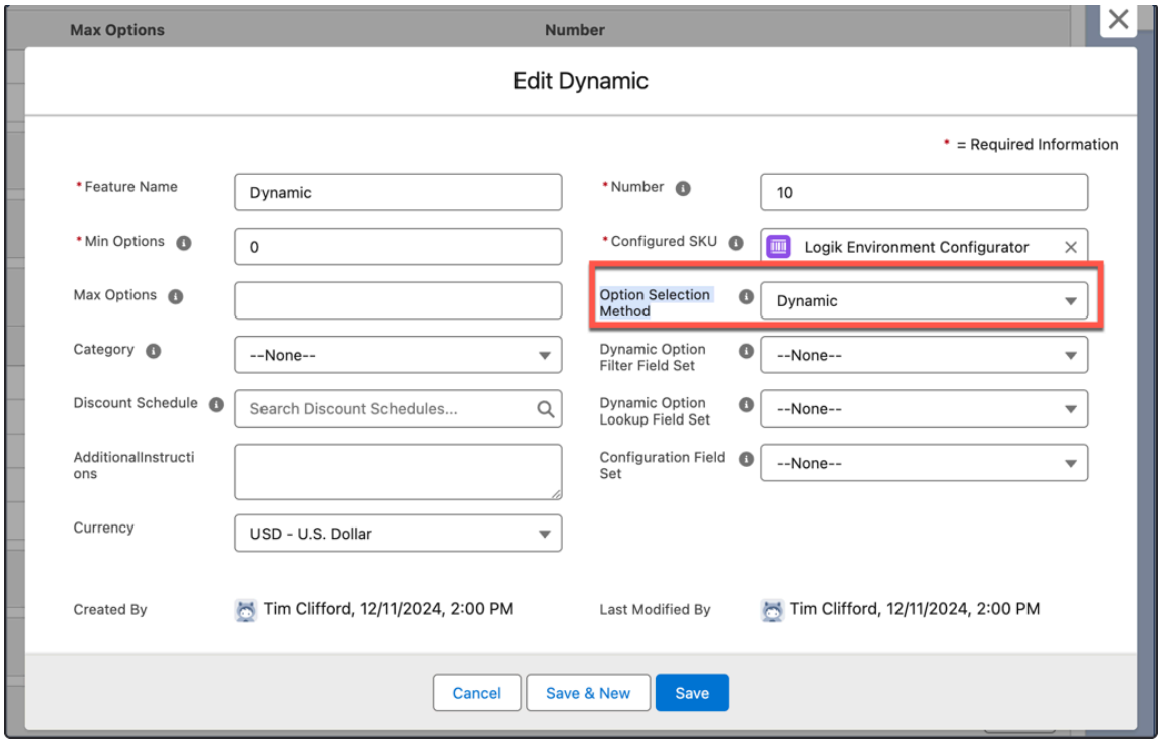

If your BOM item was of type Manufacturing and your CPQ Admin had only Sales and Installation defined in the Settings tab, that item would not be returned to the QLE.

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- Check whether the parent configurable product has the related Dynamic feature defined:




If so, also confirm that the option selection method is also dynamic:




This related feature should be automatically created when you click **ServiceNow CPQ Enabled** on the Configurable product, but some custom product triggers in your Salesforce org can disrupt this automation. To trigger the feature creation again, try disabling **ServiceNow CPQ Enabled**, saving, and then re-enabling it. Then, try to configure with that product.

(If using nested bundling, every product that has children quote line items associated with it must have this dynamic feature related to its product, not just the top-level parent Configurable Product.)

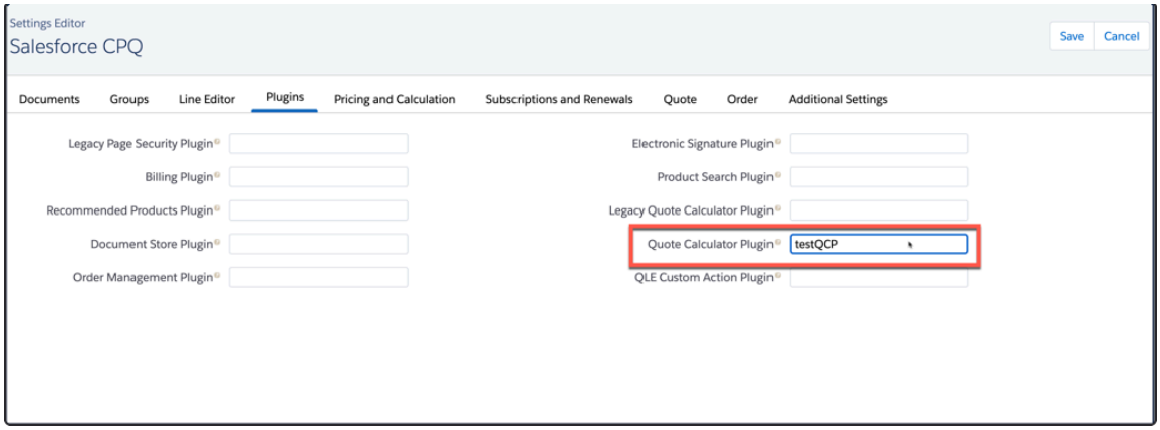
## Saving does not create quote lines as expected

This usually happens when one of the fields on the child quote lines are being populated in a way that is not reflected in the CPQ configuration. This is a tricky issue to track since there isn't a clear error.

Solution: Check to see whether the SFDC environment has any quote calculator plugin (QCP) scripts, flows, or Apex triggers acting on the quote lines.

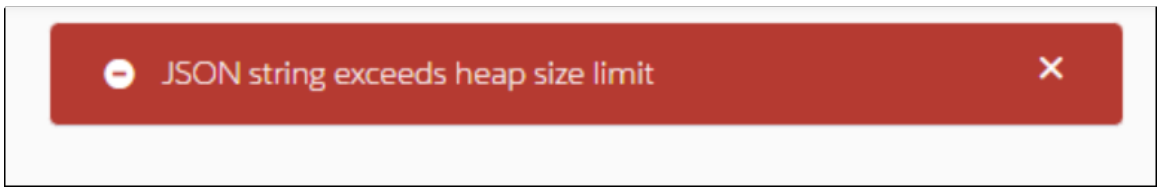
For QCP specifically, search custom scripts. Also check whether there is a script in the Quote Calculator Plugin field (Setup > Installed packages > Salesforce CPQ > Plugin).

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Review this custom script to see whether it is behaving as expected.

## CPQ: "JSON string exceeds heap size limit"




This will happen if the LGK__BomData__c field contains too much data (such as a lot of quote lines or extended information) and the user tries to reconfigure the quote.

Solution: Control how many items get written with the BOM Item Limit feature. To solve, count the items in the BOM of the configuration that is causing the error. (The number of items is the number of lines in the BOM. Items are separated by "{}" in the BomData field.) Then, create a support case to set the tenant setting to half that number. If you are not using this Salesforce field, have it set to zero.

**Note:** Create a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ (Logik.ai) Customers.

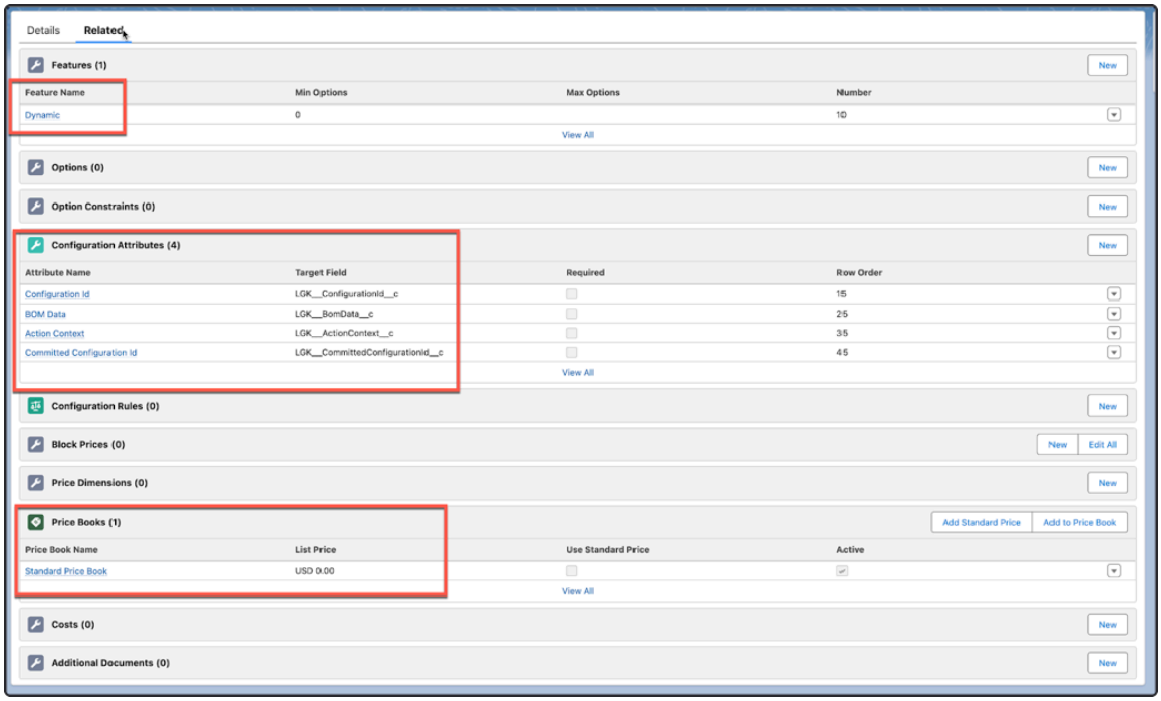
## Reconfigure doesn't save selections in CPQ

An end user can save a configuration correctly and it writes to the QLE without issues. However, when the user tries to reconfigure, not all the selections are retained.

Solutions:

- Check whether this issue occurs only with a specific user or profile. Their permissions may be set incorrectly.
- Check whether the product has the related Feature Name, Configuration Attributes, and Price Books defined.

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- Check whether the Blueprint uses twinning, which could be triggering a rule to clear certain selections, or has the On Configure/Reconfigure Enrichment set up incorrectly. To learn more about this issue, see Scripting: Checking for first and subsequent configurations.

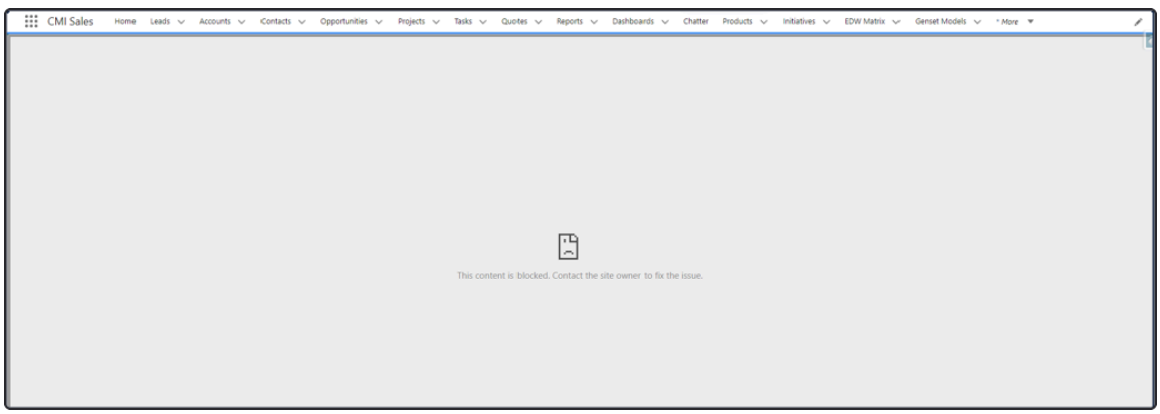
## Saving doesn't create child quote lines

The configurable product you are attempting to configure with may have had an issue with the CPQ enabled automation and did not create the necessary configuration attributes for reconfiguring. To reconfigure, the Configuration ID attribute must be present, as this is where the quote line references the previous configuration's UUID.

On the Configurable Product's details page, uncheck **ServiceNow CPQ.io Enabled**, save, then recheck and see whether the configuration attribute has been created.

## Cannot access CPQ Admin from SFDC

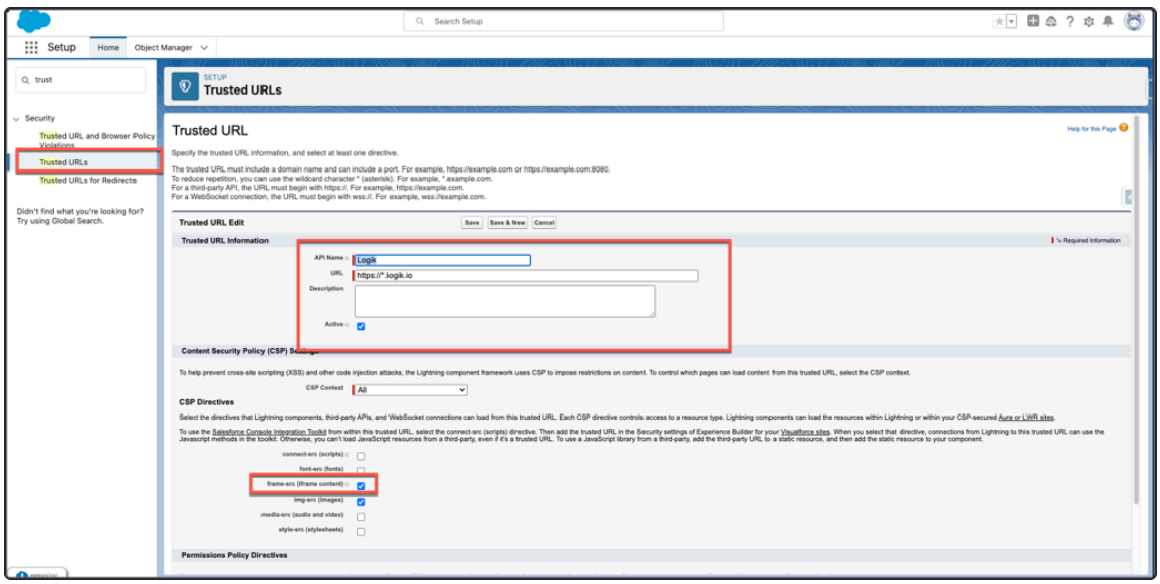
This issue may prevent admins from working on the design and implementation of CPQ. There are many causes for this issue.




Solution:

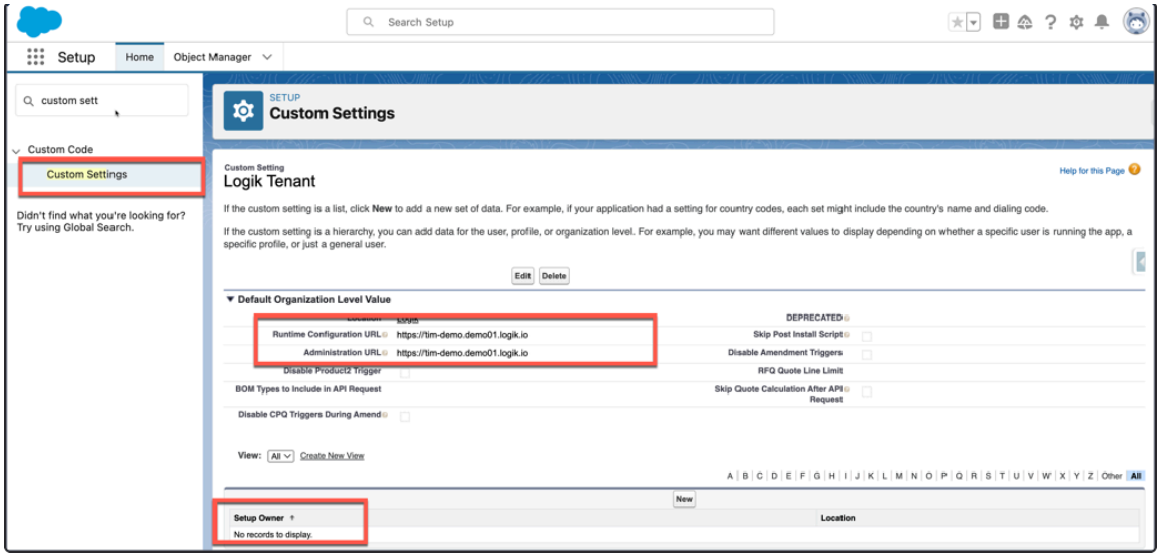
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- If this is happening for only one user:
  - Confirm that they have Admin access. See User access.
  - Check whether they are running into browser issues. See Common browser issues while using CPQ.
- If this is happening for a group of users:
  - Confirm that their profile and permission group have the proper SFDC permissions. See What to do if receiving an Insufficient Privileges or blank screen when launching a configuration.
  - Confirm that CPQ has been added to Trusted URLs in the Setup section, with iFrame enabled. While this isn't necessary in all cases, we've seen this addition help organizations with CPQ users from multiple different countries, or if they are using Subscription Manager/ RLM.




  - If this is happening for every user, check whether the URL is correctly entered in Custom Settings.

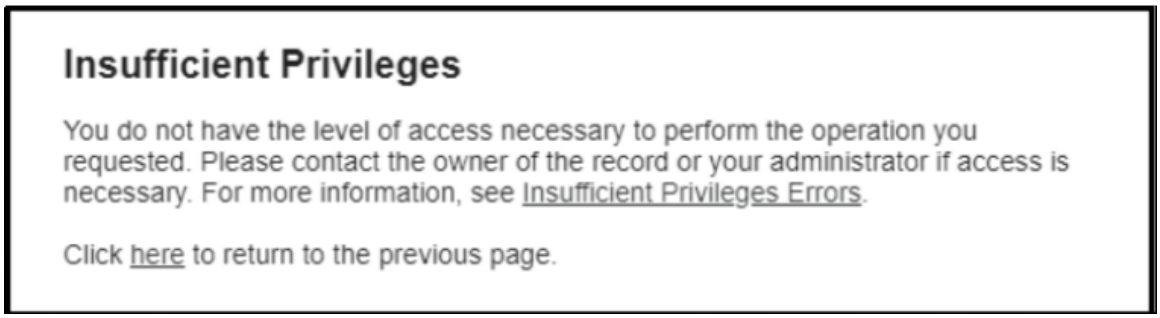
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This is usually one of the first steps done when integrating a CPQ environment with an SFDC org. Sometimes, the user that sets it up will unintentionally set the URL as an override for a profile (the bottom box) instead of accessible for all users (the middle box).

## Cannot launch a configuration

The "Insufficient Privileges" error message from Salesforce is only one of many screens a user can encounter when clicking the wrench icon in the QLE or when selecting a product after clicking **Edit lines** in the quote.



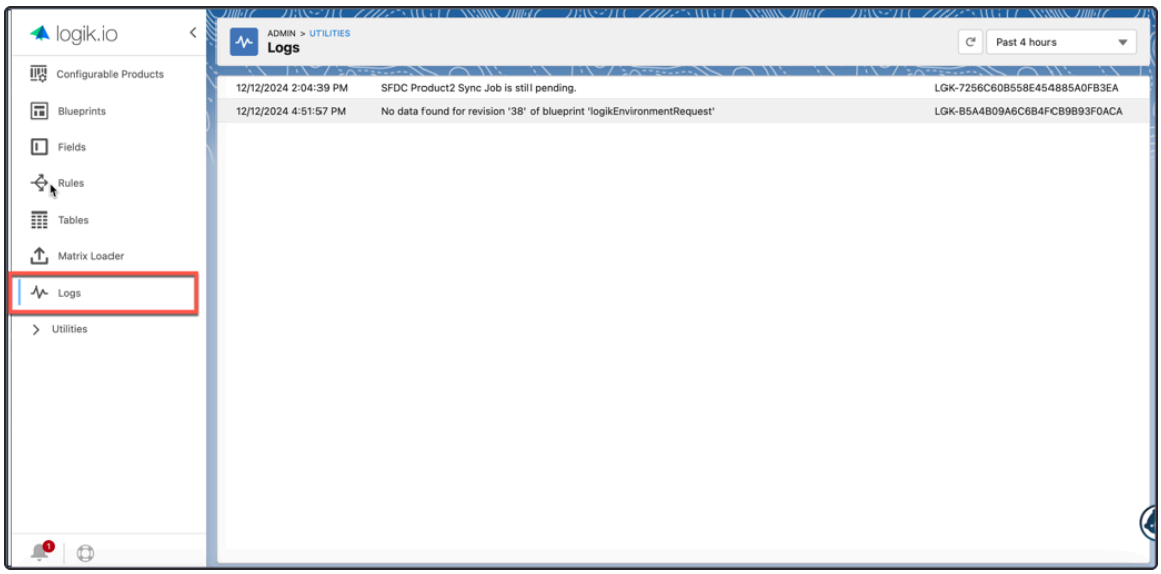

When this issue occurs, other issues may include seeing the Content Blocked screen (as seen in the Cannot Access CPQ Admin from SFDC issue), seeing a blank screen, or seeing an error message display.

This can happen for a variety of reasons, including problems with the same permissions that are necessary for accessing the CPQ Admin. However, this issue affects only end users of the configurator (that is, sales/partner users).

Solutions:

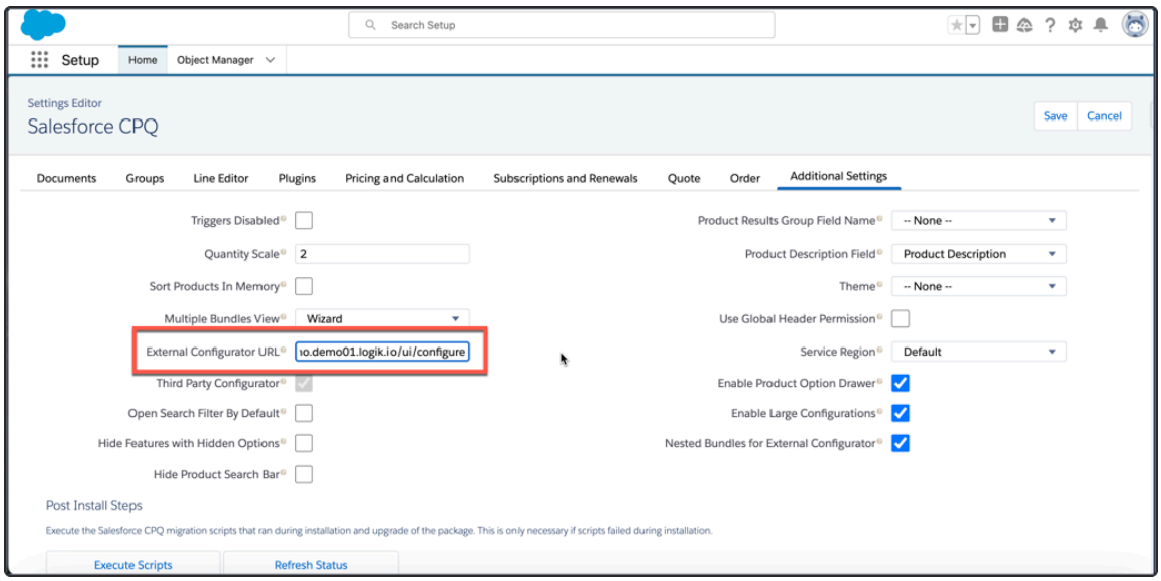
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- If this is happening only for one Blueprint or when launching from one quote, check whether there are any errors in the Logs tab of the CPQ Admin.




If you find no errors in the logs, review Common error messages and causes. This may be due to an issue with the On Configure/Reconfigure script of the Blueprint, or with a twinned field that is expected from the quote.

- If this is happening for only one user, check whether they are experiencing browser issues. See Common browser issues while using CPQ.
- If this is happening for a group of users, check to see whether their profile and permission group have the proper SFDC permissions. See What to do if receiving an Insufficient Privileges or blank screen when launching a configuration .
- If this is happening for every user, confirm that the URL is correct in Salesforce CPQ. Navigate to Setup > Installed packages > Salesforce CPQ > Configure > Additional Settings > External Configurator URL & Third Party Configurator.




This is usually one of the first steps done when integrating a CPQ environment with an SFDC org. The URL will usually take the form of `https://<domain-`

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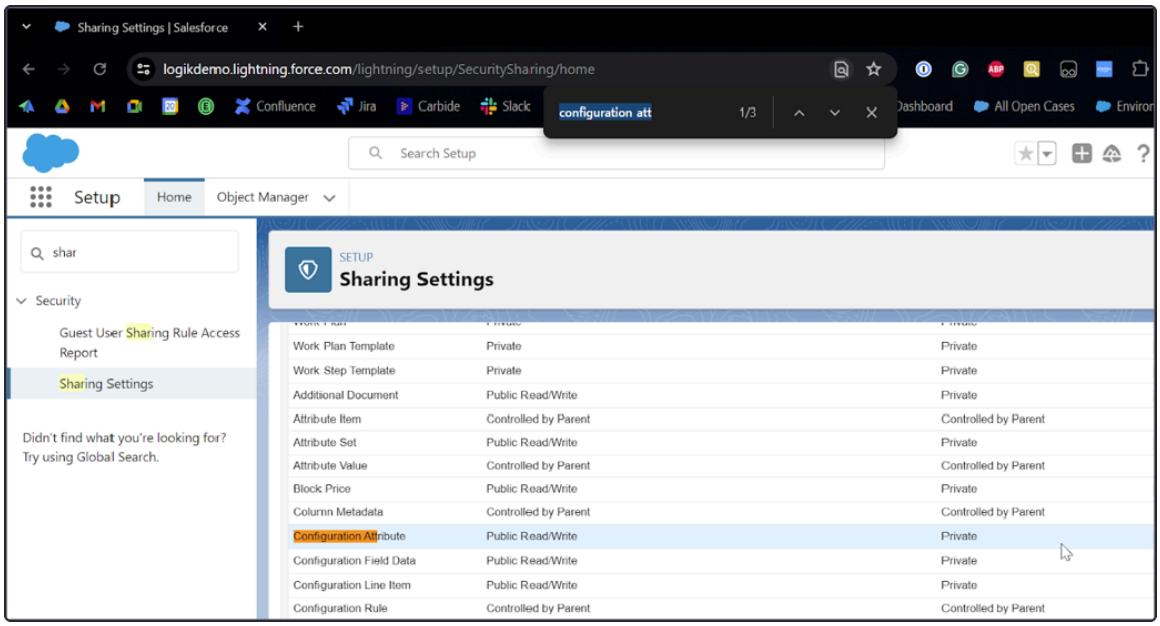
`name>.<sector>.ServiceNow CPQ.io/ui/configure`, but it can vary based on whether you use VisualForce pages to launch the configurator.

If your URL is not in the above form, your organization should have documentation for the custom setup done for launching into the CPQ configurator.

## Partner users/RFQ API sharing settings

Under Setup > Sharing Settings, check to see whether the following objects have Default External Access set to Private:

- Pricebook
- Product Feature
- Quote
- Quote line
- Configuration Attribute
- Configuration line item




Salesforce CPQ needs access to these objects for part of our reconfigure integration to work.

Usually, you wouldn't need to edit the Sharing Settings for this object since it's created by the Integration user, but in many cases, partner users could try to reference these records during RFQ, so they will need it set to either Public Read-Only or Public Read/Write.

## Salesforce platform issues

You may receive an "Error saving record" message:

```
Error saving record: We couldn't convert the configurable
 product to a static product. Ensure that the child components
 meet the requirements and try again.
```

This error can occur when you try to uncheck the *LGK__IsConfigurable__c* field on a Product2 record. To resolve the issue, from the Salesforce app launcher, visit the ServiceNow CPQ.io Admin Custom Settings page and enable the **Skip Configurable Product Setup Trigger** setting.

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### Refreshing a CPQ connected Salesforce org

Refreshing a Salesforce org severs the database sync between CPQ and Salesforce. To get things working again, take these steps after the refresh.

When a CPQ connected Salesforce org is refreshed, the database sync between CPQ and Salesforce will be temporarily broken. This is because a refresh automatically changes many pieces of the Salesforce org, including the Salesforce org ID, product IDs, and user names.

These ID changes are used for many integration points between the two systems, such as the Refresh Token User Runtime APIs that depend on a User ID, the product, the Pricebook, Pricebook entry sync, and the user access set up for the CPQ Admin.

To complete the CPQ side of the refresh, create a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

When you submit the support case, provide the following information:

- The current CPQ Environment URL
- The date the refresh will be performed
- What you'd like to do with the connected CPQ environment's existing data:
  - Retain its data (a repoint)
  - Start from scratch (decommission and create a new environment)
- The new SFDC org ID (if unknown at the time, simply give TBD)
- The SFDC My Domain URL (if changed)
- The SFDC Usernames for users that will need CPQ Admin access
- Whether you want to change the CPQ environment host name, and if so, what it should be
- The provisioning username with the email address and system administrator privileges.

Once the environment is refreshed, you will need to:

- Send the new SFDC org ID
- Navigate to Salesforce Setup > Custom Settings > Manage CPQ tenant and modify the CPQ URLs.

  Navigate to SFDC > Setup > Custom Settings > Manage CPQ Tenant > Edit, and change the Runtime Configuration URL and Administration URL.
- If using Salesforce CPQ, change the external configurator URL.

  Navigate to SFDC > Setup > Installed Packages > Configure Salesforce CPQ > Additional Settings, and change the external configurator URL to the new site with `/ui/configure` appended to the end.
- Submit a new refresh token user name with system administrator permissions.

  Navigate to CPQ Admin > Settings, and delete or reset Refresh Token Username.
- If using any Runtime APIs in SFDC, create new Runtime Clients.

  Navigate to CPQ Admin > Runtime Clients, and create the new clients.

### CPQ and Salesforce managed packages

Learn about the CPQ Extension Package and the CPQ Extension for Salesforce CPQ.

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CPQ offers two managed packages for Salesforce(SFDC) orgs: the CPQ Extension Package and the CPQ Extension for Salesforce CPQ. This article discusses what each package does and how they are different. Details on how to set up or upgrade an environment's managed packages are provided at the end of the article.

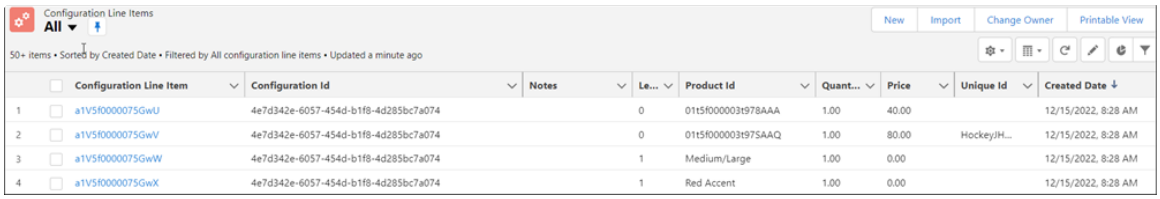
## CPQ Extension Package

This is the base package for CPQ interacting with Salesforce. This package allows the user to:

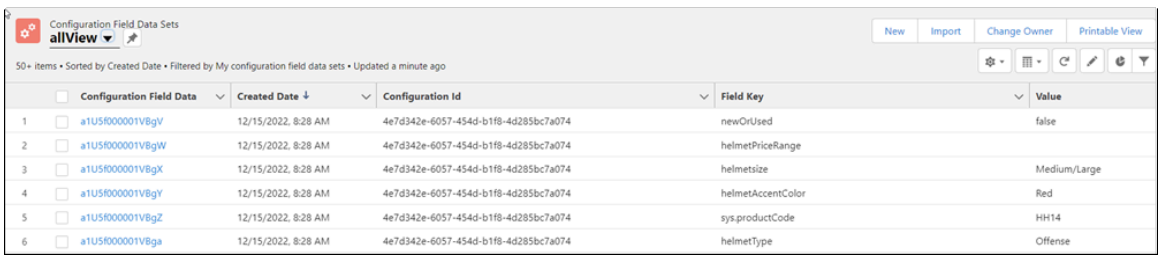
- Enable any SFDC Product2 record to be a CPQ configurable product through custom fields added to the Product2 record. For detailed steps, see Configurable products.
- Launch the CPQ Admin from Salesforce using one of these methods:
  - Navigate to the Salesforce Products tab and select the 'CPQ View' list view. Find a CPQ enabled product and click the corresponding Click Here link in the View CPQ Setup column.
  - Open the Product2 record and click the link in the **View ServiceNow CPQ.io Setup** section on the product's page.
- Support embedding the CPQ UI in Salesforce applications outside of CPQ using Visualforce. See Use case: Embed CPQ UI in a Salesforce VisualForce page.
- Call CPQ admin APIs using Salesforce Tokens. For detailed steps, see Admin APIs: Authentication using a Salesforce-connected app.

Notable components of this package include:

- Configuration line item object: This object stores the product data that comes out of a configuration including product id or code, price, BOM type, quantity, and extended information. It also includes the unique configuration ID that ties the data back to a specific configuration session and can be referenced in other flows or triggers in SFDC. Finally, it allows users to populate quote line custom fields with information from CPQ. For additional information, review the following video: Populate quote line Custom Fields.mp4

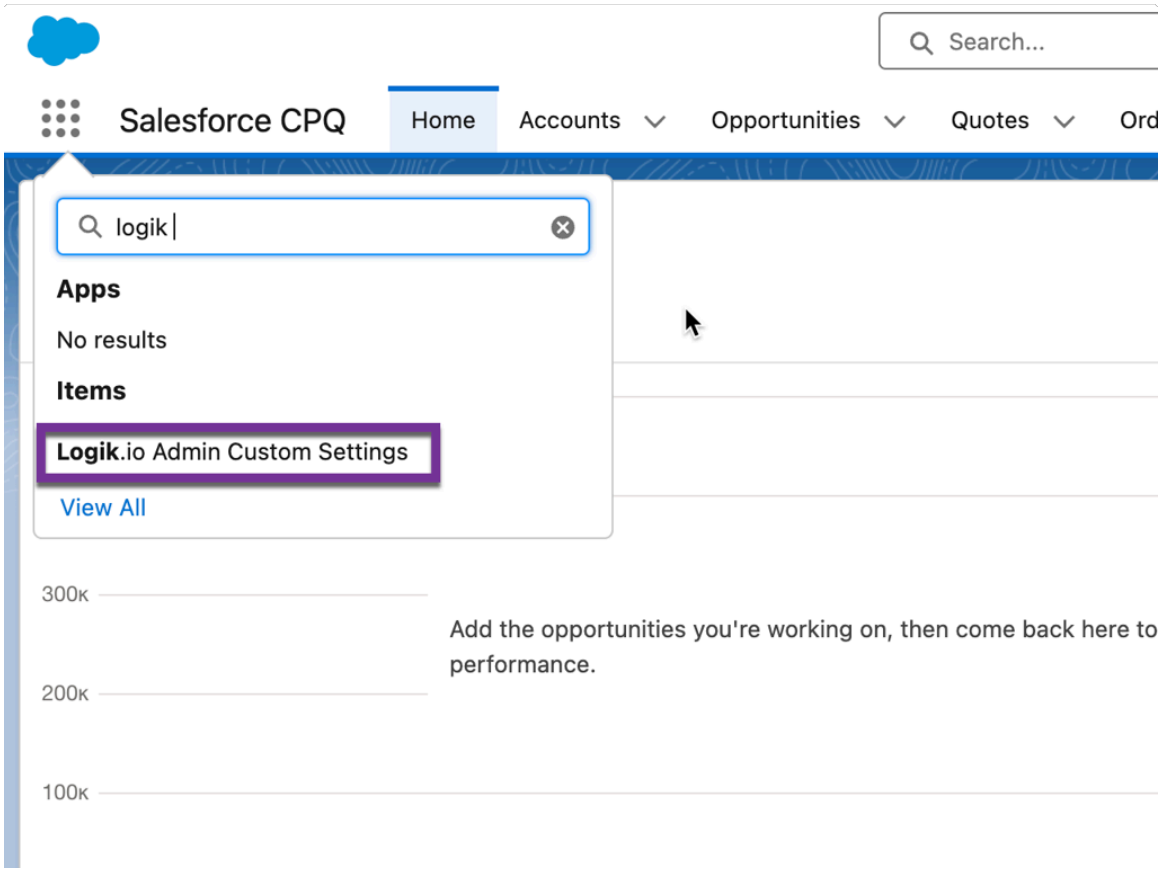



- Configuration field data object: This object stores the values set to fields in the configuration and contains the unique configuration ID of that session in order to reference that information upon reconfiguration.

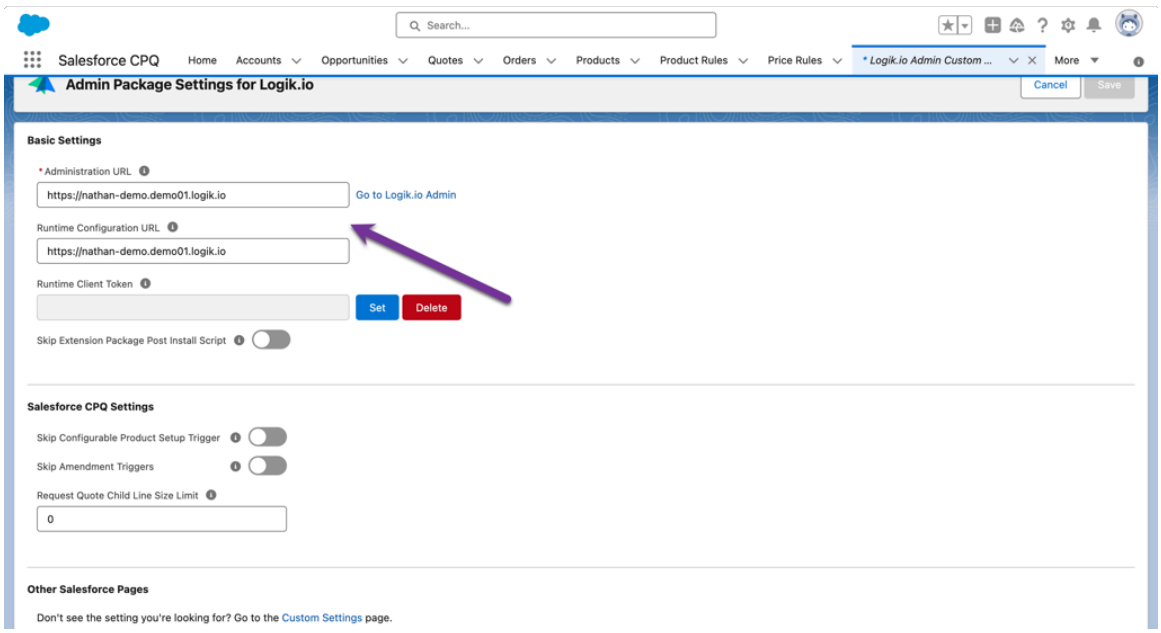



- Custom settings to control the end points by setting the Administration URL and Runtime Configuration URL. Navigate to the CPQ Admin custom settings Item:

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And update these settings here:

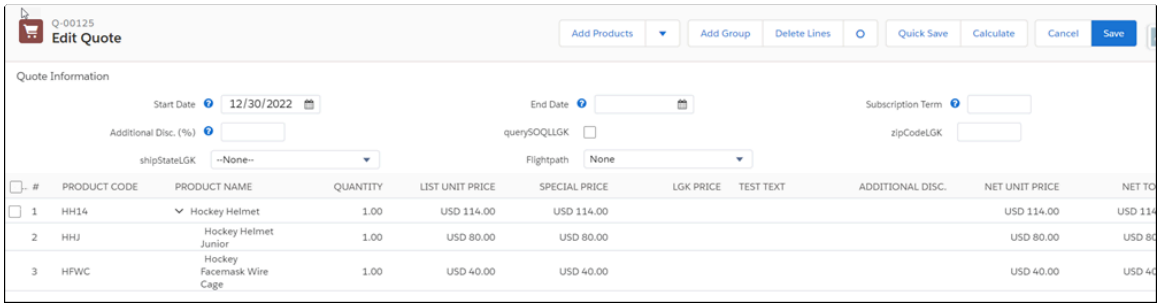



## CPQ Extension for Salesforce CPQ

In order to install the CPQ Extension for Salesforce CPQ. You must have the base package and Salesforce CPQ installed on your org, and at least version 244 or later for your Salesforce CPQ package. This package contains CPQ object specific enhancements over the base package and leverage the CPQ configuration in Salesforce CPQ. This package gives the user the ability to:

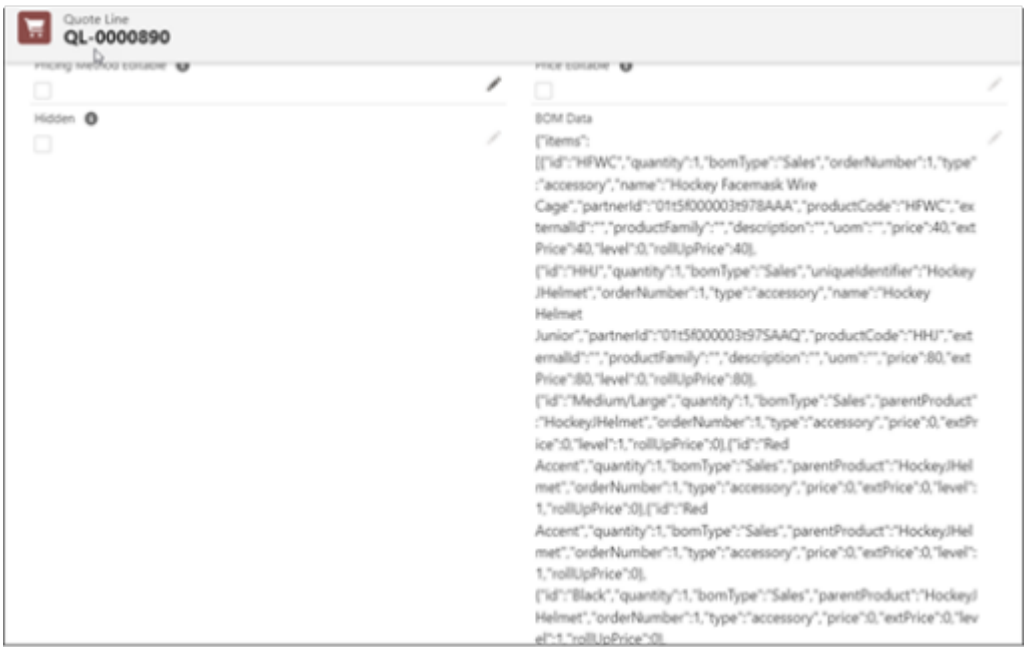
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- Launch a CPQ configuration in a CPQ new or amendment quote flow.
- Populate prior quantity and price in the BOM object for amendment flows.
- Create child quote lines for the top quote line. Automatically populate the quantity and list price values for each line item based on the information coming from CPQ. This also sets the parent item to be the top line so that the line item appears as a bundle view in the quote.




Notable components of this package include:

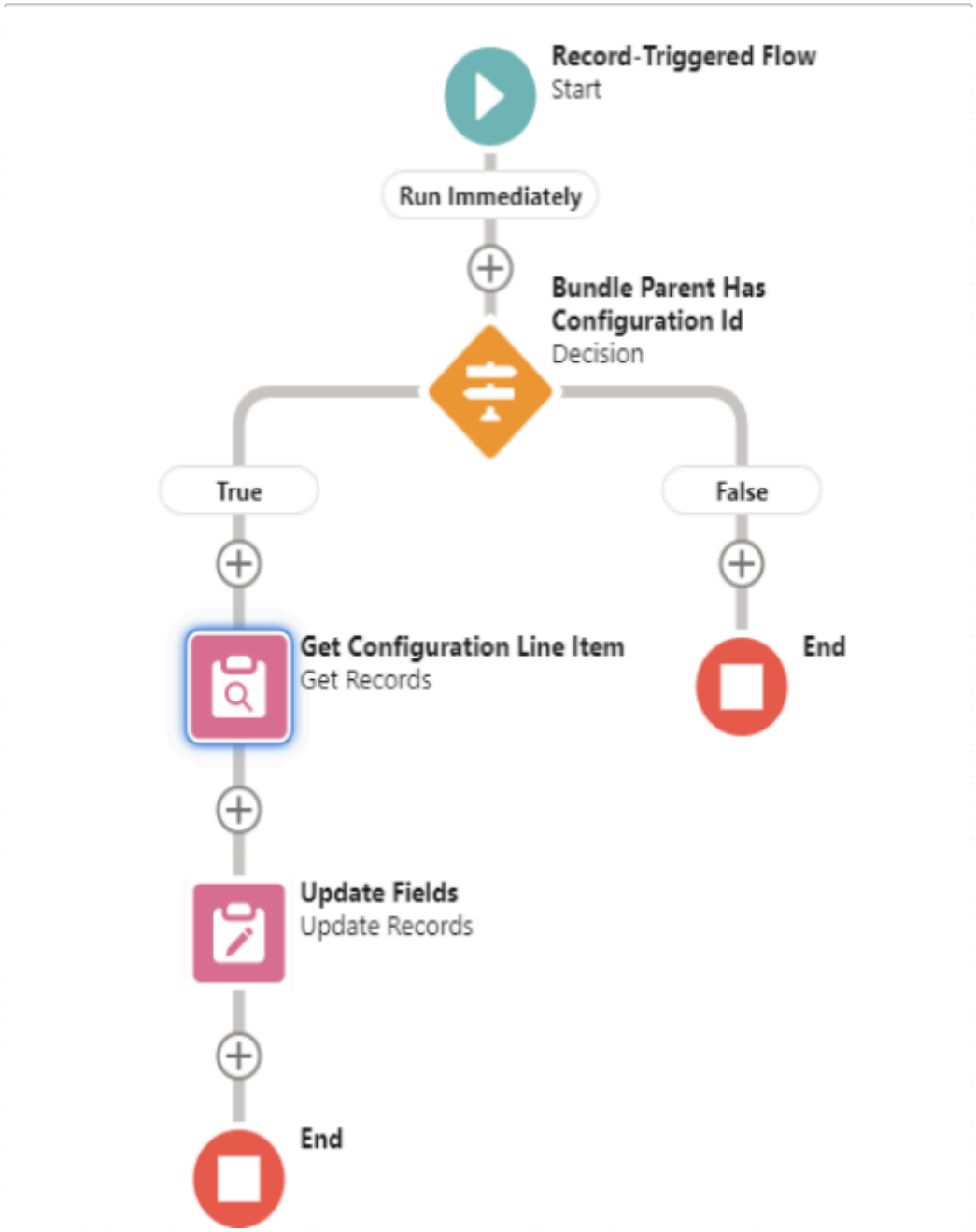
- Custom fields added to top level quote line object:
  - Configuration UD: The universally unique identifier (UUID) of the configuration session. Used upon reconfigure to restore configuration to previously determined state.
  - Committed Configuration UD: When an amendment quote is created. This field is populated with the Configuration ID. During an amendment, when Reconfigure is finished, the Committed Configuration UD is used to populate Prior Quantity and Prior Price columns on the Configuration Line Item object.
  - BOM Data: Sales line item data serialized in JSON format. Allows for use of data with the quote line calculator or other actions in Salesforce to perform some calculations or custom logic on top of the BOM data coming from a CPQ configuration.




For more information on these objects and the user capabilities they add review the following video: Delta BOM Feature.mp4

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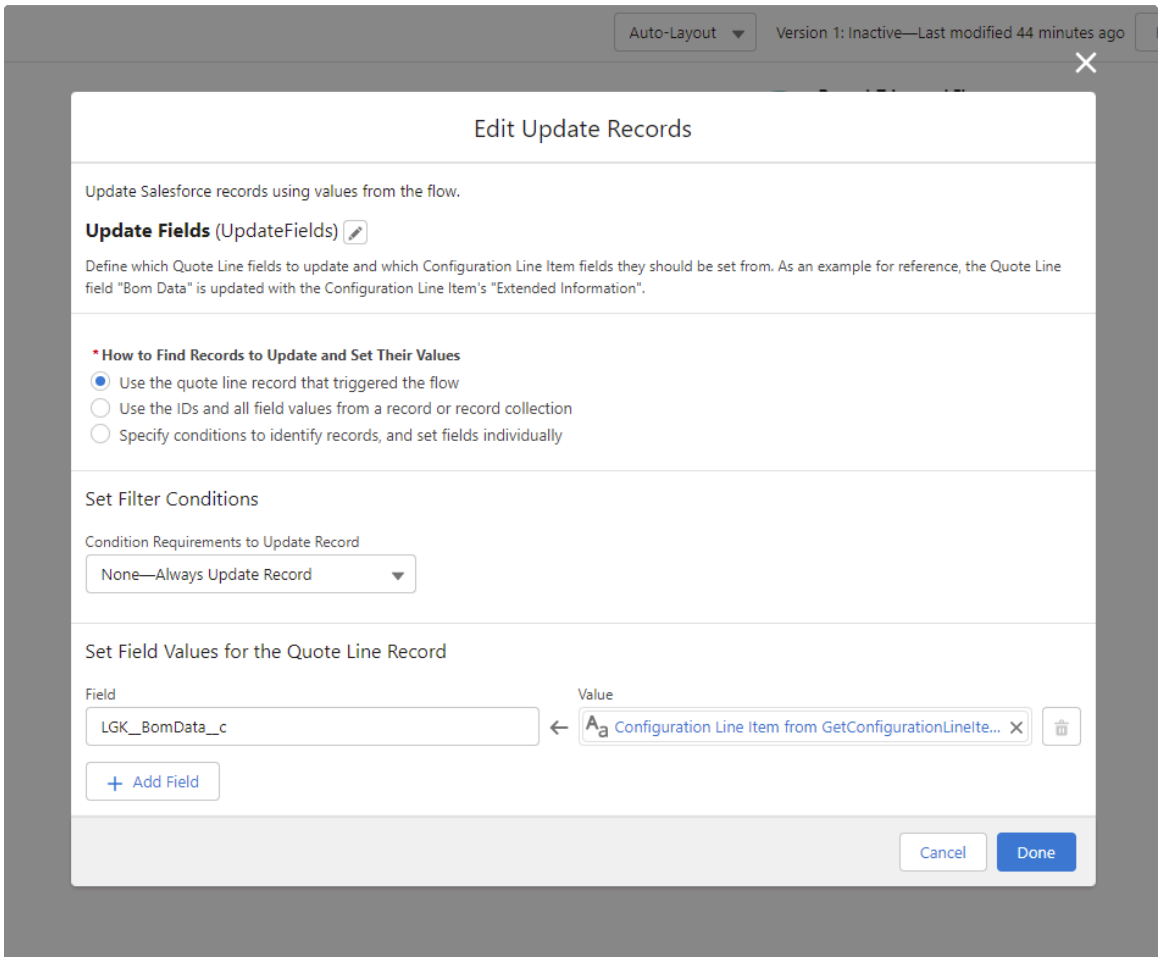
- Custom Salesforce REST endpoint that creates a quote and quote lines based on a previously saved configuration, without going through Salesforce CPQ's UI. For more information, review this video: Request for quote for Omnichannel using APIs.mp4
- Flightpath: allows the administrator to understand how the rules engine responds to end-user inputs by presenting a visual interaction between inputs and triggered rule actions.
- Configuration Line Item to quote line flow: flow template to populate quote line fields from Configuration Line Item object.




The flow starts inactive and must be enabled.

Writes Configuration Line Item field to quote line as an example for reference, write the extended info data to the BOM data field. This is where the user would define what fields should be mapped, as well as an optional filter:

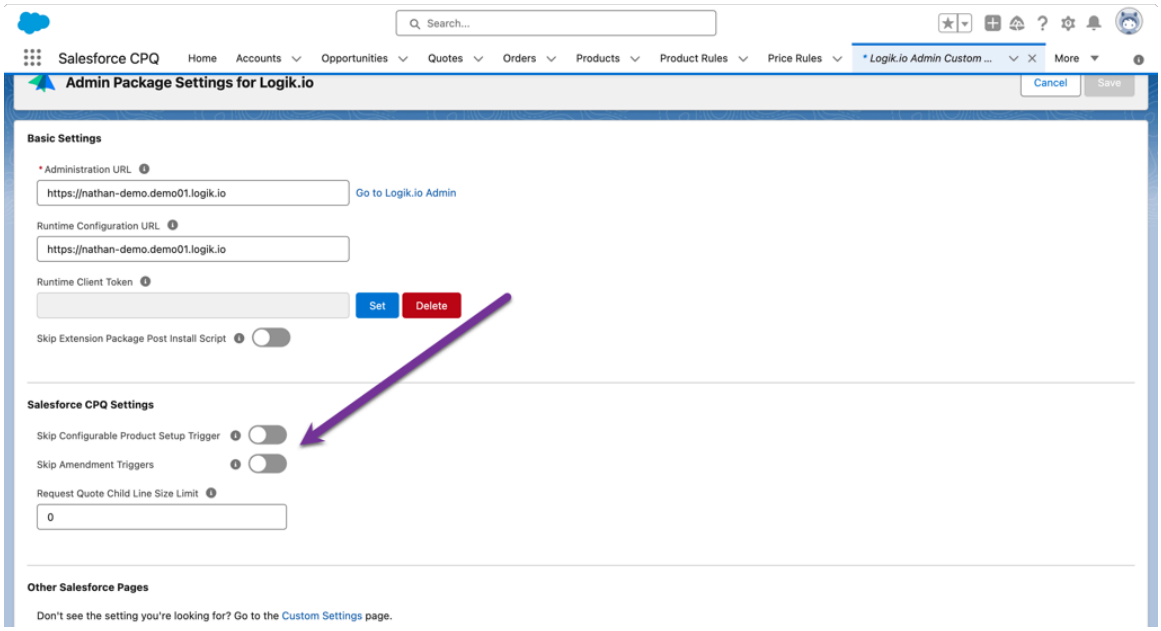
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- Triggers: Two triggers are included with this package.
  - Product configurable trigger: This trigger sets up configurable products. It provides the link to CPQ and makes the configurable product show up in the CPQ Admin (on the Configurable Products page). It also sets up product-related data for basic functionality in CPQ quoting.
  - Amendment quote line trigger: This trigger acts on the custom field Committed Configuration ID. This field gets populated when an amendment quote is created. If the subscription lines originated from a CPQ configuration, this trigger will automatically populate the current Configuration UD to the Committed Configuration UD field. During an amendment, when Reconfigure is finished, the Committed Configuration UD is used to populate Prior Quantity and Prior Price columns on the Configuration Line Item object. The Configuration UD custom field of the amended quote line is updated with new Configuration UD generated during the reconfigure flow. The Configuration UD field on the original subscription is also updated with the new value. This allows amendments to be repeated with the latest changes made during the amendment.

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You can disable these triggers through managing the CPQ Admin custom settings referenced above:




## All package components

To view all the components contained in each package, go to Setup, search for "Installed Packages" in the Quick Find box, drill into either package, and click **View Components**. To request an environment setup or upgrade, verify that a user has been created with the email address provisioning@logik.io, and request the setup or upgrade through our support site. For step-by-step instructions, see Create a case on Now Support for customers.

### Reconnect Logik after refreshing the Salesforce org

Reconnect the Logik environment to a new or refreshed SFDC org.

#### Before you begin

Role required: Admin

#### Procedure

1. Submit a support case through the support site or by emailing
   Provide the new org ID, the My Domain URL, and the custom URL of the Logik environment. The custom URL will have the form `https://<tenant>.<sector>.CPQ`.
2. If a Logik user exists on the org, send a password reset request for the user.
3. If no Logik user exists on the org, create a user.

#### Result

You will be notified when the migration of the Logik environment to the new org is complete.

#### Trouble?

If Logik has confirmed the migration is complete but you are unable to give a Logik user access to the org, follow these steps:

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1. Navigate to the Logik Tenant: Setup > Custom Settings > Click Manage next to the Logik Tenant.
2. Edit or confirm that the Administration URL is set to the custom URL of your Logik environment: `https://<tenant>.<sector>.CPQ`.
3. Navigate to Installed Packages > Find Salesforce CPQ > Configure > Additional Settings, and update the Salesforce CPQ External Configurator URL to your Logik URL followed by `/ui/configure: https://<tenant>.<sector>.CPQ/ui/configure`.

### Twinning: pulling Salesforce CPQ quote information into CPQ

You can set up Salesforce.com and CPQ to bring quote data into a CPQ configuration at runtime.

**Note:** This article is relevant only to use cases that are integrated with Salesforce CPQ.

On occasion, the CPQ Admin will need to bring Salesforce.com (SFDC) quote data into CPQ, to drive configuration, rules, calculations, and so on. This article describes the setup in both SFDC and CPQ that will bring relevant quote data into a CPQ configuration experience at runtime. This method of data transfer is nicknamed Twin Field or "field twinning."

CPQ rules run differently depending on whether the account is a new prospect or an existing customer. CPQ allows new prospects to select from a subset of offers such as starter packages, whereas existing customers are limited to renewing their existing products or upgrading to higher value products.

## Prerequisites

The CPQ managed package installed in your SFDC environment should be version 0.8 (released February 4, 2022) or later. If the managed package has not been upgraded, log an Upgrade SFDC Managed Package Request ticket in the Help Center.

Navigation in SFDC: Setup -> Object Manager -> quote (SBQQ Quote_c) -> Field Sets.

In the SFDC CPQ quote object (SBQQ_Quote_c), confirm that there is a field set named ReferencedFields. If no field set named ReferencedFields exists, create it. Navigation in SFDC: Setup -> Object Manager -> quote (SBQQ Quote_c) -> Field Sets.

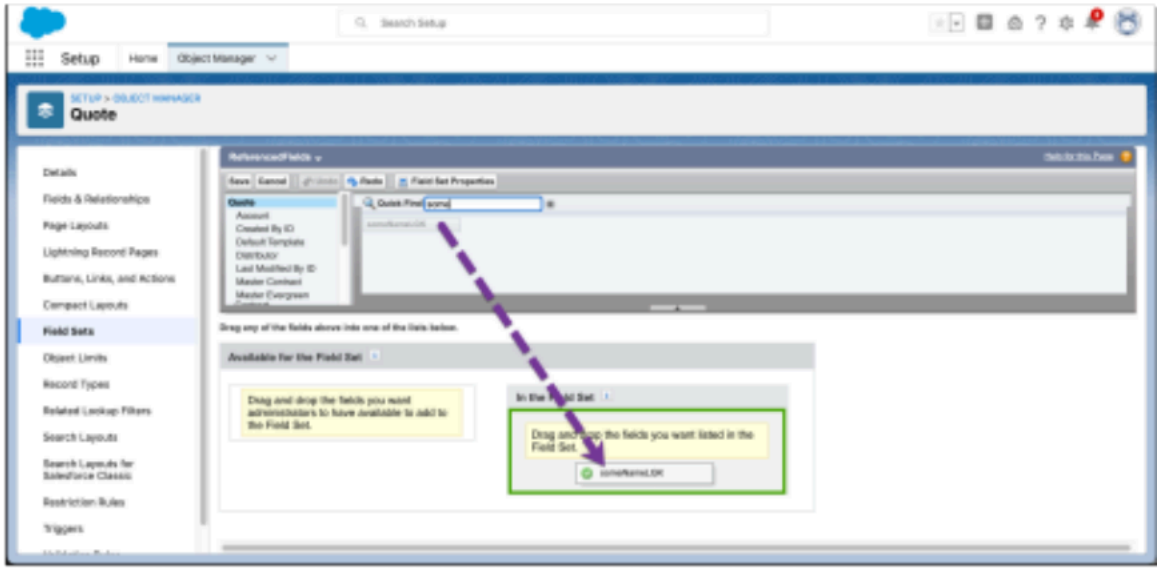
## Implementation

1. In SFDC, add a custom field to the SFDC CPQ quote object with the format <someName>LGK. This will create a field with the API name <someName>LGK_c.

   In CPQ, variable names begin with a lowercase character by default. Take care to make sure your twinned quote object in SFDC begins with a lowercase character as well.

2. Add this custom field to the ReferencedFields field set on the quote object. In SFDC, navigate to Setup -> Object Manager -> quote (SBQQ_Quote_c) -> Field Sets -> ReferencedFields. From the list of quote fields, drag and drop your new custom field into the In the Field Set box.

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3. In CPQ, add a field with variable name <someName>.

   **Note:** <someName> should be the same case-sensitive string as the one defined in the SFDC API name of the corresponding field to import, <someName>LGK_c. This CPQ field should not have LGK suffix. Twinned fields can have different field types.

4. Associate this field to the Blueprint that will utilize it.

When a user transitions from a SFDC quote into CPQ, the new field in CPQ, <someName>, will be populated with the data that SBQQ Quote_c. <someName>LGK_c stored in SFDC.

In Salesforce, the ReferencedFields field set is a custom field set that can be created on the Quote, Quote Line, and Quote Line Group objects. For more information, see SFDC: ReferencedFields Field Set in Salesforce CPQ.

## Capturing data from a configuration when amending a subscription contract

How to capture data from a prior configuration of a subscription contract.

When amending a pre-existing subscription contract, you may want to capture data relating to the prior configuration. Through additional fields added to the Configuration Quote Line and the CPQ Quote Line objects, you can access prior quantity and prior price for configuration items. For additional information, view the following 19-minute video.

https://drive.google.com/file/d/10Uffs0C7aFWPqkLYRILqZcwgIq2-uxsp/view?usp=sharing

### Related topics

CPQ integration with Salesforce B2B Commerce

### Runtime APIs

CPQ provides a set of APIs for building front-end applications and manipulating configurations. These are the buyside or runtime APIs. Customers or end users can use these APIs to create, update, and save CPQ configurations.

Runtime APIs support the standard create, read, update, and delete functions for CPQ configurations, along with the ability to retrieve bill of materials (BOM) data from CPQ.

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To provide accessible CPQ runtime APIs and a quick start to end developers, see the open source repositories for API collections that can easily be imported and tested.

## Runtime API setup

The base URL format for all runtime API calls is `https://<tenant>.<sector>.<cpq>/api/`. The `<tenant>` is the listed tenant name and `<sector>` is the appropriate sector that the environment is located on (usually `test` or `prod`).

In Salesforce, find the CPQ tenant URL by going to **Setup**, searching for **Custom Settings** in the **Quick Find** box, and then selecting **Manage** next to CPQ Tenant.

Runtime API calls are authenticated through a combination of a bearer token and the defined origin in the runtime client. The origins of the runtime application are set when a runtime client is created in the CPQ **Admin** settings.

To authorize these API calls, add two headers to each request

**Mandatory headers for runtime API requests**

| Header | Key | Value |
|---|---|---|
| Origin Header | origin | <runtimeClientOrigin> |
| Authorization Header | authorization | Bearer <runtimeToken> |

Sample headers:

- origin: localhost
- authorization: Bearer vEqzz4BVkb15Le11En8axEuN71FA6Vt_cw

## Create a configuration

To create a configuration using the APIs, the *`create configuration`* call passes the ID of the configurable product and receives in response a CPQ configuration ID that can be used to specify this configuration in later calls.

**POST**

| | |
|---|---|
| HTTP method | POST |
| URL | https://<tenant>.<sector>.logik.io/api/ |
| Path parameters | N/A |
| Query parameters | N/A |

The two key pieces of the payload are:

- The ID of a CPQ enabled product, with a blueprint that is deployed
- The CPQ configuration UUID that is being reconfigured

Sample URL:

`https://dev1.test.cpq/api/`

Sample payload:

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```
{
  "sessionContext":
  {
    "stateful": true
  },
  "partnerData":
  {
    "product":
    {
      "configuredProductId": "<Id of a Logik.io Enabled
 Product>",
    }
  },
  "fields": []
}
```

**Note:** The configuration can also be initialized by passing field values to the fields array in the following format:

```
{
  "variableName": "<Field Name>", "value": "<Field Value>"
}
```

Sample response:

```
{
  "fields": [<ARRAY OF FIELD OBJECTS>],
  "uuid": "[BANK_ACCOUNT: [BANK_ACCOUNT:
 08176434]]-9b1e-4fc8-b2c4-8aba2c35fda3",
  "revision": 0,
  "relatedChanges":
  [
    {
      "key": "products",
      "type": "PRODUCT"
    }
  ],
  "valid": true,
  "messages": [],
  "productChange": true,
  "products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
  "total": 30,
  "layouts": [<ARRAY OF LAYOUTS>]
}
```

## Reconfigure a configuration

The *reconfigure* API call is similar to the *create configuration* call. The *reconfigure* call passes the ID of the configurable product and an existing CPQ configuration ID. In return, it receives a new Configuration ID with the same field data as the prior configuration but allowing for changes to be made.

**Note:** The *UUID* field in the response payload contains the new CPQ configuration ID. The new configuration ID should be used for all operations going forward in the reconfiguration process, including update, save, and retrieve BOM.

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**POST**

| | |
|---|---|
| HTTP method | POST |
| URL | https://<tenant>.<sector>.logik.io/api/ |
| Path parameters | N/A |
| Query parameters | N/A |

The two key pieces of the payload are:

- The ID of a CPQ enabled product, with a blueprint that is deployed
- The CPQ configuration UUID that is being reconfigured

Sample URL:

`https://dev1.test.Logik/api/`

Sample payload:

```
{
  "sessionContext":
  {
    "stateful": true
  },
  "partnerData":
  {
    "product":
    {
      "configuredProductId": "<Id of a Logik.io Enabled
 Product>",
      "configurationAttributes":
      {
        "LGK__ConfigurationId__c": "<uuid>"
      }
    }
  },
  "fields": []
}
```

Sample response:

```
{
  "fields": [<ARRAY OF FIELD OBJECTS>],
  "uuid": "d98d60cd-9379-4b7b-86fd-de828c340f80",
  "revision": 0,
  "relatedChanges":
  [
    {
      "key": "products",
      "type": "PRODUCT"
    }
  ],
  "valid": true,
  "messages": [],
  "productChange": true,
```

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```
  "products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
  "total": 30,
  "layouts": [<ARRAY OF LAYOUTS>]
}
```

## Update a configuration

Updating a configuration requires a configuration to be loaded using either the *create configuration* or *reconfigure* API calls. The *Update Configuration* call passes a CPQ Configuration ID and any desired field values, and in response, receives the updated configuration from CPQ.

**PATCH**

| | | | | |
|---|---|---|---|---|
| HTTP method | PATCH | | | |
| URL | https://<tenant>.<sector>.cpq/api/ | | | |
| Path parameters | N/A | | | |
| Query Parameters | Name | Allowed Value | Required? | Default if not specified |
| | delta | true \| false | optional | true |
| | save | true \| false | optional | false |

Query parameters:

*delta*

If delta=true, CPQ sends back only data that has changed based on the update that was sent. This is the default behavior.

If delta=false, CPQ sends back the entire configuration and BOM data in response.

*save*

If save=true, CPQ saves this configuration and (depending on the settings) performs additional actions such as sending the data to a webhook or writing the data into custom objects in Salesforce. This is the behavior of the save configuration call.

If save=false, CPQ updates this configuration and sends the updated data back in the response. This is the default behavior, and this is the behavior of the update call.

Sample URL:

`https://dev1.test.logik.io/api/fbc3d32c-7f86-4461-b144-986a0e8a5768`

Sample payload:

```
{
  "fields":
  [
    {
      "variableName": "orderQty",
      "value": 3
    }
```

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```
  ]
}
```

Sample response:

```
{
  "fields": [],
  "uuid": "fbc3d32c-7f86-4461-b144-986a0e8a5768",
  "revision": 0,
  "relatedChanges":
  [
    {
      "key": "products",
      "type": "PRODUCT"
    }
  ],
  "valid": true,
  "messages": [],
  "productChange": true,
  "products": null
}
```

## Save a configuration

Saving a configuration is a subset of the update configuration. It requires a configuration to be loaded using either the *create configuration* or *reconfigure* API calls. The *save configuration* call passes a CPQ configuration ID and any desired field values, and in response, receives the updated configuration from CPQ.

**Note:** The only difference between a normal update call and a save call is the addition of the query parameter *save=true* in the URL. If set to false or excluded, this is a normal update call.

If you are using Salesforce as a backend, when the save API is called, CPQ asynchronously creates and populates the CPQ custom objects Configuration Field Data Sets and Configuration Line Items with the appropriate data.

If your CPQ instance has a webhook configured, when the save API is called, the data is sent to the endpoint specified in the webhook setting. See Webhooks.

**Note:** This ends the configuration session. Further edits or updates to the configuration must be started from the create configuration or reconfigure API calls.

### PATCH

| | | | | |
|---|---|---|---|---|
| HTTP method | PATCH | | | |
| URL | https://<tenant>.<sector>.cpq/api/ | | | |
| Path parameters | N/A | | | |
| Query Parameters | Name | Allowed Value | Required? | Default if not specified |
| | delta | true \| false | optional | true |
| | save | true \| false | optional | false |

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Query parameters:

*delta*

If delta=true, CPQ sends back only data that has changed based on the update that was sent. This is the default behavior.

If delta=false, CPQ sends back the entire configuration and BOM data in response.

*save*

If save=true, CPQ saves this configuration and (depending on the settings) performs additional actions such as sending the data to a webhook or writing the data into custom objects in Salesforce.

If save=false, CPQ updates this configuration and sends the updated data back in the response. This is the behavior of the update call.

Sample cURL request:

```
curl --location --request PATCH
 'https://mpanigrahi-demo.demo01.logik.io/api/6d0ef6fd-4c88-44
f3-a296-b03421c369c6' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Origin: https://mpanigrahi-demo.demo01.logik.io' \
--header 'Authorization: <<RUNTIME TOKEN>>' \
--header 'Cookie:
 LGKSESSION=NDA5OWJmNmEtNDhhOS00YTc4LTk3ODktZTg0OGYyOGIwMjZk' \
--data
 '{"fields":[{"variableName":"name_d1","value":"megha","dataType
":"text"}],"responseState":{"setPagination":{"collections":{"pag
eSize":10,"pageNumber":0},"fields":{"pageSize":10,"pageNumber":0
},"componentTypes":{"pageSize":10,"pageNumber":0}},"defaultPagin
ation":{"pageSize":10,"pageNumber":0},"searchValues":{}}}'
```

Sample response:

```
{
"fields": [<ARRAY OF FIELD OBJECTS>],
"uuid": "8817655d-7a11-41ef-a9fd-59c2855a3e4b",
"revision": 1,
"valid": true,
"messages": [],
"productChange": false,
"products": [<ARRAY OF PRODUCTS IN CONFIGURATION>],
"total": 0
}
```

## BOM APIs

The BOM APIs are useful for retrieving the final output of configuration. The BOM APIs can be used to retrieve the entire BOM, or specific subsets, such as sales or manufacturing BOMs.

The *Get BOM* call passes a CPQ Configuration ID and in return receives the current BOM generated by the current state of the configuration. There are 3 built in BOM types: "all", "sales" and "manufacturing". Additional BOM types can be dynamically added by setting the *bomType* field on the product.

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**Note:** If the BOM type is not included, the API returns the entire BOM.

### GET

| | | | |
|---|---|---|---|
| HTTP method | GET | | |
| URL | https://<tenant>.<sector>.cpq/api/<uuid>/bom/<bomType> | | |
| Path Parameters | Name | Allowed Value | Required? |
| | <uuid> | 32 character CPQ configuration UUID | required |
| | <bomType> | name of the BOM to retrieve | optional |
| Query parameters | N/A | | |

Sample response:


```
{"products": [
        {
            "id": "01t5f000006QKysAAG",
            "quantity": 1,
            "bomType": "Sales",
            "orderNumber": 10,
            "type": "accessory",
            "name": "Amend Flow Bundle Sub",
            "partnerId": "01t5f000006QKysAAG",
            "productCode": "AFBC-SC",
            "externalId": "",
            "productFamily": "Miscellaneous",
            "description": "",
            "uom": "",
            "price": 5,
            "extPrice": 5,
            "level": 0,
            "rollUpPrice": 5
        },
        {
            "id": "01t5f000006QKz2AAG",
            "quantity": 1,
            "bomType": "Sales",
            "orderNumber": 20,
            "type": "accessory",
            "name": "Amend Flow Bundle Asset",
            "partnerId": "01t5f000006QKz2AAG",
            "productCode": "AFBC2-SC",
            "externalId": "",
            "productFamily": "Miscellaneous",
            "description": "",
            "uom": "",
            "price": 25,
            "extPrice": 25,
            "level": 0,
            "rollUpPrice": 25
        }
    ]}
```


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For information about additional configuration APIs and sample scenarios, see Additional configuration APIs.

## Installing the Salesforce Transaction Manager Integration Package extension

To use Transaction Manager with Salesforce, you must first follow these steps to install and configure the Salesforce Transaction Manager Integration Package Extension.

## Prerequisites

This guide assumes that your CPQ environment is integrated with a Salesforce org, and that Transaction Manager is enabled. If your Salesforce org has no CPQ packages installed, install version 2.7 or later of the CPQ Managed Package. For instructions, see Set up environments linked to Salesforce orgs.

**Note:** CPQ Transaction Manager has no dependencies on Salesforce CPQ. You can ignore any steps or references specific to Salesforce CPQ.

Submit a support ticket requesting Transaction Manager be turned on in your CPQ environment.

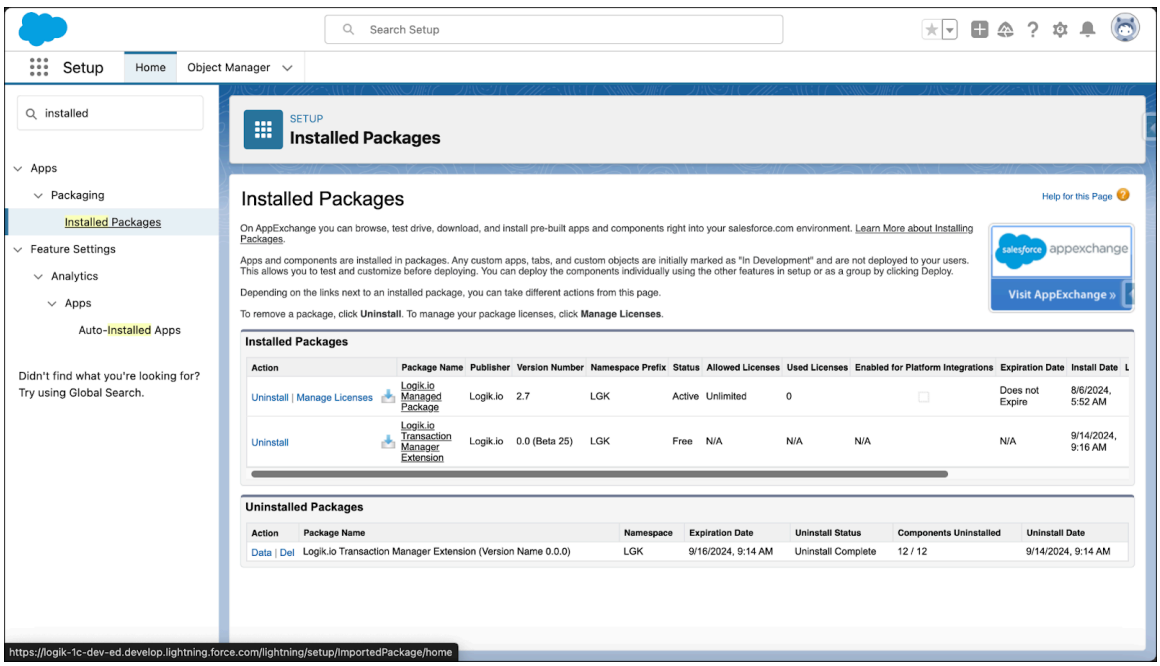
## About the CPQ Transaction Manager extension

The CPQ Transaction Manager Extension is a package of components that Salesforce administrators install on their Salesforce environment to facilitate the integration between Salesforce and CPQ Transaction Manager.

Contact ServiceNow customer support for information on the latest version and how to access the managed package for installation.

Admins can install the package for admins only, for all users, or for specific profiles. The package includes permission sets for Transaction Manager that can be assigned to individuals or replicated on profiles. To view the permissions sets, in Setup, go to **Users**, and then see the **Logik.ai Full Access** option in **Permission Sets**.

After it is installed, you can view the version of the package in the **Installed Packages** section of Salesforce Setup.




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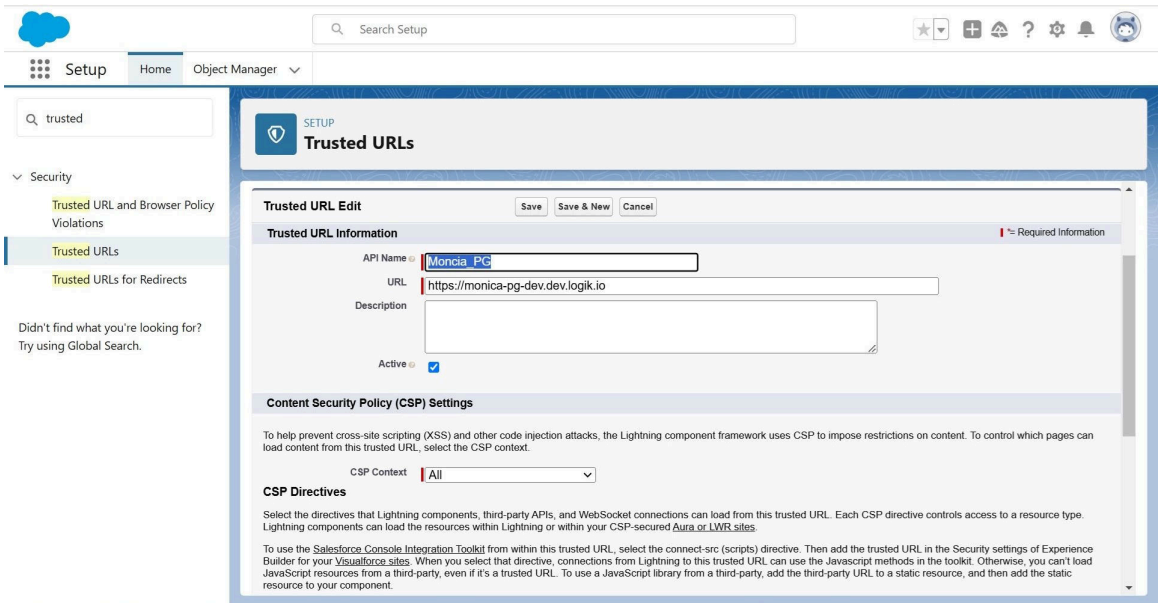
## Salesforce: Enable custom address fields

The Salesforce environment must have Custom Address Fields enabled. If this feature is not enabled, see this article for more information: Enable Custom Address Fields

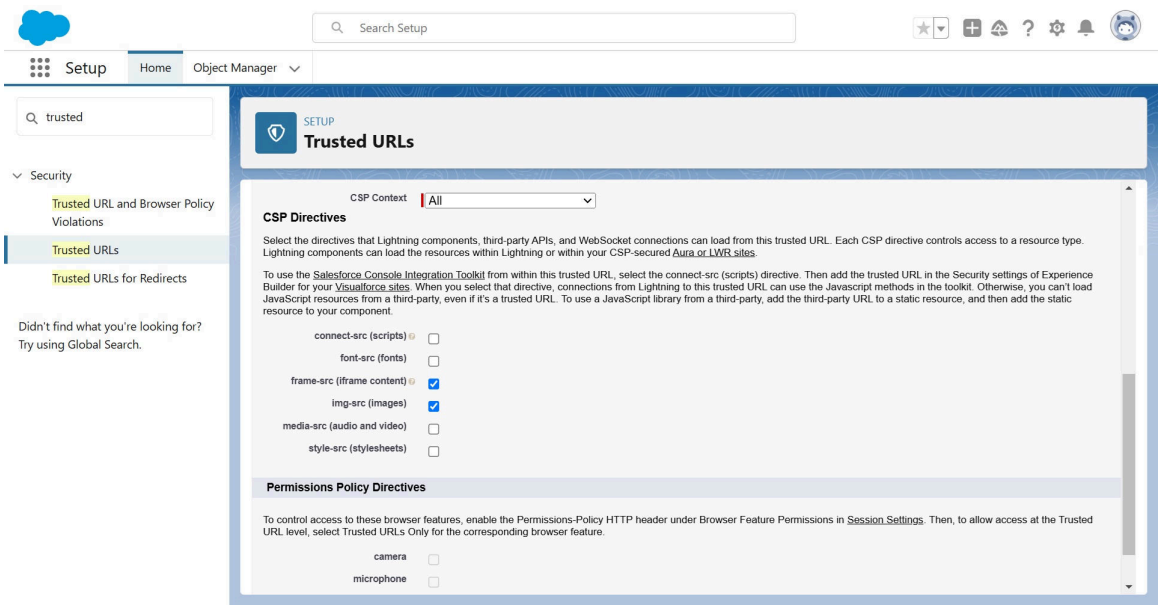
## Salesforce: Allow security exceptions for CPQ

Add trusted URLs:

1. From Salesforce Setup Home, go to **Settings** > **Security** > **Trusted URLs**. Create a new trusted URL.
2. Provide an API name.
3. Enter the URL of the CPQ environment, as shown below.



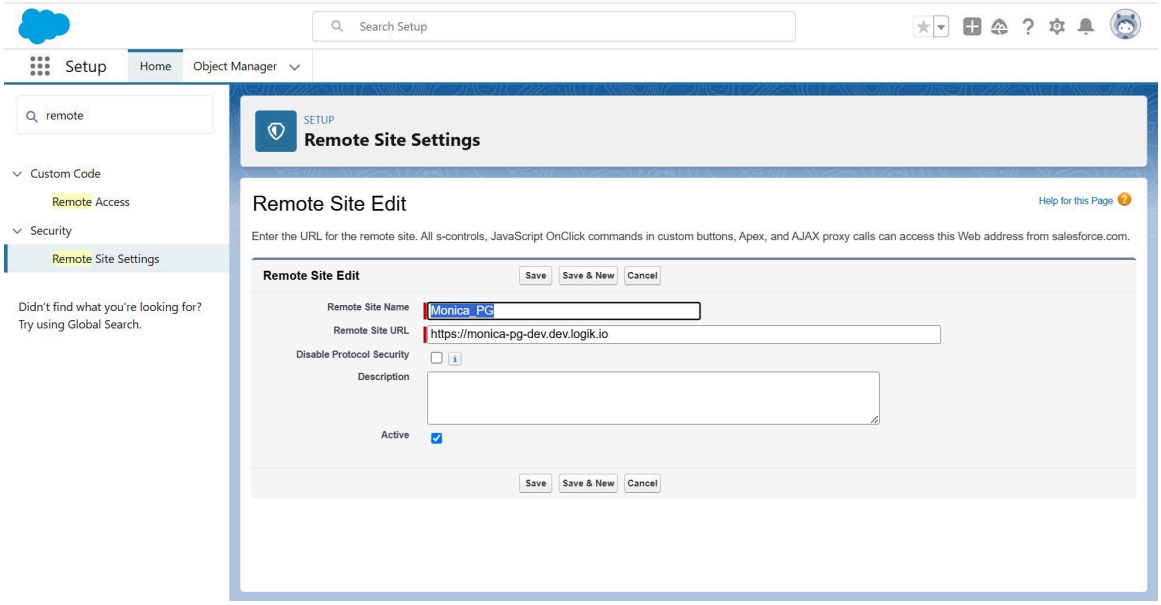

4. Under CSP Directives, make sure that at least **frame-src (iframe content)** is enabled, and click **Save**.




Configure remote site settings:

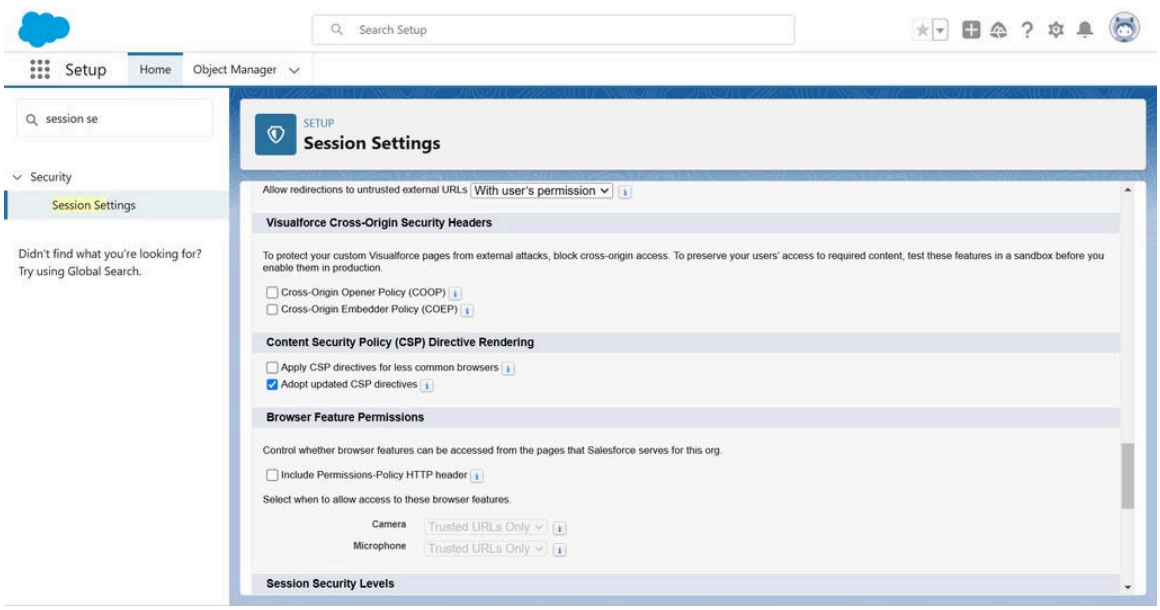
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1. From Salesforce Setup Home, go to **Settings** > **Security** > **Remote Site Settings**. Create a new remote site.
2. Provide a name.
3. Enter the URL of the CPQ environment as shown in image below, and click **Save**.




Optionally, allow microphone access for Cosmo Converse (currently in beta). Cosmo Converse allows the user to communicate via voice with Transaction Manager. By default, this feature is not enabled. To use Cosmo Converse, submit a support ticket that describes your use case. To prepare for Cosmo Converse, update Salesforce settings to allow microphone access.

1. From Setup Home, go to **Settings** > **Security** > **Session Settings**.
2. Under **Browser Feature Permissions**, make sure that the check box for **Include Permissions-Policy HTTP header** is disabled.
3. If necessary, click **Save**.

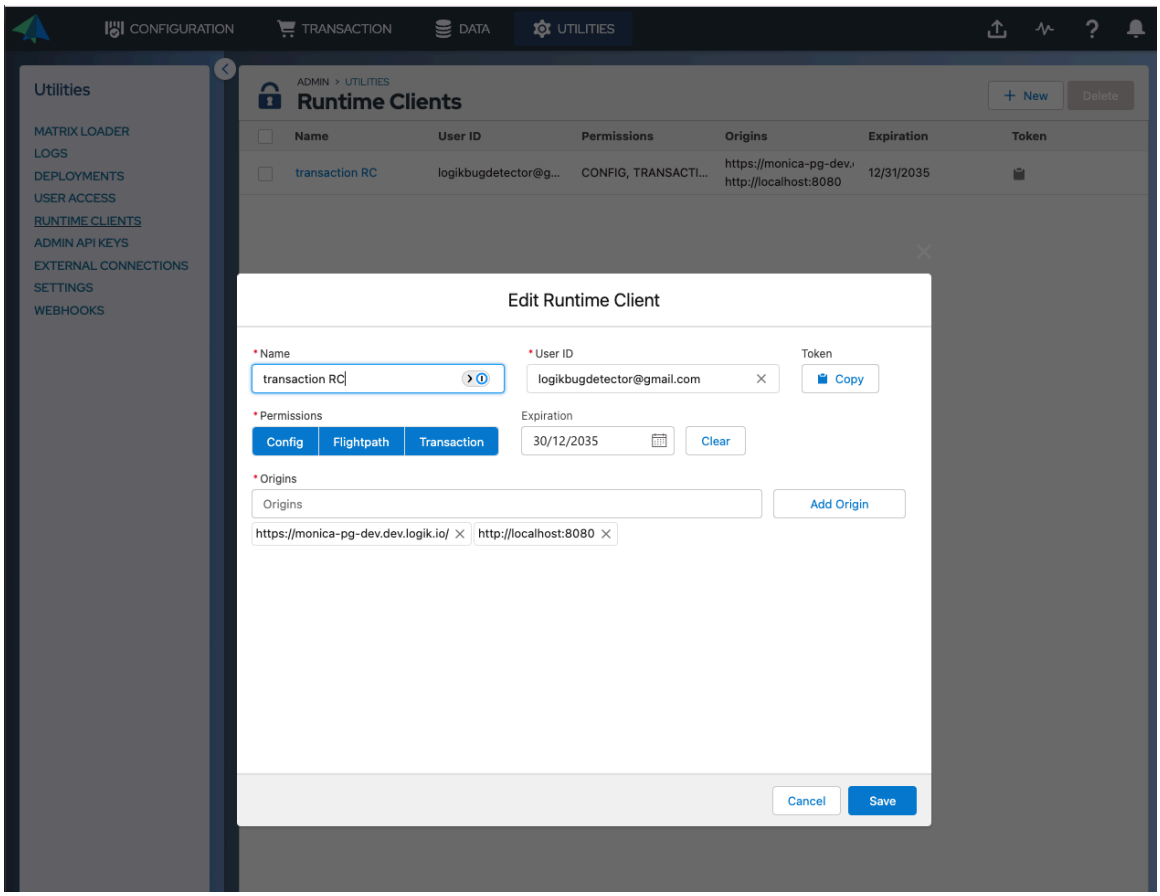



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## CPQ: Set up the runtime client token

The CPQ runtime client token facilitates authentication for communications from Salesforce to CPQ. For steps to create a runtime client token in CPQ, see Set up a runtime client. For this Transaction Manager use case, please be sure to enable permissions on this runtime client for TRANSACTION, and add a valid User ID that is recognized by the corresponding Salesforce environment.

Note that in CPQ Admin, the runtime client token must be updated to include TRANSACTION in its permissions and itself as an origin. (For example, the runtime client token for `https://test-txn.test02.logik.io` must have an origin of `https://test-txn.test02.logik.io`.) Also, when a runtime client token includes TRANSACTION, a user must be included. Make sure that the user has permission to perform the Create Transaction event.




When you have set up the runtime client token, copy it to your local clipboard for use in the next procedure.

## Install the CPQ Transaction Runtime Token in Salesforce

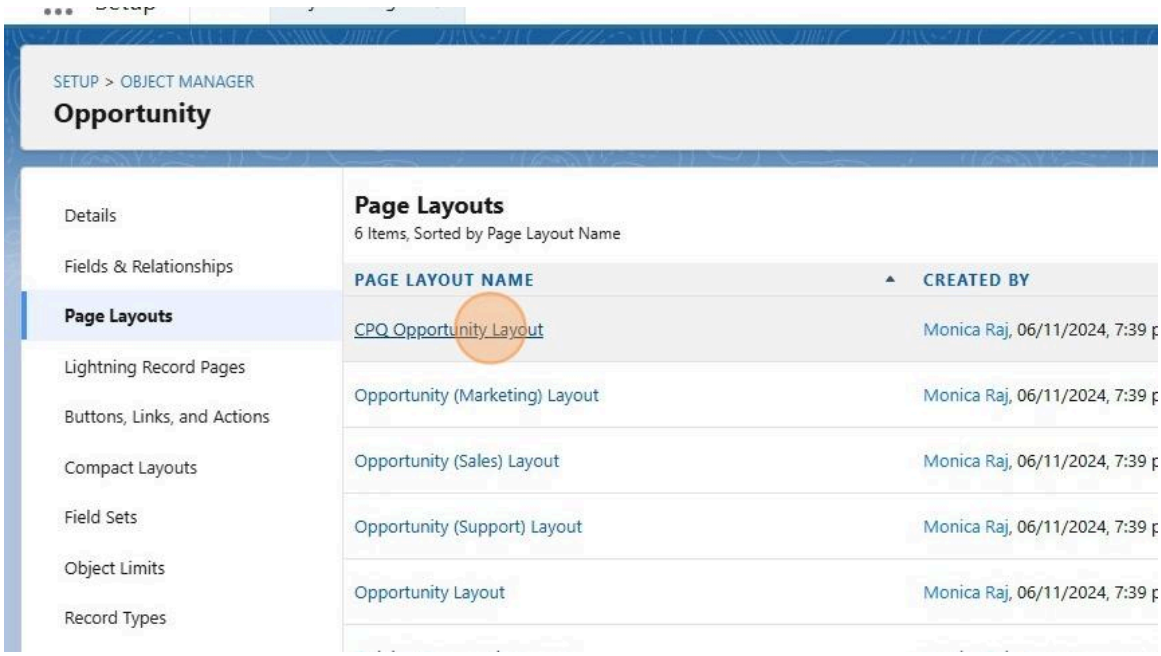
1. From the Salesforce App Launcher, search for and open **Logik.io Admin Custom Settings**.
2. Press the **Set** button next to the **Runtime Client Token** field to enable it.
3. Paste the token from CPQ into the editable field, and click **Save**.

> **Note:** The runtime client token isn't displayed on the Admin Custom Settings page after it's been saved.

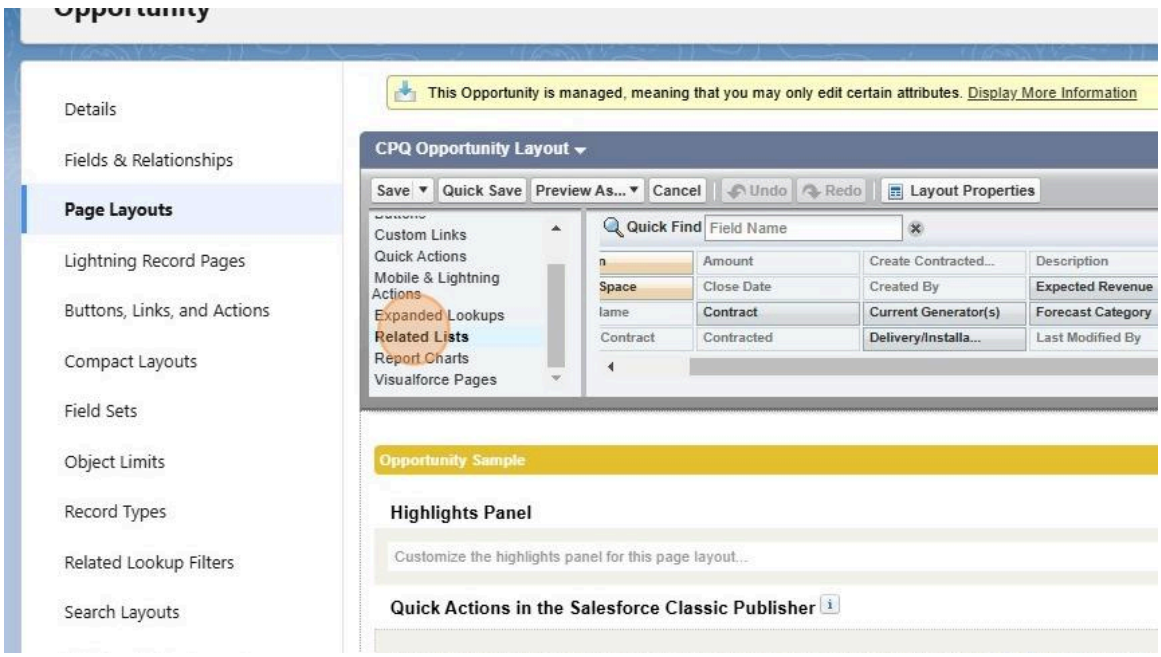
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## Salesforce: Update the Opportunity layout to Open Transaction Manager

1. In Salesforce, click the gear icon in the top right corner.
2. Navigate to **Setup** > **Object Manager** > **Opportunity** > **Page Layouts**.
3. Select the page layout to edit. (If you have multiple layouts, choose the one associated with the relevant record type or user profiles.)

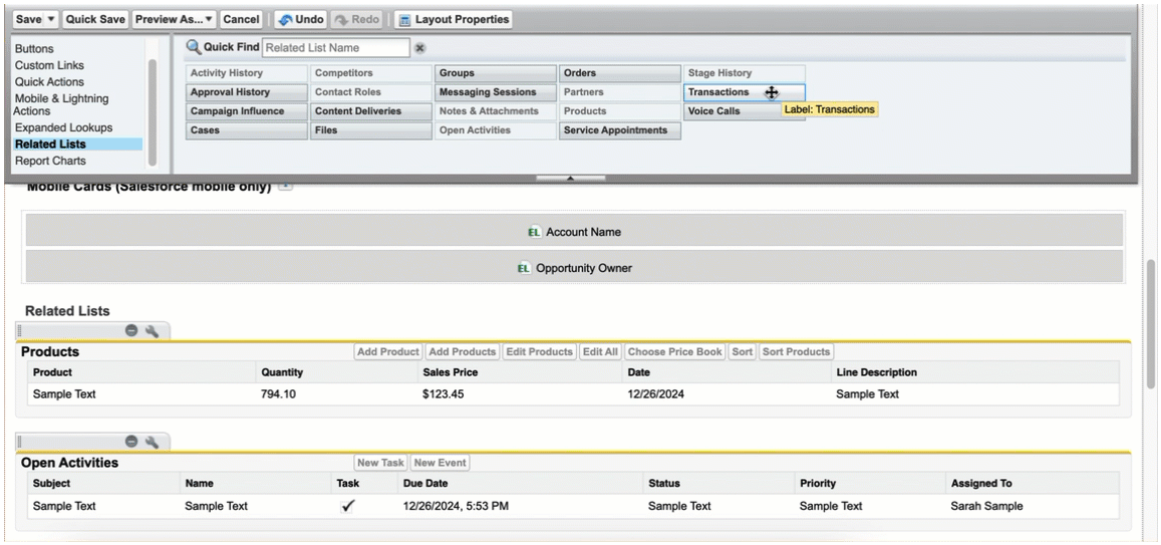



4. Scroll down in the layout editor until you see the **Related Lists** section.

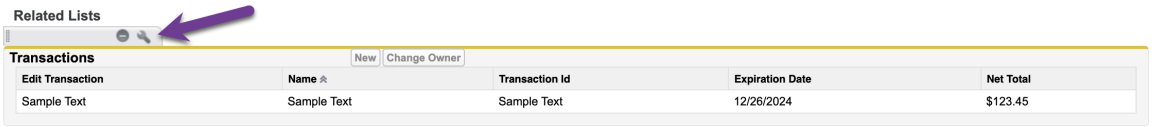



5. Drag the Transactions object from the list of available related lists on the top palette to the desired position in the **Related Lists** section.

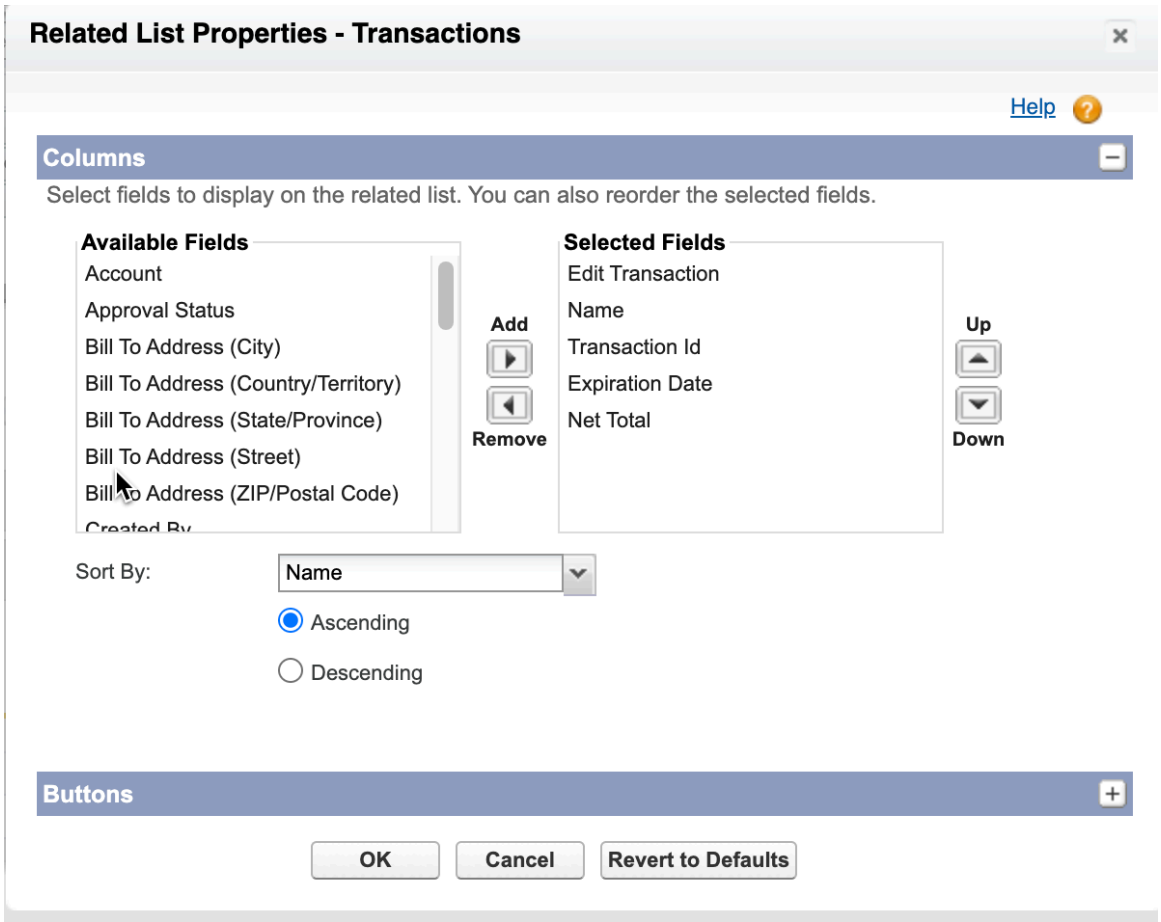
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6. Click the wrench icon for the Transaction object to open the properties for the related list.




7. In the **Selected Fields** section, select the **Edit Transaction** field from the **Available Fields** column. Click **Add** to move it to the **Selected Fields** column. Rearrange the fields as needed, and click **OK** to save the changes. After making the changes, click **Save** in the top left corner.



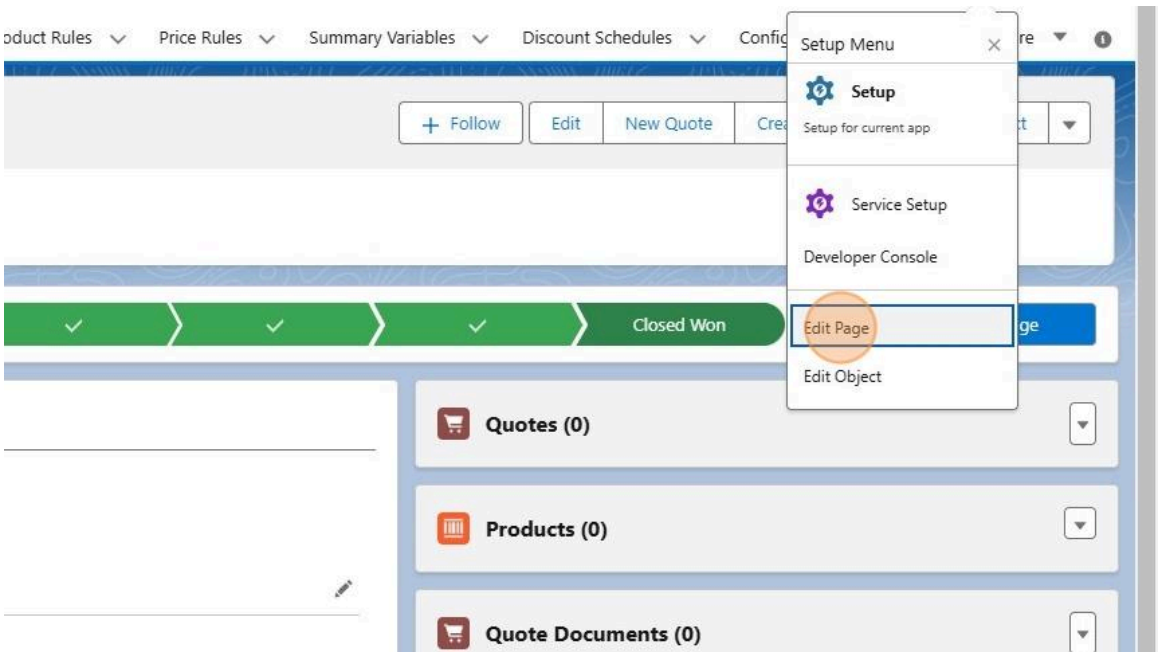

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8. Test the updated layout.
    - As an end user (on the buyside of Salesforce), navigate to an Opportunity record.
    - Ensure that the transaction related list appears on the page and that the **Edit Transaction** link is visible and functional.

## Troubleshooting: If the Transaction button is missing

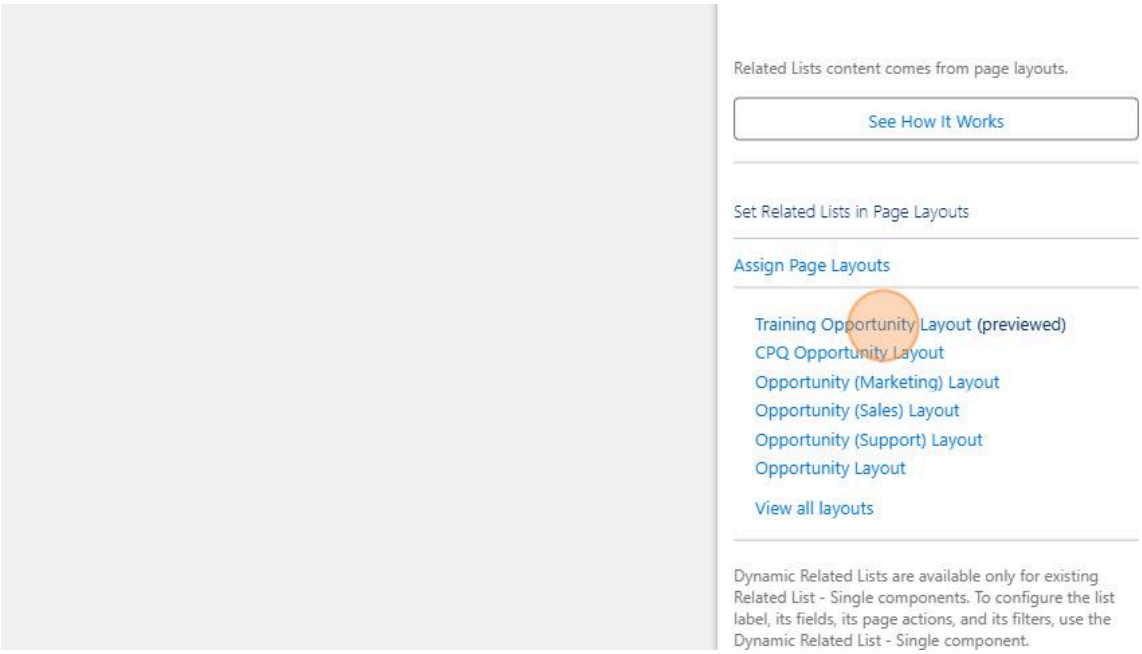
If the transaction button is missing from the buyside opportunity detail page, follow these steps.

1. In the top right corner of the page, click the gear icon, and then click **Edit Page**. This opens the Lightning App Builder for the Opportunity record page.



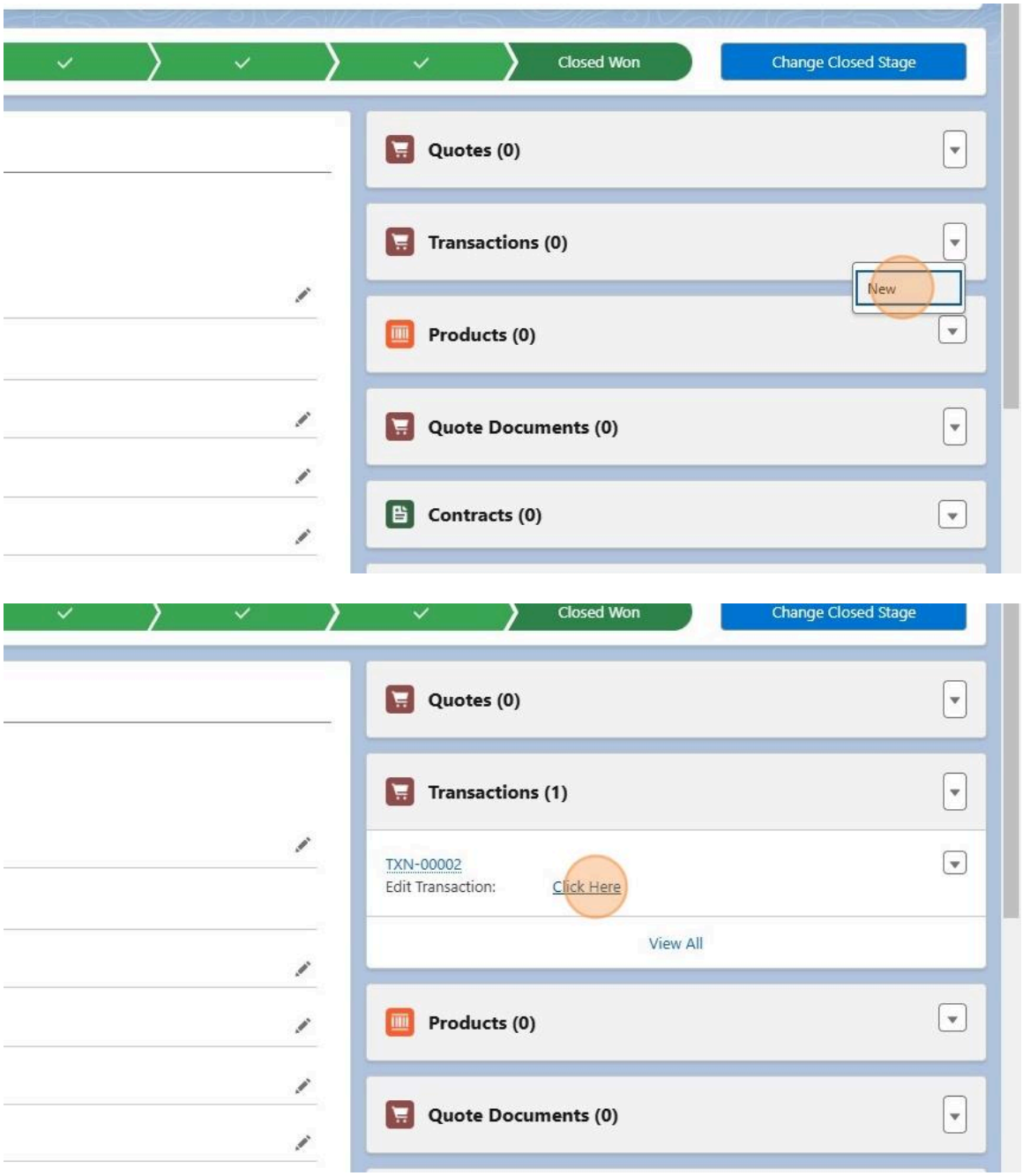

2. Select the Related Lists component of the page. In the **Assign Page Layouts** section, find the name of the page layout currently assigned. (In the image, the correct layout is indicated with the word "(previewed).")

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3. Click the previewed layout and repeat steps 4 through 7 in the "Salesforce: Update the Opportunity layout to Open Transaction Manager" section (above). Next, on the buyside, navigate to an opportunity record. Check the **Related Lists** section to confirm that the transaction object appears. Click the arrow, and create a new transaction to validate that the **Edit Transaction (EditLink__c)** field is available.

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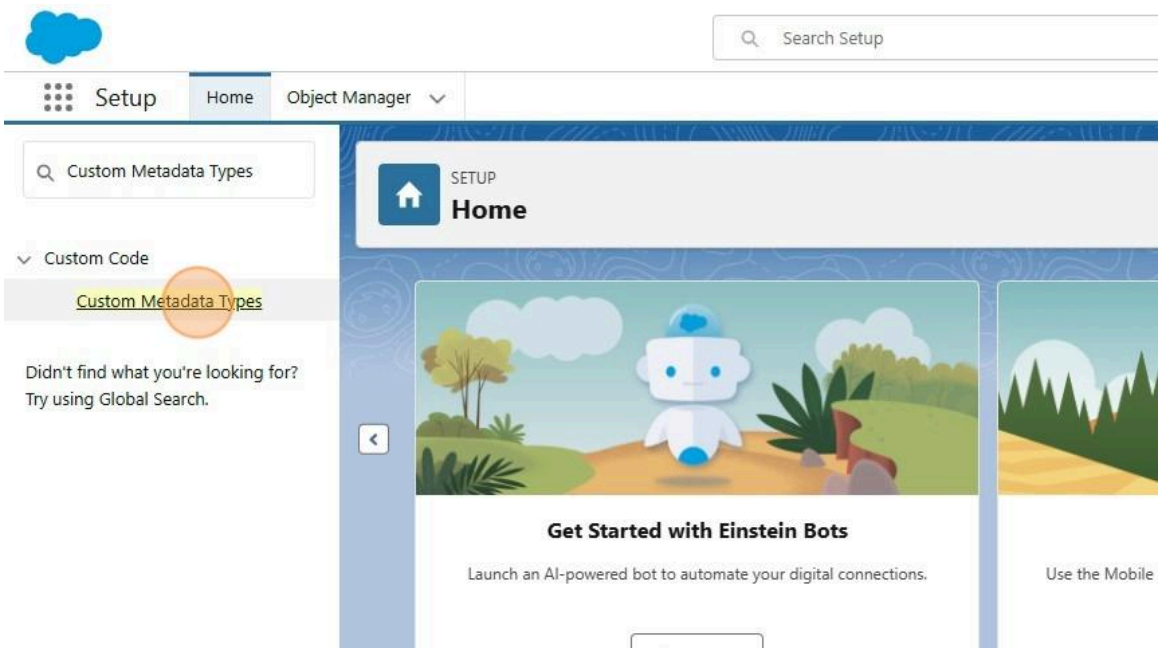



## Salesforce: Set up custom field mappings

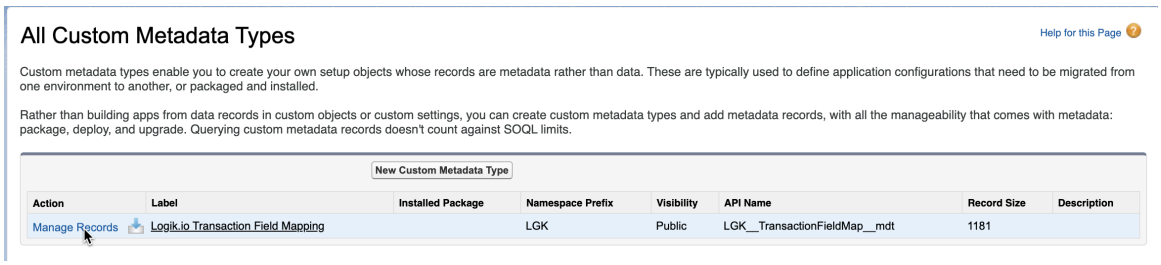
When a new CPQ transaction record is initiated in CPQ, it can be helpful to transfer essential data from the Salesforce transaction record. This section sets up field mappings that copy (or "twin") information from a field in Salesforce to a field in CPQ, or visa versa, during the transaction creation flow. As an example, it is common for the administrator to twin the value held in *`LGK__OpportunityId__c`* to the corresponding CPQ transaction field, *`txn.opportunity.id`*.

1. In Salesforce, go to Setup.
2. In the Quick Find bar, search for `Custom Metadata Types`.
3. In the search results, under Custom Code, click **Custom Metadata**.

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4. To access the existing field mappings, locate **Logik.io Transaction Field Mapping** in the list of custom metadata types, and click the **Manage Records** link next to it.



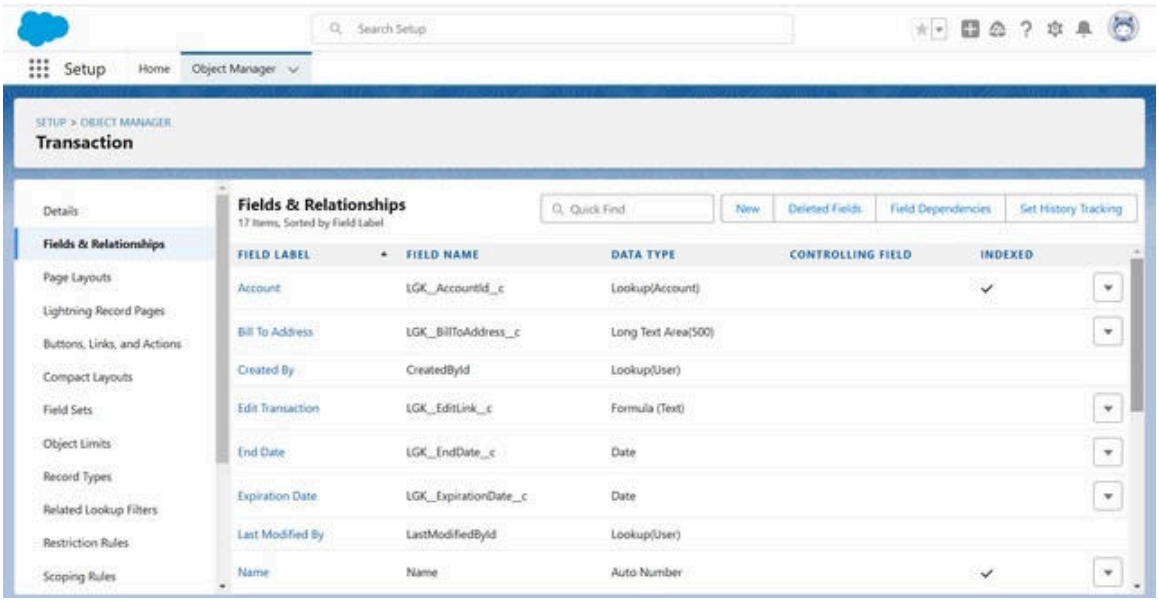

5. Click **New**, fill out the required details, and then click **Save**.

   Source fields:

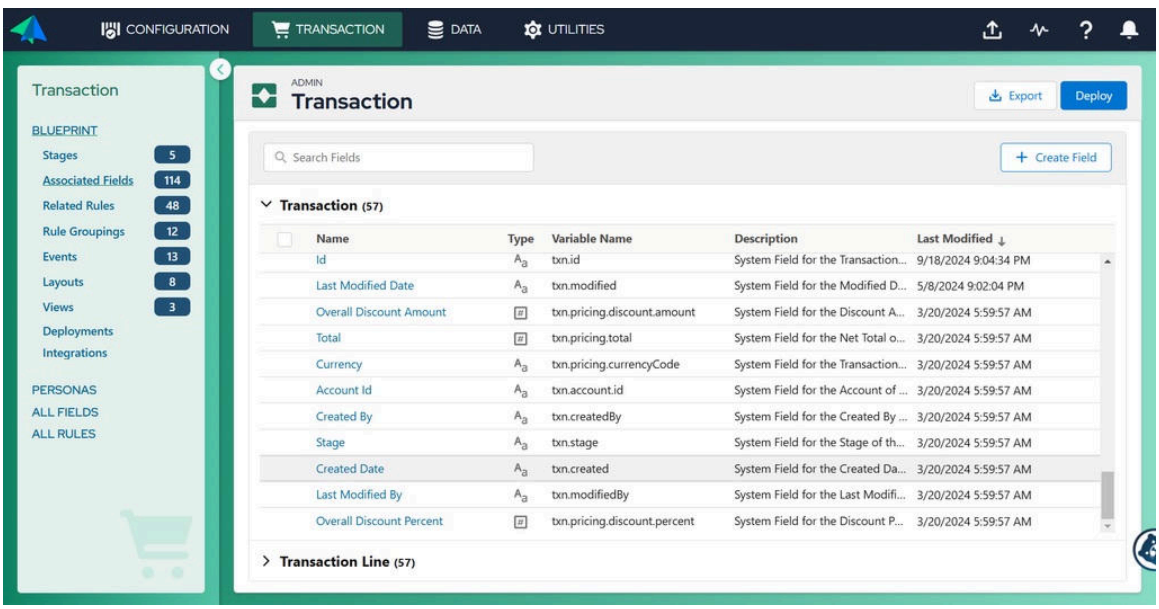
   - Environment: Choose the source of the field value:
     - Select **Salesforce** for fields originating in Salesforce.
     - Select **Logik** for fields originating in CPQ.
   - Object: Enter `Transaction`.
   - Field: Specify the field name.

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- For Salesforce fields, include the `__c` suffix (for example, `CustomField__c`). Review the exact field names from **Salesforce** > **Setup** > **Object Manager** > **Transaction** > **Fields** and relationships.



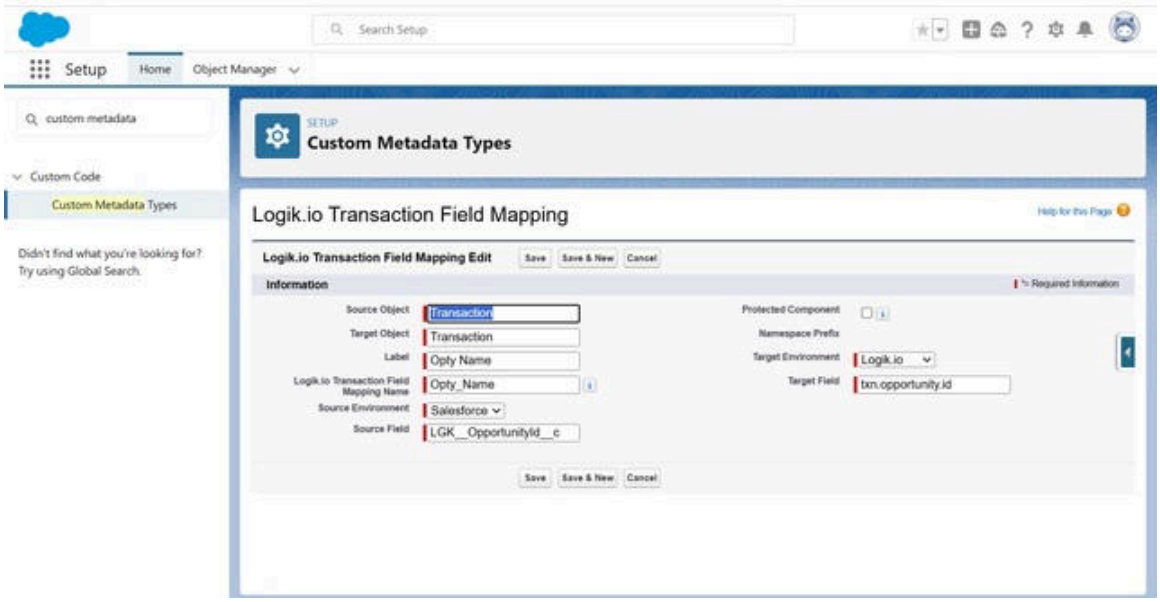

- For CPQ fields, include prefixes such as `txn.` or `txn.line.` to denote the field (for example, `txn.TotalAmount`). Be sure to use the exact field variable names from **Admin** > **Transaction** > **Associated Fields**.




Target fields:

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- Environment: Indicate where the field value should be updated (Salesforce or CPQ).
- Field: Enter the field name of the target in the same format (for example, Salesforce fields with `__c` or CPQ fields with `txn.` prefixes).




**Note:**

- A field mapping record is included as a reference. This cannot be deleted, but its source and target details can be edited. Verify that your custom added field record matches it.
- If you are uninstalling the managed package, any created records for new custom fields must be deleted first.

## Salesforce: Activate Transaction Line to Opportunity Line syncing and asset flows

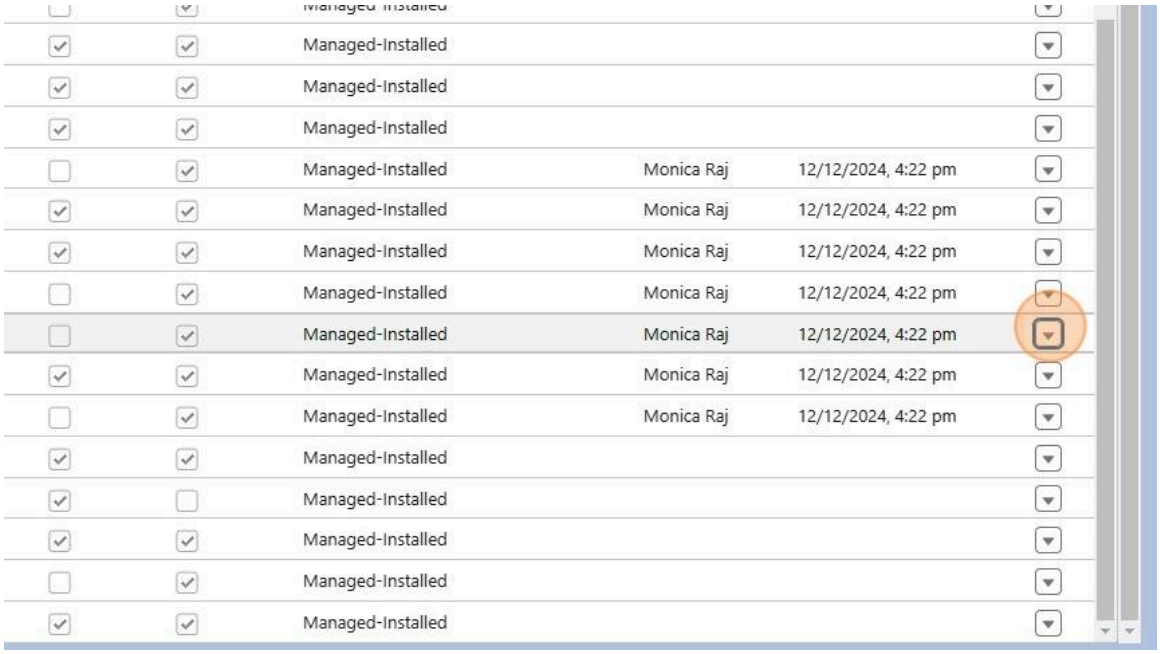
**Note:** By default, the following flows are active:

- Logik.ai Copy Transaction
- Logik.ai Create Transaction (Record Trigger)
- Logik.ai Create Transaction (Screen)

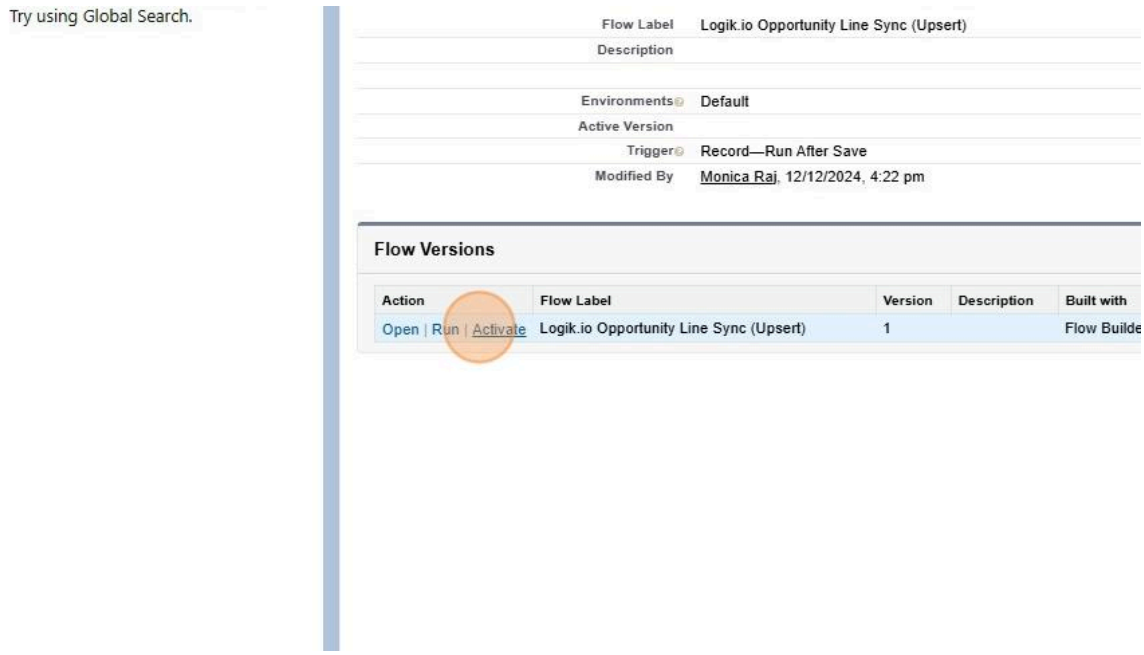
1. From Salesforce Setup Home, search for "Flows". Click **Process Automation** > **Flows**.
2. Search for the following. You will perform step 3 for each:
   - Logik.io Opportunity Line Sync (Upsert)
   - Logik.io Opportunity Line Sync (Delete)
   - Logik.io Primary Transaction Change
3. For each of the three flows identified in step 2, activate one of the following options:

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- Option 1: Using the drop-down menu:
  - Click the arrow to the right of the flow name.



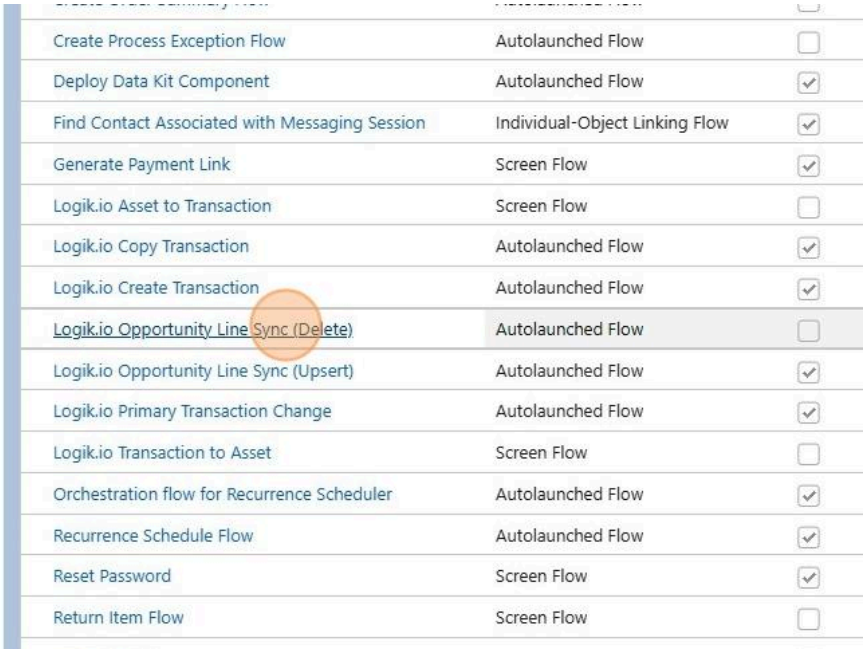

  - Select **View Details and Versions**.
  - Click **Activate** for the most recent version of the flow.



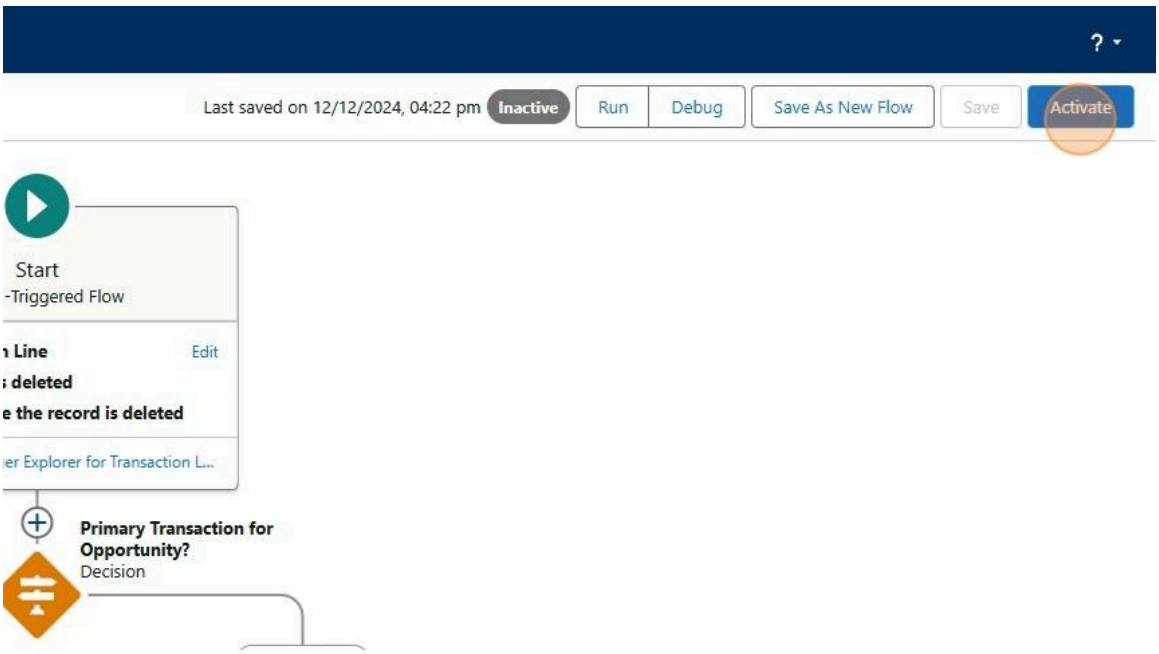

- Option 2: Open the flow:

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- Click the flow name to open it in the Flow Builder.




- Click **Activate** at the top right of the Flow Builder.




Make sure all the flows are in active status.

**Note:** Opportunity line syncing is applied only to the transaction assigned to the Primary Transaction opportunity field.

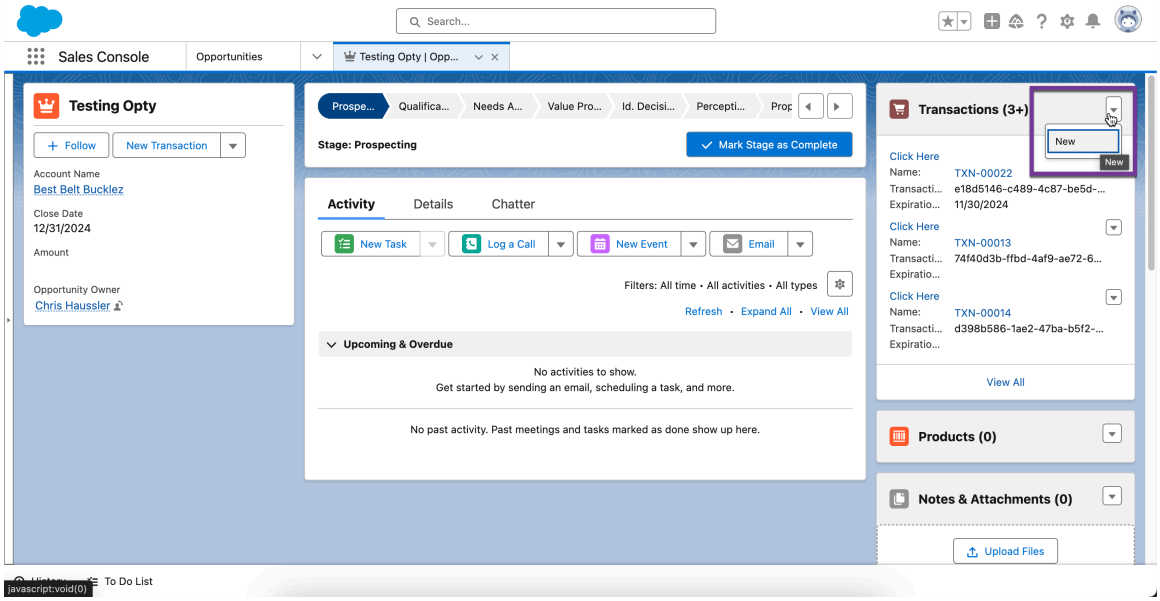
## End-user flow: Launching a CPQ transaction from Salesforce

- Create a transaction record in Salesforce

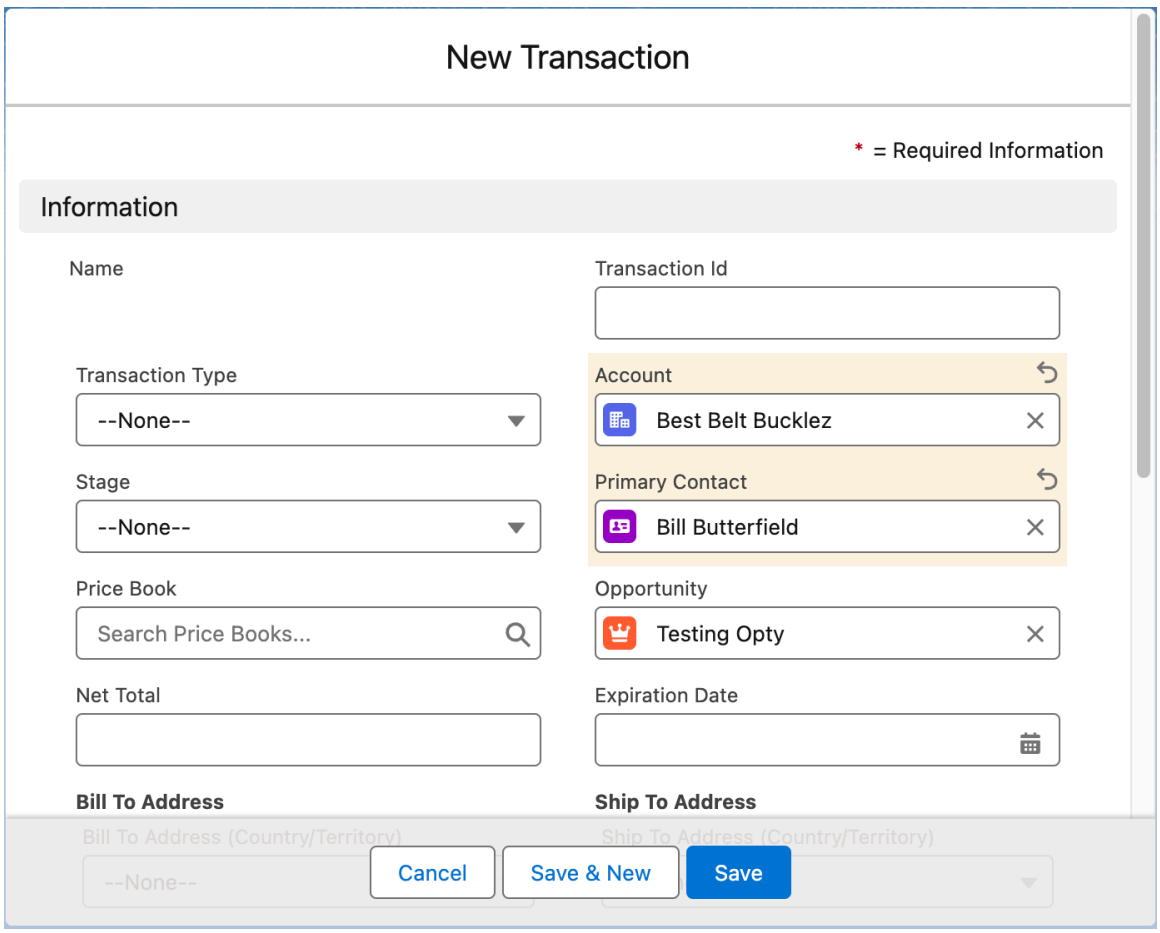
  There are several ways for the end user to initiate a CPQ transaction in Salesforce. The most common flow starts on the Opportunity record.

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1. From an Opportunity record, click the arrow in the transaction's related list, and then click **New**.

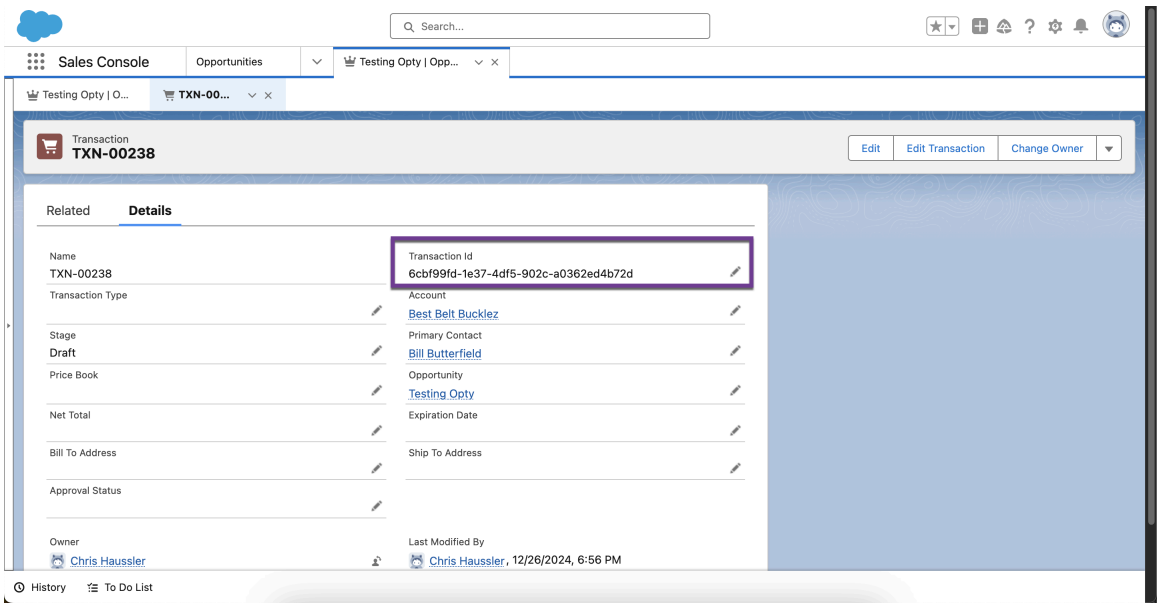



2. A new transaction opens with the **Opportunity** field populated. Fill in **Account**, **Primary Contact**, and any optional fields. Click **Save**.




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3. A record-triggered flow in the managed package creates a new transaction in CPQ. The UUID of the new CPQ transaction record updates in Salesforce (*LGK__TransactionUUID__c*). If the transaction ID does not appear immediately, refreshing the browser usually corrects the anomaly.




If the **Transaction Id** field remains unpopulated after a browser refresh, see the Troubleshooting section below.

- Edit a transaction

  From a Salesforce transaction (or a transaction related list), Transaction Manager can be launched using either the **Edit Transaction** button on the transaction detail page or the link available via the **Edit Transaction** field. This loads a CPQ transaction based on the **Transaction Id** field in the Salesforce record.

  Transaction Manager loads in an iFrame, replacing the current subtab in Salesforce.

  **Note:** Salesforce's classic UI is not supported.

- Copy Transaction

  By clicking the **Clone** button on the Salesforce transaction record, users can call a CPQ Copy event to recreate the transaction and lines in Transaction Manager. This action is based on the transaction ID on the header record in Salesforce and results in a cloned transaction record.

  **Note:** Cloning a transaction from Salesforce does not automatically make copies of the affiliated line records to the new transactions. To clone the lines to the new transaction, launch the new (cloned) transaction record in Transaction Manager, and initiate a Salesforce sync.

## Troubleshooting: CPQ fails to launch with a "Transaction with id 'null' could not be found" error




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This error occurs when the creation of a new CPQ transaction record is initiated via API call from Salesforce and fails. This failure usually occurs due to one of two reasons:

- The Transaction runtime token is incorrectly set up or has expired. Review the steps in the "CPQ: Set Up the runtime client token" section above.
- The user creating the CPQ transaction record from the Salesforce UI does not have permission to do so.

To troubleshoot permissions errors, follow these steps.

1. In Transaction Administration, click **Personas**.
2. In the list of personas, observe which persona is labeled DEFAULT. The screenshot below shows that "Sales Rep" is the default persona. By default, all new users are assigned this persona.
3. Open each persona record. Find your user name. The user you are debugging should only be visible in one persona. Once you find the appropriate persona, note the view that manages this persona's access. In the example, the user is among the listed user names in the Sales Rep persona. This persona's access is managed by the "sales" view.
4. Open the view that manages the persona's access. In our example, the view is named "sales". To open the view, in CPQ Transaction Admin Home, go to Views, and then click the managing view.
5. On the view detail page, click **Access**, click **Events**, and search for `createTransaction`. In the initial stage, the create transaction event (varname: createTransaction) must be set to **Active**.

To sum up: for any given user, the administrator must manage the items in the following table.

| Issue | Correctio |
|---|---|
| User persona assignment | Navigate to **Personas** in CPQ Transaction Admin, and select a persona record.<br>• To add a user to a persona, click **+ Associate Users**.<br>• To remove a user from a persona, select a user name, and then click **Remove Selected**. |
| Persona view assignment | In CPQ Transaction Admin, go to **Views**, select a view record, and then click **Associated Personas**. |
| View: access to each event, per stage | To administer access in a less precise way, go to Events in CPQ Transaction Admin, click the **Create Transaction** event, click **Edit Event Access**, and set the event access to Active. By default, the event is active across all stages and views. |

## ServiceNow Quote Experience Integrations

Use integrations to exchange data with third-party sources, including Salesforce.

To gather information from external sources like Salesforce, admins create integrations. These integrations define how to connect to a data source, extract information, and map it into ServiceNow Quote Experience. Integrations can also send data from ServiceNow Quote Experience to be mapped in a third-party environment

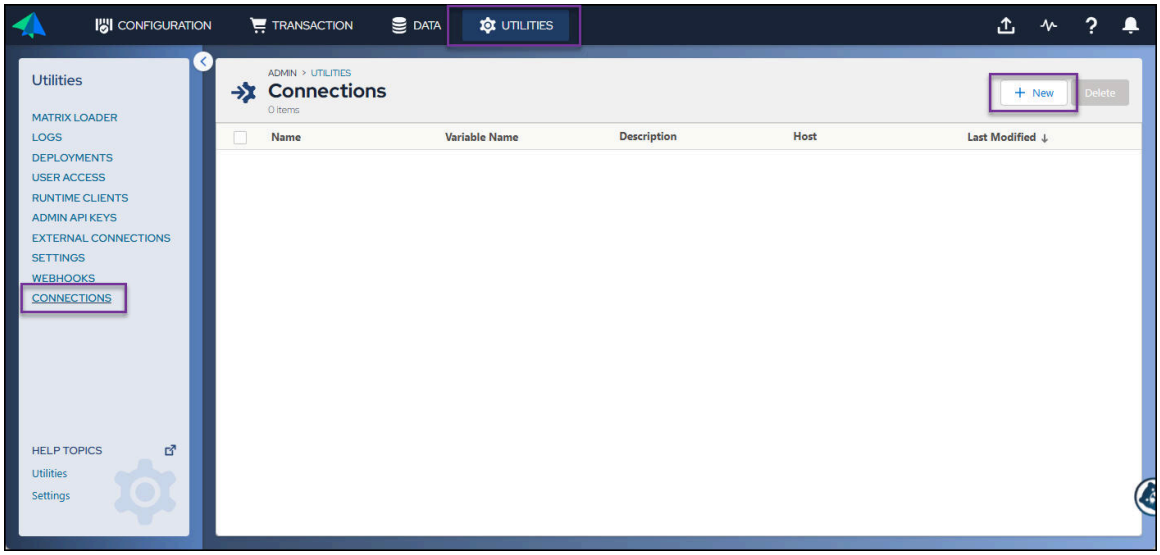
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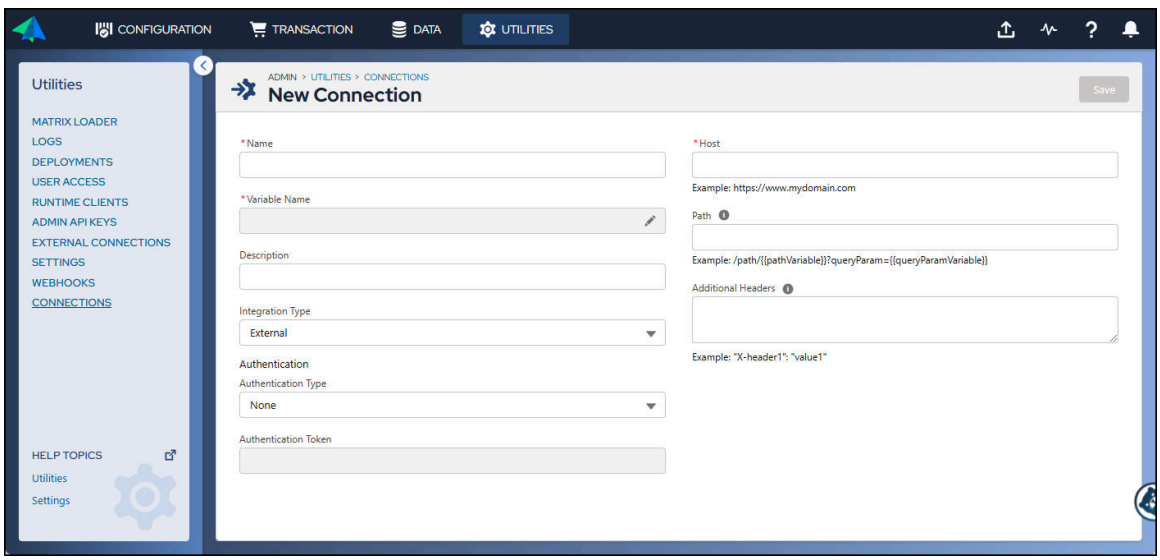
Before an integration can be defined for ServiceNow Quote Experience, the admin must first create a connection to the third-party environment, much like an external connection in the configuration environment. Connections are defined in the Utilities section of the Admin UI.

## Creating a connection

Before an integration is defined, the admin must define a connection to the third-party source for the data the integration uses.

To create a new connection, in the Utilities area of the Admin UI, click **Connections**. Then click **+ New** to display the New Connection page.




On the New Connection page, name the new connection and assign a variable name. Next, choose the integration type: Salesforce or External.

If you are creating a connection to Salesforce, none of the other fields are required. CPQ knows how to authenticate and knows the required endpoints to use when communicating with Salesforce.

If you are creating an external integration, choose the authentication type. Supported authentication methods are None, Bearer Token, and OAuth. If you choose Bearer Token, use the Authentication Token field to provide the bearer token for the site with which you are

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communicating. If you choose OAuth, use the Client ID, Client Secret, and Token URL fields to provide the required OAuth information.

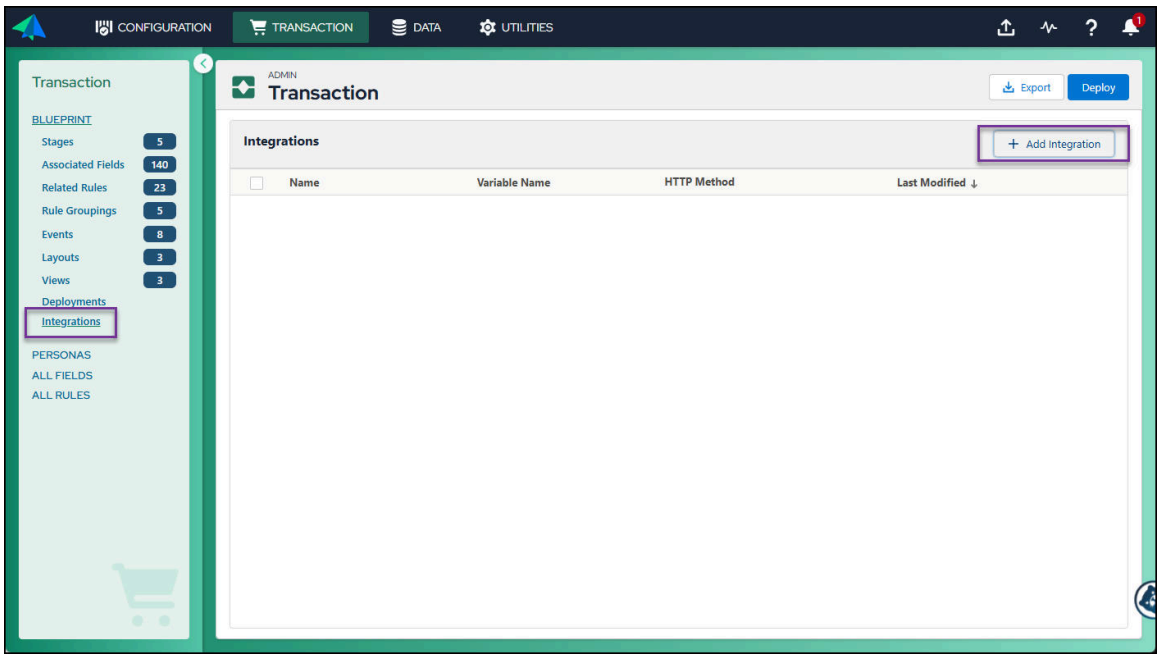
In the Host field, enter the URL to the third-party site with which you will be communicating.

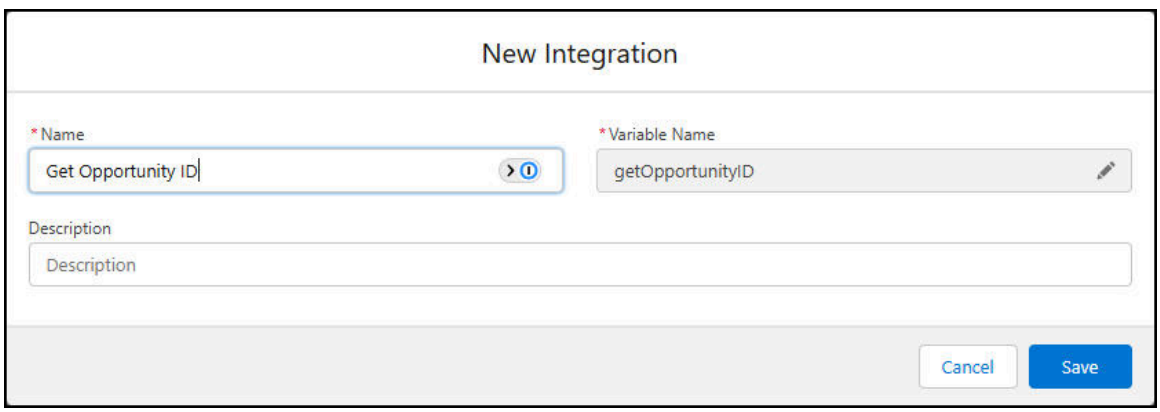
In the Path field, enter the path to the endpoint that you are trying to access on the third-party site.

Use the Additional Headers field to add any additional header information that is required by the third-party site in order to execute the desired endpoint.

## Creating an integration

To create a new integration, click **+ Add Integration**. The New Integration window appears. Give the new Integration a name and a variable name, and click **Save**.



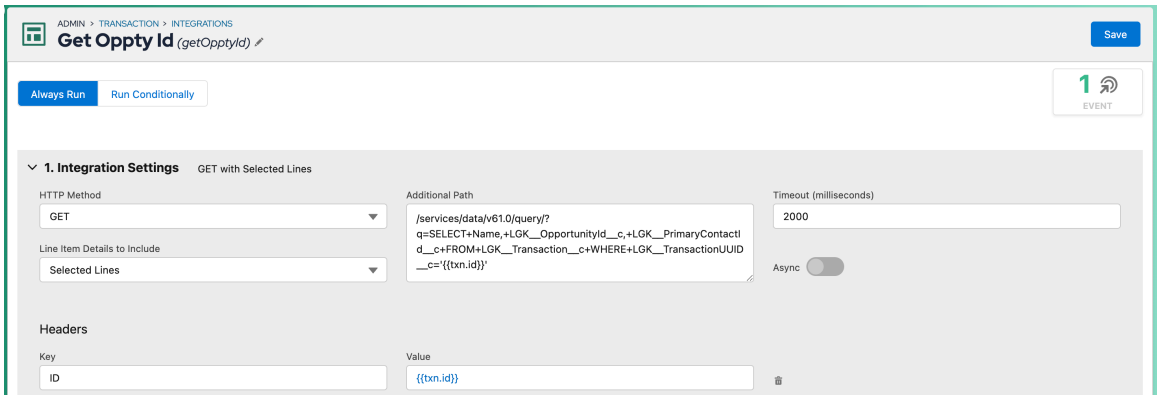




The Integration Editor page opens. Continue defining the new integration by configuring the following settings:

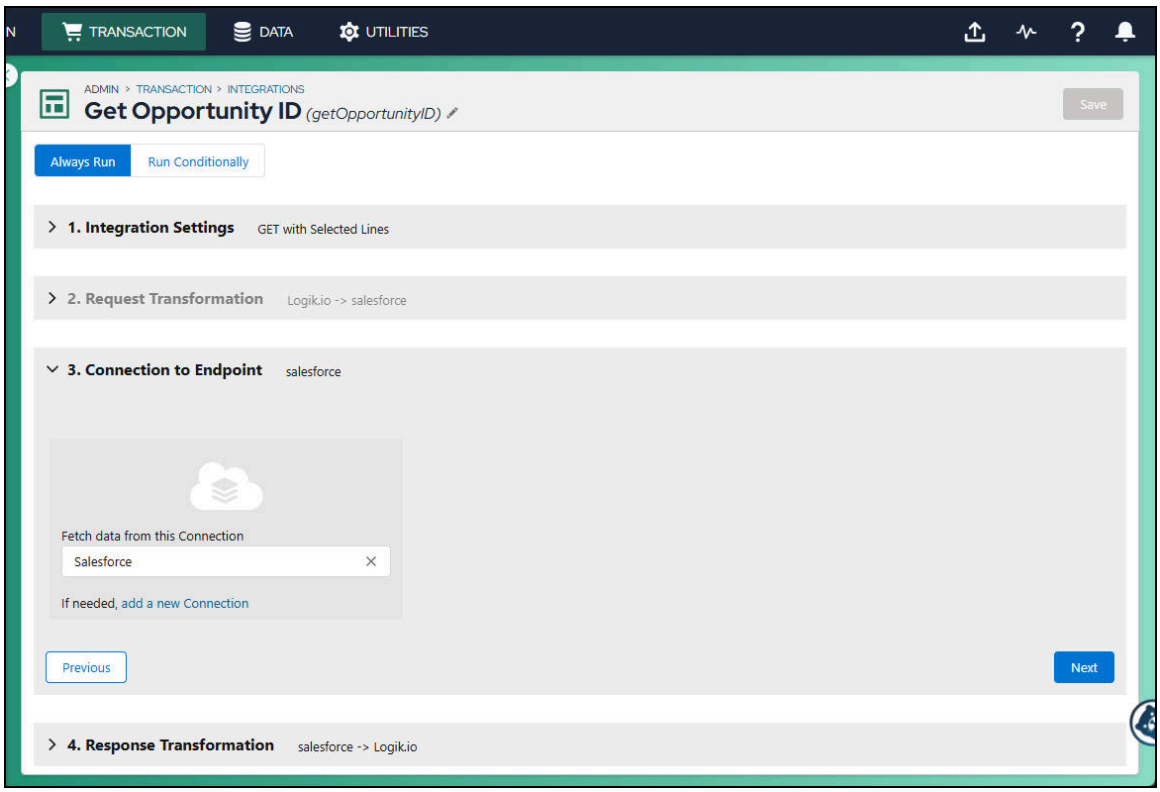
- **HTTP Method**: You can perform either a GET, POST, PATCH, PUT, or DELETE operation, depending on the endpoint that you are using on the third-party site.
- **Line Item Details to Include**: Define which type of line items you will work with in the integration. Options are Selected Lines, Modified Lines, and Deleted Lines.

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- **Additional Path**: Enter the query command to execute on the third-party site. If you are connecting to Salesforce, this will probably be a SOQL query. On other platforms, it may be a standard SQL query.
- **Timeout**: Defines the amount of time (in milliseconds) that the request will wait for a response before declaring an error.
- **Async**: This toggle allows you to run the query asynchronously in the background so that the user can continue working.
- **Headers**: You can use static text in header-level ServiceNow Quote Experience fields by using simple handlebar syntax, you can set key-value pairs for headers, or you can combine both these methods. `{{txn.fieldname}}`




Next, you need to define the connection to the endpoint. Here you choose from a list of the connections that you previously created in the Utilities area to define which third-party site to connect to for this integration.




Finally, you need to define the transformation template, which lets you map third-party data to CPQ fields or map CPQ data to third-party data source fields.

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JSON is used to define the mapping, as in the following example.

```
{
  "fields": [
    {
      "variableName": "txn.custom.tXNNumber",
      "value": "{{#each records}}{{Name}}{{/each}}"
    },
    {
      "variableName": "txn.opportunity.id",
      "value": "{{#eachrecords}}{{LGK__OpportunityId__c}}
 {{/each}}"
    },
    {
      "variableName": "txn.custom.primaryContact",
      "value": "{{#eachrecords}}{{Contact.FirstName}}{{/each}}"
    }
  ]
}
```

This example uses Mustache syntax for the Salesforce data that was extracted from the Salesforce site. Each field mapping includes the variable name of the CPQ field that receives the extracted data, followed by the value that identifies the Salesforce field where the data was extracted. The `#eachredords` and `/each` nomenclature denote that each record in the query response is searched for each of the three field values in the template.

You can use the Sample Return Data area and the Transformation Result area to troubleshoot an Integration that is not working. If you perform the query in a tool like Postman, where you can see and copy the query response, you can paste the query response in the Sample Response Data area and then click **Run Transformation** below the Transformation Template area. The query response data runs through the defined transformation template, and the results of the Transformation is displayed in the Transformation Result area.

## ServiceNow Quote Experience Integration - POST

Learn how to write data to a third-party application suh as Salesforce by using the POST integration.

## Prerequisites

This article assumes that you have a CPQ environment that is integrated to a corresponding Salesforce environment. Before you continue, see Installing the Salesforce Transaction Manager Integration Package extension to complete the necessary integrations.

When the end user initiates a function that writes CPQ data back to the corresponding Salesforce transaction record, CPQ must have the Salesforce transaction's record identifier on hand. To understand how to retrieve the Salesforce transaction ID and save it into CPQ for future use, see ServiceNow Quote Experience Integration - GET.

## Salesforce setup

In this example, we write LGK data to the Salesforce fields listed below. Review the Salesforce Transaction and TransactionLine objects to ensure these fields are present.

Header fields (Salesforce object: *LGK__Transaction__c*)

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- *LGK__Stage__c* holds the stage of the CPQ transaction.
- *LGK__PricingExtendedNet__c* is the transaction (header-level) net total.
- *LGK__Id__c* is mapped to the *id* of the parent transaction.

Line Fields (Salesforce object: *LGK__TransactionLine__c*)

- *LGK__Quantity__c*: the line-level quantity.
- *LGK__PricingList__c*: the line-level list price.
- *LGK__PricingNet__c*: the line net price, or discounted piece price.
- *LGK__PricingExtendedNet__c*: the line net total, or extended net price (includes quantity).
- *LGK__ParentTransactionLineId__c* checks whether *txn.line.custom.parentLineReferenceId* exists. If it does, it assigns the corresponding line's *id*; otherwise, it sets the value to *null*.
- *LGK__Product2Id__c* is mapped to the *partnerId* of the product associated with the current transaction line.

## POST integration using Composite Graph

The LGK POST integration uses the Salesforce Composite Graph API to update multiple Salesforce objects simultaneously in a single API call, allowing both header-level and line-level fields to be updated in the same request.

The Salesforce Composite Graph API enables bundling multiple operations into a single request, making it highly efficient for integrations. It allows writing to multiple Salesforce objects in a single POST call, reducing API usage, ensuring data consistency, and enabling atomic transactions—where either all operations succeed or none are applied. This simplifies integration processes and improves error handling. For more details on the Composite Graph construct, see Composite Graph | REST API Developer Guide | Salesforce Developers.

Because the Composite Graph API is a core Salesforce capability, no setup is necessary. However, we introduce the concept here, before we populate a Composite Graph in the LGK POST call, described below. In the example below for POST, the integration uses the previously mentioned header-level and line-level fields in the Salesforce Setup section above, with the option for users to add or remove fields as per their requirements.

## ServiceNow Quote Experience setup

The transaction ID mappings mentioned in the Salesforce Setup section help CPQ send the right line IDs to Salesforce and manage updates, deletions, and additions effectively. By mapping LGK__TransactionId__c to the parent transaction ID, Salesforce can link all line-level changes to the correct transaction, ensuring proper association. The LGK__ParentTransactionLineId__c checks for a parent line reference; if present, it assigns the corresponding line ID, ensuring that only valid lines are updated or deleted. If no reference exists, it sets the value to null. The LGK__Product2Id__c maps to the product's partner ID, ensuring the correct product is linked to the line for accurate pricing and discount application. These dynamic mappings ensure that Salesforce can accurately update quantities, delete lines, and add new ones while preserving user's line-level discounts by maintaining proper associations with transaction and product data.

This integration transform requires the use of two custom line fields, *lineReferenceId* and *parentLineReferenceId*. These fields must be set up to store a variation of the *txn.line.id* and (potentially) *txn.line.parent.id* system fields.

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## Rules

The Salesforce Composite Graph API does not support hyphens in certain identifiers, which can cause issues when sending data that includes hyphenated IDs, such as the LGK line IDs. To make the integration work, the system removes any hyphens present in the LGK line IDs before sending them to Salesforce. This ensures that the IDs comply with Salesforce's format requirements and that the integration functions correctly without errors related to invalid characters. By removing the hyphens, the system ensures that all identifiers are accepted by Salesforce, allowing the integration to process updates and other operations smoothly.

To remove hyphens by using a rule, create a determination rule action to make line-level reference Id fields Salesforce-compatible. You can add both the lineReferenceId determination action and parentLineReferenceId determination action in a single rule.

Below are two determination scripts (transaction line level) for how the fields should be defined.

```
// lineReferenceId Determination Action

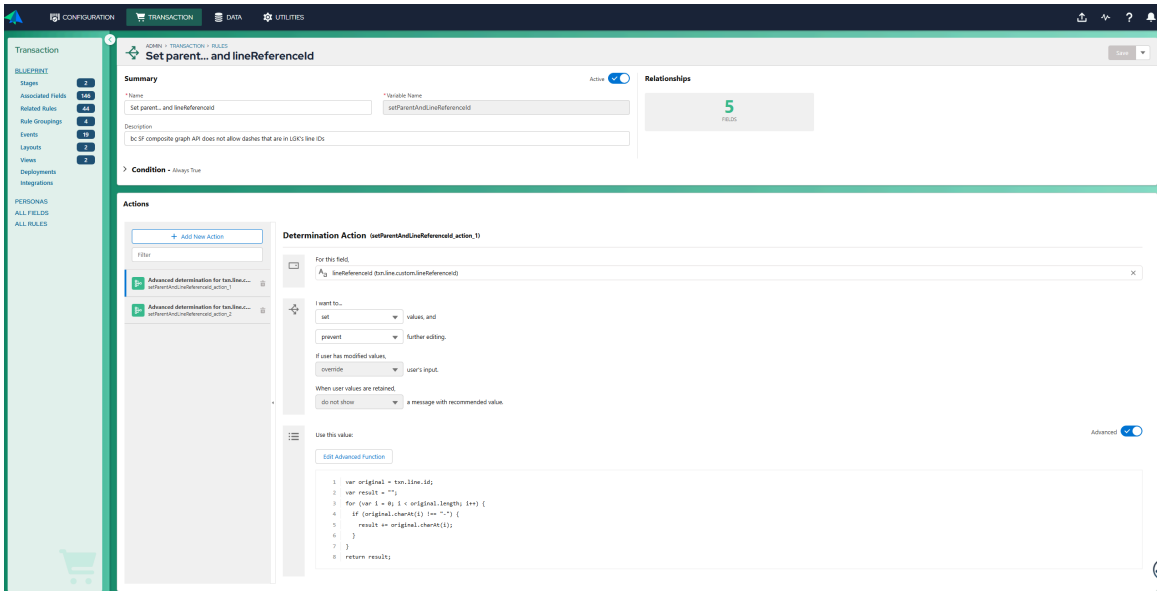
var original = txn.line.id;
var result = "";
for (var i = 0; i < original.length; i++) {
  if (original.charAt(i) !== "-") {
     result += original.charAt(i);
   }
}
return result;
```

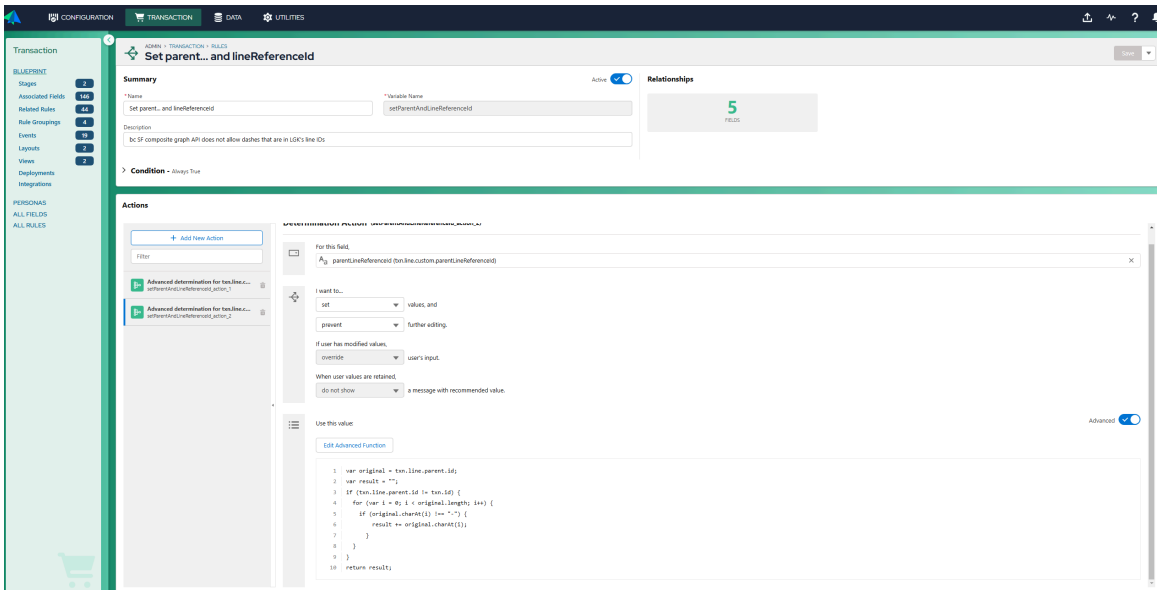
```
// parentLineReferenceId Determination Action

var original = txn.line.parent.id;
var result = "";
if (txn.line.parent.id != txn.id) {
  for (var i = 0; i < original.length; i++) {
    if (original.charAt(i) !== "-") {
        result += original.charAt(i);
      }
  }
}
return result;
```

The rule should be configured as follows, with two determination actions to handle *`txn.line.custom.lineReferenceId`* and *`txn.line.custom.parentLineReferenceId`*:

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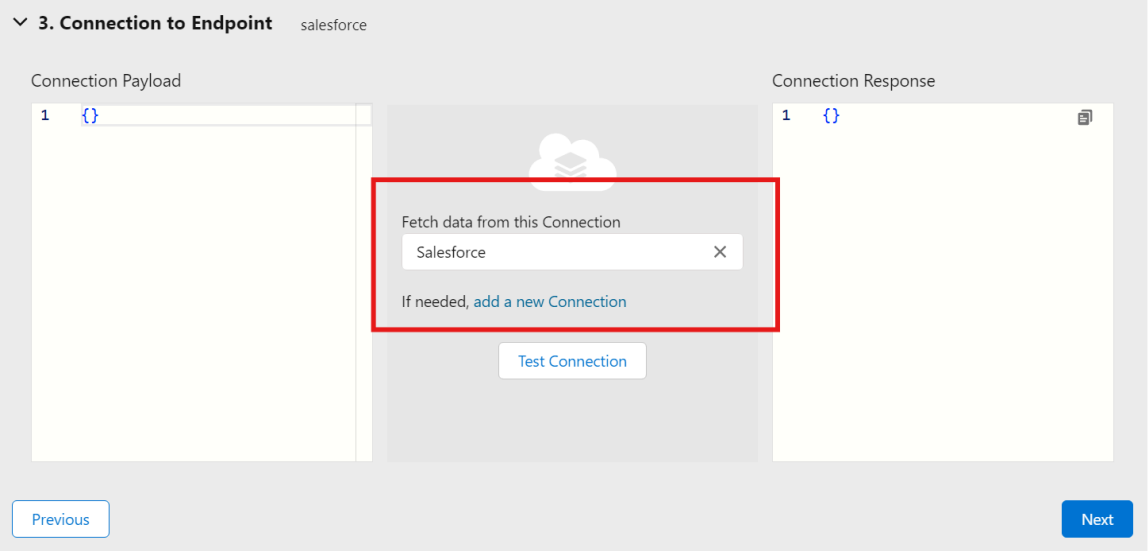




## Add Connection

The screenshot below shows the external connection as “Salesforce” in the POST integration.

If you want to create a new connection, see the "Creating a Connection" section in ServiceNow Quote Experience Integrations.

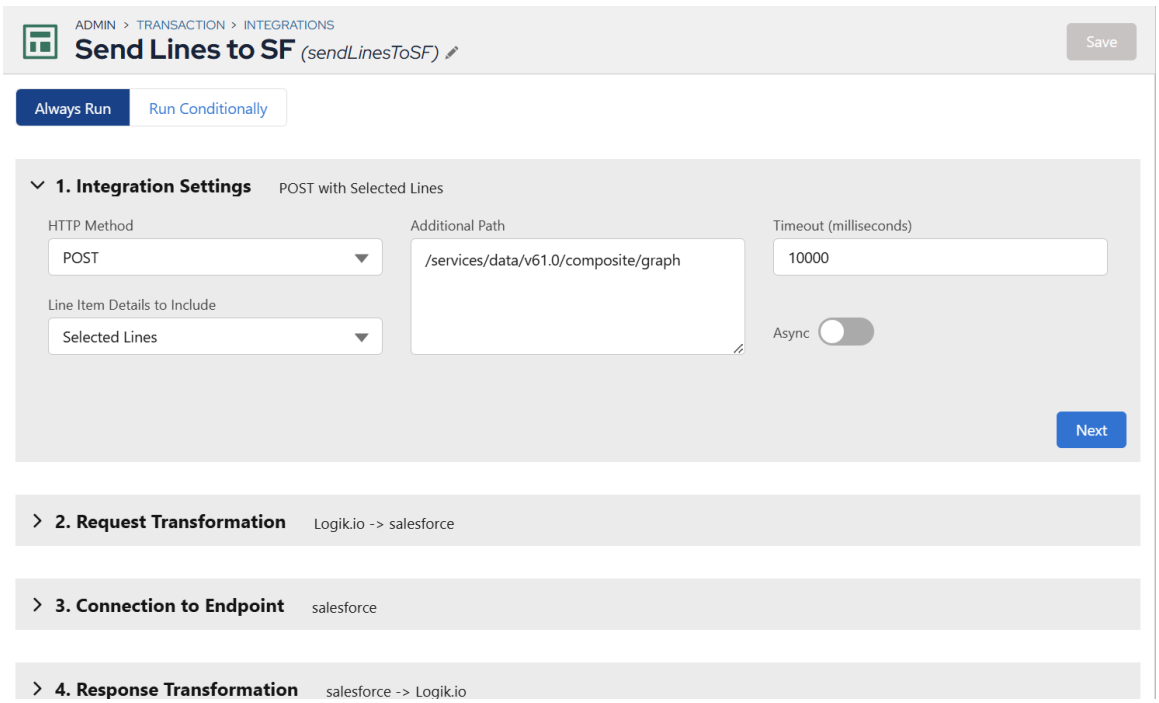
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To POST data back to Salesforce, you need the Salesforce transaction record ID. If you have not yet set up the GET integration to fetch the transaction ID, see ServiceNow Quote Experience Integration - GET.

## Add integration

1. Navigate to the Integrations section and create a new integration.
   - HTTP Method: POST
   - Additional Path: `/services/data/vXX.X/composite/graph`, where `vXX.X` is the latest composite graph version. You can check for the latest version here.
   - Line Item Details to Include: Selected Lines
   - Connection: Salesforce



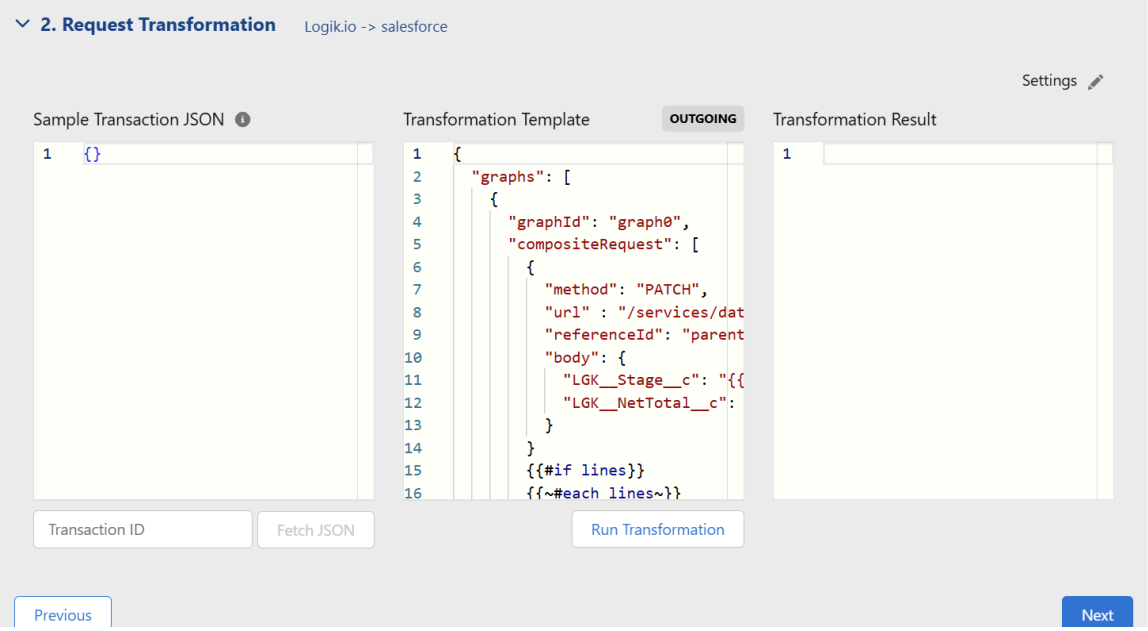

2. In the Request Transformation section, add this sample transaction JSON (header and line-level fields may vary according to your preference):

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```
{
  "graphs": [
    {
      "graphId": "graph0",
      "compositeRequest": [
        {
          "method": "PATCH",
          "url" :
 "/services/data/v61.0/sobjects/LGK__Transaction__c/LGK__Transac
tionUUID__c/{{txn.id}}",
          "referenceId": "parentTransaction",
          "body": {
            "LGK__Stage__c": "{{txn.stage}}",
            "LGK__NetTotal__c": "{{txn.pricing.total}}"
          }
        }
        {{#if lines}}
    {{~#each lines~}}
    {{#if txn.line.product.partnerId}}
    ,
        {
          "method": "PATCH",
          "url":
 "/services/data/v61.0/sobjects/LGK__TransactionLine__c/LGK__Tra
nsactionLineId__c/{{txn.line.id}}",
          "referenceId":
 "line_{{txn.line.custom.lineReferenceId}}",
          "body": {
            "LGK__TransactionId__c": "@{parentTransaction.id}",
            "LGK__ParentTransactionLineId__c": {{#if
 txn.line.custom.parentLineReferenceId}}"@{line_{{txn.line.custo
m.parentLineReferenceId}}.id}"{{else}}null{{/if}},
            "LGK__Product2Id__c":
 "{{txn.line.product.partnerId}}",
            "LGK__Quantity__c": "{{txn.line.quantity}}",
            "LGK__ListPrice__c": "{{txn.line.pricing.list}}",
            "LGK__NetPrice__c": "{{txn.line.pricing.net}}",
            "LGK__NetTotal__c":
 "{{txn.line.pricing.extendedNet}}"
          }
        }
        {{/if}}
  {{/each}}
  {{/if}}
      ]
    }
  ]
}
```

This transformation template is added to the Transformation Template area of the Request Transformation section as follows:

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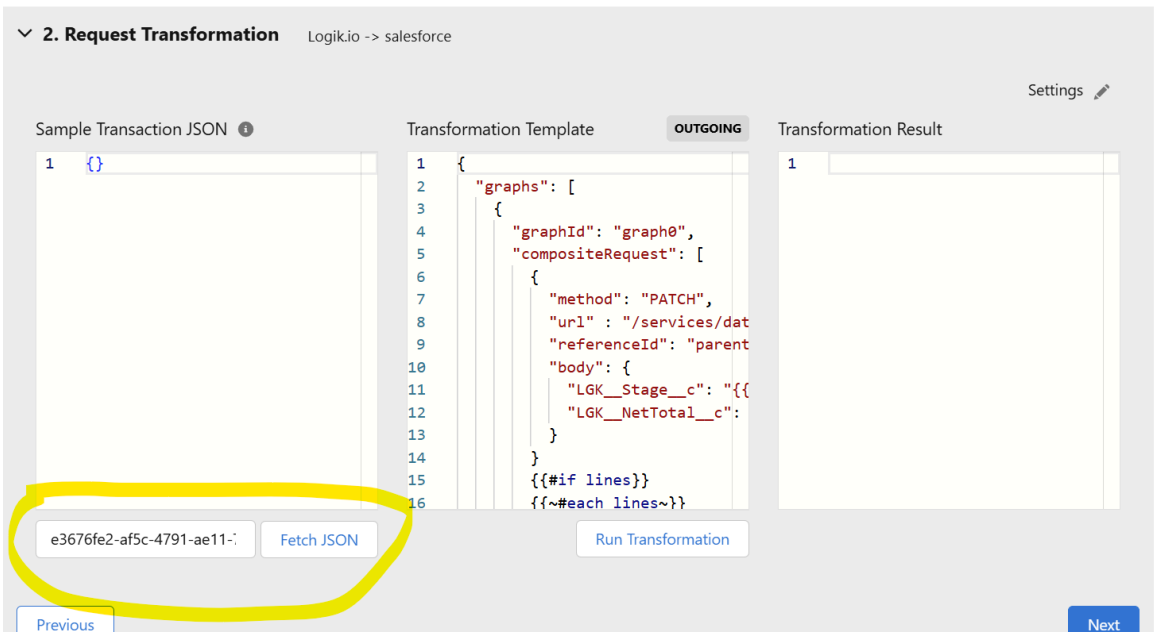



For more information about Handlebar syntax, see ServiceNow Quote Experience Integrations - Handlebars syntax.

## Debugging the POST call

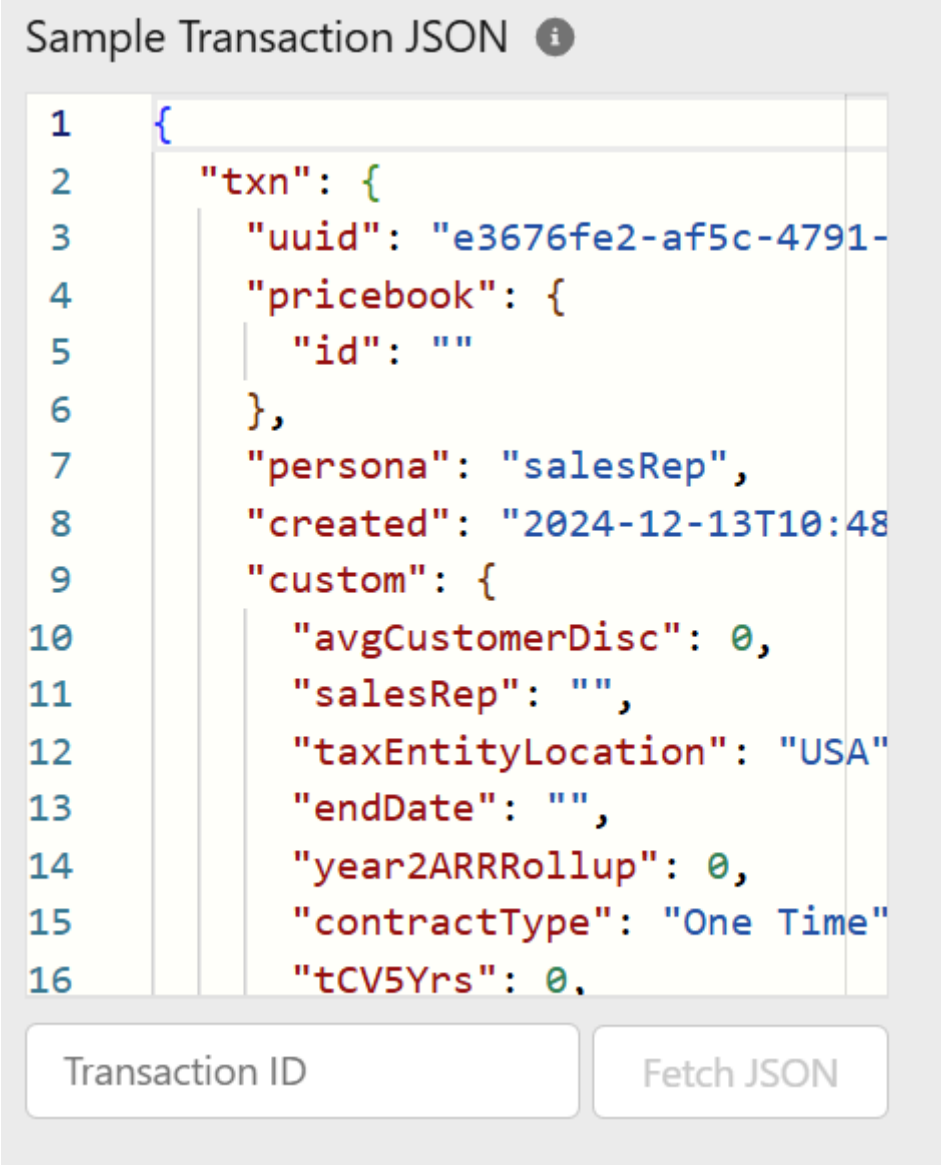
To use the Integration Admin interface to debug a POST call that is not working as expected, follow these steps:

1. Copy the transaction ID for which the integration is not working, paste it in the small Transaction ID box, and then click **Fetch JSON**.




The application populates the Sample Transaction JSON box.

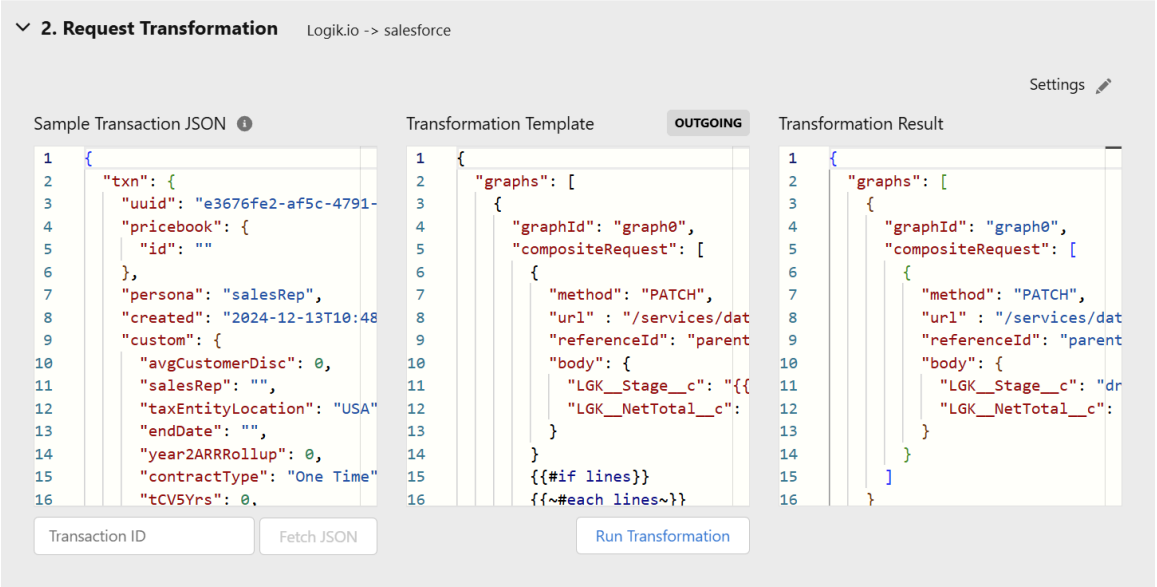
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2. Click **Run Transformation**. This processes the transaction information contained in the Sample Transaction JSON input through the transformation logic and generates a result that you can test using Postman.

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For more information about setting up Postman to interface with your Salesforce org, see Connect Postman to Salesforce.




**Related topics**

ServiceNow Quote Experience Integration - GET

## ServiceNow Quote Experience Integration - GET

Learn how to access data from a third-party application such as Salesforce by using the GET integration.

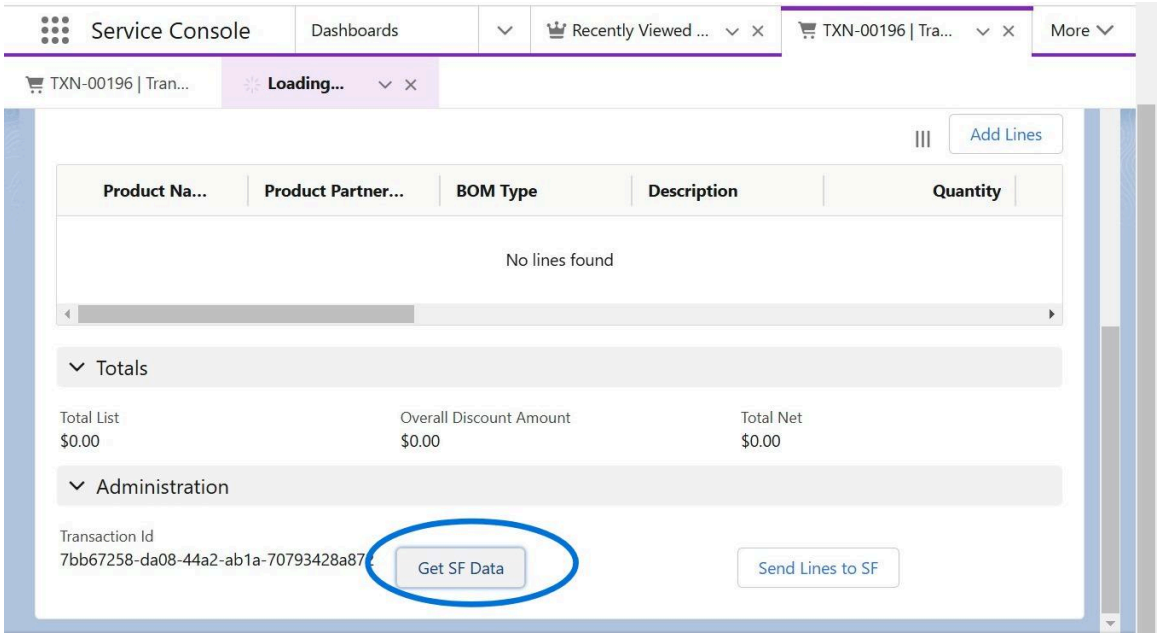
This article describes how to retrieve the Salesforce opportunity ID, together with transaction details including the account name, opportunity name, shipping address, and billing address, and write them into CPQ transaction fields. This pattern is relevant to any integration that requires CPQ to request data from a third party.

### Goal: End-user (buyside) flow

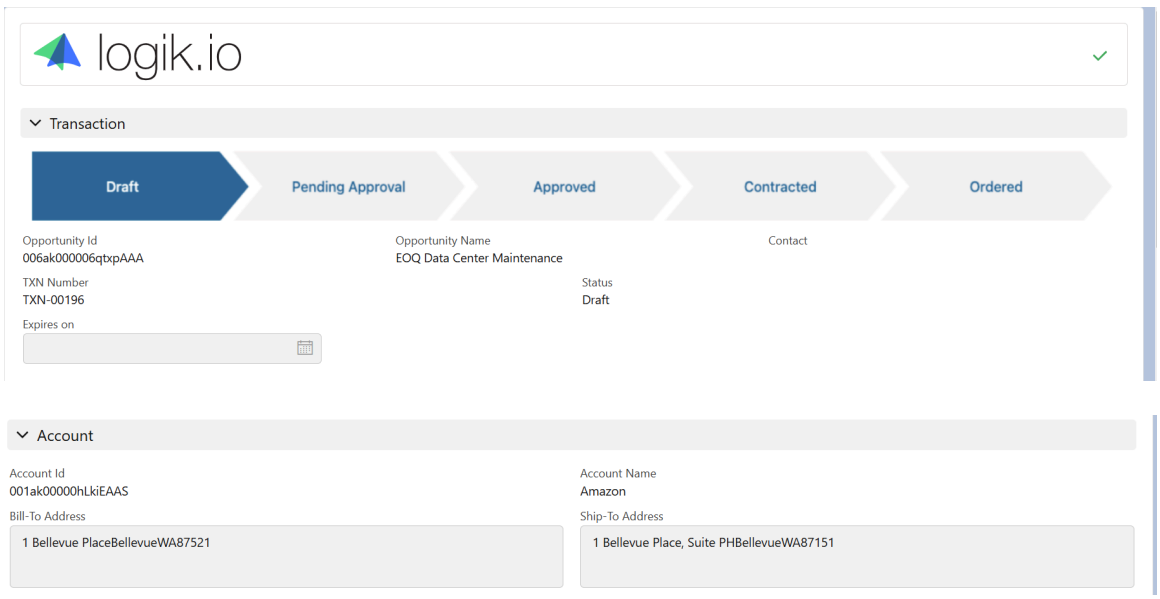
We begin by opening a ServiceNow Quote Experience transaction in Salesforce. Then, by clicking **Get SF Data** in the buyside UI, we trigger the Get SF Data event. This event initiates several integrations that connect to Salesforce, extracting the relevant transaction data (opportunity ID, opportunity name, shipping address, billing address, account ID, and account name) and populating the corresponding fields in the buyside UI.

In the buyside transaction UI, click **Get SF Data**.

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Notice that the details are all populated.







The rest of this article lists the steps in CPQ to create the integrations that get the data from Salesforce.

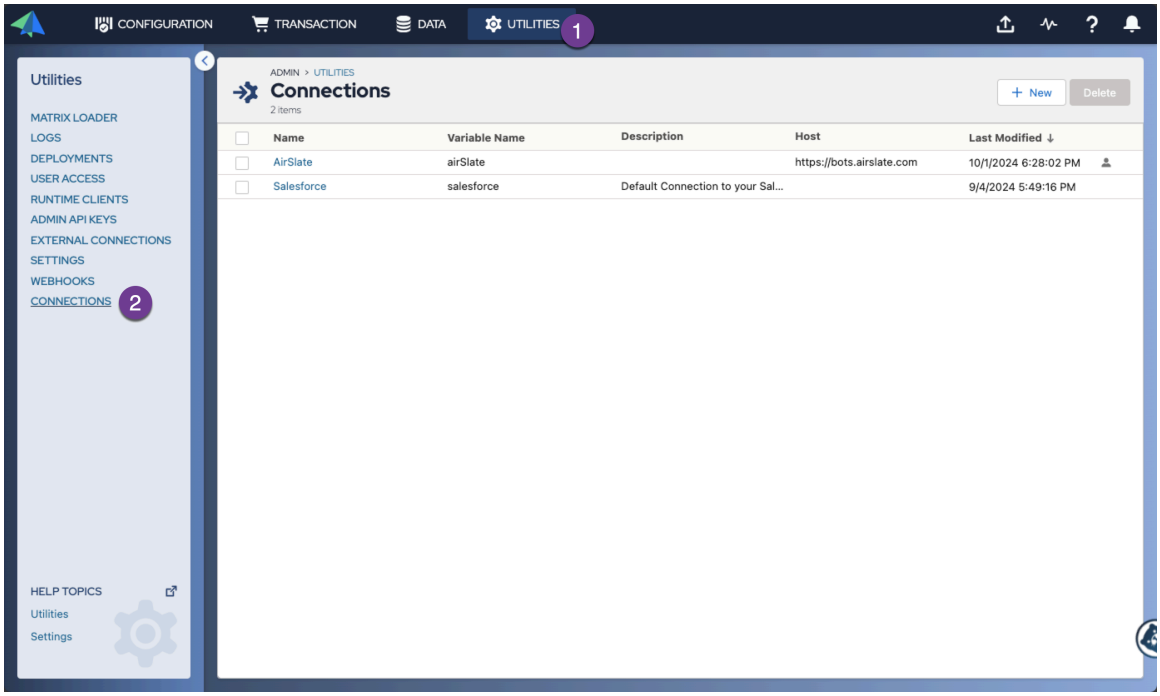
## Administration setup: Prerequisites

This guide assumes a CPQ environment with ServiceNow Quote Experience features enabled, as well as installation of the CPQ ServiceNow Quote Experience Integration Extension on a corresponding Salesforce environment. To view the installation instructions, see Installing the Salesforce Transaction Manager Integration Package extension.

## CPQ: Add a connection

A connection record contains the data required to initiate a ServiceNow Quote Experience Integration. This includes authentication details, host URL, path, and headers. To view a connection record, in CPQ Admin, go to **Utilities**, and then click **Connections**.

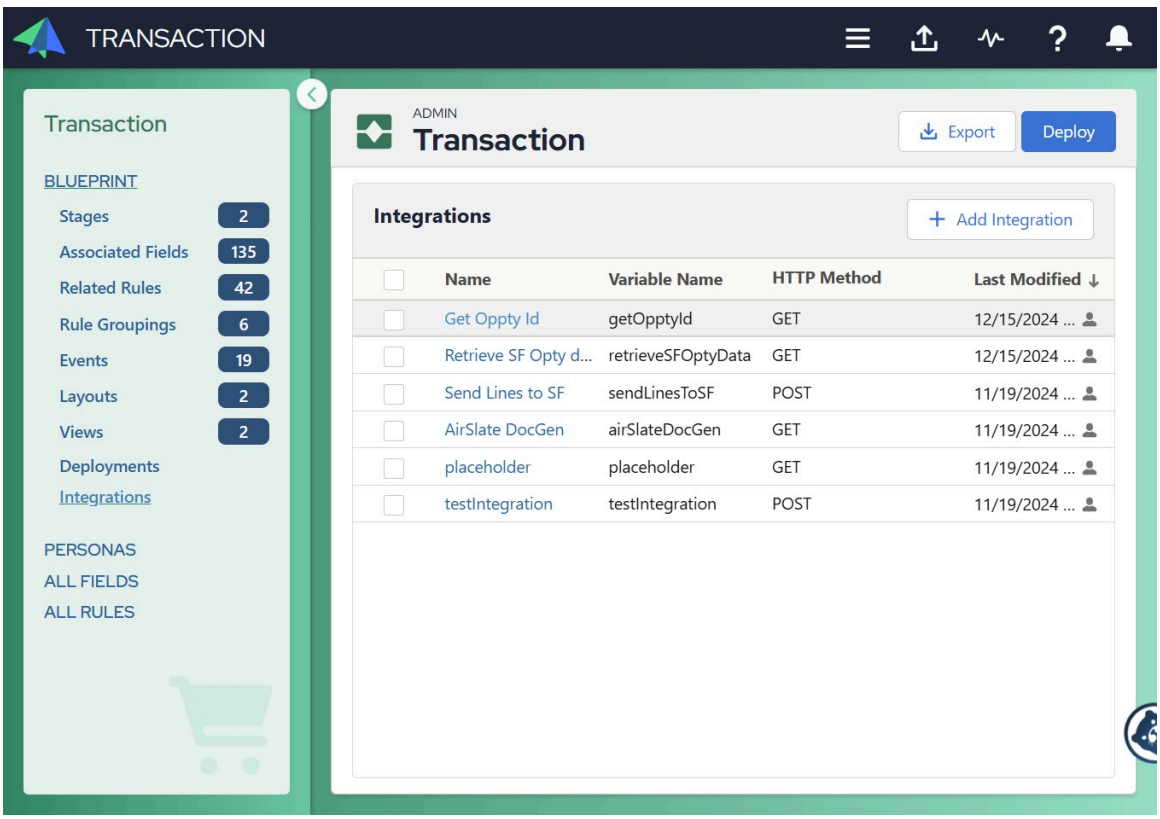
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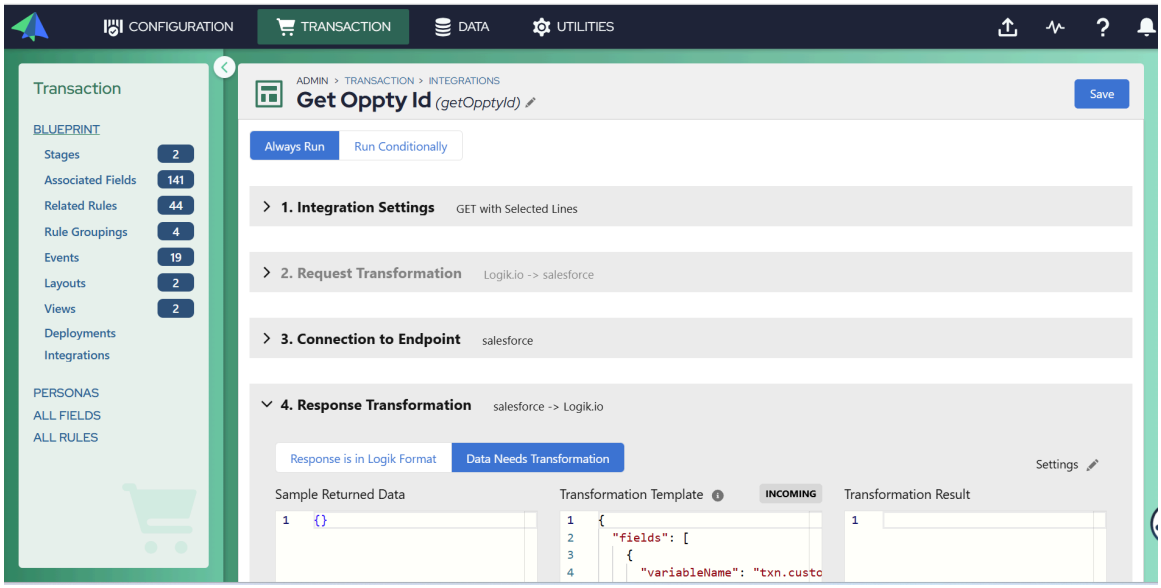

For information about adding a connection, see the "Creating a Connection" section in ServiceNow Quote Experience Integrations. For the purposes of this article, we use a connection to a Salesforce environment.

## CPQ: Add the integration

1. Open CPQ Admin and go to the Integrations section.
2. Click **Add Integration**. Create a new integration using any suitable name. In this example, we use the name "Get Oppty Id".




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The integration details page shown above includes the following sections:

- Integration settings
- Request Transformation
- Connection to Endpoint
- Response Transformation

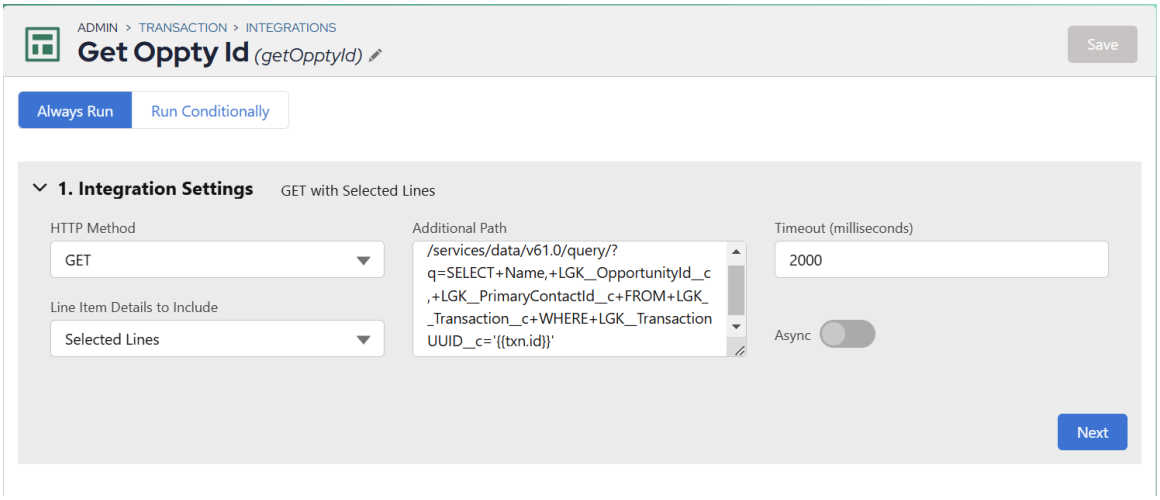
Details about these sections follow.

- Integration settings:
  - HTTP method: GET
  - Path: `/services/data/vXX.X/query/?q=SELECT+Name,+LGK__OpportunityId__c FROM+LGK__Transaction__c+WHERE +LGK__ID__c='{{txn.id}}'`

    The GET request retrieves the *Name* and *LGK__OpportunityId__c* fields from the *LGK__Transaction__c* object in Salesforce, filtering by the transaction ID “txn.id” in the *LGK__ID__c* field.

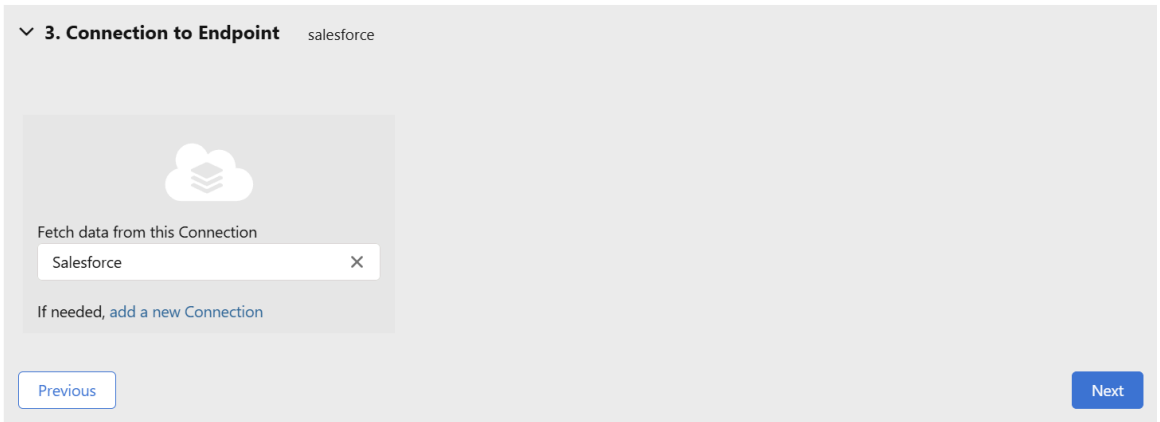
    In the path, <vXX.X> is the latest composite graph version. You can check for the latest version here.
  - Line Item Details to Include: Selected Lines
  - Timeout: 2000 ms

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Click **Next**.

- Request Transformation: Not required when we are building a GET Integration.
- Connection to Endpoint: For this example, we are querying **Salesforce**. If you are setting up an integration with another system, select the appropriate connection.




Click **Next**.

- Response Transformation: See this sample response transformation template.

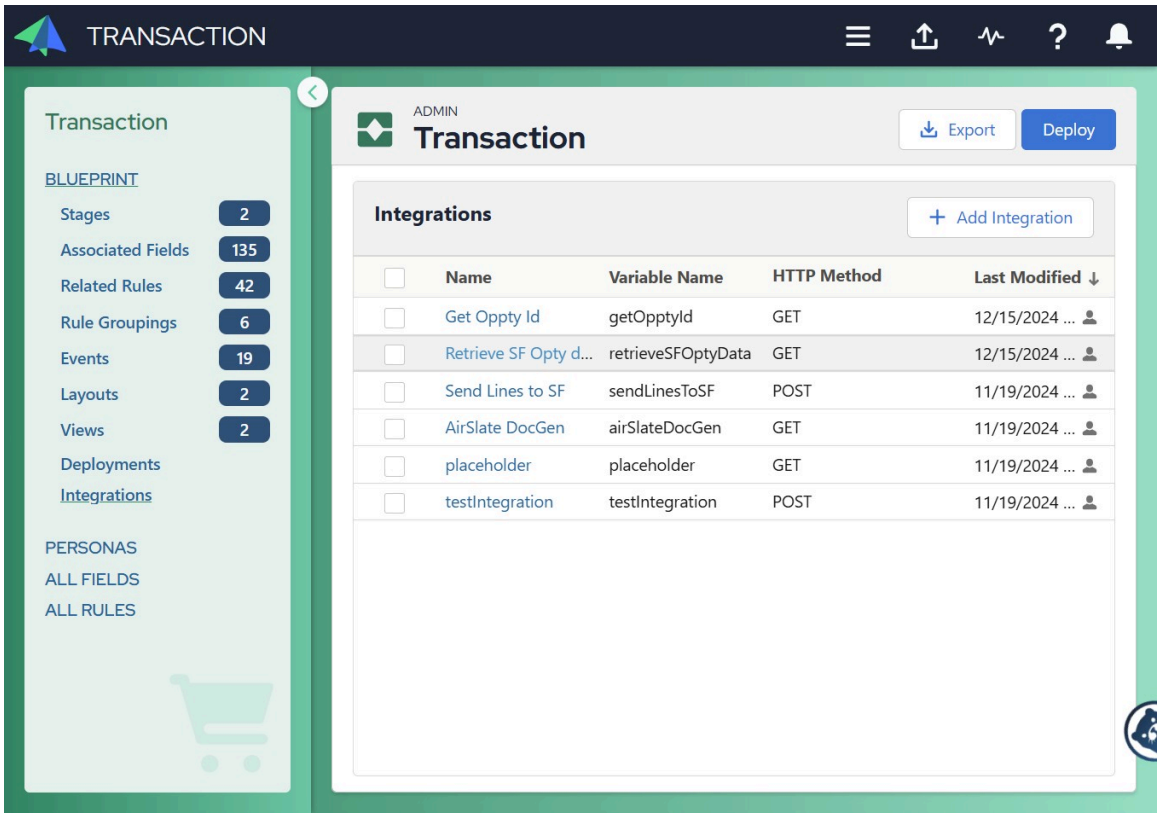
```
{
  "fields": [
    {
      "variableName": "txn.custom.tXNNumber",
      "value": "{{#each records}}{{Name}}{{/each}}"
    },
    {
      "variableName": "txn.opportunity.id",
      "value": "{{#each
 records}}{{LGK__OpportunityId__c}}{{/each}}"
    }
  ]
}
```

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## Integration: Retrieve opportunity details

Create another integration to get additional details through *txn.opportunity.id*.

Now that we have the opportunity ID, the next step in the integration involves using it as a reference to retrieve additional details from the opportunity and to populate the relevant LGK transaction fields.

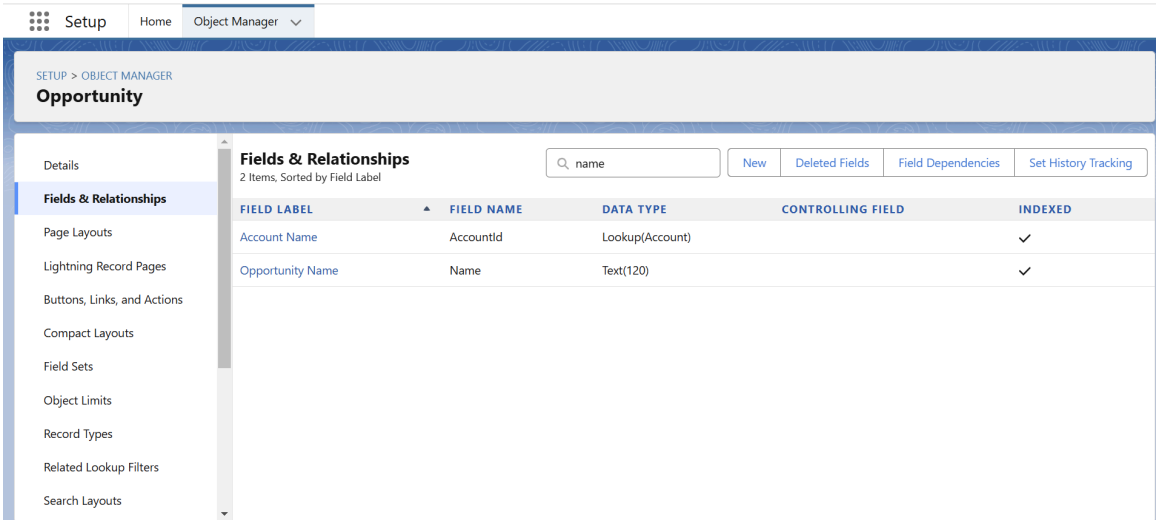



- Integration settings:
  - HTTP method: GET
  - Path: `GET /services/data/vXX.X/query?q=SELECT Id,Name,Owner.Username,AccountId,Account.Name,Account.BillingAddress,Accou FROM Opportunity WHERE Id='{{txn.opportunity.id}}'`

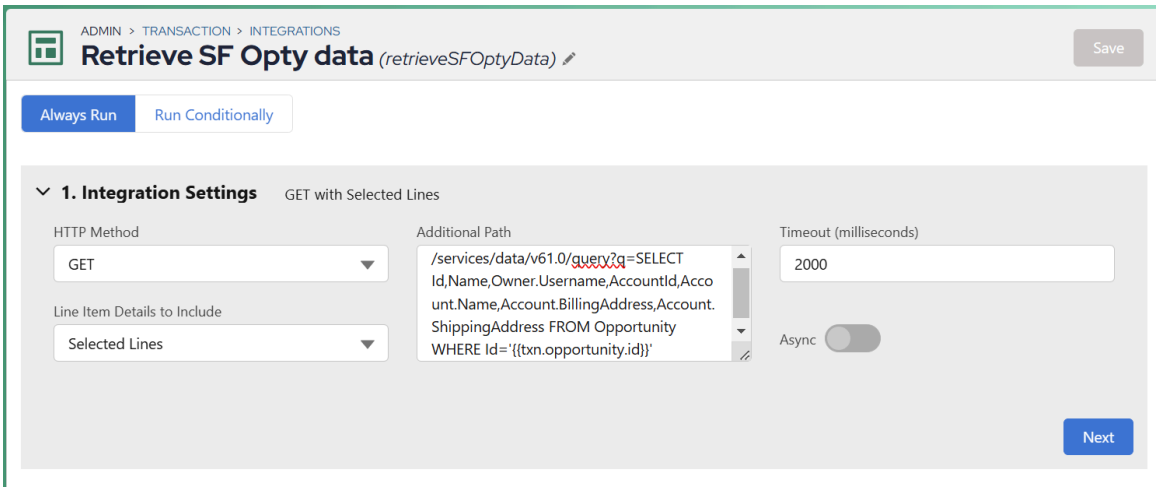
    This query retrieves fields from an Opportunity record in Salesforce, based on the unique ID of the opportunity. It also retrieves related account details, such as the account's name, billing address, and shipping address. The query returns data for a specific opportunity identified by *{{txn.opportunity.id}}*.

    To get the field details from Salesforce, click **Setup** > **Object Manager** > **Opportunity** > **Fields & Relationships**.

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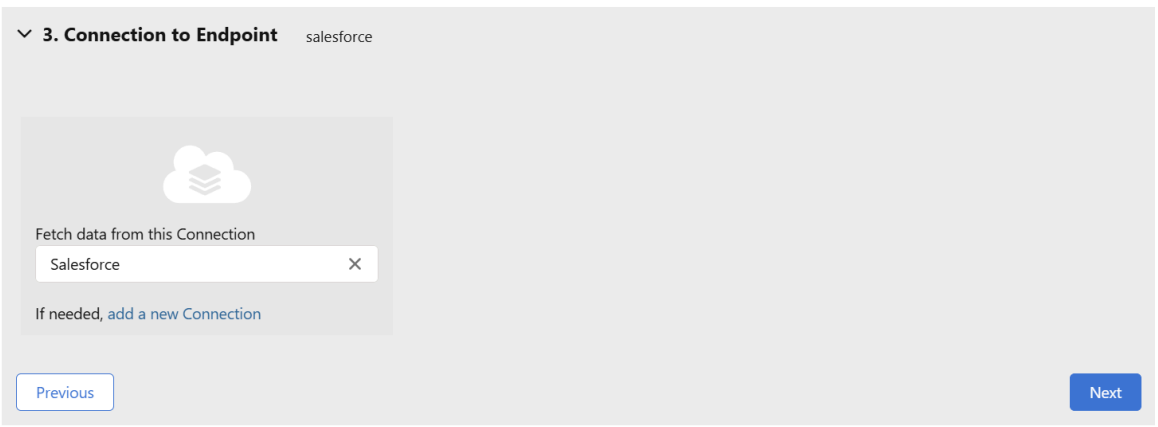

- Line Item Details to Include: Selected Lines
- Timeout: 2000 ms




Click **Next**.

- Request Transformation: not required when building a GET integration.
- Connection to Endpoint:

  Select **Connection to Endpoint**. For this example, we are querying Salesforce. If you are setting up an integration with another system, select the appropriate connection.




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Click **Next**.

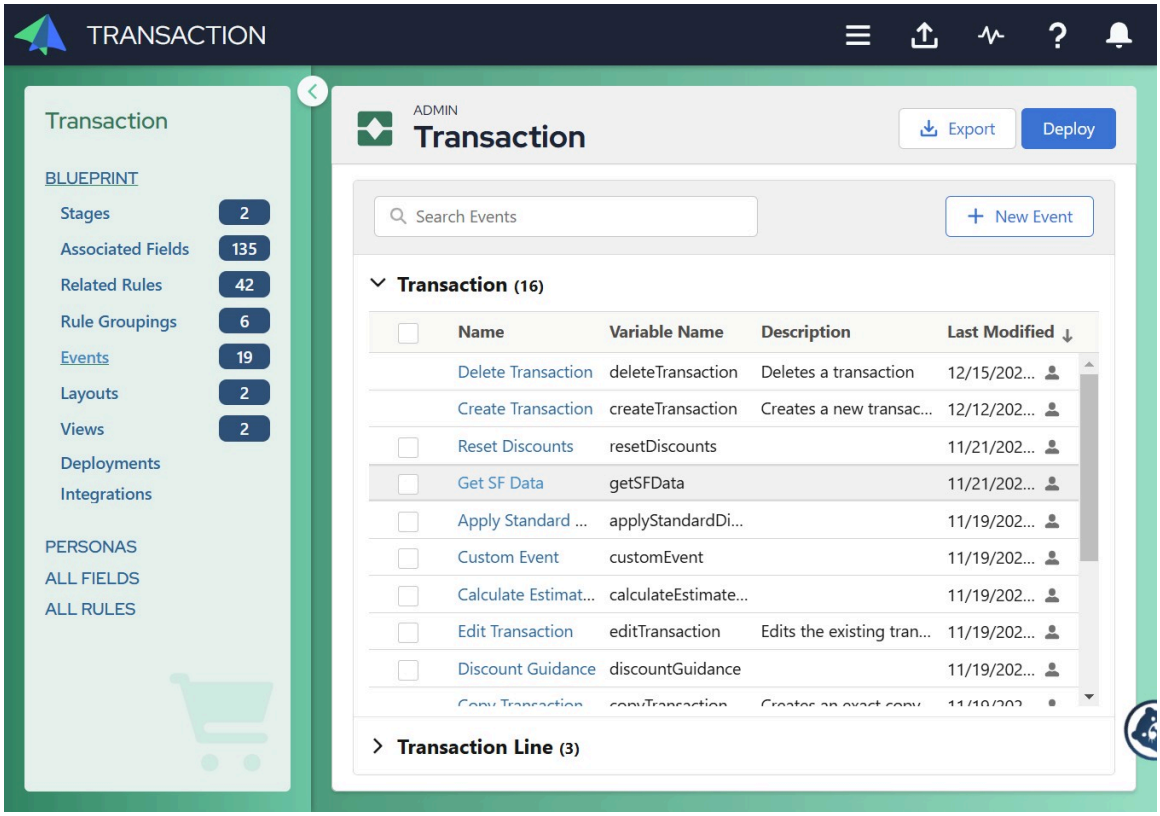
- Response Transformation: The following JSON snippet defines how to populate variables defined in additional path by iterating over a collection of `records`.

  For *`txn.custom.opportunity`*, it extracts the *`Name`* field from each record, while for *`txn.custom.billToAddress`*, it extracts and concatenates the *`Account.BillingAddress.street,Account.BillingAddress.city,Account.BillingAd`* field. The Handlebars *`{{#each}}`* loop is used to process each record, and the resulting values depend on the system's handling, either as concatenated strings or arrays of values.

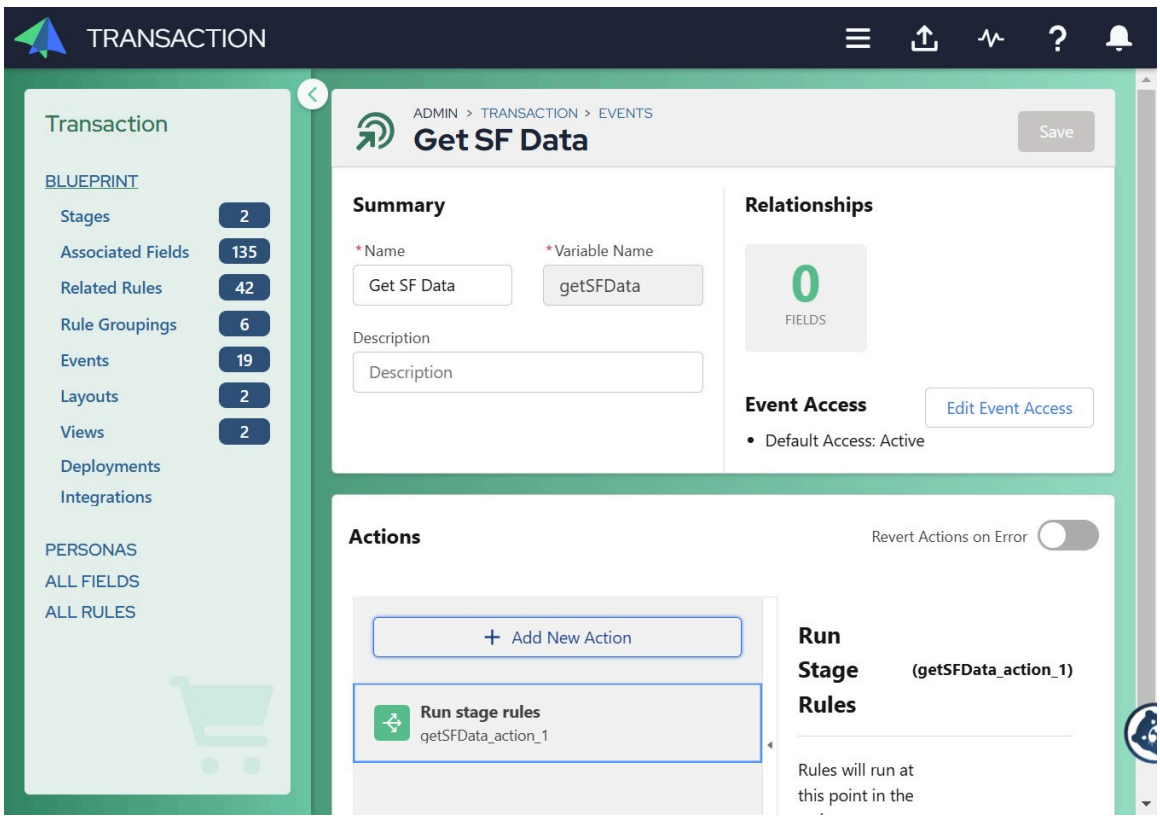
```
{
  "fields": [
    {
      "variableName": "txn.custom.opportunity",
      "value": "{{#each records}}{{Name}}{{/each}}"
    },
    {
      "variableName": "txn.account.id",
      "value": "{{#each records}}{{AccountId}}{{/each}}"
    },
    {
      "variableName": "txn.custom.accountName",
      "value": "{{#each records}}{{Account.Name}}{{/each}}"
    },
    {
      "variableName": "txn.custom.quoteNumber",
      "value": "{{#each records}}{{QuoteNumber}}{{/each}}"
    },
    {
      "variableName": "txn.custom.billToAddress",
      "value":
 "{{records.[0].Account.BillingAddress.street}}{{records.[0].Ac
count.BillingAddress.city}}{{records.[0].Account.BillingAddress
.state}}{{records.[0].Account.BillingAddress.postalCode}}"
    },
    {
      "variableName": "txn.custom.shipToAddress",
      "value":
 "{{records.[0].Account.ShippingAddress.street}}{{records.[0].A
ccount.ShippingAddress.city}}{{records.[0].Account.ShippingAddr
ess.state}}{{records.[0].Account.ShippingAddress.postalCode}}"
    }
  ]
}
```

Trigger the integration when the end user clicks a button. You can now click **Events** to create a new event or to select an existing one. In this case, we use the Get SF Data event (a button in the UI) to connect to the integrations we previously created.

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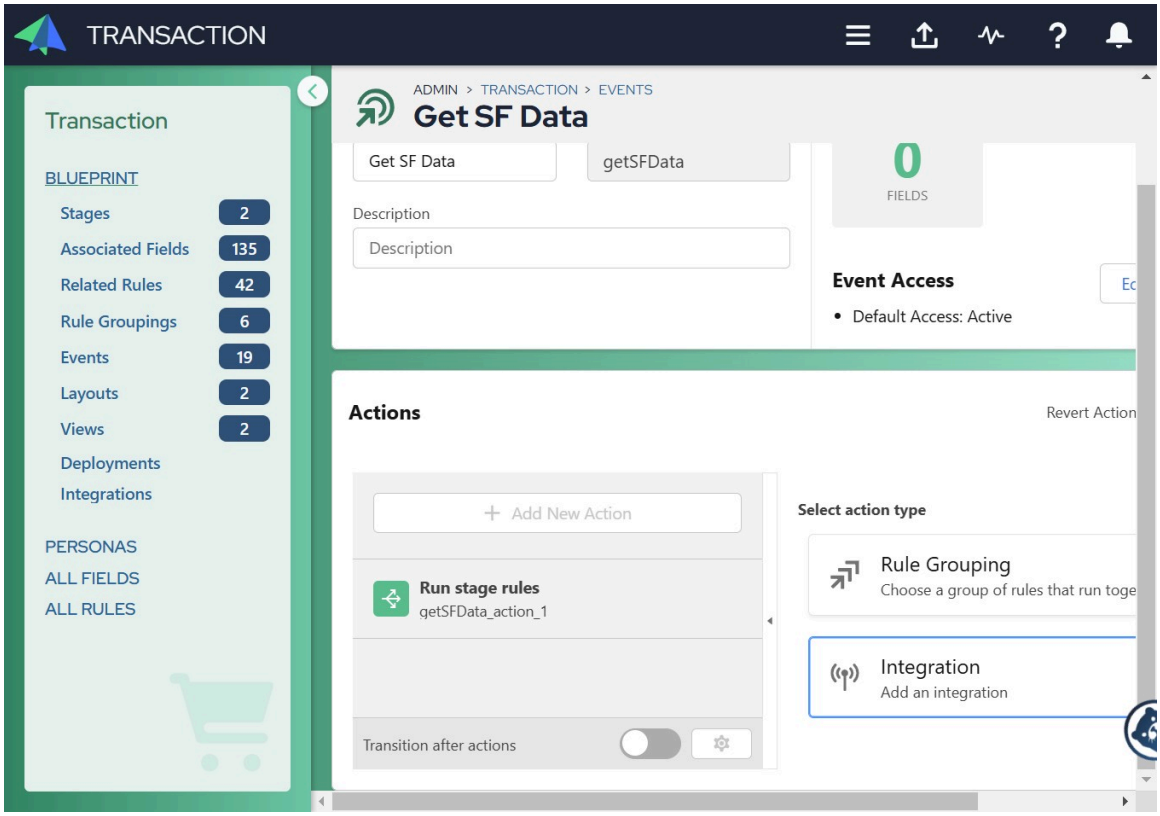



Click **Add New Action**.

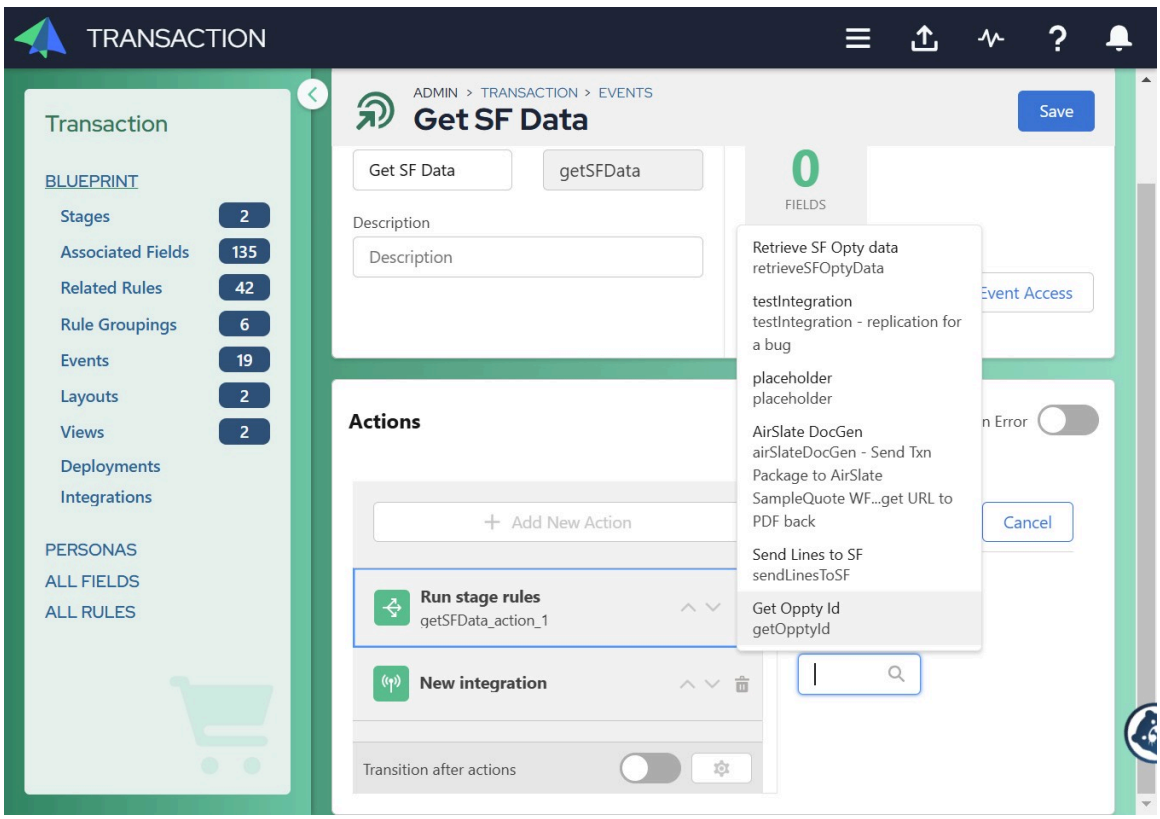



Click **Integrations**.

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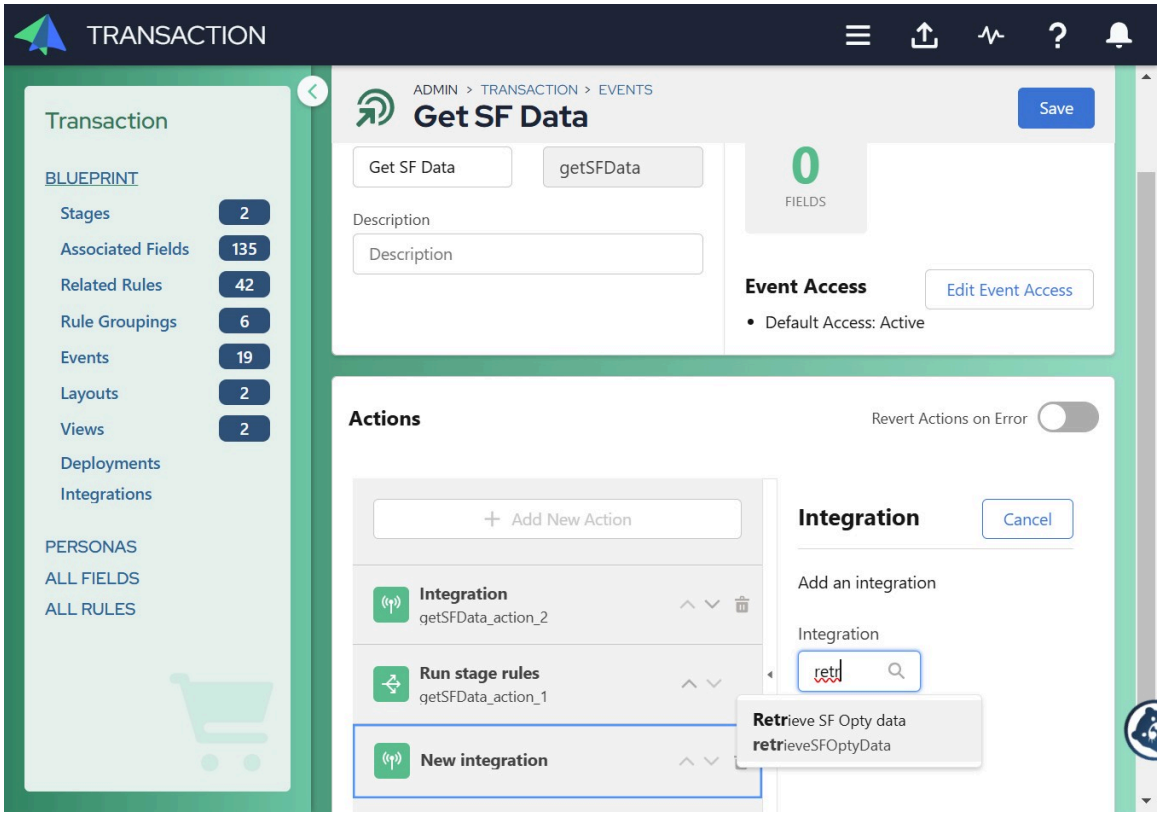



Search for and add the "Get Oppty Id" integration.

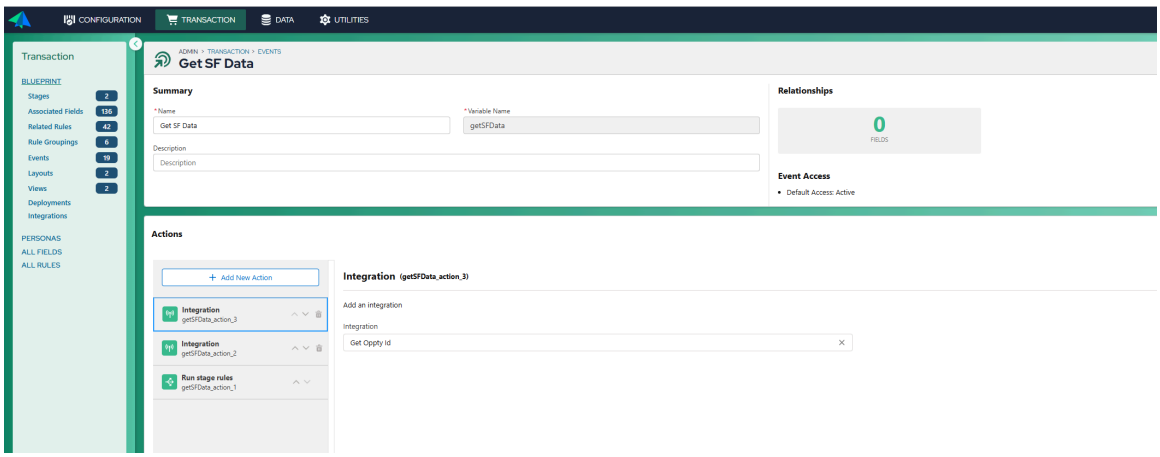



Click **Save**. Then, click **Add New Action** and add "retrieveSFOptyData".

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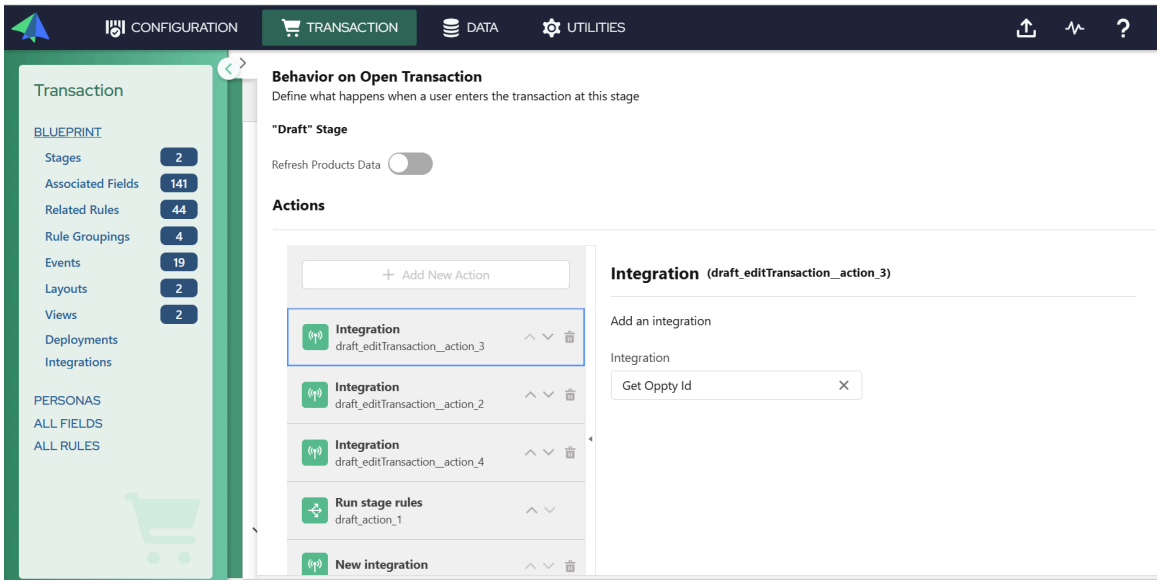

Click the up and down arrows next to the action items to arrange them in the desired order. (Here, we are selecting "Get Oppty Id", followed by "Retrieve SF Opty Data", to fetch the opportunity ID and retrieve relevant data.)




Click **Save**, and deploy the changes.

We have discussed how integrations can be added with events. Integrations can also be configured at the stage level. To do so, navigate to **Stages** > **Edit Settings** > **Add New Action** > **Integration**.

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## Troubleshooting

When configuring integrations, it is crucial to ensure that the sequence of integrations is set up correctly to retrieve accurate details. The order of execution plays a significant role in maintaining data consistency and alignment.

To achieve this, follow these steps:

1. Fetch the opportunity ID: The opportunity ID serves as the key reference for linking related data. This step is essential because the transaction details you retrieve later are directly associated with a specific opportunity.
2. Fetch the transaction ID through opportunity details: Use the opportunity ID to fetch the transaction ID. Because each transaction is linked to a particular opportunity, this approach ensures that you accurately associate the correct transaction with its corresponding opportunity.

By following this order, you can maintain the integrity of the integration and ensure that the data flow remains seamless and reliable.

### Related topics

ServiceNow Quote Experience Integration - POST

## ServiceNow Quote Experience Integrations - Handlebars syntax

You can use the Handlebars templating language when you build an integration transformation template.

Handlebars is a lightweight templating language used to generate dynamic content. Administrators building integration transformation templates use the following key elements of Handlebars syntax, together with enhancements specific to CPQ:

- Handlebars expressions: Enclosed in double curly braces `{{ }}`, expressions enable administrators to insert variables, functions, or properties into the template. For example, `{{user.name}}` renders the value of the name property of the user object.
- Built-in helpers include conditional helpers and iteration helpers.

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- Conditional helpers enable you to render content conditionally based on a value. For example:
  - *#if* renders content if the condition is true.

    ```
    {{#if user.isActive}}
      Active
    {{/if}}
    ```

    This snippet renders "Active" only if `user.isActive` is true.

  - *#unless* – The opposite of #if, it renders content if the condition is false.

    ```
    {{#unless user.isActive}}
      Inactive
    {{/unless}}
    ```

    This snippet renders "Inactive" if `user.isActive` is false.

- Iteration helpers let you loop through lists or modify scope.
  - *#each* loops through an array and renders content for each item.

    ```
    {{#each users}}
      <li>{{this.name}}</li>
    {{/each}}
    ```

    This snippet iterates through users and displays each user's name as a list item.

  - *#with* changes the scope to a specific object.

    ```
    {{#with user}}
      <p>{{name}}</p>
    {{/with}}
    ```

    This snippet simplifies access to properties of `user` in the block.

## Advanced Handlebars syntax for integrations

Here's an explanation of each syntactical element used in the Integration Template, which leverages the Handlebars templating language.

- *{{#if lines}} {{/if}}*

  *{{#if}}* checks whether something is true.

  The following snippet checks whether there is something in `lines`. If `lines` has a value (like a list of items or some data), it will do something inside the block. If `lines` is empty or doesn't exist, it skips the block.

  ```
  {{#if lines}}
    We have lines to process!
  {{else}}
    No lines available.
  {{/if}}
  ```

  If `lines` exists, it shows "We have lines to process!". If not, it shows "No lines available."

- *{{~#each lines~}} {{/each}}*

  *{{#each}}* repeats something for each item in a list.

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The following snippet iterates over each item in the `lines` list and renders the content inside the block for every item. The ~ symbols are whitespace control characters in Handlebars. They help remove any extra spaces or line breaks before and after the block, ensuring cleaner and more compact output. (See below.)

```
{{~#each lines~}}
  <p>{{this}}</p>
{{/each}}
```

The snippet goes through each item in `lines` and puts each item in a paragraph tag.

- *{{#if <cpq line-level field varname>}} {{/if}}*

  *{{#if <cpq ...}}* checks whether a specific piece of data is true or exists. It checks whether a specific field or value (like varname) in your data exists or is true. It's a way to check for specific information in a more complex structure (like in a dataset).

```
{{#if logik.lineLevelField.isActive}}
  The field is active!
{{else}}
  The field is not active.
{{/if}}
```

  This snippet checks whether `logik.lineLevelField.isActive` is true (like checking if something is "active"). If it is, it shows "The field is active!" If not, it shows "The field is not active."

### The tilde (~)

The tilde (~), a control character, hides whitespace and line breaks, helping keep the output clean. It makes HTML more compact and prevents spacing issues in output.

In some of the examples above, a leading tilde before *#each* removes whitespace before the block starts. The trailing tilde after #each removes whitespace after the block starts.

### The zeroIfMissing custom helper

The zeroIfMissing helper prevents errors due to missing values and ensures numerical fields always have a valid default value.

```
Custom Helper 'zeroIfMissing'
"price": {{zeroIfMissing txn.price}}, would become -> "price": 0
 (or "price": 9.99, if txn.price is present)
```

### The lgkFilter custom helper

The lgkFilter helper iterates through a collection and includes only items that meet a specified condition.

```
{
  "numericFiltered": [
    {{#lgkFilter lines "txn.line.custom.someNumber > 10"}}
      {
      "id": "{{txn.line.product.id}}",
      "someNumber": "{{txn.line.custom.someNumber}}"
    }
    {{else}}
      {
```

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```
      "error": "Item could not be added (numeric condition)"
    }
    {{/lgkFilter}}
  ],
  "textFiltered": [
    {{#lgkFilter lines "txn.line.custom.status == Active"}}
      {
      "id": "{{txn.line.product.id}}",
      "status": "{{txn.line.custom.status}}"
    }
    {{else}}
      {
      "error": "Item could not be added (text condition)"
    }
    {{/lgkFilter}}
  ]
}
```

This helper replaces *#each* and *#unless* blocks.

- Simple syntax: *{{#lgkFilter lines "<predicate_field>"}}*
- Conditional syntax: *{{#lgkFilter lines "<predicate_field> <comparator> <literal_value>"}}*
- Supported comparators: *<*, *>*, *<=*, *>=*, *!=*, *==*
- Complex conditions such as && are not supported

The `else` block is supported within the helper.

The helper throws an error when its syntax is incorrect and when fields cannot be parsed.

The helper performs comma joins internally for valid JSON output.

### The @ symbol

The @ ensures that you're pulling the value from the outer or parent context and not from the current context. It's often used when the data you need is at a higher level in the structure, and you want to avoid confusing it with the local data of the current scope.

In the expression *"LGK__TransactionId__c": "@{parentTransaction.id}"*, the *@* symbol is used to reference a value from a parent context or object in templating systems, such as Handlebars or other similar systems.

The *@{}* syntax tells the system to look at the parent context (the object or data outside the current scope) and retrieve the value of `parentTransaction.id`.

For example, suppose you have an object like this:

```
{
  "parentTransaction": {
    "id": "12345"
  }
}
```

When you use *"LGK__TransactionId__c": "@{parentTransaction.id}"*, the `id` from `parentTransaction` (which is `12345`) will be used as the value for *"LGK__TransactionId__c"*.

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## Conditional assignment example

The line *"LGK__ParentTransactionLineId__c": {{#if txn.line.custom.parentLineReferenceId}} "@{line_{{txn.line.custom.parentReferenceId}}.id}" {{else}} null {{/if}}* is part of a Handlebars template and conditionally sets the value of the field `LGK__ParentTransactionLineId__c`.

- `LGK__ParentTransactionLineId__c` is the key where the resulting value will be placed.
- *{{#if txn.line.custom.parentLineReferenceId}}* checks whether `txn.line.custom.parentLineReferenceId` exists and has a value.
- *@{line_{{txn.line.custom.parentReferenceId}}.id}* creates a dynamic reference to the `id` of a specific line based on `parentReferenceId`.
- *{{else}} null {{/if}}* sets the value to null if the condition is false.

## Concatenating Salesforce fields with conditional punctuation

In Handlebars, concatenating multiple fields together with punctuation (like commas, spaces, and conditional checks) can be done by combining variables in the template and using {{#if}} blocks to handle conditional logic.

For example, you can use the following approach to concatenate fields such as street address, street address2, city, state, and zip code for an address while ensuring that a comma and space after street address2 are only included if street address2 is populated:

```
{{#if streetAddress}}
  {{streetAddress}}
  {{#if streetAddress2}}, {{streetAddress2}}{{/if}}
  {{#if city}}, {{city}}{{/if}}
  {{#if state}}, {{state}}{{/if}}
  {{#if zipcode}}, {{zipcode}}{{/if}}
{{else}}
  No address available
{{/if}}
```

This concatenates fields like streetAddress, streetAddress2, and city, ensuring that commas are only included when the corresponding fields are populated.

Example output with `streetAddress2`: *"123 Main St, Apt 4, San Francisco, CA, 94105"*

Example output without `streetAddress2`: *"123 Main St, San Francisco, CA, 94105"*

## Conclusion

By using these key elements, administrators can create dynamic, flexible, and maintainable integration transformation templates. Understanding and leveraging expressions, helpers, blocks, conditionals, and parent context references enables handling complex data and logic with ease.

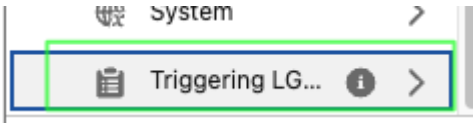
For more information on Handlebars syntax, see the Handlebars documentation.

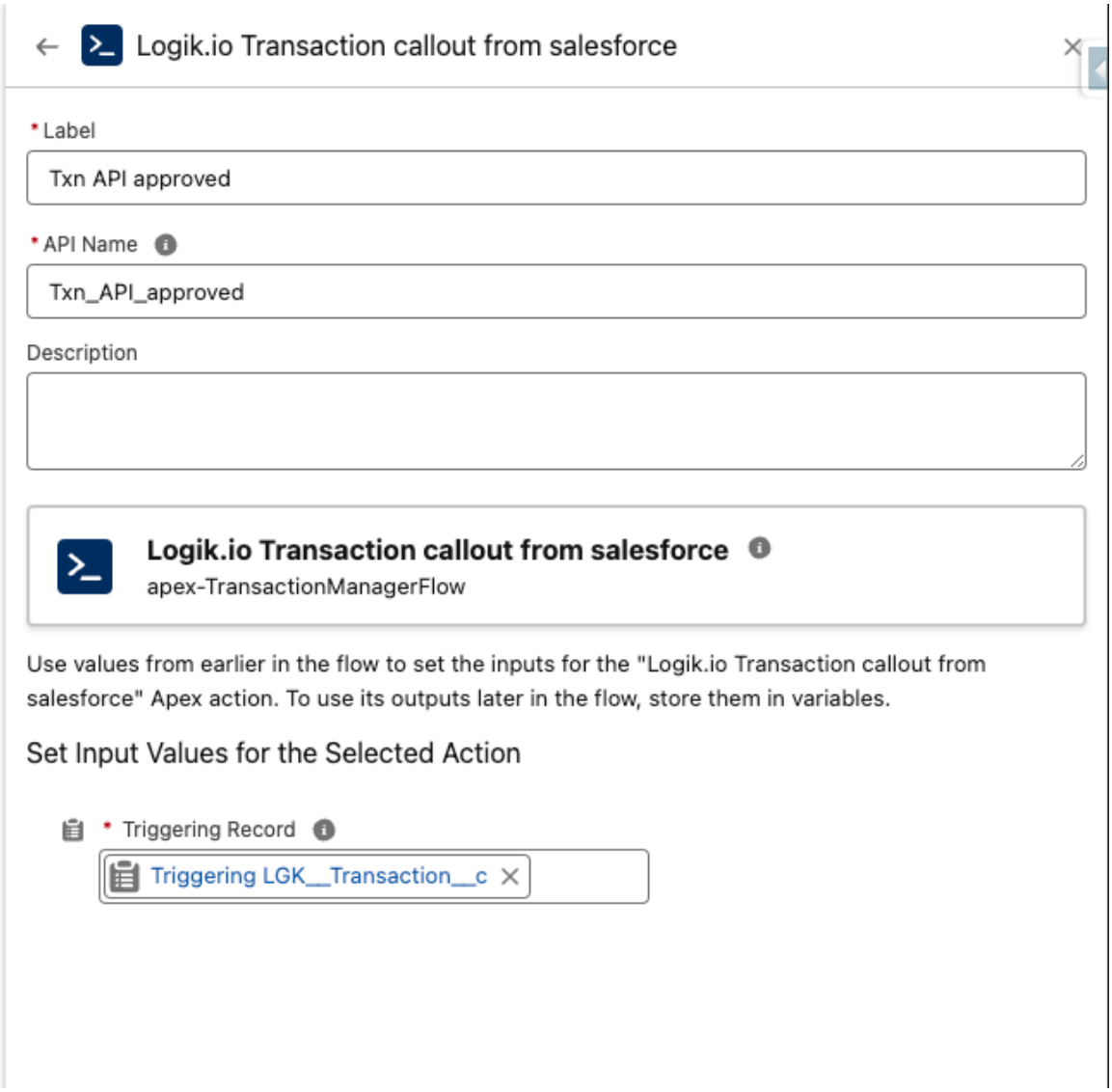
**Note:** Handlebars syntax does not support all the features described in this external document.

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## ServiceNow Quote Experience Integrate Salesforce approvals

Integrate Salesforce approvals into ServiceNow Quote ExperienceServiceNow Quote Experience.




## Salesforce setup

Refer to these Salesforce Trailheads modules and documentation:

- Postman: Quick Start: Connect Postman to Salesforce
- Submit for Approval: Salesforce Developers: Submit a Record for Approval

An approval process in Salesforce automates record approval workflows in an organization. It defines:

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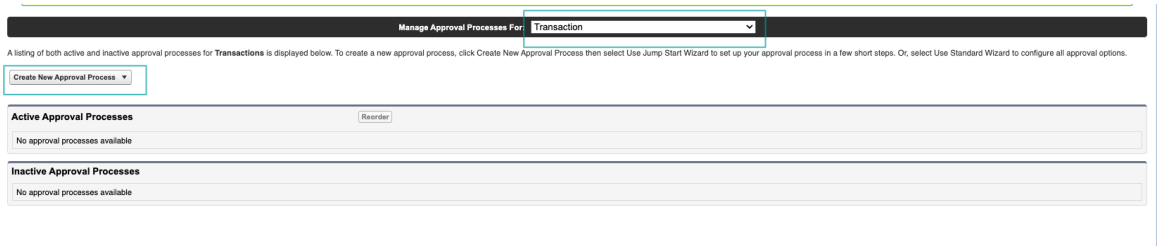
- Approval Steps: The sequence of steps and approvers for a record, for example, sending a time-off request to an employee's manager for approval.
- Actions: Automated actions based on the approval outcome, such as updating records if approved or sending notifications if rejected.

This streamlines the approval process and ensures consistency.




1. Go to Setup, click **Approval Processes**, and select the transaction record.
2. In **Manage Approval Processes For**, select **Opportunity**.
3. Click **Create New Approval Process**.

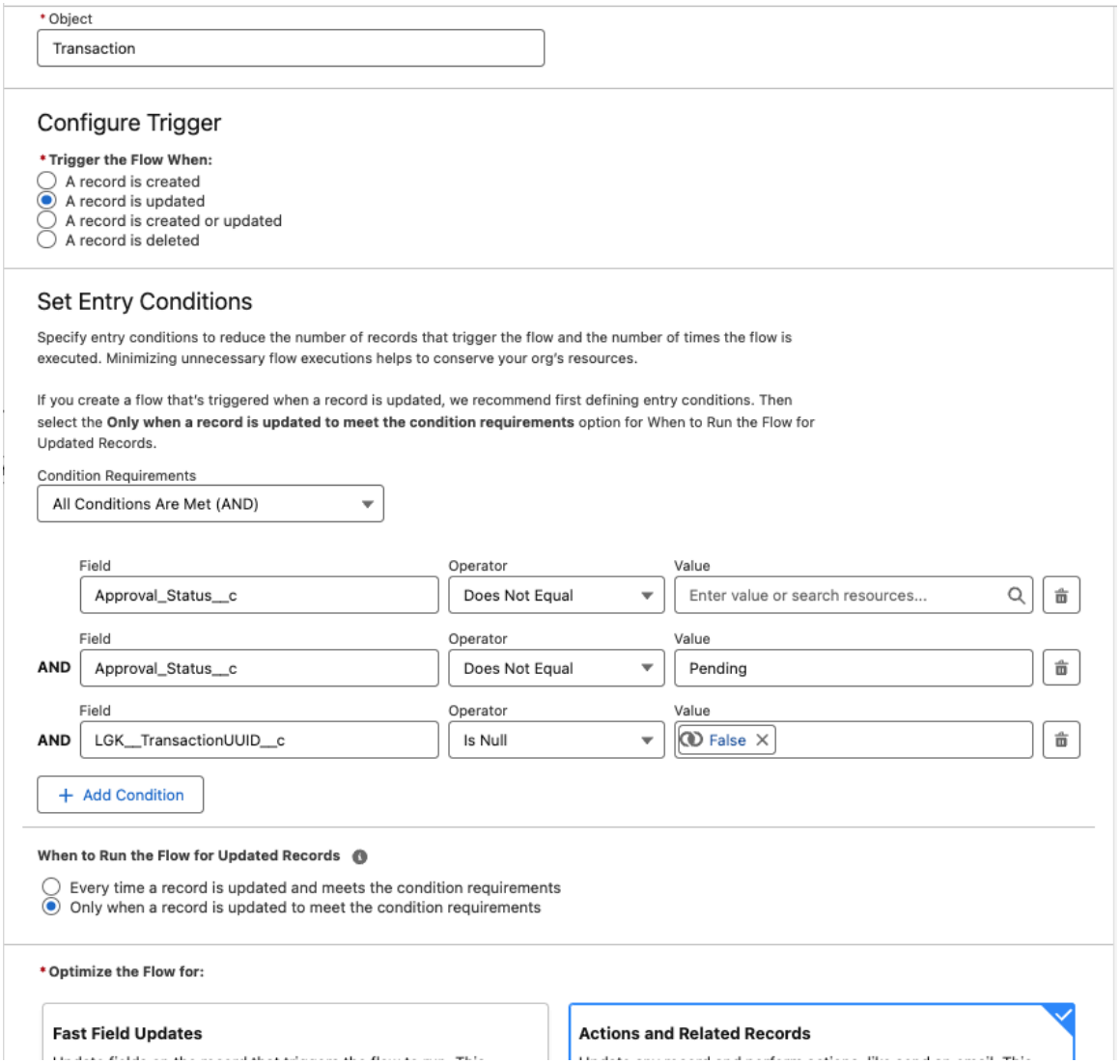
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4. Ensure that the **Add the Submit for Approval and Approval History** option is checked.

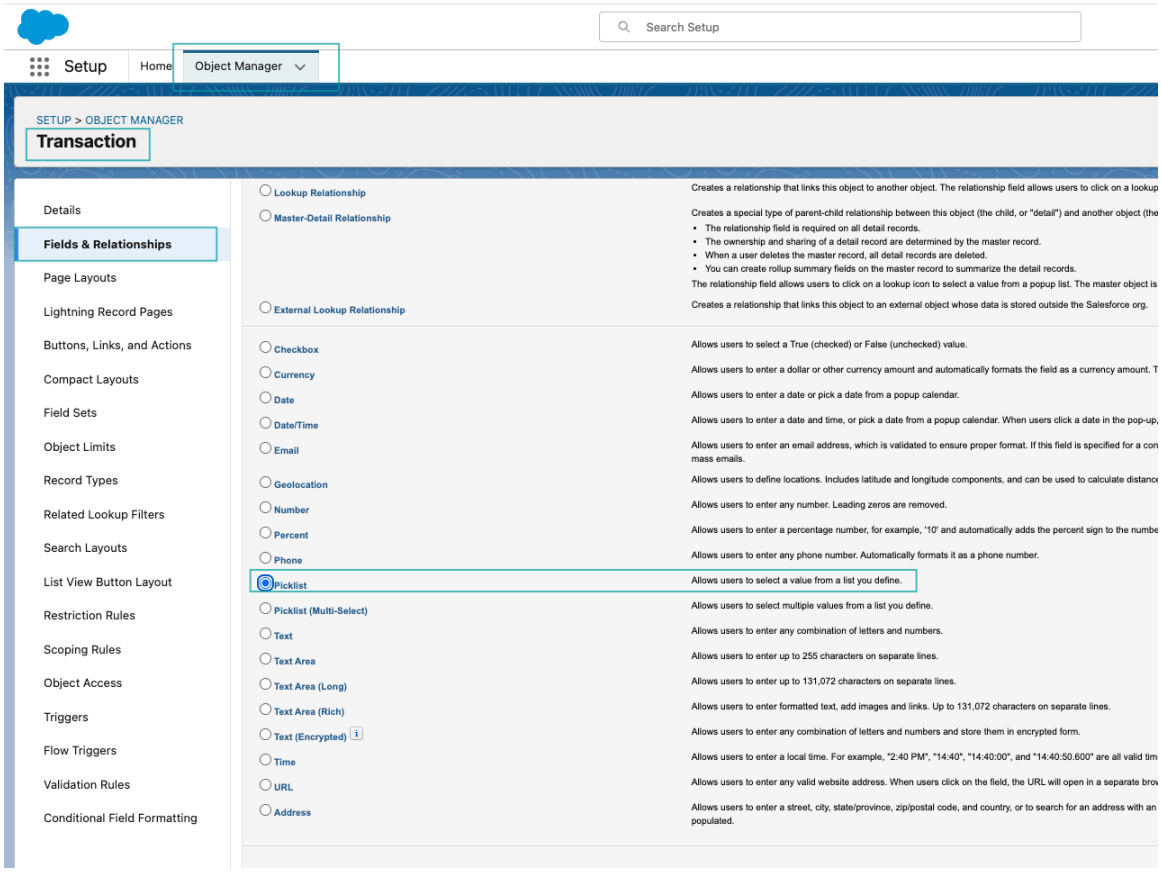
   You can specify conditions, if applicable, in the Entry-Specific Criteria section.

5. Choose **Automatically assign approvers** and set it to anyone with the SysAdmin role.



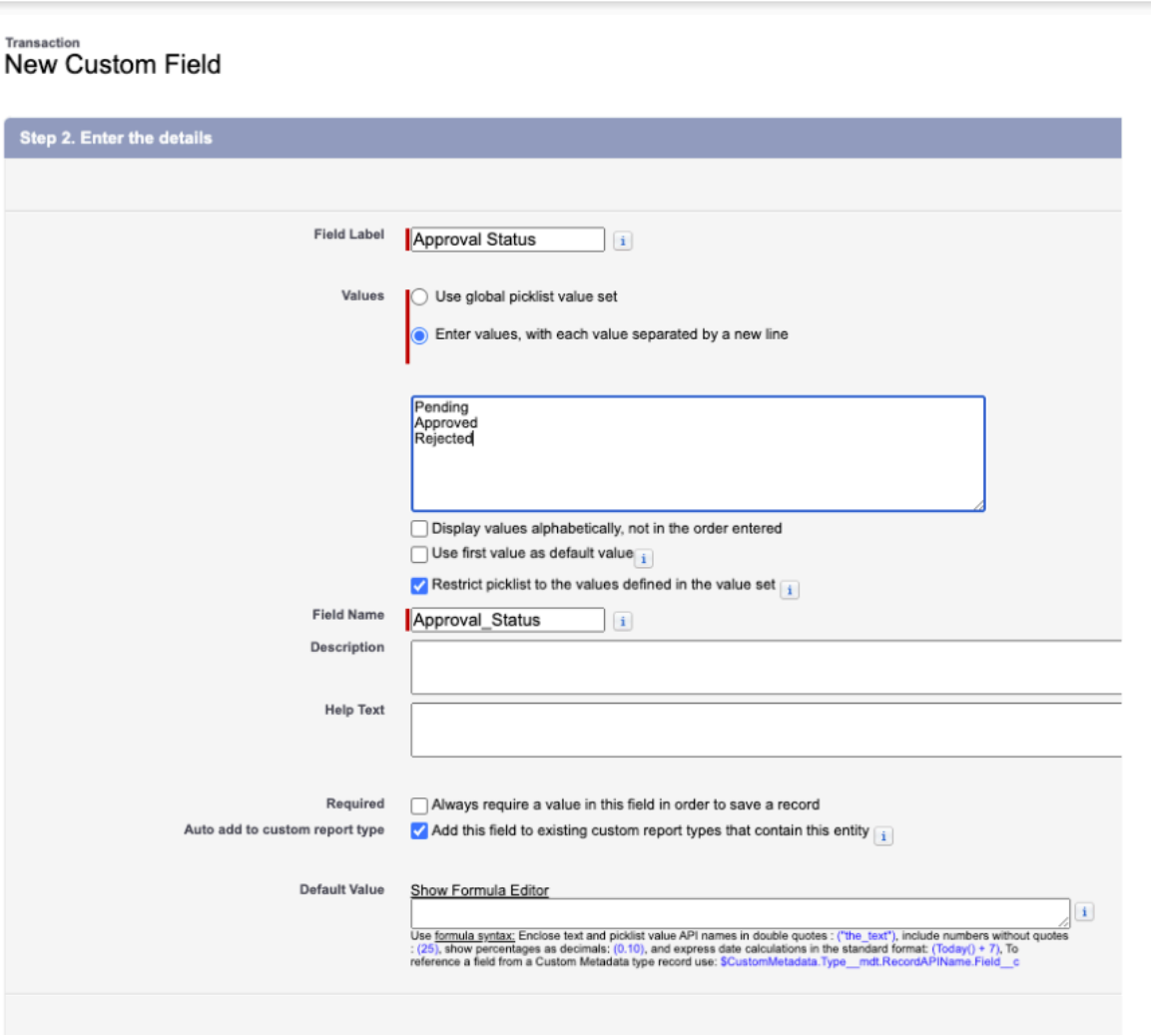

6. Create a custom picklist field in the transaction record by navigating to Setup, clicking **Object Manager**, and then clicking **Transaction**. Ensure that the field is not set as a multi-select picklist.

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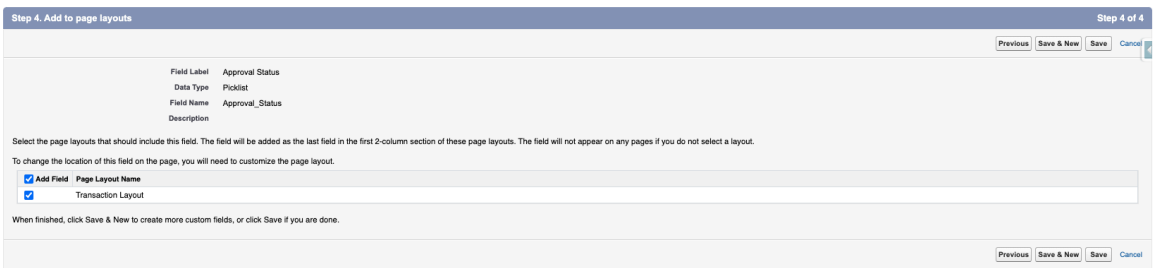



7. Give the picklist field three values to distinguish between Pending Approval, Approved, and Rejected.

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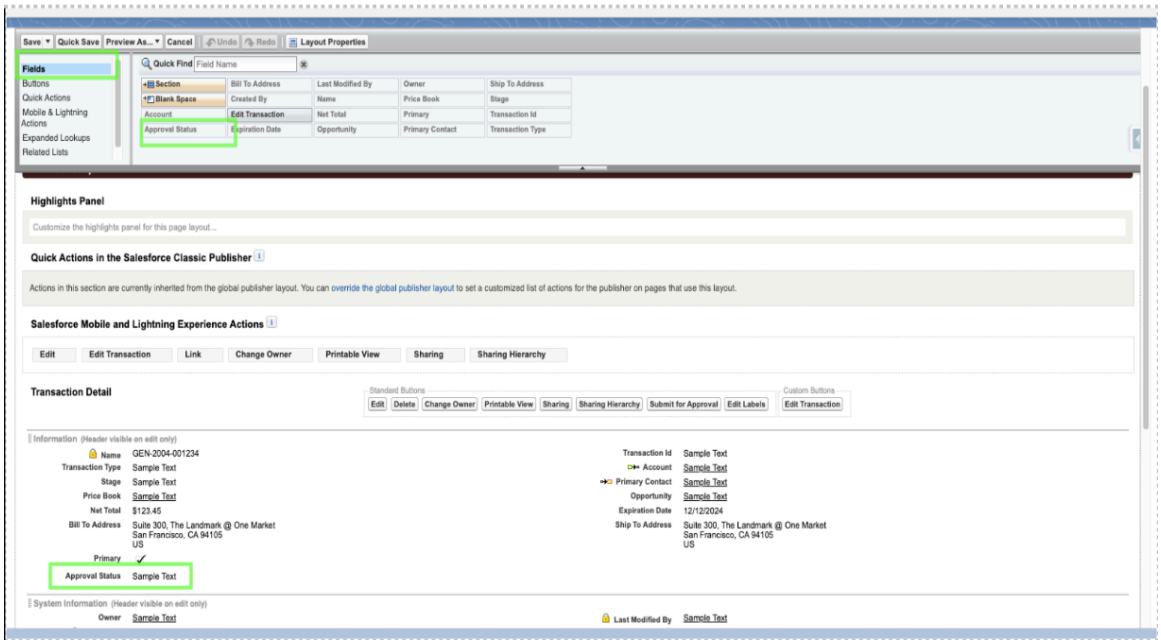



**8.** Add the custom field to the Transaction Layout.

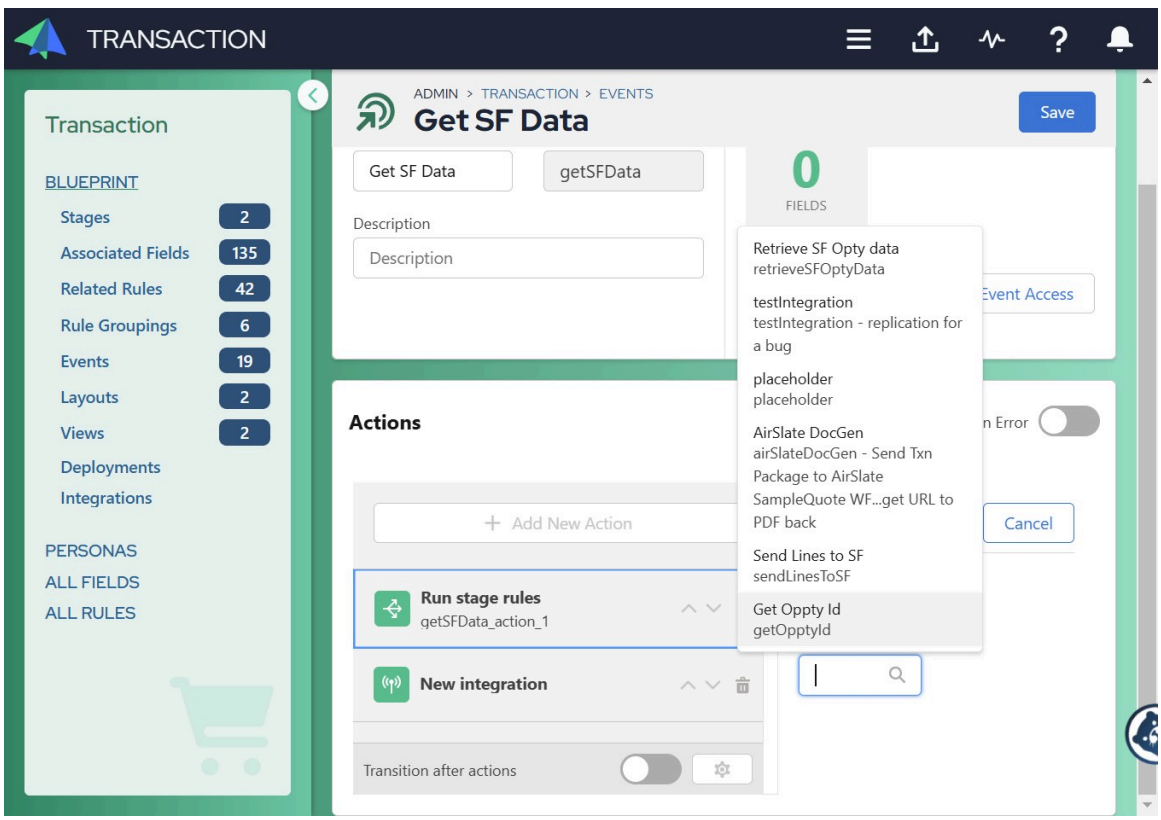



If you skipped the previous step, you can add the field to the Transaction Layout like so:

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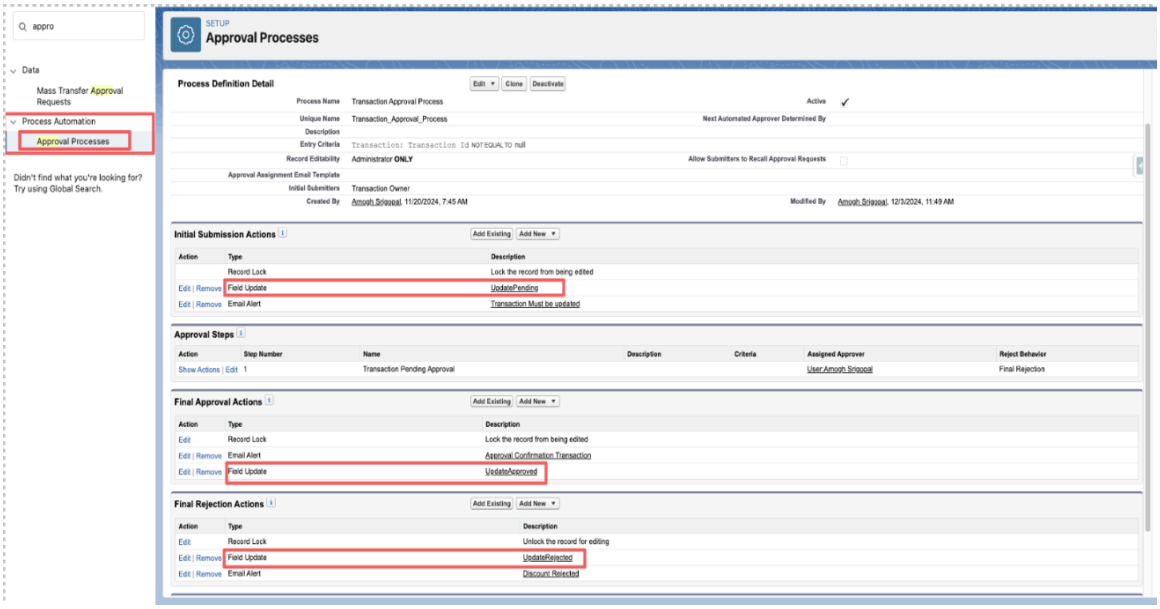



9. Go back to the approval process, click **Initial Submission Actions**, click **Add New**, and then select **Field Update**. Configure it with the required values.
10. To ensure that the relevant fields are updated based on the outcome of the approval process, repeat step 9 for the Approval Actions and Rejection Actions sections. The following screenshot shows the final rejection option.

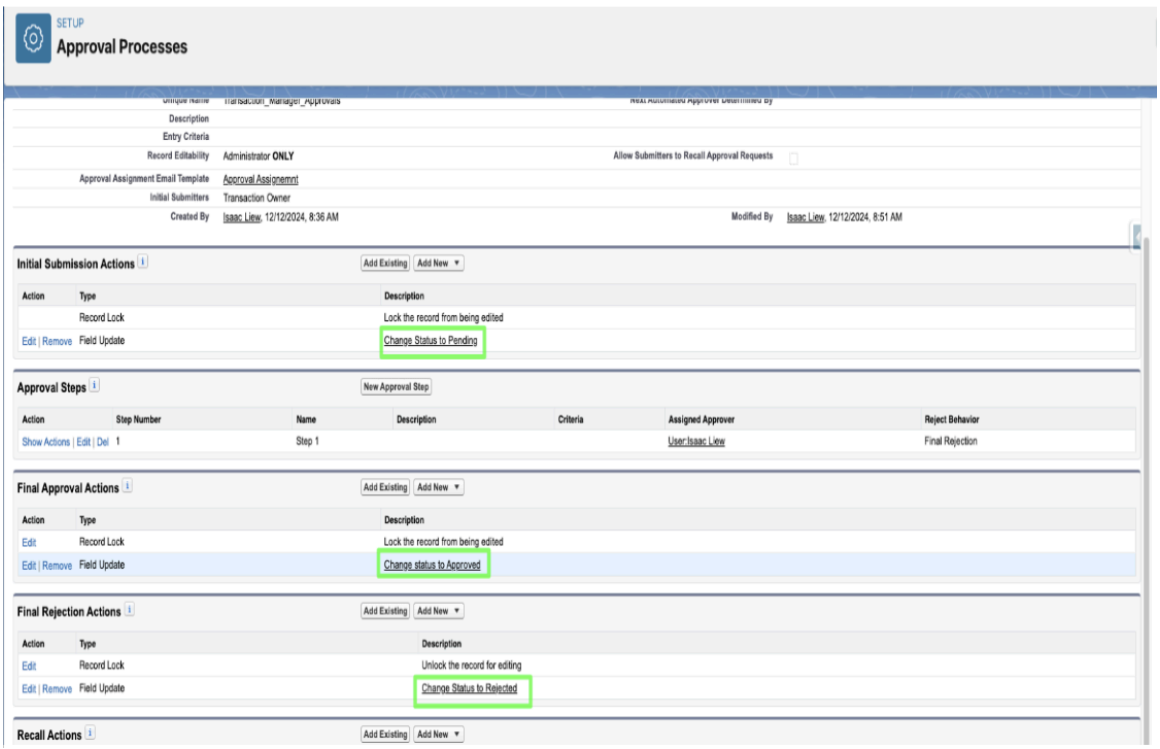



If you included email alerts along with field updates, the approval process should resemble the following:

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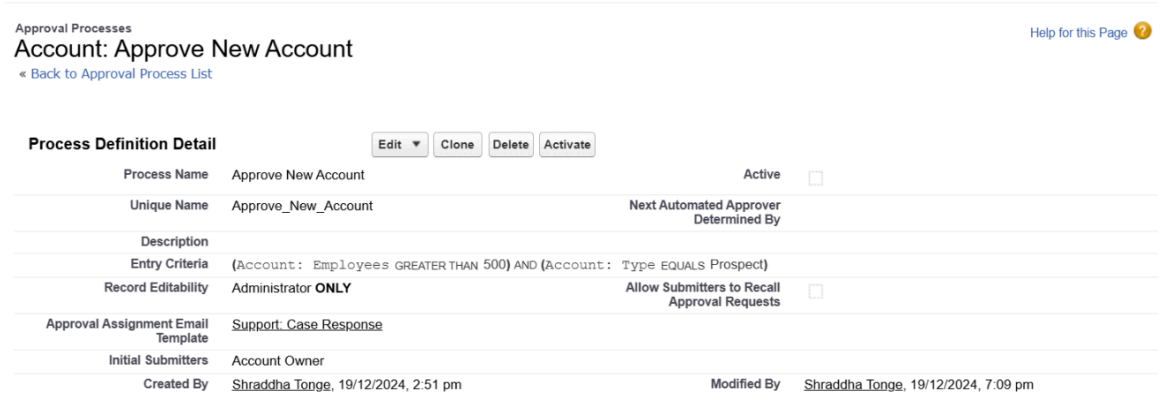



If the final approval process has only field updates, it should resemble the following:

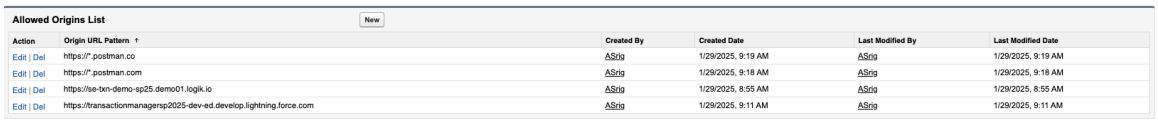



**11.** Click **Activate**.

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12. To ensure that CORS includes the URL, in the Setup search bar, search for CORS, or go to Setup, click **Security**, and then click **CORS**. Verify that these are included in the CORS:




## ServiceNow Quote Experience setup integrations

Create two integrations for an event that will be used to submit the record for approval through ServiceNow Quote Experience.

**Note:** If you want to test these calls in Postman, the endpoint is the my Salesforce URL: `<https://logik-1e-dev-ed.develop.my.salesforce.com/>`.

1. Receive the Salesforce record ID: Fetch the right Salesforce record ID using the UUID. This integration is used for filling in the custom field for the integration above.
   - Connection: Salesforce
   - GET

     Additional path: `/services/data/v62.0/query/?q=SELECT Id, CreatedDate, LGK__TransactionUUID__c FROM LGK__Transaction__c WHERE LGK__TransactionUUID__c = '{{http://txn.id/}}'ORDER BY CreatedDate DESC`

     Response Transformation:

```
{
  "fields": [
    {
      "variableName": "txn.custom.sfRecordID",
      "value": {{#each records}}{{#if
@first}}"{{this.Id}}"{{/if}}{{/each}}
    },
    {
      "variableName": "txn.custom.opportunityName",
      "value": {{#each records}}{{#if
@first}}"{{this.LGK__OpportunityId__r.Name}}"{{/if}}{{/each}}
    },
    {
      "variableName": "txn.custom.accountName",
```

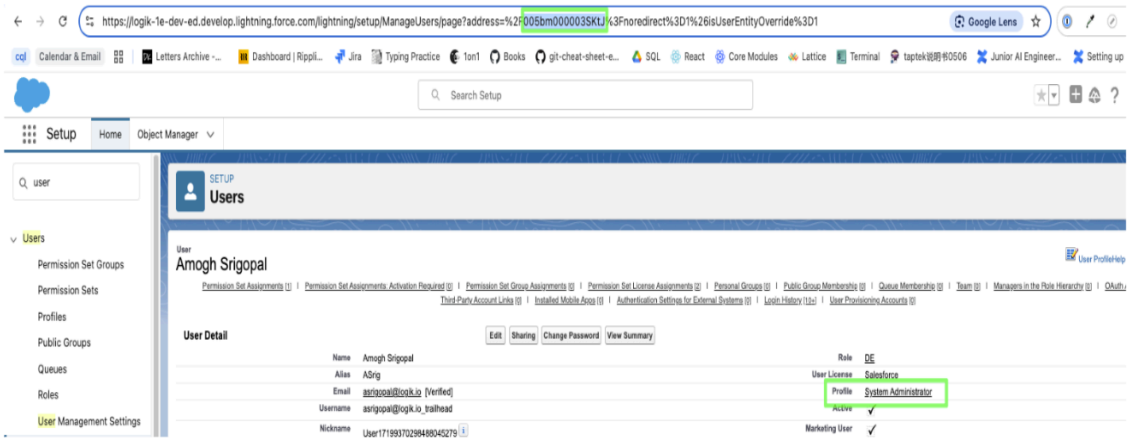
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```
      "value": {{#each records}}{{#if
 @first}}"{{this.LGK__AccountId__r.Name}}"{{/if}}{{/each}}
    }
  ]
}
```

UPDATED QUERY USE THIS:

```
/services/data/v62.0/query/?q=SELECT Id,
 CreatedDate,LGK__OpportunityId__c,LGK__OpportunityId__r.Name,
 LGK__AccountId__r.Name,
 LGK__AccountId__c,LGK__TransactionUUID__c FROM
 LGK__Transaction__c WHERE LGK__TransactionUUID__c
 ='{{txn.id}}'ORDER BY CreatedDate DESC
```

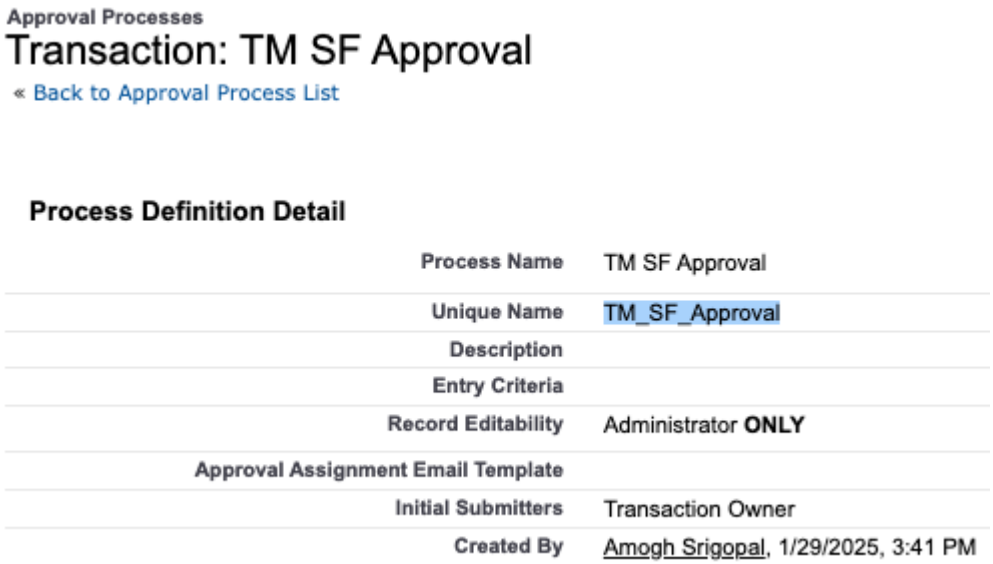
*contextActorId* refers to the system Admin Record ID in Salesforce. It can be obtained by navigating to Setup and clicking **Users**, and then copying the ID from the URL of the user page.




2. Submit for approval.
   - Connection: Salesforce
   - POST

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Additional path: `/services/data/v62.0/process/approvals`




Request Transformation:

```
{
  "requests" : [{
  "actionType": "Submit",
  "contextId": "{{txn.custom.sfRecordID}}",
  "nextApproverIds": [],
  "comments":"The line item has a discount percentage of
 {{txn.custom.overallDealDiscount}}%",
  "contextActorId": "005bm000003SKtJ", -- SF Record ID of user
 highlighted above
  "processDefinitionNameOrId" : "TM_SF_Approval", --should be
 the unique name fro process definition detail highlighted above
  "skipEntryCriteria": "true"}]
}
```

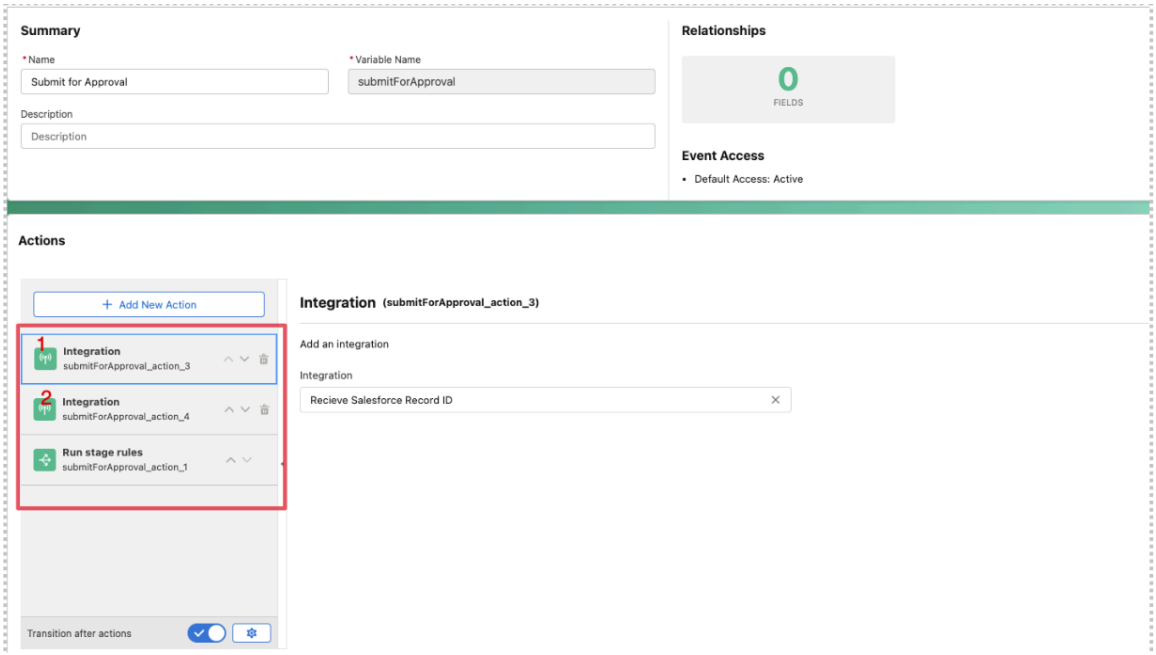
Make sure that the transform template has these values correctly:

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```
equests" : [{
ctionType": "Submit",
ontextId": "{{txn.custom.sfRecordID}}",
extApproverIds": [],
omments":"The line item has a discount percentage of {{
ontextActorId": "005bm000005XhMf",
rocessDefinitionNameOrId" : "Transaction_Manager_Approv
kipEntryCriteria": "true"}]
```

## ServiceNow Quote Experience setup creating events

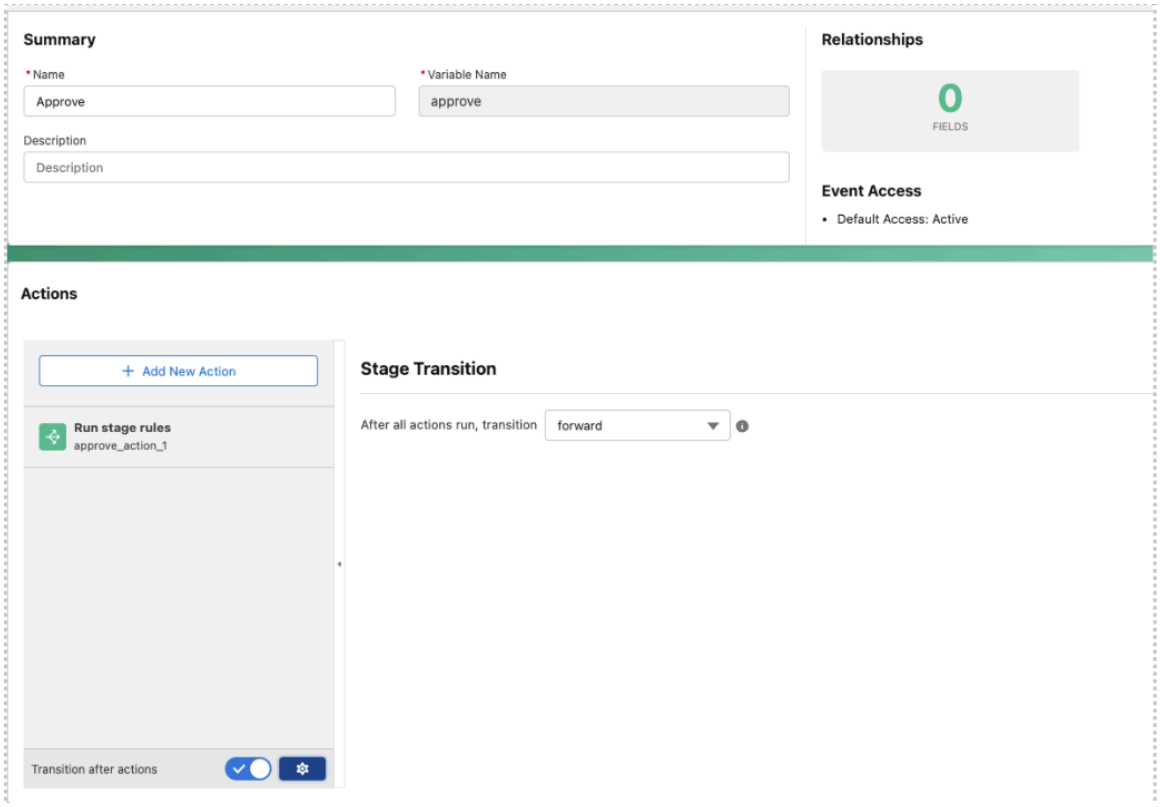
Slack Approvals Integration is implemented through headless event API calls. In this approach, we'll use these headless API calls in a record-triggered flow and perform the callout through Apex actions.

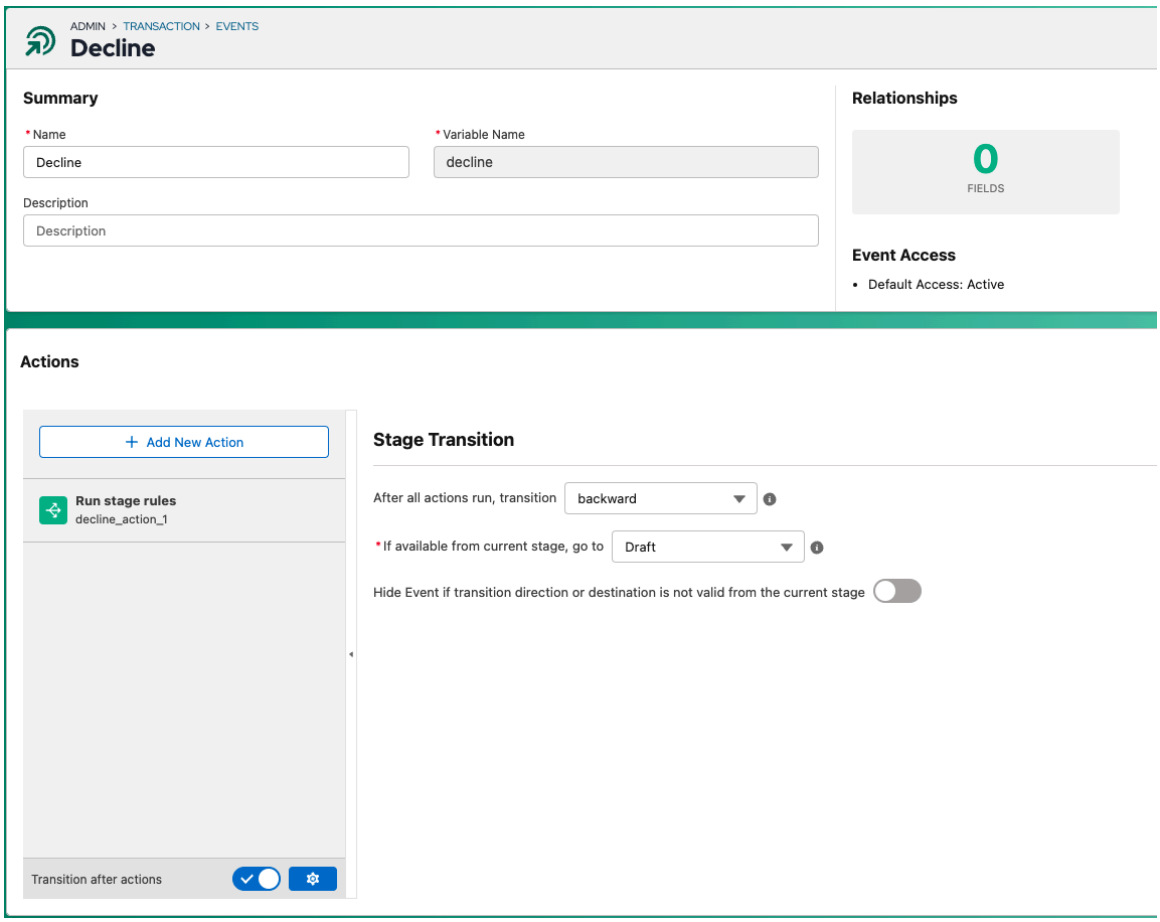



Note that the two integrations created in the previous step are designed to work in sequence. The first integration receives the Salesforce record ID, and the second integration submits it for approval. Alternatively, the process of receiving the Salesforce ID can occur on the Open Transaction action by adding the necessary configuration at that stage.

Create two additional events that will move the stage either forward for approval or backward for revision. Be sure to note their respective variable names for use in the API callout configuration.

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## Add the Submit for approval option to ServiceNow Quote Experience

The button events can be added to the default_draft layout using the following JSON format:

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```
{
  "type": "button",
  "event": "submitForApproval",
  "label": "Revise",
  "columnOrder": 2,
  "variableName": "revise"
},
```

Make sure to add the custom field to the `draft fields: []` section; it's not necessary to include it in the layout.

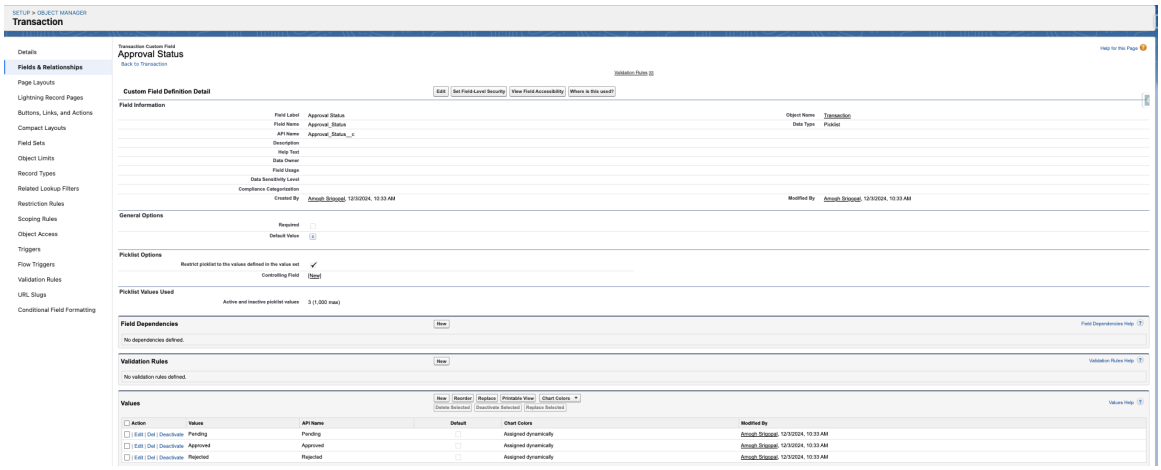
```
{
  "type": "ReadOnlyText",
  "label": "SF Record ID",
  "variableName": "txn.custom.sfRecordID"
},
```

## Record-triggered flow

To set up the VS code environment, install the VS Code extensions from this document: Sales Engineering Team Member Setup

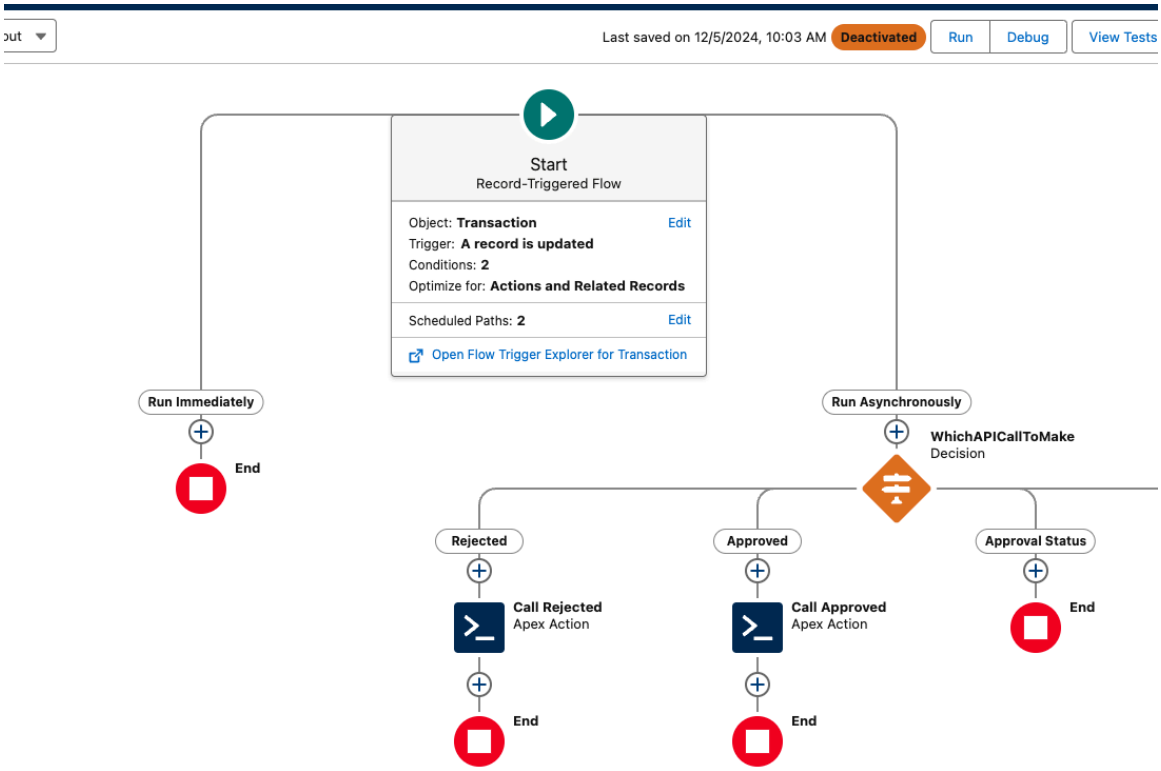
1. Following the Trailheads approval process, create a picklist record on the *LGK__Transaction__C* object that has the current approval state of the transaction, and ensure the process updates the record based on approval, rejection, and pending approval.

   The following image shows a custom field that triggers the record-triggered field: the *Approval_Status__C* field that you made when you created the approval process.




   The following image shows what the flow will look like when it's complete.

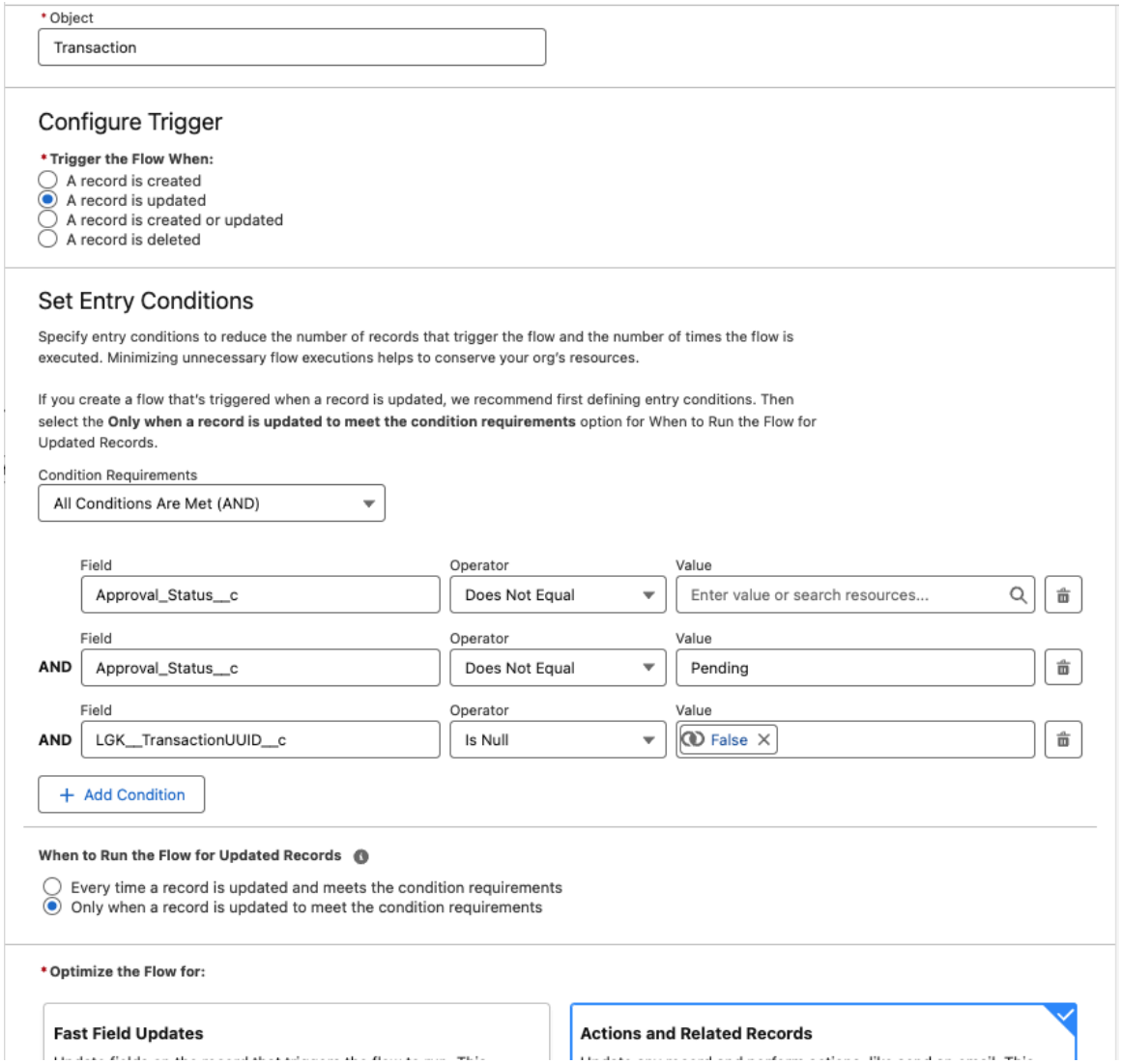
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2. In the Start block, click **Edit**.

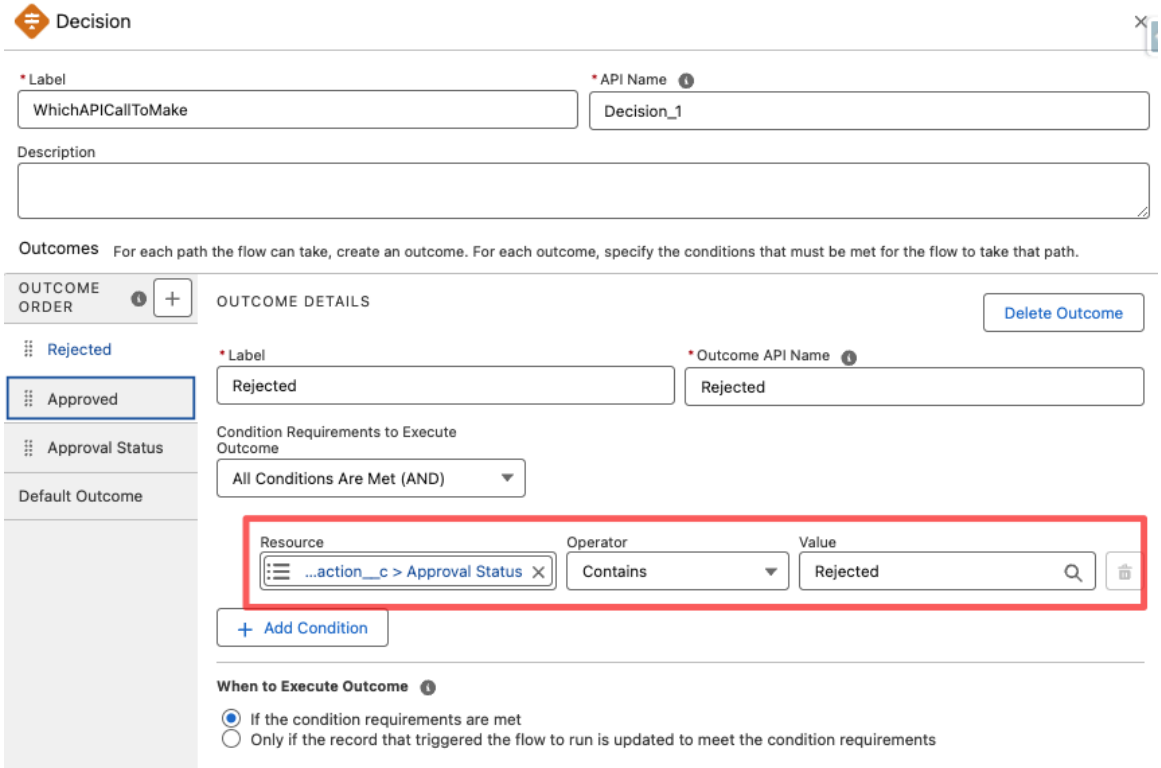
   Trigger on the *LGK__Transaction__C* object based on the custom field, ensuring that a UUID is not null. Also make sure to click **Run Asynchronously** and **Only when a record is updated to meet**.

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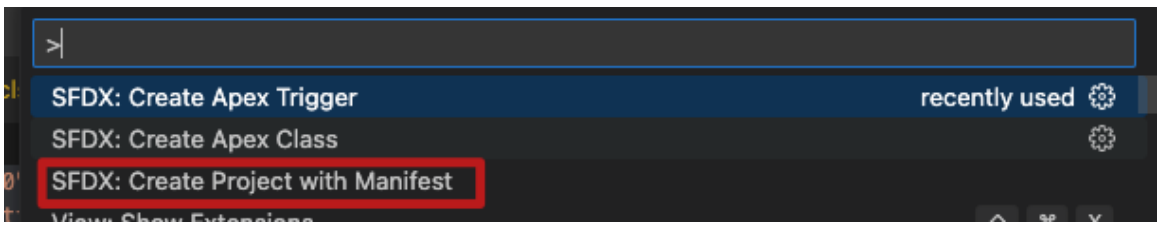

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3. Add a decision block, and create outcomes for when the custom field you created is approved or rejected.



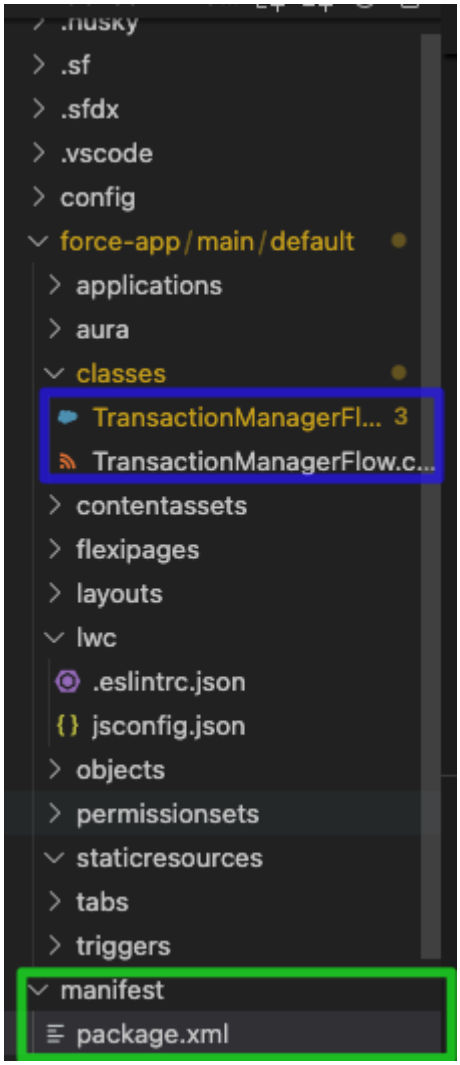

## Apex Code

Although this Apex Class was deployed through VS code, it could also be deployed in Salesforce. The first step is the create a new Project with manifest.




Next, create an Apex class (in the blue box) as well as a manifest.xml file (in the green box) to go into the respective files in the project directory.

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Apex code:

```
global with sharing class TransactionManagerFlow {
    global class FlowInput {
        @InvocableVariable(label='Triggering Record'
 required=true)
        global LGK__Transaction__c triggeringRecord;
    }
    // Handle logic for Rejected status
    @InvocableMethod(label='Logik.io Transaction callout from
 Salesforce' description='Makes callout to transition Logik.io
 transaction stage.')
    global static void handleApprovalStatus(FlowInput[]
 requestInputs) {
        System.debug('Handling Rejected status for Record: ' +
 requestInputs[0].triggeringRecord.Id);
        LGK__ConfigurationTenant__c customSettings =
 LGK__ConfigurationTenant__c.getInstance();
        String updatedRuntimeToken =
 '_gdyiOwOoGu1bNk3PO5exhUGqDFcZQVLIw';
        System.debug(updatedRuntimeToken);
        String endpoint =
 'https://se-txn-sandbox.test02.logik.io';
        for (FlowInput eachTxn : requestInputs) {
```

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```
            // Make the API request to transfer a transaction
from 'new' stage to 'rejected' stage
            // (compare with snippet from
ApprovalProcessHandler.makeApiCall)
            String uuid =
eachTxn.triggeringRecord.LGK__TransactionUUID__c;
            Http http = new Http();
            HttpRequest request = new HttpRequest();
            request.setHeader('Origin', endpoint);
            if (eachTxn.triggeringRecord.Approval_Status__c ==
'Rejected') {
                request.setEndpoint(endpoint + '/api/t/' +
String.valueOf(uuid) + '/events/revise'); // Example endpoint
                System.debug('Endpoint set for rejection' +
request.getEndpoint());
            } else if
(eachTxn.triggeringRecord.Approval_Status__c == 'Approved') {
                request.setEndpoint(endpoint + '/api/t/' +
String.valueOf(uuid) + '/events/proceedToApproved'); // Example
endpoint
                System.debug('Endpoint set for approval' +
request.getEndpoint());
            }
            request.setMethod('POST');
            request.setHeader('Authorization', 'Bearer ' +
updatedRuntimeToken);
            request.setHeader('Content-Type',
'application/json');
            request.setBody('{}');  // Convert to JSON if inputs
are needed
            System.debug(request);
            if (!Test.isRunningTest()) {
                HttpResponse response = http.send(request);
                if (response.getStatusCode() != 200) {
                    System.debug(LoggingLevel.ERROR, 'Error
transitioning transaction: ' + response.getStatusCode());
                    System.debug(LoggingLevel.ERROR,
response.getBody());
                } else {
                    System.debug('Rejected API Call Failed: ' +
response.getStatusCode() + ' - ' + response.getBody());
                }
            } else {
                eachTxn.triggeringRecord.LGK__TransactionUUID__c
= 'testUUID';
            }
        }
    }
}
```

XML:

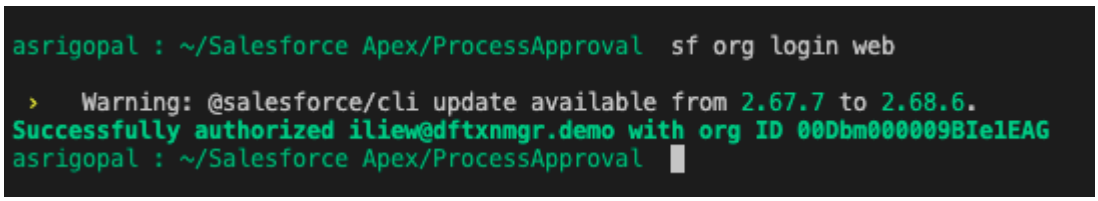
```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>TransactionManagerFlow</members>
        <name>ApexClass</name>
```

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```
    </types>
    <version>61.0</version>
</Package>
```

Next, if you're not logged into the org you want to deploy to, do so with the `sf org login web` command, which takes you to login.salesforce.com.

When you've authorized CLI, the result should resemble the following:

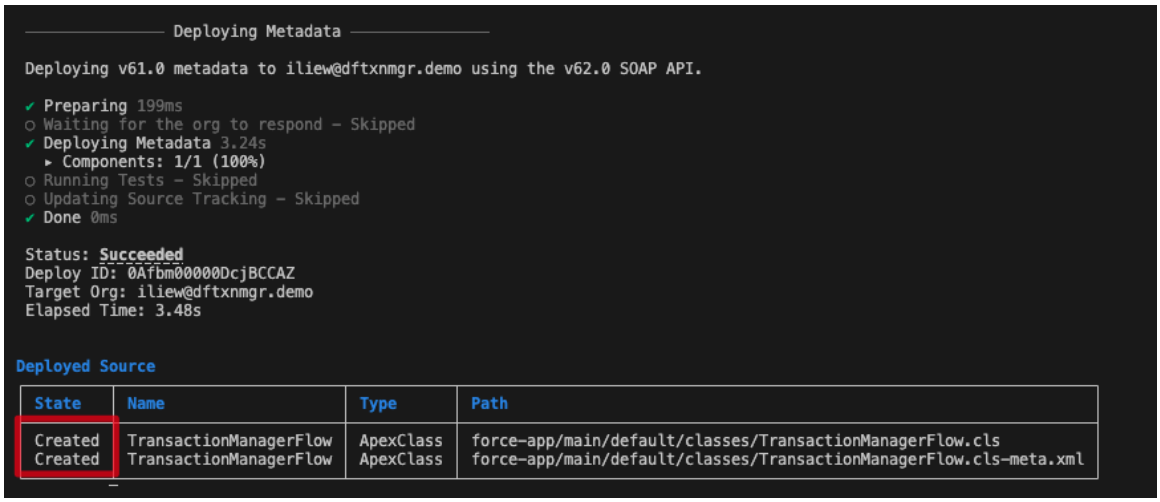



**Note:** If you're logged into multiple orgs through CLI, use this command to switch:

`sf config set target-org=<username>`

When you're logged in, execute this command:

`sf project deploy start --manifest manifest/package.xml`




Add the Apex actions after the decision blocks, and make sure your flow looks similar to the one provided in the screenshot. (Look for a name that matches the label parameter in the invocable method.)

Finally, activate the flow and test.

## Testing

After the record-triggered flow and the ServiceNow Quote Experience blueprint are created, you may find this SOQL query helpful for debugging your approvals process in Salesforce.

Receiving Salesforce Approval Status (getting the state of most recent process)

- Connection: Salesforce
- GET

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- Additional Path: {_endpoint}/services/data/v61.0/query/? q=SELECT +Id,Status,TargetObjectId+FROM+ProcessInstance+WHERE +TargetObjectId={{sfRecordId}}+ORDER+BY+CreatedDate+DESC
- SOQL Query

```
SELECT Id, Status, TargetObjectId
FROM ProcessInstance
WHERE TargetObjectId-'006bm000002IUI4AAO' -- This is the sf
 oppy/transaction object  id
ORDER BY CreatedDate DESC
```

# Sales Customer Relationship Management reference

Reference topics provide additional information about the Sales Customer Relationship Management applications.

## Sales Customer Relationship Management REST APIs

Sales Customer Relationship Management (Sales CRM) APIs provide endpoints to create and manage Sales CRM entities such as pricing, leads, quotes, and orders from external systems.

**Sales CRM APIs**

| REST API | Description |
|---|---|
| Entitlement API | The *Entitlement* API provides endpoints to create and retrieve entitlement records from an instance. |
| lead API | The *lead* API provides endpoints that enable you to create, update, and query/ retrieve marketing leads and their associated lead line items from an instance. |
| Order API | The *Order* API provides endpoints for retrieving and creating orders with order line items for the Customer Service Management application. |
| Product Catalog Search API | The *Product Catalog Search* API provides endpoints to search the product catalog and retrieve products that match supplied search parameters, and also catalog items such as eligible product catalog-category hierarchies. |
| Product Inventory Open API | The *Product Inventory Open* API provides endpoints to create and retrieve product inventories. |
| Sales CRM Pricing API | The *Sales CRM Pricing* API provides endpoints to create, update, and retrieve pricing records. |
| Sales Agreement API | The *Sales Agreement* API provides methods for creating a new sales agreement and retrieving an existing sales agreement of a given sys_id. |
| Sales Cart REST API | The *Sales Cart* API gives an external system programmatic control of a ServiceNow sales cart. |
| Work Order Management API | The *Work Order Management* API provides endpoints to create, update, and retrieve work orders. |

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**Related topics**

- TMF APIs for TMT
- Browse APIs by product
- API implementation and reference

# Sales automation reference

Reference for sales automation applications.

## Lead Management reference

Reference topics provide additional information about the Lead Management application.

### Components installed with Lead Management

Several types of components are installed with activation of the Lead Management plugin, including tables and user roles.

## Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Lead writer [sn_lead_mgmt_core.lead_writer] | A granular role created to give write access to Lead and Lead Line Item. | sn_lead_mgmt_core.lead_viewer |
| Lead integrator [sn_lead_mgmt_core.lead_integrator] | Lead integrator have access to call the REST APIs of lead. | • sn_crm_touchpoint.touchpoint_writer<br>• sn_lead_mgmt_core.lead_writer<br>• sn_meeting_mgmt.meeting_creator |
| Lead responsibility write granular [sn_lead_mgmt_core.lead_responsibility_write_granular] | Provides granular access to lead and related entities through the responsibility framework. | sn_lead_mgmt_core.lead_responsibility_read_ |
| Lead responsibility read granular [sn_lead_mgmt_core.lead_responsibility_read_granular] | Provides granular read-only access to lead and its related entities through the responsibility framework. | None |
| Lead agent [sn_lead_mgmt_core.lead_agent] | Lead agent can perform CRUD operations on Lead and related tables. | • sn_customerservice.csm_workspace_user<br>• sn_lead_mgmt_core.lead_writer<br>• sn_meeting_mgmt.meeting_creator<br>• sn_crm_touchpoint.touchpoint_writer |
| Lead admin [sn_lead_mgmt_core.lead_admin] | An admin role created to give create, update, read, and delete access on lead tables. | • sn_crm_touchpoint.admin<br>• sn_lead_mgmt_core.lead_agent<br>• sn_lead_mgmt_core.lead_integrator |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| Lead viewer [sn_lead_mgmt_core.lead_viewer] | A granular role created to give read access to Lead and Lead Line Item. | • sn_csm_ctxrul_mgt.context_variable_viewer<br>• sn_prd_pm.product_catalog_viewer<br>• canvas_user<br>• sn_csm_ctxrul_mgt.rule_matrix_viewer |

## Tables installed

| Table | Description |
|---|---|
| Lead Needs<br>sn_lead_mgmt_lead_needs | Specific requirements or expectations of a customer. |
| Lead Line Item<br>sn_lead_mgmt_core_lead_line_item | Individual product entry within a lead. |
| Lead Task<br>sn_lead_mgmt_core_lead_task | A specific action or activity assigned to manage or progress a lead, such as follow-up calls, sending proposals, or scheduling meetings. |
| Lead<br>sn_lead_mgmt_core_lead | Prospective customers who have expressed their interest through various channels, such as website forms, social media, or events. |

### Lead details form

Field descriptions for editing or reviewing details on the Lead form for Lead Management.

#### Details fields

| Field | Description |
|---|---|
| Number | Unique, auto-generated identifier for the lead record. This field is automatically set to the next available LEAD number. |
| Lead Group | Group or campaign segment associated with the lead. |
| First Name | First name of the lead contact. |
| Middle Name | Middle name of the lead contact. |
| Last Name | Last name of the lead contact. |
| Title | Job title of the lead contact. |
| Email | Email address of the lead contact. |
| Business Phone | Primary business phone number of the lead contact. |

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### Details fields (continued)

| Field | Description |
|---|---|
| Mobile Phone | Mobile phone number of the lead contact. |
| Owner | Name of the user responsible for managing the lead. |
| Company | Name of the company or organization the lead represents. |
| Industry | Industry vertical of the lead's organization. The available options are:<br>• Manufacturing<br>• Healthcare<br>• Technology Services<br>• Banking<br>• Bio-Technology<br>• Telecommunications |
| Website | Website URL of the lead's organization. |
| Short Description | Brief summary of the lead's inquiry or intent. |
| Stage | Current stage of the lead in the sales lifecycle. The available options are:<br>• New<br>• Contacted<br>• Nurturing<br>• Qualified<br>• Disqualified |
| Lead Type | Category of the lead. The available options are:<br>• New Business<br>• Existing Business |

### Additional Information fields

| Field | Description |
|---|---|
| Lead Source | Channel or origin through which the lead was acquired. The available options are:<br>• Inbound Phone<br>• Inbound Web<br>• Partner Referral<br>• 3rd Party Referral |

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### Additional Information fields (continued)

| Field | Description |
|---|---|
| | • Employee Referral<br>• List<br>• Trade Show<br>• Pr<br>• Display Ad<br>• Billboard<br>• AI-Suggested<br>• Other |
| Lead Score | Numerical score indicating the lead's likelihood to convert. |
| Lead Rating | Rating that indicates the quality or priority of the lead. The available options are:<br>• Cold<br>• Warm<br>• Hot<br>• Super Hot |
| Closed Date | Date on which the lead was closed. |
| Account | Account record associated with the lead. |
| Contact | Contact record associated with the lead. |
| Consumer | Consumer record associated with the lead. |

### Address fields

| Field | Description |
|---|---|
| Street | Street address of the lead contact. |
| City | City of the lead contact's address. |
| State | State or province of the lead contact's address. |
| Zip/Postal Code | ZIP or postal code of the lead contact's address. |
| Country | Country of the lead contact's address. |

### Customer Preferences fields

| Field | Description |
|---|---|
| Do Not Call | Option to exclude the lead contact from phone outreach. |
| Do Not Email | Option to exclude the lead contact from email outreach. |
| Do Not Share | Option to prevent the lead contact's information from being shared. |

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### System Information fields

| Field | Description |
|---|---|
| Created By | Name of the user who created the lead record. |
| Updated By | Name of the user who last updated the lead record. |
| Created | Date and time when the lead record was created. |
| Updated | Date and time when the lead record was last updated. |
| Notes | General notes related to the lead. |
| Work Notes | Internal notes related to the lead, visible only to agents and administrators. |

### Create new lead task form

Field descriptions for editing or reviewing details on the Create New Lead Task form in the Lead Management and CRM Touchpoints modules.

| Field | Description |
|---|---|
| Number | System#generated unique identifier assigned to each lead task record with the prefix LDTASK. |
| Short description | Brief description of the work to be completed for the lead. |
| Due date | Date and time by which the lead task has to complete. |
| Assigned to | Name of the sales agent to whom this lead task is assigned. |
| State | Current status of the lead task. The available options are:<br>• Draft<br>• In Progress<br>• Completed<br>• Cancelled<br>• Closed |
| Touchpoint | CRM touchpoint associated with the lead record. This field is automatically populated when the task is created from a touchpoint record. |
| Work notes | Internal notes visible only to team members with appropriate access. |

### Related topics

Add lead tasks

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### Create new appointment form

Field descriptions for editing or reviewing details on the Create New Appointment form in the Lead Management and CRM Touchpoints modules.

| Field | Description |
|---|---|
| From | Email id of the sender. |
| To | Email id of the receiver. |
| Activity state | State of the appointment. |
| Start time | Start time of your appointment. |
| End time | End time of your appointment. |
| Reminder | Time interval for a reminder. |
| Subject | Subject information of your appointment. |
| Location | Location of your appointment. |
| Message | Additional information for your appointment. |

**Related topics**

Create appointments for lead tasks

## Opportunity Management reference

Reference topics provide additional information about the Opportunity Management application.

### Components installed with Opportunity Management

Several types of components are installed with activation of the Opportunity Management plugin, including user roles and tables.

## Roles installed

| Role name | Description | Contains roles |
|---|---|---|
| sn_opty_mgmt_core.opportunity_viewer | A granular role created to give read access to Opportunity and Opportunity Line Item. | • sn_csm_pricing.pricelist_viewer<br>• sn_prd_pm.product_catalog_viewer<br>• sn_customerservice.customer_data_viewer<br>• sn_opty_mgmt_core.opportunity_setup_viewe |
| sn_opty_mgmt_core.opportunity_responsibility_reader | Provides granular read access to opportunity and its related entities through the responsibility framework. | None |
| sn_opty_mgmt_core.opportunity_admin | A granular role created to give CRUD access to Opportunity tables. | • sn_meeting_mgmt.meeting_creator<br>• sn_nowassist_admin.nsa_admin<br>• sn_opty_mgmt_core.opportunity_setup_write<br>• sn_opty_mgmt_core.opportunity_writer |

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| Role name | Description | Contains roles |
| --- | --- | --- |
| | | • sn_opty_mgmt_core.opportunity_allocation_w<br>• sn_crm_touchpoint.admin |
| sn_opty_mgmt_core.opportunity_integration | Provides integration-level write access to the opportunity entity. | • sn_meeting_mgmt.meeting_creator<br>• sn_crm_touchpoint.touchpoint_writer<br>• sn_opty_mgmt_core.opportunity_writer |
| sn_opty_mgmt_core.opportunity_responsibility_access | Provides granular access to opportunity and related entities through the responsibility framework. | sn_opty_mgmt_core.opportunity_responsibility_ |
| sn_opty_mgmt_core.opportunity_setup_viewer | Provides viewer-only access to the Sales cycle and Opportunity stage tables. | None |
| sn_opty_mgmt_core.opportunity_writer | A granular role created to give write access to Opportunity and Opportunity Line Item. | • sn_opty_mgmt_core.opportunity_viewer<br>• sn_quote_mgmt_core.quote_writer |
| sn_opty_mgmt_core.opportunity_contributor | Provides limited permissions to FSM/CSM agents to generate opportunities and view their progress across the sales life cycle. | • sn_prd_pm.product_catalog_viewer<br>• sn_opty_mgmt_core.opportunity_setup_viewe<br>• sn_csm_pricing.pricelist_viewer<br>• sn_customerservice.customer_data_viewer |
| sn_opty_mgmt_core.opportunity_setup_writer | Provides access to read, create, and write the Sales cycle and Opportunity stage tables. | sn_opty_mgmt_core.opportunity_setup_viewer |
| sn_opty_mgmt_core.opportunity_allocation_viewer | Provides viewer access to view opportunity allocations. | None |
| sn_opty_mgmt_core.opportunity_allocation_writer | Provides writer access to manage opportunity allocations. | sn_opty_mgmt_core.opportunity_allocation_vie |
| sn_opty_mgmt_core.opportunity_allocation_responsibility_access | Provides granular access to opportunity allocations through the responsibility framework. | None |
| sn_opty_mgmt_core.opportunity_allocation_responsibility_write | Provides granular write access to opportunity allocations through the responsibility framework. | sn_opty_mgmt_core.opportunity_allocation_res |

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## Tables installed

| Table | Description |
|---|---|
| Opportunity<br>sn_opty_mgmt_core_opportunity | Potential sales deal with a customer account. |
| Opportunity Task<br>sn_opty_mgmt_core_opportunity_task | Tasks associated with an opportunity, such as follow#ups, reviews, or sales actions required to progress the opportunity through its stages. |
| Opportunity Line Item<br>sn_opty_mgmt_core_opportunity_line_item | Individual products or services included in an opportunity. |
| Opportunity Line Characteristic<br>sn_opty_mgmt_core_opportunity_line_characteristic | Additional attributes or characteristics associated with an opportunity line item, such as product#specific options, classifications, or dimensions required for pricing, reporting, or allocation logic. |
| Opportunity Needs<br>sn_opty_mgmt_opportunity_needs | Customer#expressed business needs or requirements linked to an opportunity. |
| Opportunity Competitor<br>sn_opty_mgmt_core_opportunity_competitor | Competitors associated with an opportunity, enabling sales teams to record competitive presence, assess deal risk, and analyze win/loss patterns across opportunities. |
| Opportunity Team Member<br>sn_opty_mgmt_core_opportunity_team_member | Users involved in working on an opportunity, along with their roles and responsibilities. |
| Opportunity Associated Contact<br>sn_opty_mgmt_core_opportunity_associated_contact | Contacts related to an opportunity, such as decision#makers, influencers, or stakeholders at the customer account. |
| Opportunity Stage<br>sn_opty_mgmt_core_opportunity_stage | The current phase of an opportunity within a sales cycle, such as Qualify, Develop, Propose, or Close. |
| Sales Cycle Type<br>sn_opty_mgmt_core_sales_cycle_type | A category of sales motion for opportunities, such as New Customer, Renewal, or Upsell. |
| Sales Cycle Stage<br>sn_opty_mgmt_core_sales_cycle_stage | A stage configuration within a specific sales cycle type. |
| Opportunity Related Party<br>sn_opty_mgmt_core_opportunity_related_party | Non#user entities related to an opportunity, such as partners, resellers, or external organizations. |
| Opportunity Related Channel Partner<br>sn_bus_org_opptym_related_business_organization | Channel partners associated with an opportunity, such as distributors or resellers. |

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| Table | Description |
|---|---|
| Opportunity Allocation<br><br>sn_opty_mgmt_core_opportunity_allocation | Transactional allocation records that represent how opportunity value is distributed across participants, such as team members, territories, or product groupings. |
| Opportunity Allocation Type<br><br>sn_opty_mgmt_core_opportunity_allocation_type | Allocation configuration metadata, such as what entity is allocated (opportunity or line item), which numeric field is used, and whether allocations must total 100%. |
| Opportunity Allocation Dimension<br><br>sn_opty_mgmt_core_opportunity_allocation_dimension | Allocation values that are grouped or categorized, such as by territory or product family. |

**Related topics**

Install Opportunity Management

### Opportunity details form

Field descriptions for editing or reviewing details on the Opportunity form for Opportunity Management.

#### Details

| Field | Description |
|---|---|
| Number | The system-generated number of the opportunity starting with the prefix OPTY. |
| Primary Quote | A Primary Quote within an opportunity. |
| Account | Company name of the customer account. |
| Industry | Name of the industry. For example, Telecommunications or Manufacturing or Healthcare or Banking. |
| Contact | Name of the individual in the company that you interact with. |
| Estimated Deal Size | Amount of potential opportunity. |
| Deal type | Indicates the type of deal associated with the opportunity:<br>• Direct: The seller engages directly with the customer, with no intermediary partner involved.<br>• Indirect: The seller engages the customer through an intermediary, such as a reseller, service provider, or distributor. |
| Probability % | Estimated percentage of the sales opportunity's success. |
| Route to market | Identifies the exact sales channel used to execute the deal: |

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### Details (continued)

| Field | Description |
|---|---|
| | • Direct<br>• Reseller<br>• Service Provider<br>• Distributor |
| Amount | Total opportunity amount.<br><br>**Note:** If an opportunity doesn't have any line items, then the amount picks up the same value as the **Estimated Deal Size**. When opportunity line items are added, the amount value changes as the value is picked up from **Total TCV**. |
| Sales Cycle Type | Type of sales, for example NEWCUST, RENEW, or UPSELL. |
| Weighted Amount | Total revenue adjusted by the probability percentage.<br><br>The **Weighted Amount** for an opportunity is calculated by multiplying the **Probability %** with the **Amount**. For example, if the probability percentage for an opportunity is 10 (0.1%) and the amount is 100$, the weighted amount is 0.1 X 100 = 10.00. |
| Stage | Phases of the opportunity. For example, Qualify, Develop Propose, Negotiate, Closed-Won, or Closed-Lost. |
| Opportunity Group | Logical grouping of related opportunities. |
| Forecast Category | Forecast classification of the opportunity. |
| Territory | Sales territory associated with the opportunity. Used to assign responsibility, control access, and support reporting and forecasting. |
| Owner | Sales agent or sales representative assigned to this opportunity. |
| Channel partner | An external organization involved in selling, influencing, or supporting an opportunity as part of an indirect sales. |
| Short Description | Brief description of the opportunity. |
| Description | Description of the opportunity. |

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### Pricing

| Field | Description |
|---|---|
| Currency | Currency of the price list, for example USD for US dollars. |
| Price List | Default price list for the opportunity. |
| Term (months) | Subscription period of the opportunity line item.<br><br>The default term is 12 months. |
| Total one-Time Price | Total price of all one-time products or services in the opportunity. |
| Total MRR | Total monthly recurring revenue (MRR) amount for all recurring products and services. |
| Total ARR | Total annual recurring revenue (ARR) amount for all recurring products and services each year. |
| Total ACV | Total annual contract value (ACV), which is the yearly amount revenue for all products and services from a customer contract. |

### Totals

| Field | Description |
|---|---|
| Total Renewal Amount | The sum of all renewal amounts associated with the opportunity. Represents revenue from renewing existing contracts. |
| Total Upsell/Downsell Amount | The net sum of all upsell and downsell amounts on the opportunity. Represents incremental increase or decrease in contract value compared to the existing contract. |
| Total TCV | Total contract value (TCV), which is the total amount of revenue from a customer contract expected over the lifetime of the contract. |
| Total Net New Amount | The cumulative net new price associated with the opportunity, excluding renewal portions of existing contracts |
| Total One#Time Price | The total price of all one#time (non#recurring) products or services included in the opportunity. |

### Win/Loss Outcome

| Field | Description |
|---|---|
| Win reason | A predefined choice that captures the primary reason an opportunity was won. Used to record why the customer selected the |

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### Win/Loss Outcome (continued)

| Field | Description |
| --- | --- |
| | solution and to support win/loss analysis and reporting. The choices are:<br>• Brand and reputation<br>• GenAI capabilities<br>• Ease of implementation<br>• Security, Risk and compliance<br>• Ability to customize<br>• Product features and functionality<br>• Upsell/cross sell merged opportunity<br>• Partner support<br>• Executive relationships<br>• Others - please specify<br>• I don't know<br>• Consolidation |
| Loss reason | A predefined choice that captures the primary reason an opportunity was lost or resulted in no decision. Used to analyze deal losses and identify patterns across competitors, products, or pricing. The choices are:<br>• Customer not ready<br>• Lack of GenAI capabilities<br>• Security, Risk and compliance did not fit customer's needs<br>• Inability to customize<br>• Product features and functionality did not fit customer's needs<br>• No longer funded<br>• Price too high for value gained<br>• Product has too many issues<br>• Lack of partner support<br>• Account went silent<br>• Contract consolidated<br>• Others - please specifyI don't know |
| Lost to | Identifies the competitor to whom the opportunity was lost. The list is populated from competitors already associated with the opportunity. Used for competitive analysis and reporting. |

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### Win/Loss Outcome (continued)

| Field | Description |
|---|---|
| Outcome notes | Free#text notes used to capture additional context or supporting details for the win or loss outcome, beyond the selected reason. Remains visible for both won and lost opportunities. |

### Additional Information

| Field | Description |
|---|---|
| Source | Identifies the source from where the opportunity originated. The options are:<br>• Lead: Indicates that the opportunity originated from a lead record.<br>• Direct: Indicates that the opportunity was created directly by a sales user without an originating lead, for example through direct customer engagement or outbound sales activity.<br>• Partner: Indicates that the opportunity originated from a partner, such as a reseller, distributor, or alliance partner who identified or referred the deal.<br>• Other: Indicates that the opportunity originated from a source that does not fall into the standard Lead, Direct, or Partner categories. Used when the source cannot be clearly classified. |
| Lead | The lead record associated with the opportunity, indicating the originating lead from which the opportunity was created. |
| Score | A system#derived or user#assigned value used to indicate the relative quality or priority of the opportunity. |
| Rating | A qualitative assessment of the opportunity, typically used to classify opportunity attractiveness or health. The classifications are:<br>• Cold: Indicates low engagement or low likelihood of progression. The opportunity shows limited momentum, minimal customer activity, or weak buying signals.<br>• Warm: Indicates moderate engagement and emerging buying interest. The opportunity is progressing, but key signals or commitments are still developing. |

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### Additional Information (continued)

| Field | Description |
|---|---|
| | • Hot: Indicates strong engagement and a high level of buying intent. The opportunity shows clear momentum with positive signals toward closure.<br>• Super Hot: Indicates very strong engagement and an imminent likelihood of closure. The opportunity demonstrates sustained momentum, high confidence, and near-term action. |
| Contract start date | The date on which the customer contract associated with the opportunity begins. |
| Estimated Closed Date | The expected date on which the opportunity is projected to close. Used for pipeline planning and forecasting. |
| Actual Closed Date | The date on which the opportunity was actually closed, either as won or lost. |
| Consolidated opportunity | Indicates that the opportunity is part of an account or contract consolidation, where multiple source opportunities are merged into a single target opportunity for execution and reporting. |
| Contract end date | The date on which the customer contract associated with the opportunity ends. |
| Customer Preferences | The customer's preferred mode of communication:<br>• Do Not Call<br>• Do Not Email<br>• Do not Share |

### System Information

| Field | Description |
|---|---|
| Opened By | Identifies the user who initially opened or created the opportunity record in the system. |
| Created | Displays the date and time when the opportunity record was created in the system. This value is system#generated and cannot be edited. |
| Work Notes | Internal notes used to capture additional information, updates, or context related to the opportunity. Work notes are intended for internal use and are not visible to customers. |

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## Create new appointment form

Field descriptions for editing or reviewing details on the Create New Appointment form in the CRM Touchpoints and Opportunity Management modules.

### Create New Appointment form fields

| Field | Description |
|---|---|
| From | Email ID of the user sending or organizing the appointment. This field is automatically set to the logged-in user. |
| To | Email ID of the recipient or attendee of the appointment. |
| Activity state | Read-only field displaying the current state of the appointment activity. Available options are:<br>• Ready (default)<br>• Sent<br>• New<br>• Completed<br>• Cancelled<br>• Pending |
| Start time | The date and time the appointment begins. |
| End time | The date and time the appointment ends. |
| Reminder (minutes) | How many minutes before the appointment start time a reminder notification is sent. The available options are:<br>• None<br>• 15 (default)<br>• 30<br>• 60<br>• 120 |
| Subject | A brief description of the purpose of the appointment. |
| Location | Optional physical locations or conference rooms where the appointment takes place. |
| Message | Additional details or notes about the appointment. This field supports rich text formatting. |

**Related topics**

- Create an appointment from Opportunity Management
- Schedule an appointment from a touchpoint

## Create new opportunity task form

Field descriptions for editing or reviewing details on the Create New Opportunity Task form in CRM Touchpoints and Opportunity Management modules.

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| Field | Description |
|---|---|
| Number | System-generated unique identifier for the opportunity task record starting with the prefix OPTASK. |
| Opportunity | Opportunity record associated with the task. |
| Due date | Date and time by which the task should be completed. |
| State | Current state of the opportunity task. The available options are:<br>• Draft (default)<br>• In Progress<br>• Completed<br>• Cancelled<br>• Closed |
| Assigned to | User responsible for completing the task. |
| Touchpoint | CRM touchpoint associated with the opportunity record. This field is automatically populated when the task is created from a touchpoint record. |
| Short description | Brief summary of the task. |
| Work notes (Private) | Internal notes visible only to team members with appropriate access. |

**Related topics**

Create a related task from a touchpoint

## Sales Forecasting reference

Several types of components are installed with activation of the Sales Forecasting application.

### Roles in Sales Forecasting

| Role | ID | Functions |
|---|---|---|
| Forecast Administrator | sn_sales_forecast.forecast_admin | • Setup group hierarchy and sales teams with the managers and sales agents' information for the organization.<br>• Set up Sales forecasting settings and be able to initiate calculate forecasts.<br>• Create/edit/view forecast category choices and forecast model details. |
| Forecast Analyst | sn_sales_forecast.forecast_analyst | View all forecasts item entries, forecast category, forecast |

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**Roles in Sales Forecasting (continued)**

| Role | ID | Functions |
|---|---|---|
| | | model, and associated opportunities. |
| Sales Quota Admin | sn_quota_core.quota_admin | Create/import/edit/delete quota for different sales teams and individuals. |
| Sales Quota Manager | sn_quota_core.quota_manager | Edit the sales quota for the groups. |
| Sales Quota Owner | sn_quota_core.quota_owner | View the Sales quota assigned to the owner. |
| Adjustment Viewer | sn_sales_forecast.adjustment_viewer | View forecast-adjusted records assigned to them and the people below them in the hierarchy. |
| Adjustment Writer | sn_sales_forecast.adjustment_writer | Edit the forecast-adjusted records that they own. |
| Forecast Viewer | sn_sales_forecast.forecast_viewer | View all the forecast data that they own and the data of people below them in the hierarchy. |
| Submission Viewer | sn_sales_forecast.submission_viewer | View forecast-submitted records that they own and the records owned by people below them in the hierarchy. |
| Submission Writer | sn_sales_forecast.submission_writer | Edit the forecast-submitted records that they own. |

## Customer Engagement Sequences reference

Reference topics provide additional information about the Customer Engagement Sequences application.

### Components installed with Customer Engagement Sequences

Several types of components are installed with activation of the Customer Engagement Sequences plugin, including tables and user roles.

## Roles installed

The following roles are installed if you're using Customer Engagement Sequences version 1.0.0.

| Role title [name] | Description | Contains roles |
|---|---|---|
| Sequence viewer<br><br>[sn_crm_sequence.viewer] | Views sequence-related records. | sn_crm_sequence.sn_crm_sequence_ |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| Sequence task read granular<br>[sn_crm_sequence.sn_crm_sequence_task_read_granular] | Granular role to grant read access to the sequence task records. | None |

The following roles are installed if you're using Customer Engagement Sequences version 2.0.0:

| Role title [name] | Description | Contains roles |
|---|---|---|
| Sequence admin<br>[sn_crm_sequence.admin] | Granular admin role grants full administrative access to all sequence records and their related data. | • pd_cancel<br>• pd_content_author<br>• sn_crm_sequence.writer |
| Sequence writer<br>[sn_crm_sequence.writer] | Creates sequence records, and views related records such as sequence tasks and sequence steps. | • playbook.write<br>• sn_crm_sequence.executor |
| Sequence executor<br>[sn_crm_sequence.executor] | Views sequence and sequence task records, and completes activities related to the sequence steps. | • sn_crm_sequence.reader<br>• sn_crm_sequence.sn_crm_seque |
| Sequence reader<br>[sn_crm_sequence.reader] | Views sequence records. | playbook.designer_access |
| Sequence task read granular<br>[sn_crm_sequence.sn_crm_sequence_task_read_granular] | Granular role to grant read access to the | None |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| | sequence task records. | |

## Tables installed

| Table | Description |
|---|---|
| Customer Engagement Sequence Task<br><br>[sn_crm_sequence_task] | Stores the sequence task records that are generated when a sequence is triggered. |

The Customer Engagement Sequence Task [sn_crm_sequence_task] table extends the Task [task] table.

**Related topics**

- Install Customer Engagement Sequences
- Using Customer Engagement Sequences

### My sequence task list view

Description of the details displayed on the My sequence task list view.

#### My Sequence Task list view

| Column | Description |
|---|---|
| Number | ID of the sequence task record. |
| Sequence entity record | Sales entity record that triggered the sequence. For example, lead. |
| Sequence | Sequence that created the sequence task record. |
| Description | Description of the sequence. |
| State | Current state of the sequence task. The available options are:<br>• Work in progress<br>• Completed |
| Priority | Priority of the sequence task. |
| Due date | Date by which the sequence task must be completed. |
| Added at | Timestamp when the sequence task was created. |

### Automation form fields

The Automation form enables you to configure properties and pull data from referenced tables for an automated call attempt.

Dot-walking enables you to access columns from referenced tables so you can pull data beyond the current record into your configuration. For more information, see Dot-walking examples.

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| Field | Description |
|---|---|
| Short description | The parent table field containing a value that you want to use as a short description on the call task. |
| Description | Optional description about the schedule call activity. |
| Phone number | The parent table field containing the phone number. |
| Sequence task | Sequence task associated with the call task. This value should be **1.1 - Start sequence** > **Sequence task record**. |
| Assigned to | Agent assigned to the sequence task. |
| Priority | Priority of the call task. |
| Reason for call | Purpose of calling the prospective customer. |
| State | The state of the call task. The available options include:<br>• Open<br>• Work in Progress<br>• Closed Complete<br>• Closed Abandoned<br>• Cancelled |

## Components installed with Buying Group

Several types of components are installed with activation of the Buying Group[var.buying-group] plugin, including user roles and tables.

## Roles installed

| Role name | Description | Contains roles |
|---|---|---|
| sn_buying_group.bg_viewer | Provides read access to buying groups and buying group members. | None |
| sn_buying_group.bg_writer | Provides write access to buying groups and buying group members, including the ability to create, update, and delete records. | sn_buying_group.bg_viewer |

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### Tables installed

| Table | Description |
|---|---|
| Buying Group<br>[sn_buying_group_buying_group] | A stakeholder committee associated with a customer account and product offering family, representing all individuals involved in a purchase decision. |
| Buying Group Member<br>[sn_buying_group_member] | A contact or lead associated with a buying group, along with their role and engagement details within the purchasing committee. |
| Buying Group Stage<br>[sn_buying_group_stage] | Configuration records that define the lifecycle stages of a buying group, such as Identified, Targeted, Qualified, In-Sales Motion, and Closed. |
| Opportunity Buying Group<br>[sn_buying_group_opportunity_buying_group] | Association records that link buying groups to opportunities, enabling sellers to connect a purchasing committee to one or more active deals. |

## Components installed with Sales Territory Management

Several types of components are installed with activation of the Sales Territory Management plugin, including user roles.

### Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Sales Territory Override<br>[sn_sales_territory.sales_territory_override_user] | Role for overriding territory associated on Lead, Opportunity, Account, or Consumer. | None |
| Sales Territory Viewer<br>[sn_sales_territory.sales_territory_viewer] | Role for viewing sales territory levels, territory models, territories, and sales data. | • sn_tp.territory_read<br>• sn_sales_territory.sales_territory_basic |
| Sales Territory admin<br>[sn_sales_territory.sales_territory_admin] | Role for creating and managing sales territory levels, territory models, and territories. | • sn_lead_mgmt_core.lead_viewer<br>• sn_quote_mgmt_core.quote_viewer<br>• sn_tp.territory_admin<br>• sn_opty_mgmt_core.opportunity_viewer<br>• sn_tmt_core.inbound_queue_read |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| | | • sn_customerservice.customer_data_viewer<br>• sn_sales_territory.sales_territory_basic<br>• sn_sales_territory.sales_territory_override_user |
| Sales Territory Manager<br>[sn_sales_territory.sales_territory_manager] | Role for managing resources of the assigned territory and its child territories. | • sn_sales_territory.sales_territory_basic<br>• sn_tp.territory_resource_manager |
| Sales Territory Basic<br>[sn_sales_territory.sales_territory_basic] | Granular role to access sales territory data. | None |
| Sales Territory Member<br>[sn_sales_territory.sales_territory_member] | Role for viewing the sales territory associated on the CRM entities like Lead, Opportunity, Account, or Consumer. | • sn_tp.territory_member<br>• sn_crm_customer_access_management_user<br>• sn_sales_territory.sales_territory_basic |

## Components installed with Sales Common

Several types of components are installed with activation of the Sales Common (sn_sales_common) plugin, including user roles and tables.

## Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Sales manager<br>[sn_sales_common.sales_manager] | Assigns opportunities to sales agents based on the team's expertise and creates, reads, and updates opportunities. | sn_sales_common.sales_agent |
| Sales agent<br>[sn_sales_common.sales_agent] | Creates, reads, and updates opportunities assigned by a sales manager to identify, nurture, and convert opportunities into successful sales. | • sn_quote_mgmt_core.quote_writer<br>• sn_som_gen_ai.sales_ai_user<br>• sn_meeting_mgmt.meeting_creator<br>• sn_mcp_server.viewer<br>• sn_crm_touchpoint.touchpoint_writer<br>• sn_sales_forecast.forecast_viewer<br>• sn_doc.reader<br>• sn_customerservice.csm_workspace_user<br>• sn_opty_mgmt_core.opportunity_setup_viewe |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| | | • sn_opty_mgmt_core.opportunity_writer<br>• sn_opty_mgmt_core.opportunity_allocation_w |
| Sales order specialist<br>[sn_sales_common.sales_order_specialist] | Includes both the sales agent role and the order agent role access, so sales order specialists can work on both middle-office and front-office activities for creating quotes and orders within a company. | sn_sales_common.sales_agent |
| Sales restricted agent<br>[sn_sales_common.sales_restricted_agent] | Provides access to leads, opportunities, quotes, sales territories, and other resources, enabling the user to manage the sales life cycle effectively through the responsibility framework. | • sn_customerservice.cust_data_resp_granula<br>• sn_opty_mgmt_core.opportunity_setup_viewe<br>• sn_customerservice.csm_workspace_user<br>• sn_crm_touchpoint.touchpoint_writer<br>• sn_mcp_server.viewer<br>• sn_opty_mgmt_core.opportunity_allocation_r<br>• sn_meeting_mgmt.meeting_creator<br>• sn_crm_customer_access_management_use<br>• sn_quote_mgmt_core.quote_responsibility_w<br>• sn_prd_pm.product_catalog_viewer<br>• sn_csm_ctxrul_mgt.context_variable_viewer<br>• sn_tmt_core.inbound_queue_read<br>• sn_opty_mgmt_core.opportunity_responsibili<br>• sn_csm_ctxrul_mgt.rule_matrix_viewer |
| Sales operations specialist<br>[sn_sales_common.sales_ops_specialist] | Configures and optimizes the sales process within an organization by handling administrative and setup tasks, ensuring that the sales team operates within a well-structured framework for tracking and managing sales transactions from initiation to closure. | • sn_som_gen_ai.sales_ai_admin<br>• sn_opty_mgmt_core.opportunity_setup_write<br>• canvas_user<br>• sn_opty_mgmt_core.opportunity_allocation_v<br>• sn_doc.writer<br>• sn_crm_touchpoint.touchpoint_reader<br>• sn_quote_mgmt_core.quote_viewer<br>• sn_opty_mgmt_core.opportunity_viewer<br>• sn_sales_forecast.forecast_admin<br>• sn_meeting_mgmt.meeting_viewer |

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## Tables installed

| Table | Description |
| --- | --- |
| Sales CRM Progression Checkpoint<br><br>[sn_sales_common_sales_crm_progression_checkpoint] | Records that track progression checkpoint events for an object as it moves through the sales life cycle. |

# Activity Management reference

Reference topics provide additional information about the Activity Management application.

### Components installed with CRM Touchpoints

Several types of components are installed with activation of the CRM Touchpoints plugin, including tables and user roles.

## Roles installed

| Role title [name] | Description | Contains roles |
| --- | --- | --- |
| CRM touchpoint admin<br><br>[sn_crm_touchpoint.admin] | Allows users with write permission on the associated entity to create, read, update, and delete CRM touchpoint records. | sn_crm_touchpoint.touchpoint_w |
| CRM touchpoint writer<br><br>[sn_crm_touchpoint.touchpoint_writer] | Allows users with write permission on the associated entity to create and update CRM touchpoint records. | sn_crm_touchpoint.touchpoint_re |
| CRM touchpoint reader<br><br>[sn_crm_touchpoint.touchpoint_reader] | Allows users with read permission on the associated entity to view CRM touchpoint records. | None |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| CRM touchpoint responsibility write granular<br><br>[sn_crm_touchpoint.touchpoint_responsibility_write_granular] | Provides granular write access to touchpoints through the responsibility framework. Access is scoped per record rather than granting blanket write access to all CRM touchpoint records. | sn_crm_touchpoint.touchpoint_re |
| CRM touchpoint responsibility read granular<br><br>[sn_crm_touchpoint.touchpoint_responsibility_read_granular] | Provides granular read access to touchpoints through the responsibility framework. Access is scoped per record rather than granting blanket read access to all CRM touchpoint records. | None |

## Tables installed

| Table | Description |
|---|---|
| CRM Touchpoint<br><br>[sn_crm_touchpoint_touchpoint] | Stores touchpoint records that track customer engagement activities across the sales and service life cycle. |

The CRM Touchpoint [sn_crm_touchpoint_touchpoint] table extends the Case [case] table.

### Create new CRM touchpoint form

Field descriptions for the Create New CRM Touchpoint form.

| Field | Description |
|---|---|
| Number | System-generated unique identifier for the touchpoint record starting with the prefix CRMTPT. |

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| Field | Description |
| --- | --- |
| Title | Descriptive name for the touchpoint. For example, Product demo session. |
| Type | Type of interaction the touchpoint represents. The available options are:<br>• None (default)<br>• Discovery<br>• Demo<br>• Customer business review<br>• Qualification<br>• Solution review<br>• Proposal review<br>• Commercials<br>• Technical win<br>• Account check-in<br>• Buying group check-in<br>• Executive alignment<br>• Renewal discussion<br>• Adoption review<br>• Business value assessment<br>• Partner enablement<br>• Sequence outreach<br>• Other |
| Category | Category that classifies the type of touchpoint. The available options are:<br>• None (default)<br>• Pre-Sales<br>• Sales<br>• Post-Sales<br>• Partner |
| Associated entity | The table name of the CRM entity linked to the touchpoint, such as Opportunity [sn_opty_mgmt_core_opportunity]. |
| Associated record | Record from the selected associated entity that is linked to the touchpoint, such as an opportunity record. The available options are based on the value set in the Associated entity field. |
| Primary channel | Primary communication channel used for the touchpoint. The available options are:<br>• None (default)<br>• Email<br>• Call<br>• Meeting |

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| Field | Description |
|---|---|
| | • In-Person<br>• Social |
| State | Current state of the touchpoint. The available options are:<br>• Open (default)<br>• In Progress<br>• Complete<br>• Canceled |
| Priority | Priority level of the touchpoint. The available options are:<br>• Low<br>• Medium (default)<br>• High |
| Account | This field is automatically set to the account of the Associated entity. |
| Contact | This field is automatically set to the contact associated with the Account. You can select a contact from the drop-down list if the Associated entity is set to Account. |
| Due date | Date and time by which the touchpoint activity should be completed. |
| Owner | User responsible for the touchpoint. This field is automatically set to the logged-in user. |
| Description | Optional additional details about the touchpoint. |
| Notes (Private) | Internal notes visible only to the touchpoint owner and team members with appropriate access. |

**Note:** The Account and Contact fields become read-only after you save the CRM Touchpoints.

**Related topics**

Create a CRM touchpoint

### Create new meeting form

Field descriptions for editing or reviewing details on the Create New Meeting form for CRM Touchpoints.

Field availability depends on the selected State and whether the Virtual meeting option is selected.

- When State is set to Scheduled, the following fields become available: Invitees, Video software, Cadence, Location, Virtual meeting, and Meeting link.
- When State is set to Completed or Canceled, the following fields become read-only: Meeting type, Video software, Cadence, Location, Virtual meeting, and Meeting link.
- When State is set to Scheduled and Virtual meeting is unselected, Video software and Meeting link are unavailable.

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| Field | Description |
| --- | --- |
| Number | System-generated unique identifier for the meeting record, starting with the prefix CCMTG. |
| Source | This field is automatically set to the CRM touchpoint from which the meeting was created. |
| State | Current state of the meeting record. The available options are:<br>• Draft<br>• Scheduled<br>• Completed<br>• Canceled |
| Meeting type | Type of meeting. The available options are:<br>• Ad-hoc<br>• Weekly Status<br>• QBR<br>• Renewal |
| Video software | Video conferencing application used for the meeting. |
| Cadence | Frequency of the meeting. The available options are:<br>• Daily<br>• Weekly<br>• Biweekly<br>• Monthly<br>• Quarterly |
| Locations | Optional physical locations or conference rooms where the meeting takes place. |
| Virtual meeting | Option to indicate that the meeting is virtual rather than occurring in a physical location. |
| Meeting subject | Title or topic of the meeting. |
| Start date & time | Date and time the meeting is scheduled to begin. |
| End date & time | Date and time the meeting is scheduled to end. |
| Duration | Length of the meeting expressed in days, hours, minutes, and seconds. Automatically calculated based on the start and end date and time values when you save the meeting. |
| Invitees | People invited to the meeting. |
| Repeat until | End date for the recurring meeting series. This field is available only when a value is set in the **Cadence** field. |

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| Field | Description |
|---|---|
| Meeting link | URL that enables participants to join a virtual video or audio meeting. |
| Agenda | Meeting agenda shared with the participants when the invite is sent. This field supports rich text formatting. |
| Customer notes | Notes or updates to share with the participants in an email. This field supports rich text formatting. |
| Internal notes | Post-meeting observations and follow-up actions for internal teams. This field supports rich text formatting. |

**Related topics**

Schedule a meeting from a touchpoint

### Create new callback form

Field descriptions for the Create New Callback form for CRM Touchpoints.

| Field | Description |
|---|---|
| Number | System-generated unique identifier for the callback record starting with prefix CAL. |
| Short description | Brief summary of the purpose of the call. |
| Reason for the call | Reason or context for the callback. The available options are:<br>• None (default)<br>• Product Issue<br>• Order Issue<br>• Billing Issue<br>• Customer Survey<br>• Other issue<br>• Sales Discovery<br>• Product Feedback<br>• Customer Relationship Building |
| Callback context | This field is automatically set to the CRM touchpoint from which the callback was created. |
| Priority | Priority level of the callback. The available options are:<br>• None (default)<br>• 1 - Critical<br>• 2 - High<br>• 3 - Moderate<br>• 4 - Low<br>• 5 - Planning |

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| Field | Description |
|---|---|
| Assigned to | Agent responsible for making the call. |
| Due date | Date and time by which the call should be completed. |
| Callback number | Phone number to call. |
| Outcome | Result of the call, recorded after the callback is completed. The available options are:<br>• None (default)<br>• Resolved<br>• Timeout<br>• Max attempts exceeded<br>• No show<br>• Cancelled by agent<br>• Technical issue<br>• Picked up<br>• Interested<br>• Left Voicemail<br>• Rescheduled<br>• Other |
| State | Current state of the callback record. The available options are:<br>• Open<br>• Work in Progress<br>• Closed Complete<br>• Closed Abandoned<br>• Cancelled |
| Description | Optional additional details about the callback. |
| Work notes | Internal notes about the callback, visible only to team members. |

**Related topics**

Schedule a call from a touchpoint

### Components installed with the CRM Outlook Add-in

User roles are installed with activation of the CRM Outlook Add-in plugin.

## Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| CRM Outlook Add-in admin | Granular administrative permission | • ais_admin<br>• sn_crm_outlook.crm_outlook_user |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| [sn_crm_outlook.crm_outlook_admin] | for configuring and managing data related to the CRM Outlook Add-in. | • sn_nb_action.next_best_action_author<br>• sn_outlook_addin.outlook_addin_setup |
| CRM Outlook Add-in user<br>[sn_crm_outlook.crm_outlook_user] | Associates emails to existing or new CRM entities using the ServiceNow CRM for Outlook add-in. | • workspace_user<br>• sn_nb_action.next_best_action_user |

### Lead form in the ServiceNow CRM for Outlook add-in

Field descriptions for creating or viewing a lead record from the ServiceNow CRM for Outlook add-in.

| Field | Description |
|---|---|
| Number | System-generated unique identifier for the lead record starting with the prefix LEAD. |
| First Name | First name of the lead. |
| Last Name | Last name of the lead. |
| Email | Email address of the lead pre-populated from the From field of the email header. |
| Mobile Phone | Mobile phone number of the lead. |
| Business Phone | Business phone number of the lead. |
| Account | Account associated with the lead. |
| Title | Job title of the lead. |
| Company | Company name of the lead. |
| Lead Score | Numeric score indicating the lead's potential value or likelihood of being converted into an opportunity. |
| Stage | Current stage of the lead in the sales process. The available options are:<br>• New (default)<br>• Contacted<br>• Nurturing |

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| Field | Description |
| --- | --- |
| | • Qualified<br>• Disqualified |

**Related topics**

Associate an email with an existing CRM record

### Account form in the ServiceNow CRM for Outlook add-in

Field descriptions for viewing or editing an account record from the ServiceNow CRM for Outlook add-in.

| Field | Description |
| --- | --- |
| Name | Name of the account or company. |
| Website | Company website URL. |
| Number | System-generated unique identifier for the account record starting with the prefix ACCT. |
| Phone | Primary phone number for the account. |
| Primary Contact | Main contact person for the account. |
| Street | Street address of the account. |
| Parent Account | Parent account if this account is a subsidiary. |
| City | City where the account is located. |
| State / Province | State or province where the account is located. |
| Zip / Postal code | Postal or ZIP code for the account address. |
| Country | Country where the account is located. |

**Related topics**

Associate an email with an existing CRM record

### Contact form in the ServiceNow CRM for Outlook add-in

Field descriptions for creating a contact record from the ServiceNow CRM for Outlook add-in.

| Field | Description |
| --- | --- |
| First name | First name of the contact. |
| Last name | Last name of the contact. |
| Email | Email address of the contact pre-populated from the From field of the email header. |
| Business phone | Business phone number of the contact. |

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| Field | Description |
|---|---|
| Mobile phone | Mobile phone number of the contact. |
| Account | Account associated with the contact. |
| Title | Job title of the contact. |
| Time zone | Time zone of the contact. This field is set to the system setting by default. |
| Language | Preferred language of the contact. This field is set to the system setting by default. |
| Notification | Option to enable notifications for this contact. |

**Related topics**

Associate an email with an existing CRM record

### Opportunity form in the ServiceNow CRM for Outlook add-in

Field descriptions for viewing or editing an opportunity record from the ServiceNow CRM for Outlook add-in.

| Field | Description |
|---|---|
| Number | System-generated unique identifier for the opportunity record starting with the prefix OPTY. |
| Short Description | Brief summary of the opportunity. |
| Sales Cycle Type | Type of sales cycle for this opportunity. The available options are:<br>• NEWCUST<br>• RENEW<br>• UPSELL |
| Industry | Industry associated with the opportunity. The available options are:<br>• Manufacturing<br>• Healthcare<br>• Technology Services<br>• Banking<br>• Bio-Technology<br>• Telecommunications |
| Account | Account associated with the opportunity. You can use the search icon to find an existing account. |
| Stage | Current stage of the opportunity in the sales pipeline. The available options are:<br>• Qualify<br>• Develop<br>• Propose<br>• Negotiate |

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| Field | Description |
|---|---|
| | • Closed - Won<br>• Closed - Lost |
| Estimated Deal Size | Estimated monetary value of the opportunity. Includes currency selection. |
| Owner | Sales representative responsible for the opportunity. |
| Opportunity Group | Group or team associated with managing the opportunity. |
| Probability % | Likelihood of closing the opportunity, expressed as a percentage. |
| Description | Optional description of the opportunity. |

**Related topics**

Associate an email with an existing CRM record

### Staged Email table

Field descriptions for viewing email records linked to CRM entities in the Staged Email [sys_email_staging] table.

| Field | Description |
|---|---|
| Receive type | Processing status of the email, such as New. |
| Target | CRM record the email is linked to, displayed as record type and number. For example, Lead: LEAD0000001. |
| User | Email address of the user who sent the email. |
| User ID | User ID of the user associated with the email, if one exists. |
| UID | Unique identifier for the email message. |
| Importance | Priority level of the email if specified by the sender. |
| Deleted | Indicates whether the email has been marked as deleted. |
| Target table | Database table of the linked CRM record, such as Lead [sn_lead_mgmt_core_lead]. |
| Reply to | Email address specified for replies if different from the sender. |
| Recipients | Email addresses of all recipients, including the **To** and **CC** fields. |
| Subject | Subject line of the email. |
| Headers | Any headers embedded in the email, such as routing details, authentication results, and server timestamps. |
| Content type | The MIME (Multipurpose Internet Mail Extension) media type of the email content stored in this record. This value indicates how the email body should be interpreted and rendered by email clients, including the content format and character encoding. For example, `text/html; charset=utf-8`. |
| Body | HTML-formatted content of the email. |
| Body text | Plain text version of the email content. |

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**Related topics**

Track emails linked from Microsoft Outlook

# Configure, price, quote reference

Reference for configure, price, and quote applications.

## Advanced Approval Management reference

Reference topics provide additional information about Advanced Approval Management.

**Related topics**

Using Advanced Approval Management

Configuring Advanced Approval Management

Notifications in Advanced Approval Management

### Components installed with Advanced Approval Management

Several types of components are installed with activation of the Advanced Approval Management plugin, including tables, scheduled jobs, and user roles.

## Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Approval rule admin<br><br>[sn_adv_appr_mgmt.approval_rule_admin] | Manages all aspects of approval workflows. Creates, updates, and deletes approval configurations, chains, approval trigger conditions, approval rules, and approval users and groups. | sn_adv_appr_mgmt.approval_rule_writer |
| Approval rule writer<br><br>[sn_adv_appr_mgmt.approval_rule_writer] | Creates, updates, and views approval configurations, approval chains, approval trigger conditions, approval rules, and approval users | sn_adv_appr_mgmt.approval_rule_viewer |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| | and groups. An approval rule writer can't delete approval-related items. | |
| Approval rule viewer<br><br>[sn_adv_appr_mgmt.approval_rule_viewer] | Views approval configurations, approval chains, approval trigger conditions, approval rules, and approval users and groups. | None |
| Approval request approver<br><br>[sn_adv_appr_mgmt.approval_request_approver] | Views approval steps and approves approval requests for which they are an approver. | • sn_adv_appr_mgmt.approval_request_vie<br>• approver_user (if using My Approvals) |
| Approval request writer<br><br>[sn_adv_appr_mgmt.approval_request_writer] | Creates and views approval requests. | [sn_adv_appr_mgmt.approval_request_view |
| Approval request submitter<br><br>[sn_adv_appr_mgmt.approval_request_submitter] | Submits only requests for approval. Requesters with this role can submit approval requests but can't change or recall the request, nor view the approval workflow interface. | [sn_adv_appr_mgmt.approval_rule_viewer] |
| Approval request viewer<br><br>[sn_adv_appr_mgmt.approval_request_viewer] | Views approval requests. | sn_adv_appr_mgmt.approval_rule_viewer |

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## Scheduled jobs installed

| Scheduled job | Description |
|---|---|
| Approval Reminder Daily Processor | Sends reminders to approvers to accept or reject an approval request. |

## Tables installed

| Table | Description |
|---|---|
| Approval Configurations<br>[sn_adv_appr_mgmt_approval_configuration] | Details of an approval workflow entity, for example quotes that need approvals. |
| Approval Trigger Conditions<br>[sn_adv_appr_mgmt_approval_trigger_condition] | Conditions that trigger one or more approval requests. Conditions map to one or more approval rules. |
| Approval Rules<br>[sn_adv_appr_mgmt_approval_rule] | One or more approval rules associated to an approval trigger condition. Rules define steps in an approval process. A rule can have:<br>• Multiple users or groups<br>• Dynamic approvers: Approvers determined at runtime from the approval request, based on approval rules that reference fields in the approval record or custom logic. |
| Approval Chains<br>[sn_adv_appr_mgmt_approval_chain] | A group of approval rules that run in a specified order sequentially. A chain can run one or more rules in sequence. Chains can run in parallel or sequentially. |
| Approval Users<br>[sn_adv_appr_mgmt_approval_user] | A list of users who can approve requests. |
| Approval Groups<br>[sn_adv_appr_mgmt_approval_group] | A list of groups that can approve requests. |
| Approval Reminders<br>[sn_adv_appr_mgmt_approval_reminder] | A list of reminder durations for an approval workflow entity. |
| Approval Rule Reminders<br>[sn_adv_appr_mgmt_approval_rule_reminder] | A list of reminder durations for approval rules. |
| Approval Requests<br>[sn_adv_appr_mgmt_approval_request] | The approval request records created when an approval request is submitted. |

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| Table | Description |
|---|---|
| Approval Steps<br><br>[sn_adv_appr_mgmt_approval_step] | The approval step records created for an approval request. The records contain the relevant approval rules, conditions, and chain details defined for an approval configuration.<br><br>The Approval Steps table is extended from the Task [task] table. |

### Approval Configuration form

Field descriptions for the Approval Configuration form in Advanced Approval Management.

#### Approval Configuration form

| Field | Description |
|---|---|
| Name | Name of the configuration for a Sales Customer Relationship Management entity, for example Quote. |
| Entity table | Sales Customer Relationship Management Entity for the approval configuration.<br><br>For example, if you're creating an approval configuration for Quote Management, select the Quote [sn_quote_mgmt_core_quote] table. |
| Allow escalations | Option that turns on escalations for approvals. If you select this option, you must also define escalation details in the appropriate approval rules, including the escalation assignee, length of time allowed for approval completion, and associated Service Level Agreement (SLA).<br><br>For information on the escalation details defined in an approval rule, see Create Approval Rule form. |
| Allow email consolidation | Option that turns on the consolidation of multiple approval email requests for an approver or approval group into a single email. |
| Send auto reminders | Option that enables notification approval reminders to be sent automatically to approvers. |
| Reminder schedule | Option displayed when **Send auto reminders** is enabled. Enter the time (days, hours, minutes, seconds) at which approval reminder notifications are sent. |

### Related topics

Create an approval configuration

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### Create Approval Rule form

Field descriptions for the Create Approval Rule form in Advanced Approval Management.

#### Create Approval Rule form

| Field | Description |
|---|---|
| Name | Functional name of the approver associated with this approval rule, for example, Contract Manager or VP Finance. |
| Approval trigger condition | Approval condition that triggers this approval rule. |
| Approval chain | Sequence of approval steps that an approval request must meet before the request is fully approved. |
| Order | Sequence in which the approval rule is triggered within a set of steps. |
| Advanced rule | Option, when selected, for entering a script that identifies the functional approver. Only admins can enter an approver using a script. |
| Description | Brief explanation of the rule. For example the description of the Contract Manager approval rule could be `Reviews contracts and terms`. |
| Active | Option indicating that the approval rule is in use. To deactivate the approval rule, deselect this option. |
| Approver type | Type of approver:<br>• User: Specific approval user who can approve a request, such as Contract Manager.<br>• Group: A group that can approve a request, such as the Contracts group.<br>• Dynamic: An approver determined by the advanced approval engine when an approval request is submitted, based on relationships, roles, or rules provided in the **Dynamic approver** field. |
| Dynamic approver | Rule logic that determines the approver dynamically when an approval request is submitted. |
| Approval criteria | Option that determines how approval requests are handled: |

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**Create Approval Rule form (continued)**

| Field | Description |
|---|---|
| | • All: Indicates all designated approvers must approve the request.<br>• Anyone: Indicates that only one approver from multiple approvers must approve the request. |
| Auto escalate | Option that turns on escalations for the approval rule. Escalation is a mechanism for reassigning an approval request to another approver when the original approver hasn't acted on the request within the defined time set in the **Expected days to complete** field. |
| Expected days to complete | The number of days, hours, minutes, and seconds that defines the total time allotted to approve or reject the request. |
| Escalation schedule | The escalation schedule to be applied. The default schedule is the Approval Escalation SLA. |
| Escalation type | Type of approver for the escalation:<br>• User: Specific approval user who can approve a request, such as Contract Manager.<br>• Group: A group that can approve a request, such as the Contracts group.<br>• Dynamic: An approver determined by the advanced approval engine when an approval request is submitted, based on relationships, roles, or rules provided in the **Dynamic escalated assignee** field. |
| Escalated assignee | The approver designated to act on the approval request instead of the original approver. |
| Dynamic escalated assignee | Rule logic that determines the escalated assignee dynamically when an approval request is submitted. |

**Related topics**

Create approval rules

## Components installed with Advanced Approval Management AI

MCP tools are installed with activation of the Advanced Approval Management AI plugin.

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### Tools installed

| Tool name [ID] | Description |
|---|---|
| Approver Actions (sn_adv_apr_mgt_ai.approver_actions) | For approvers:<br>• Approve or reject one or more pending approval steps.<br>• Add an ad-hoc approver (user or group) to an in-progress approval request. |
| Get Approval Details (sn_adv_apr_mgt_ai.get_approval_details) | Provides:<br>• Preview of approval rules and routing for a quote that hasn't been submitted for approval.<br>• Full history of approval cycles for a quote version, including steps that are pending, haven't started, or are finished.<br>• List of eligible ad-hoc approver candidates. |
| Get Pending Approvals List (sn_adv_apr_mgt_ai.get_pending_approvals_list) | For approvers, retrieves all approval requests currently waiting for approval action, grouped by approval chain. |
| Get Quote Details (sn_qut_mgmt_ai.get_quote_details) | Retrieves quote header and line item details for active quotes. |
| Requester Actions (sn_adv_apr_mgt_ai.requestor_actions) | For requesters:<br>• Recall an approval request for a quote<br>• Submit a quote for approval, which creates a new approval request.<br>• Add an ad-hoc approver (user or group) to an in-progress approval request. |

## Components installed with Pricing Management

Several types of components are installed with activation of the Pricing Management plugin, including tables and user roles.

### Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Price list administrator<br><br>[sn_csm_pricing_pricelist_administrator] | Create and update pricing entities, set up or edit pricing-related system | • sn_csm_pricing.pricelist_manager<br>• sn_export_entities.export_user<br>• import_admin |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| | properties, and view transaction logs. | |
| Price list manager<br><br>[sn_csm_pricing_pricelist_manager] | Create and update pricing entities such as price lists and price list lines, set up or edit pricing-related system properties, and view transaction logs. | sn_csm_pricing.pricelist_writer |
| Price list writer<br><br>[sn_csm_pricing.pricelist_writer] | Granular role that has read, write, and delete access to pricing entities. To delete a pricing entity such as a price list or cost book, the pricing entity must be in Draft state. | • decision_table_crud_api<br>• decision_rule_author<br>• n_csm_ctxrul_mgt.rule_matrix_writer<br>• sn_csm_pricing.pricelist_viewer<br>• personalize_decision_table_input |
| sn_csm_pricing.pricing_integrator | Role required to access pricing features through the Pricing REST API when using the advanced configurator. | None |
| sn_csm_pricing.pricing_integrator_internal | Role required to access pricing features through | None |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| | the Pricing REST API when using the CPQ Configurator. Exempt from API rate limits. | |
| Sales Agreement price list writer<br><br>[sales_agreement_pricelist_writer] | Granular role that has read, write, and delete access to pricing entities. Write access only for Sales Agreement price lists. | None |
| Price list viewer<br><br>[sn_csm_pricing.pricelist_viewer] | Granular role that has read access to pricing entities such as price lists, price list lines, cost books, and cost book lines. | None |

## Tables installed

| Table | Description |
|---|---|
| Pricing Plan<br><br>[sn_csm_pricing_pricing_plan] | Stores the pricing steps used by the pricing engine to retrieve and calculate product pricing. |

## Pricing Management properties

System properties available with Pricing Management that enable you to control the precision applied to non-currency pricing values, tune how multiline pricing requests are processed, and set the level of detail captured for pricing engine troubleshooting.

These properties are available for Pricing Management.

**Note:** To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

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### Properties for Pricing Management

| Property | Description |
| --- | --- |
| sn_csm_pricing.db_batch_size | Number of transaction lines included in each batch when a multiline pricing request is read from the database. Pricing splits large requests into batches so that each database call stays within the number of items allowed in an IN clause.<br>• Type: Integer<br>• Default value: 500<br>• Location: System Property [sys_properties] table |
| sn_csm_pricing.enable_perf_stats | Option to include performance statistics, such as total and per-step timings, in the pricing engine response. Use these statistics to investigate how long a pricing request takes to process.<br>• Type: Boolean<br>• Default value: false<br>• Location: System Property [sys_properties] table |
| sn_csm_pricing.log.verbosity | Level of detail captured in the Pricing Management code execution log. Each level includes the levels above it, so selecting Debug captures debug, info, warning, and error entries.<br>• Type: Choice list<br>• Default value: Error (3)<br>• Other possible values:<br>  ○ Debug (0): Information that's useful when you debug the application.<br>  ○ Info (1): Status information about pricing processing.<br>  ○ Warning (2): Conditions that don't stop processing but may need attention.<br>• Location: System Property [sys_properties] table |
| sn_csm_pricing.rounding.non_currency_max_precision_digits | Number of decimal digits used when rounding non-currency pricing fields, such as margin |

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### Properties for Pricing Management (continued)

| Property | Description |
|---|---|
| | percentage. This property doesn't apply to currency fields, which are rounded to the number of decimal digits defined for their currency.<br>• Type: Integer<br>• Default value: 4<br>• Location: System Property [sys_properties] table |

## Quote Management reference

Reference topics provide additional information about the Quote Management application.

### Configuring Quote Management

Learn how to set up Quote Management so that your sales agents can create and manage customer quotes.

Admins and Quote Management administrators complete the following configuration tasks to set up Quote Management.

### Configuration tasks for Quote Management

| Task | Description | Role |
|---|---|---|
| #unique_1062 | Install Quote Management from the ServiceNow® Store Store. It provides these key features for your agents:<br>• Build quotes with products and pricing, then present them to customers.<br>• Use the product configurator to select simple and configurable product offerings.<br>• Add pricing adjustments to products.<br>• Convert quotes to product orders once customers have approved. | Admin |
| Configuring product offerings and catalogs | Create the product offerings and catalogs, unless they've been previously defined. | Product catalog admin |
| Configuring product pricing | Define the price lists, pricing strategies, and other pricing features that you want to | Pricing admin |

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**Configuration tasks for Quote Management (continued)**

| Task | Description | Role |
| --- | --- | --- |
| | use, unless they've been previously defined.<br>• Set the price lists and pricing strategies that control how pricing is applied to quotes.<br>• If you're using cost books, create the cost books that define the unit costs for product offerings. | |
| Activate cost books and cost margins | Use the *sn_quote_mgmt_core.enable_cost_margin_calculation* system property to activate the cost book and cost margin features in Quote Management. These features enable sales agents to view product unit costs and cost margins when creating sales quotes. | Quote Management admin |
| Activate location-based transactions | Use the *sn_sales_common.enable_location_based_transactions* system property to activate location-based transactions in Quote Management. | Admin |
| Configure quote PDF documents | Set up PDF template, signers, and Docusign.<br>• Create PDF templates<br>• Configure DocuSign<br>• Set up PDF document signers | sales_operations_specialists |

## What to do next

After completing the configuration tasks, you can start using Quote Management to build and manage customer quotes. See Using Quote Management.

Optionally, configure Configuring Advanced Approval Management to build automated approval workflows for customer quotes and other Sales Customer Relationship Management entities.

**Related topics**

ServiceNow Quote Experience

Using Quote Management

Approving or rejecting quotes

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Using product offering recommendations in quotes

Sync quote and opportunity

### Components Installed with Quote Management

Several types of components are installed with activation of the Quote Management plugin, including user roles.

## Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Quote responsibility read granular [sn_quote_mgmt_core.quote_responsibility_read_granular] | Provides granular read access to quote and related entities through the responsibility framework. | None |
| Quote responsibility write granular [sn_quote_mgmt_core.quote_responsibility_write_granular] | Provides granular write access to quote and related entities through the responsibility framework. | sn_quote_mgmt_core.quote_responsibility_read |
| Quote integrator [sn_quote_mgmt_core.quote_integrator] | Role required to access quote features when using the CPQ Configurator. | sn_quote_mgmt_core.quote_writer |
| Quote admin [sn_quote_mgmt_core.quote_admin] | A granular role created to give create, update, read, or delete access on quote tables. | sn_quote_mgmt_core.quote_writer |
| Quote writer [sn_quote_mgmt_core.quote_writer] | A granular role created to give write access to quote tables. | • sn_quote_mgmt_core.quote_viewer<br>• sn_nb_action.next_best_action_user<br>• sn_doc.reader |
| Quote viewer [sn_quote_mgmt_core.quote_viewer] | A granular role created to give read access to quote tables. | • sn_bus_loc.ibl_viewer<br>• sn_service_org.customer_criteria_read<br>• sn_bus_loc.ebl_viewer<br>• sn_csm_pricing.pricelist_viewer<br>• sn_tmt_core.inbound_queue_read<br>• sn_prd_invt.product_inventory_viewer<br>• sn_customerservice.customer_data_viewer |

### Quote details forms

Use Quote details forms to capture, view, and manage all key information about a quote.

#### Quote

| Field | Description |
|---|---|
| Number | System#generated unique identifier for the quote. |

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### Quote (continued)

| Field | Description |
|---|---|
| Active | Option indicating that the current quote is the active quote. When there are multiple versions of a quote, selecting this option indicates this is the active quote. |
| State | Options that reflect the quote status.<br>• Draft - The default state of a quote that indicates the quote is still in development.<br>• In review - Use this state to indicate that the quote is in a review state.<br>• Pending customer acceptance - Set to this state when the quote is created and in review with a customer.<br>• Accepted - Use this state to indicate that the quote was accepted by the customer.<br>• Revised - Revised indicates that changes have been made to the quote that other working on the quote can take note.<br>• Expired - Shows that the quote is beyond its expiration date. Reset the expiration date to make the quote active again.<br>• Canceled - Use this state to show that the quote is canceled.<br>• Closed - Shows that the quote is closed.<br>• Completed - Shows that the quote is completed. When a quote is set to **Completed**, the quote can be used to create an order. For more info, see Convert quotes into orders. |
| Synced | Indicates whether the quote is synchronized with a downstream or external process. |
| Created by | Identifies the user who created the quote. |
| Source Opportunity | References the opportunity from which the quote was created, if applicable. |
| Account | The customer account for which the quote is created. |
| Enable sales agreement quote | Option to enable a quote to be governed by a sales agreement. |
| Contact | Primary customer contact associated with the quote. |
| Sales agreement | A sales agreement that defines the scope, pricing, and conditions under which the quote is created. |
| Partner account | Specifies the partner organization associated with the quote, such as a reseller or distributor, if applicable. |
| Existing contract | References an existing contract associated with the quote. |
| Partner contract | Specifies the contact person from the partner organization. |
| Assignment group | The group responsible for owning and processing the quote. |
| Channel partner | Specifies the channel partner involved in the quote. |
| Assigned to | The individual user responsible for the quote. |
| Deal type | Indicates the type of deal associated with the quote: |

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### Quote (continued)

| Field | Description |
|---|---|
| | • Direct: The seller engages directly with the customer, with no intermediary partner involved.<br>• Indirect: The seller engages the customer through an intermediary, such as a reseller, service provider, or distributor. |
| Route to market | Identifies the exact sales channel used to execute the deal:<br>• Direct<br>• Reseller<br>• Distributor |
| Short description | A brief description that summarizes the quote. |
| Consolidated quote | Indicates the quote is generated after consolidating multiple contracts, contract lines, or source opportunities into a single unified commercial offer. |

### Pricing

| Field | Description |
|---|---|
| Currency | The currency for the price matches the currency stated in the account information. |
| Renewal adjustment basis | Specifies the price reference used to calculate renewal pricing adjustments, such as contracted price or price list. |
| Price list | The Standard Price List field is the default price list for the product catalogs referenced in the quote. |
| Renewal adjustment type | Specifies the method used to adjust the renewal price, such as applying a markup percentage to the selected renewal adjustment basis. The adjustment type is applied after the renewal adjustment basis is determined. |
| Cost book | The Standard Cost Book is the default cost book for the product catalogs referenced in the quote. |
| Renewal adjustment value | Specifies the numeric value used to adjust the renewal price, such as a percentage increase or decrease applied during renewal pricing. |

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### Totals

| Field | Description |
|---|---|
| Total annual price | Sum of the cumulative annual recurring price of all root parent quote lines. This value represents the total recurring revenue for the quote over one year. |
| Total cost | Roll#up of the cumulative net cost of all root parent quote lines. This includes one#time costs and recurring costs calculated over the quote term. |
| Total amount | Roll#up of the cumulative net price of all root parent quote lines. This represents the total quoted amount, including recurring and one#time charges. |
| Total margin% | Percentage representing the overall profitability of the quote. Calculated as:<br><br>(Total amount – Total cost) ÷ Total amount × 100 |
| Total net new amount | Sum of the cumulative net price for all root quote lines with Line Type = Net New. This value represents incremental revenue generated from new products or services only. |

### Dates

| Field | Description |
|---|---|
| Quote date | Date from which the quote is considered valid. This date is used as the reference point for quote lifecycle and pricing calculations. |
| Contract start date | Date on which the contract associated with the quote becomes effective. This date is used to calculate subscription pricing, term, and contract end date. |
| Expiration date | Date after which the quote is no longer valid. This date defines the offer validity period and is used on generated quote and order documents. |
| Contract end date | Date on which the contract term ends. This date is derived from the contract start date and term, and is used to determine renewal eligibility and renewal quote generation. |
| Payment Terms | Specifies the payment conditions agreed for the quote, such as when payment is due after invoicing. Payment terms are applied to the quote document and downstream orders. |
| Term (months) | Duration of the contract or subscription in months. When a start and end date are |

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### Dates (continued)

| Field | Description |
|---|---|
| | provided, the system automatically calculates the term value. |
| Quote Document Details | Contains information used when generating the quote document, such as dates, pricing, and validity details displayed on the document sent to the customer. |
| Auto-renew contract | Indicates whether the contract is enabled for automatic renewal. When selected, the system automatically generates renewal opportunities and renewal quotes based on configurable rules before the contract end date. |

### Addresses

| Field | Description |
|---|---|
| Billing address same as shipping | Indicates whether the billing address is the same as the shipping address. When enabled, billing address fields are automatically populated from the shipping address. |
| Shipping location | Reference to the shipping location associated with the quote. This location identifies where products or services are delivered. |
| Shipping street | Street address of the shipping location. |
| Shipping city | City of the shipping address. |
| Shipping state/Province | State or province of the shipping address. |
| Shipping country | Country of the shipping address. |
| Shipping Zip/Postal code | ZIP or postal code of the shipping address. |
| Billing location | Reference to the billing location associated with the quote. This location is used for invoicing and billing purposes. |
| Billing street | Street address of the billing location. |
| Billing city | City of the billing address. |
| Billing state/Province | State or province of the billing address. |
| Billing country | Country of the billing address. |
| Billing Zip/Postal code | ZIP or postal code of the billing address. |

### Notes

| Field | Description |
|---|---|
| Work notes | Internal notes used to record behind#the#scenes information related to the quote, such as negotiation details, pricing |

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**Notes (continued)**

| Field | Description |
|---|---|
| | decisions, or internal follow#ups. Work notes are intended for internal users only and are included in the quote activity history. |
| Additional comments | Free#form comments used to capture customer#facing or general information related to the quote. Additional comments can be used to communicate updates or clarifications and are visible to a broader audience, depending on access permissions. |

### Configure DocuSign for PDF documents

Quote operations specialists can configure PDF documents to work with Docusign to enable customers to sign PDF documents electronically.

Role required: quote_operations_specialist

## Link quote PDF documents to Docusign

Sales operation specialists can link quote PDF documents to Docusign so that signers can sign documents electronically. The following links explain how to link PDF documents to Docusign:

- Docusign eSignature Spoke
- Set up Docusign eSignature spoke using authorization code grant
- Set up Docusign eSignature spoke using JWT grant
- Create child aliases for additional Docusign accounts
- Set up a bi-directional webhook for the Docusign eSignature spoke
- Synchronize Docusign with ServiceNow
- Activate catalog items
- Change the Docusign API version
- How to automate signing requests using templates
- How to automate signing requests using templates
- How to separate Docusign account data

### Integrate with Contract Management Pro

With the integration of Quote Management and Contract Management Pro, sales agents can initiate contract requests while finalizing a deal and formalizing agreements between you and your customers.

### Before you begin

Role required: admin

### Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for Contract Management for Sales CRM (Quote Management with Contract Management Pro) plugin (com.sn_som_clm).

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**Note:** To activate this plugin, there's a dependency on the Contracts core plugin (com.sn_cm_core). Verify that it's installed to use the contract creation workflow from a quote.

3. Select **Activate**.
4. Complete the initial configuration steps to set up this integration.
   For more information on setting up Contract Management Pro, see Configuring Contract Management Pro.

**Related topics**

Configuring Contract Management Pro

Initiate a contract request

### Run fix scripts to update Contract Management Pro

Manually run fix scripts after you have installed the demo data.

**Before you begin**
Role required: admin

**About this task**
If the demo data was installed, the Request Type field in the demo data will remain blank. Consequently, the field may not display the correct value to distinguish between new contracts and amendments. To fix this, run the Populate Request Type script in CMR to ensure the request type is set correctly.

**Procedure**

1. Navigate to **All** > **Fix Script**.
2. Search for Populate Request type in Contract document revision (CMR) and open the record.
3. Click **Run Fix Script** at the top of record, in the modal that opened up select **Proceed/Proceed in background** to run the script.

## Quote creation via Self-Service fields

Store the main details related to a quote submitted and track the life cycle of the quote through its stages on the self-service quote (sn_quote_mgmt_core_quote) table. Use the fields to manage and store information related to quote creation.

**Note:**

The fields displayed on this form are pre-defined. You can configure the form to add or remove fields, and update the table to show or hide columns.

### Quote details

| Field | Description |
|---|---|
| Account | The customer account for which the quote is created. |
| Consumer | Reference to consumer (csm_consumer). |
| Contact | Primary customer contact associated with the quote. |

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### Quote details (continued)

| Field | Description |
|---|---|
| Short description | A brief description that summarizes the quote. |

### Additional details

| Field | Description |
|---|---|
| Source opportunity | The opportunity record associated with this quote. |
| Currency | The currency for the price matches the currency stated in the account information. |
| Renewal adjustment basis | Specifies the price reference used to calculate renewal pricing adjustments, such as contracted price or price list. |
| Price list | The **Standard Price List** field is the default price list for the product catalogs referenced in the quote. |
| Renewal adjustment type | Specifies the method used to adjust the renewal price, such as applying a markup percentage to the selected renewal adjustment basis. The adjustment type is applied after the renewal adjustment basis is determined. |
| Quote date | Date from which the quote is considered valid. This date is used as the reference point for quote lifecycle and pricing calculations. |
| Contract start date | Date on which the contract associated with the quote becomes effective. This date is used to calculate subscription pricing, term, and contract end date. |
| Expiration date | Date after which the quote is no longer valid. This date defines the offer validity period and is used on generated quote and order documents. |
| Contract end date | Date on which the contract term ends. This date is derived from the contract start date and term, and is used to determine renewal eligibility and renewal quote generation. |
| Payment Terms | Specifies the payment conditions agreed for the quote, such as when payment is due after invoicing. Payment terms are applied to the quote document and downstream orders. |
| Term (months) | Duration of the contract or subscription in months. When a start and end date are provided, the system automatically calculates the term value. |

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**Additional details (continued)**

| Field | Description |
|---|---|
| Auto-renew contract | Indicates whether the contract is enabled for automatic renewal. When selected, the system automatically generates renewal opportunities and renewal quotes based on configurable rules before the contract end date. |
| Shipping/Billing location | Reference to the shipping/billing location associated with the quote. This location identifies where products or services are delivered. |
| Shipping/Billing street | Street address of the shipping location. |
| Shipping/Billing city | The city of the shipping address. |
| Shipping/Billing state / Province | The state or province of the shipping address. |
| Shipping/Billing country | The country of the shipping address. |
| Shipping/Billing Zip / Postal code | The postal code or ZIP of the shipping address. |

## Product offerings catalog

Enter the products that the customer is interested in the **Select a catalog** field.

## Line items

Apply a header discount across all line items, or delete line items in the **Apply header discount**.

## Customer Contracts and Entitlements reference

Reference topics provide additional information on service contract life cycle and forms available within the Customer Contracts and Entitlements application.

## What to explore next

To learn more about configuring and using Customer Contracts and Entitlements, see:

- Configure Customer Contracts and Entitlements
- Using Customer Contracts and Entitlements

### Customer contract life cycle

A customer contract goes through the various states in each phase of its life cycle.

In each state, a customer contract is enabled to perform certain actions as mentioned in the following table.

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**customer contract life cycle, related states, and actions that it can perform**

| Life-cycle | State | Action |
|---|---|---|
| A customer contract is generated. | Draft | • The start and end dates of the customer contract can be modified such that the child records' dates are within the date range.<br>• The related contract lines and entitlements can be added, removed, or modified.<br>• The sold product/install base item covered can be added or removed. |
| Customer contract gets activated on the date of activation. | Active | • Modifications to the customer contract can be done manually, via integration and via Sales Customer Relationship Management workflow.<br>• The start date can't be modified.<br>• The end date can be extended and should be greater than the current date.<br>• customer contract line items can be added.<br>• The sold product/install base item covered can be modified. |
| Customer contract is deactivated on the date of expiration. | Expired | No action. |
| Customer contract is canceled. | Canceled | No action. |

The customer contract line items and entitlements also perform similar actions in the respective states.

When a parent entity moves to the Expired state, the child entities inherit the same state. For example, when a customer contract expires, the related contract lines and entitlements also expire.

However, the state change of a child entity doesn't affect it parent entity.

The sold product or install base item referenced either in the contract line or an entitlement must be in the same state as the entity where it's referenced.

## Suspended state

When a sold product is suspended, the related customer contract lines and entitlements, in the Draft or Active states, move to the Suspended state as well.

A suspended customer contract line or entitlement is paused for any activity, except the following:

- Editing the field values.
- Creating records in the corresponding related lists.

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On resuming the sold product, the related customer contract line item or entitlement acquires the state depending on its start and end dates. For example, a resumed entitlement that has its start date in the past and its end date in the future, acquires the Active state.

Exceptionally, when a contract line or entitlement in the Suspended state has reached its end date, it moves to the Expired state automatically.

## Date validations

A customer contract line associated with a customer contract must be created within the customer contract's start and end dates. Any modification to the dates of customer contract lines must comply with the date range of the parent service contract.

### Customer contract form

The Customer Contracts and Entitlements application uses the Customer contract form to create customer contracts.

**customer Contract form**

| Field | Description |
|---|---|
| Name | The name of the customer contract. |
| Number | The internal unique identification number that is generated when the customer contract is created. This number isn't editable. |
| Contract Reference | The externally assigned identification number assigned to the customer contract. |
| Account | The name of the account associated with the customer contract.<br>**Note:**<br>• A customer contract can be associated with either an account or a consumer.<br>• An account can be created if no account is found by selecting **New** on the Account form. For more information on the fields in the Account form, see Account form. |
| Consumer | The name of the consumer associated with the contract.<br>**Note:** If no consumer record is found, you can create a consumer and add it to the customer contract. For more information, see Create a consumer record. |
| Buyer Organization | The name of the organization for which the order is created. |
| Buyer Organization Member | The individual who created the order on behalf of the Buyer Organization. |
| State | The current state of the customer contract:<br>• Draft<br>• Active<br>• Expired |

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### customer Contract form (continued)

| Field | Description |
|---|---|
| | • Canceled<br>• Suspended |
| Start date | The activation date of the customer contract. |
| End date | The date when the customer contract ends. |
| Renewal root | A customer contract can be renewed multiple times. Renewal root refers the customer contract reference of the first or base customer contract. |
| Renewed from | A customer contract can be renewed multiple times. Renewed from field refers to the previous customer contract that was renewed. |

## Customer contract line form

You can create customer contract lines in the Customer Contracts and Entitlements application by using the Customer Contract Line form.

### Customer Contract Line form

| Field | Description |
|---|---|
| Name | The name of the customer contract line. |
| Contract | The internal unique identification number that is generated when the customer contract is created. This number isn't editable. |
| Parent contract line | The internal unique identification number of the parent customer contract line that is associated with the child customer contract line. |
| Account | The name of the account associated with this customer contract.<br>**Note:**<br>• A customer contract can be associated with either an account or a consumer.<br>• An account can be created if no account is found by selecting **New** on the Accounts form. For more information on the fields in the Account form, see Account form. |
| Location | The customer or installation location. |
| Product specification | The product specification that is mapped to the sold product. |
| Number | The internal unique identification number of the customer contract line that is generated when it is created. This number isn't editable. |
| Consumer | The name of the consumer associated with this contract.<br>**Note:** If no consumer record is found, you can create a consumer and add it to the customer contract. For more information, see Create a consumer record. |
| State | The current state of the contract line: |

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**Customer Contract Line form (continued)**

| Field | Description |
|---|---|
| | • Draft<br>• Active<br>• Expired<br>• Canceled<br>• Suspended<br>**Note:**<br>• The state of the customer contract line is inherited from its parent customer contract.<br>• Suspended state is only applicable when the contract line item is created via the Sales Customer Relationship Management workflow. |
| Start date | The date of activation of the customer contract line. |
| End date | The date when the customer contract line expires. |
| Product | The product model that is mapped to the product offering for the sold product. |
| Product offer | The product offering that is mapped to the sold product. |
| Sold product | The name of the sold product that is added to the contract line.<br>**Note:**<br>• When the customer contract line item is created via the Sales Customer Relationship Management workflow, this field displays the sold product name from which the contract line is generated.<br>• When customer contract lines are created via integration, the field becomes invalid. |
| Renewal root | A customer contract line can be renewed multiple times. Renewal root refers the customer contract line reference of the first or base customer contract line. |
| Renewed from | A customer contract line can be renewed multiple times. Renewed from field refers to the previous customer contract line that was renewed. |

You can see the pricing information on a contract line for subscription contracts that helps you in reviewing your contract information.

**Subscription & Pricing**

| | |
|---|---|
| Term (Months) | Validity period of having access to the service or product. |
| Subscription Start Date | Start date of the contract subscription. |
| Subscription End Date | End date of the contract subscription. |
| Price List | Price list associated for servicing the product. |

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### Subscription & Pricing (continued)

| | |
|---|---|
| Unit net price | The price for each unit within the product offering. The net price of a single unit of the sold product. |
| Pricing method | The pricing method for the selected sold product. It can be one-time or recurring. One-time pricing charges one fee for the product offering. Recurring pricing lets you set the pricing periodicity. |
| Periodicity | The frequency of the pricing method. It can be monthly, quarterly, semiannually, or annually.<br><br>This field becomes valid only when the method in the **Pricing method** field is a recurring payment. |
| One Time Price | Represents one-time charges to be paid for the product or service. |
| Monthly Recurring Price | Represents the price that the customer is supposed to pay monthly during usage of the product. |
| Annual Recurring Price | Represents the price to pay annually during usage of the product. |
| Cumulative one-time price | Represents one-time charges to be paid for the parent line and all the child line items. |
| Cumulative monthly recurring price | Represents monthly price for the parent line and all the child line items |
| Cumulative annual recurring price | Represents annual price for the parent line and all the child line items. |
| Cumulative net price | Represents the total price of the contract line by calculating the roll-up amount of all root lines. |

**Note:** When a customer contract line item is created manually, the **Pricing method**, **Unit net price**, and **Periodicity** fields are invalid. They're only applicable when the contract line is created by the Sales Customer Relationship Management workflow or by integration. In that case, these fields are auto-populated with the details from the related sold product. The start and end dates of a child customer contract line must be in between the start and end date of the associated parent customer contract line.

## Entitlement form

The Entitlement form can be used to create entitlements in Customer Contracts and Entitlements.

### Entitlement form

| Field | Description |
|---|---|
| Name | The name of the entitlement. |

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**Entitlement form (continued)**

| Field | Description |
|---|---|
| Product | The product associated with the entitlement. |
| Contract | The internal unique identification number that is generated when the customer contract is created. This number isn't editable. |
| Account | The name of the account associated with this contract.<br>**Note:**<br>• A customer contract can be associated with either an account or a consumer.<br>• An account can be created if no account is found by selecting **New** on the Accounts form. For more information on the fields in the Account form, see Account form. |
| Location | The service or installation location. |
| Product specification | The product specification that is mapped to the sold product.<br>**Note:** Configure this field manually on the entitlement form using form layout. |
| Consumer | The name of the consumer associated with this contract.<br>**Note:** If no consumer record is found, you can create a consumer and add it to the customer contract. For more information, see Create a consumer record. |
| Customer contract line | The name of the related customer contract line. |
| State | The current state of the entitlement:<br>• Draft<br>• Active<br>• Expired<br>• Canceled<br>• Suspended<br>**Note:** The state of the entitlement is inherited from its parent contract line. |
| Start date | The entitlement activation date. |
| End date | The date when the entitlement ends. |
| Sold entitlement | The name of the sold product that is added to the entitlement. |

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### Entitlement form (continued)

| Field | Description |
|---|---|
| | **Note:**<br>• If the entitlement is created manually, this field remains read-only.<br>• The field must have the same state as its related entitlement.<br>• The field becomes invalid when entitlements are created via integration. |
| Product offer | The product offering that is mapped to the order line item. |
| Renewal root | An entitlement can be renewed multiple times. Renewal root refers the entitlement reference of the first or base service entitlement. |
| Renewed from | An entitlement can be renewed multiple times. Renewed from field refers to the previous entitlement that was renewed. |

You can see the pricing information on an entitlement for subscription contracts that helps you in reviewing your contract information.

### Subscription & Pricing

| | |
|---|---|
| Term (Months) | Validity period of having access to the service or product. |
| Subscription Start Date | Start date of the contract subscription. |
| Subscription End Date | End date of the contract subscription. |
| Price List | Price list associated for servicing the product. |
| Unit net price | The price for each unit within the product offering. The net price of a single unit of the sold product. |
| Pricing method | The pricing method for the selected sold product. It can be one-time or recurring. One-time pricing charges one fee for the product offering. Recurring pricing lets you set the pricing periodicity. |
| Periodicity | The frequency of the pricing method. It can be monthly, quarterly, semiannually, or annually.<br><br>This field becomes valid only when the method in the **Pricing method** field is a recurring payment. |
| One Time Price | Represents one-time charges to be paid for the product or service. |
| Monthly Recurring Price | Represents the price that the customer is supposed to pay monthly during usage of the product. |

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### Subscription & Pricing (continued)

| | |
|---|---|
| Annual Recurring Price | Represents the price to pay annually during usage of the product. |
| Cumulative one-time price | Represents one-time charges to be paid for the parent line and all the child line items. |
| Cumulative monthly recurring price | Represents monthly price for the parent line and all the child line items |
| Cumulative annual recurring price | Represents annual price for the parent line and all the child line items. |
| Cumulative net price | Represents the total price of the contract line by calculating the roll-up amount of all root lines. |

## Sold Product Covered form

The Customer Contracts and Entitlements application uses the Sold Product Covered form to add sold products or install base items that are covered to the Customer Contracts and Entitlements entities.

For information about adding sold products or install base items that are covered, see Add a sold product or install base item to a customer contract.

### Sold Product Covered form

| Field | Description |
|---|---|
| Contract | The reference number of the associated customer contract. |
| Sold Product | The products that are sold to a customer.<br>**Note:**<br>• The list of sold products is filtered based on the account related to the contract or entitlement.<br>• If a product is added, the **Install Base Items** field is automatically removed.<br>• If a product isn't listed, you can add it. Select **New** in the Sold Products window. For more information, see Create a sold product. |
| Install Base Item | The related install base item.<br>**Note:**<br>• The list of sold products is filtered based on the account related to the contract or entitlement.<br>• If an install base item is added, the **Sold Product** field is automatically removed.<br>• If an install base item isn't listed, you can add it. Select **New** in the Install Base Item window. For more information, see Create an install base item. |

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**Sold Product Covered form (continued)**

| Field | Description |
|---|---|
| Customer contract line | The associated customer contract line reference. |
| Entitlement | The associated entitlement reference. |
| Date added | The date that the product is added to the entity. |
| Date removed | The date until which the product is active on the entity. |

**Note:** The activation time period for the sold product or install base item covered must comply with the related entity's activation period.

## Components installed with Sales Agreement Management

Several types of components are installed with activation of the Sales Agreement Management plugins, including tables and user roles.

## Roles installed

**Sales Agreement roles details**

| Role | Description | Contains roles |
|---|---|---|
| sn_sales_agmt_core.sales_agreement_viewer | This role enables users to perform read operations on sales agreements, sales agreement lines, and related data such as characteristics, price lists, and other tables. | • sn_prd_pm.product_catalog_viewer (contains sn_prd_pm.characteristics_viewer)<br>• sn_quote_mgmt_core.quote_viewer (contains sn_csm_pricing.pricelist_viewer) |
| sn_sales_agmt_core.sales_agreement_writer | This role enables users to perform, create, read, and update operations on sales agreements and sales | sn_sales_agmt_core.sales_agreement_viewer |

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### Sales Agreement roles details (continued)

| Role | Description | Contains roles |
|---|---|---|
| | agreement lines. | |

## Tables installed

### Sales Agreement Management tables

| Table | Description |
|---|---|
| sn_sales_agmt_core_sales_agreement | Stores all the sales agreements. |
| sn_sales_agmt_core_sales_agreement_line | Stores the lines of a sales agreement indicating the products and services agreed for sale. |
| sn_sales_agmt_core_line_characteristic | Stores the attributes of products and services to be sold. |
| sn_sales_agmt_core_line_adjustment | Stores the adjustments applied during negotiation. |

## CPQ reference

Reference topics provide additional information about CPQ.

### Boundaries and limits

View a list of boundaries and limits in CPQ.

## Blueprints

No limits are imposed on the number of fields, rules, or layouts associated with a Blueprint.

## Fields

Text fields: 2000 characters.

Picklist extensions: ProductOrderNumber accepts an integer up to 88 characters.

## Fields

Simple message actions: 256 characters.

Picklist fields will only display 100 options in a drop-down list. Options not included in the list are still searchable by typing into the field.

Subfields that product picker can contain: 50.

## Sets

Each set can contain up to 2000 records. An error will be thrown if the set.size field is greater than 2000.

No hard limit exists on the number of fields that can be associated with a set. However, a practical threshold exists, beyond which runtime performance will suffer. This threshold has several dependencies, including the number and complexity of rules running between fields

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on set index, the number of set records defined during configuration, the total number of fields shown in the UI, and so on. Unfortunately, no simple rule of thumb exists to determine this threshold for your implementation.

Set repeater indices that display on a layout: 50.

### Rules

Custom grouping: 2000 characters.

### Tables

Rows in a table: no practical limit.

Columns in a table: no practical limit.

Length of value stored in text-type column cell: 2000 characters.

Length of value stored in number-type column cell: For practical purposes, no limit.

### ProductList object

ProductList.orderNumber: 28 digits.

### Scripting and enrichments

Lookup: returns a maximum of 10,000 rows from a managed table.

Advanced rules and enrichments are limited to 50,000 characters.

### Matrix Loader

ZIP files over 75 MB cannot be imported.

### Layout Wizard

500 fields can be automatically loaded when the Layout Wizard is initialized. Additional fields must be added manually via the Add Field menu.

#### Session and configuration timeouts

Learn how timeouts for inactive or abandoned configurations improve system efficiency and prevent resource waste.

Because CPQ is a web-based application, we regulate our software usage by implementing certain timeouts on sessions, so as to not waste processing power on abandoned configurations.

Timeouts for the CPQ platform have two key mechanisms:

- Session timeout: Set at 30 minutes of user inactivity.

  This applies to any end user or Admin interaction. When configuring a product or editing a rule, if nothing has been updated on any tab in this time, the session times out.

- Configuration cache timeout: 15 minutes if abandoned (browser closed or navigated away)

  This cache can stay active for up to 2 hours. As long as the configuration UI remains open and is being updated, or the user has multiple browser tabs that they are configuring in, the cache will be maintained.

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Here are a few example scenarios.

- Scenario 1: If an end user is configuring, or if an Admin is creating a rule and stays on that tab, but does not update the site, the session will time out after 30 minutes.
- Scenario 2: If a user calls a runtime API to configure a product, the 15-minute configuration cache timeout applies to make PATCH updates to the configuration, as there is no automatic heartbeat for this method.
- Scenario 3: If an end user is actively configuring a product, that configuration session can remain active for up to 2 hours.
- Scenario 4: If a user navigates to a different tab while in the middle of configuring, that configuration can still remain active for up to 2 hours as long as the user is still actively working with another configuration in CPQ.

  **Note:** While this behavior works well in CPQ, we cannot guarantee the same functionality in Salesforce iframe tabs. SFDC may not allow JavaScript to run on inactive tabs, potentially affecting the 2-hour timeout in that environment.

- Scenario 5: If the CPQ configurator is in an SFDC iframe and the user navigates to a different tab, the 15-minute cache expiry for inactive sessions may occur.

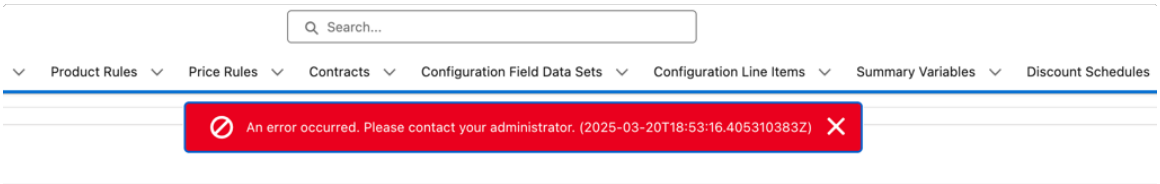
The most effective approach to avoid a timeout is to manually save your configurations, especially when working across multiple tabs. This way, progress is not lost when completing other work.

### Troubleshooting

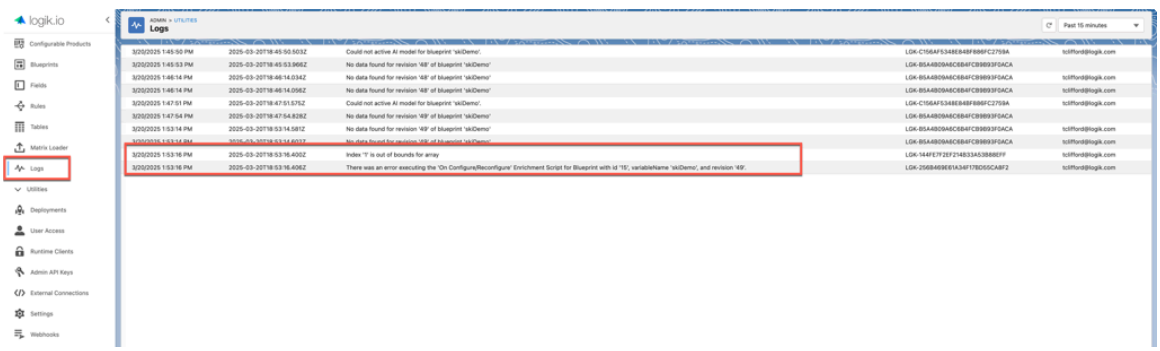
Steps to take if you encounter problems using CPQ.

## Error messages

- An error occurred. Please contact your administrator.




This generic error message appears for every error logged when configuring. This usually points to an edge case that was not previously considered when building the Blueprint and can be rectified by looking into the results of the Logs tab in CPQ Admin when this error occurs. A more detailed response will usually be present that should point your administrator to the location of the error, such as a rule, enrichment, or an external connection.




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If there is no further detail located in the Admin log, or if you are still confused by the messaging of the error, please log a support ticket.

**Note:** To log a support ticket, use the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

- Cannot get Configurable Product. Product <Salesforce Product2 Id> is not available in cache.

  The CPQ user that was added when your environment was being set up in your Salesforce org may have been deactivated, causing an issue with the Refresh Token Username and Refresh Token.

## Admin

The Products tab is not visible in Admin view.

The Products Admin page is only shown when CPQ is set up to support a headless use case. In this scenario, CPQ provides its own product master.

In a Salesforce-integrated use case, the CPQ environment is integrated with a Salesforce [SFDC] environment. In a headless or eCommerce use case, CPQ is accessed from a resource other than SFDC, such as an eCommerce platform, partner portal, or a non-SFDC CPQ application. In this scenario, the CPQ environment is frequently accessed via APIs only, with the calling resource digesting the results and displaying them in its own user interface.

When a CPQ environment is not integrated with Salesforce, this is commonly called a 'headless' or 'ecommerce' use case. The Products Admin page only displays to CPQ administrators when the environment is set up for this headless mode.

As a point of contrast, when the CPQ environment is integrated with SFDC, the SFDC product2 object is the part master. CPQ administration intentionally does not show a Products administration page when integrated with SFDC.

## APIs

- The Salesforce Authentication call is returning a Status: 400 Bad Request

  Inspect the permissions of this OAuth App, as defined in Salesforce, by navigating to App Manager in Salesforce Setup. For your connected app, select "Manage" from the drop-down menu on the right, and then click **Review OAuth Policies**. The **IP Relaxation** setting may be set to **Enforce IP restrictions**. Set this to **Relax IP restrictions**.

- When using the JWT to authenticate the administration API call, you get a 302 Found error with no body.

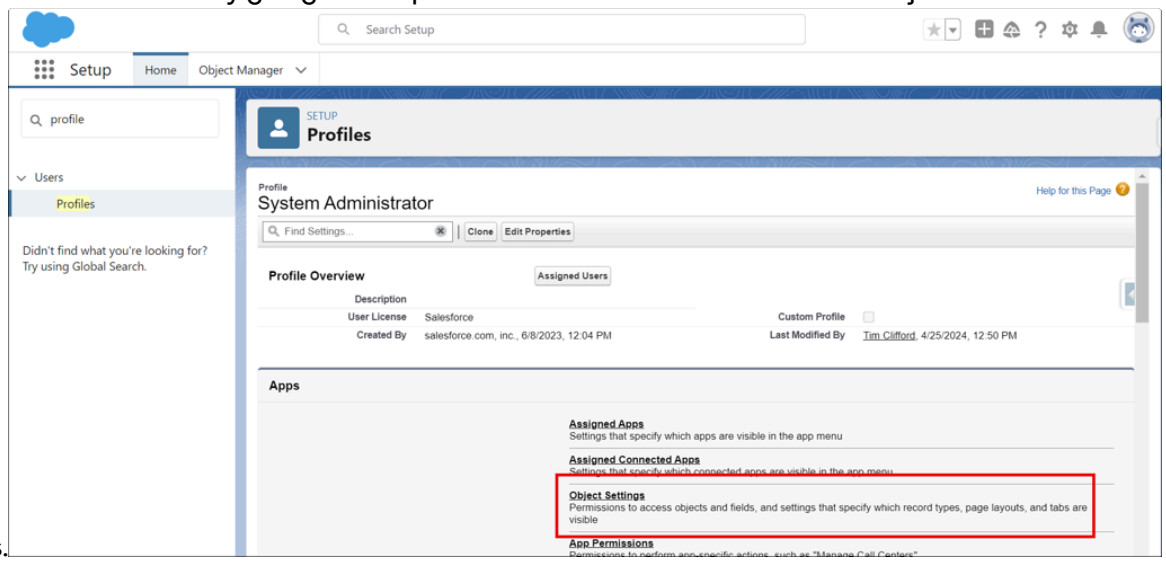
  Make sure that you insert the string, "Bearer" before the JWT access_token text in the Authorization value.

## Configuration

For some user profiles, configuring results in a white screen or reconfiguring does not load any of the previously chosen options. In order to properly configure or reconfigure, users need access to certain objects and fields in Salesforce. These can be assigned

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using permission sets or by going to Setup > Profiles > Select Desired Profile > Object Settings.




Users will need read/edit access in the Field Permissions section to the following objects:

Configuration Attributes:

- Id
- Name
- Target Field
- Product
- Raw Order
- Column Order
- Position

Product features:

- Id
- Name
- Option Selection Method
- Configured SKU
- Number
- Min Options

For products (Product2):

- Configuration Type
- Has Configuration Attributes
- Externally Configurable

For quote lines:

- Configuration Id
- BOM Data
- Product

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- Incomplete
- Dynamic Option ID
- Quantity
- List Unit Price
- Option Level

For product options:

- Read/Edit access in Object Permissions
- Configuration Id
- BOM Data

And if using Amendments, users also need the following:

Quote lines:

- Committed Configuration Id
- Action context
- Upgraded subscription
- Source

Subscriptions (SBQQ__Subscription__c):

- Configuration Id
- BOM Data

See Granting user access in CPQ.

## Salesforce integration

- Products in CPQ do not create quote lines in Salesforce CPQ

  When using CPQ with Salesforce CPQ, certain configuration requirements must be met in order for your products to get added to CPQ as quote lines. Here are the most common causes for products not creating quote lines in CPQ.

  - The Product Id in CPQ is not equal to the Product Code field on the product record in Salesforce.

    This is contingent upon the “Product Id Field” tenant setting in the Admin. You can use either Product Code (Product2.ProductCode), Partner Id (Product2.Id), or External Id (Product2.ExternalId).

  - The product record is not active in Salesforce.
  - No pricebook entry has been assigned to the product record.
  - The pricebook entry for the pricebook is different from the pricebook on the quote. The pricebook entry for the product is inactive.

  If you have confirmed none of these are true and a quote line is still not being created, then it is probable that the product sync that takes place between CPQ and Salesforce via the refresh token user has not occurred yet. This sync occurs via API every 30 minutes for test and demo

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environments and every 15 minutes for production. To determine when this sync last occurred, enter Salesforce and navigate to Setup → Bulk Data Load Jobs.

•

### Solution configuration limits

Structural limits that apply to solution configurations, including hierarchy depth, total configuration count, and field mapping constraints.

#### Solution configuration limits

| Limit | Value and notes |
|---|---|
| Maximum hierarchy depth | 4 levels, including the solution root. The BOM hierarchy can have an arbitrary depth. |
| Maximum configurations per session | 20 total — the solution root plus up to 19 active child configurations across all depths. |
| Circular references | Not permitted. A blueprint cannot appear more than once in any path from a child configuration back to the solution root. |
| Configurable products per action | One configurable product per configurable product action. To add multiple child configurations from a single rule, add multiple configurable product actions to that rule. |
| Field mapping direction | Parent to child only, one level at a time. To continue a mapping across multiple levels, define the mapping on each blueprint in the chain. |
| Field types supported for mapping | Number, Text, Boolean, and Picklist only. For the full list, see Define field mappings for a solution configuration . |
| Sets and Product Pickers in mapping | Mapping of an entire Set or an entire Product Picker is not supported. Fields inside a Set can be mapped. Product Picker subfields cannot be mapped. |
| Reverting a configurable product action | Once a product action is marked as configurable, it cannot be changed back to a standard product action. |

**Related topics**

Solution configurations

Create a configurable product action

Define field mappings for a solution configuration

### Field mapping supported field types

Field types that are supported as source and target fields in solution configuration field mappings.

**Note:** Source and target fields must be the same type. For example, a Picklist field cannot be mapped to a Text field.

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### Supported field types for mapping

| Field type | Supported | Notes |
|---|---|---|
| Number | Yes | Can be used as a source or target field. Maps to a Number field on the child blueprint. |
| Text | Yes | Can be used as a source or target field. Maps to a Text field on the child blueprint. |
| Boolean | Yes | Can be used as a source or target field. Maps to a Boolean field on the child blueprint. |
| Picklist | Yes | Can be used as a source or target field. Maps to a Picklist field on the child blueprint. |
| Set (entire) | No | Mapping of an entire Set is not supported. Individual fields inside a Set can be used as source fields. |
| Fields inside a Set | Yes (source only) | Can be used as a source field. Maps to a compatible field on the child blueprint. |
| Product Picker (entire) | No | Mapping of an entire Product Picker is not supported. |
| Product Picker subfields | No | Product Picker subfields cannot be used as source or target fields in any mapping. |
| System fields — as source | Yes | System fields can be used as source fields. |
| System fields — as target | No | System fields cannot be set as target fields. |

**Related topics**

- Define field mappings for a solution configuration
- Solution configuration limits

## ServiceNow Quote Experience: Use cases

View a list of example use cases for CPQ ServiceNow Quote Experience.

## ServiceNow Quote Experience use case: Apply parent line discounts to child lines

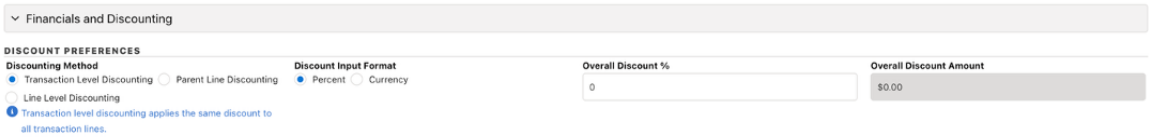
ServiceNow Quote Experience can help manage transactions whose configurable products have many child and grandchild transaction line items.

A single transaction may include multiple configurable products, and each configurable product may have more than 100 child, grandchild, or other descendant transaction line items.

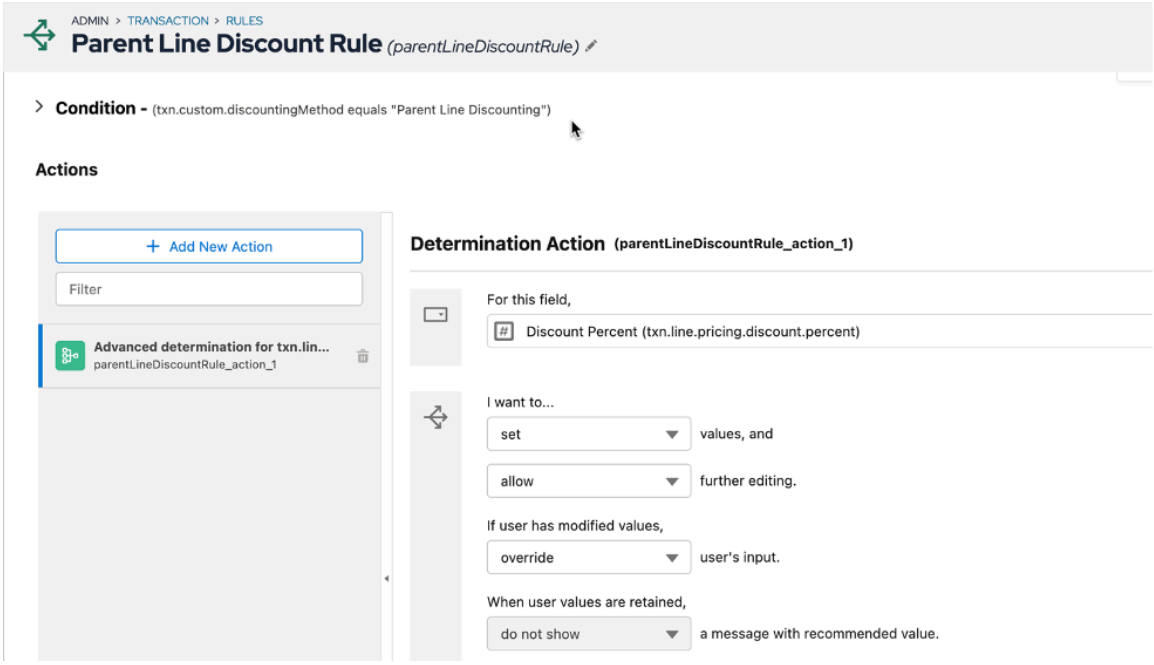
Discounting at the transaction header level could apply a uniform discount across all products and transaction line items. Conversely, applying discounts at the transaction line-level lets you discount individual products and lines at different rates. However, for a product with many descendant line items, this may become burdensome.

Using the `.parent` system field enables the look up of a parent line-item field, which can then be applied to only the child lines of that product. For example, a picklist can be used at the header level to designate the discounting method to apply.

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When **Parent Line Discounting** is selected, a rule sets the descendant line's discount field equal to that of its parent line.




### ServiceNow Quote Experience use case: Calculate prices for line-level fields

ServiceNow Quote Experience can apply rules to line-level fields that dynamically calculate prices according to changes to the field, such as when products are added or removed.

In the ServiceNow Quote Experience, we can apply rules on line-level fields to cover various price calculations relevant to selected products. These calculations adapt dynamically to changes, such as the addition or removal of products. This article outlines a use case involving three types of price calculations and the steps required to configure them.

The use case involves three types of price calculations:

- Annual List Price: This is the list price multiplied by the number of months chosen in the subscription period.
- Unit Net: The price of a product after the discount amount has been deducted.
- Extended Net: The unit net of the product multiplied by the quantity of the product.

## Step 1: Create Custom Fields

- Navigate to CPQ Admin > Transaction > Associated Fields.
- Create all the custom fields required for your use case. For the detailed steps on how to create fields, see Quote transaction fields.

In this example, we intend to use the following fields:

**Start Date**

Custom header (dateTime type) field that stores the subscription start date.

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**End Date**

Custom header field (dateTime type) that stores the subscription end date.

**Subscription Term (Months)**

Custom header (Number type) field that calculates the difference between the start date and end date, displaying the subscription term. For the detailed steps on how to do DateTime field calculations, see Date and time field fields.

**Target Line Item Discount**

Custom header (Number type) field where users select the discount rate.

**Quantity**

Line-level system field specifying the quantity of the product chosen.

**List Price**

Line-level system field specifying the product's price.

**Discount Percent**

Line-level system field storing the discount rate. This field is automatically populated with the value selected in the Target Line Item Discount field using a rule.

**Annual List Price**

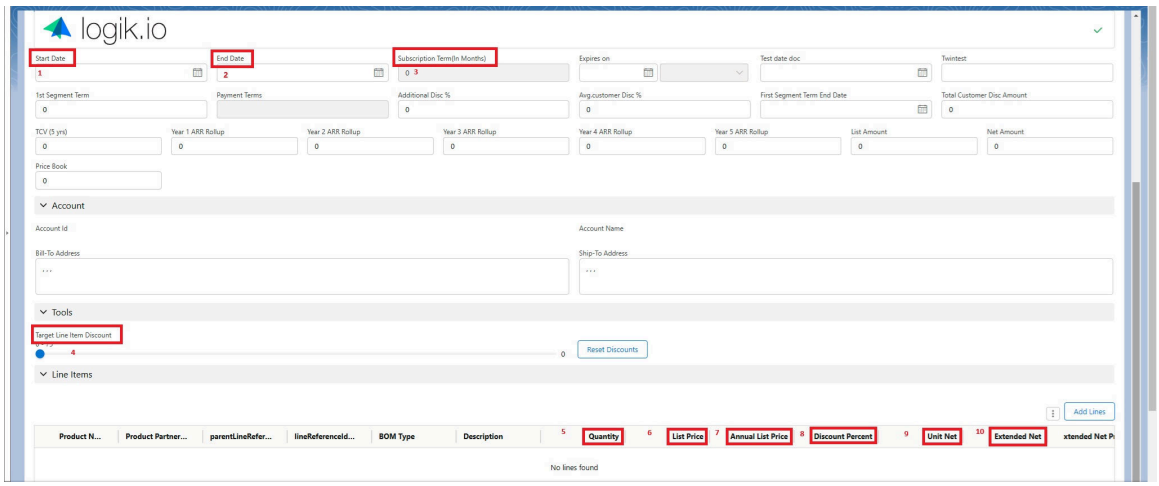
Custom field used to store results of price calculations for annual list price. This is a transaction line level custom field (Number Type)

**Unit Net**

System field labeled as "Net Price" in the system but renamed "Unit Net" by layout definition. This field stores results of price calculations.

**Extended Net**

System field that stores the total unit net price for the product in the line entry.




## Step 2: Add fields to layout

Map the configured fields into the appropriate layout for visibility. For the detailed steps, see Set up layouts.

## Step 3: Create the rules

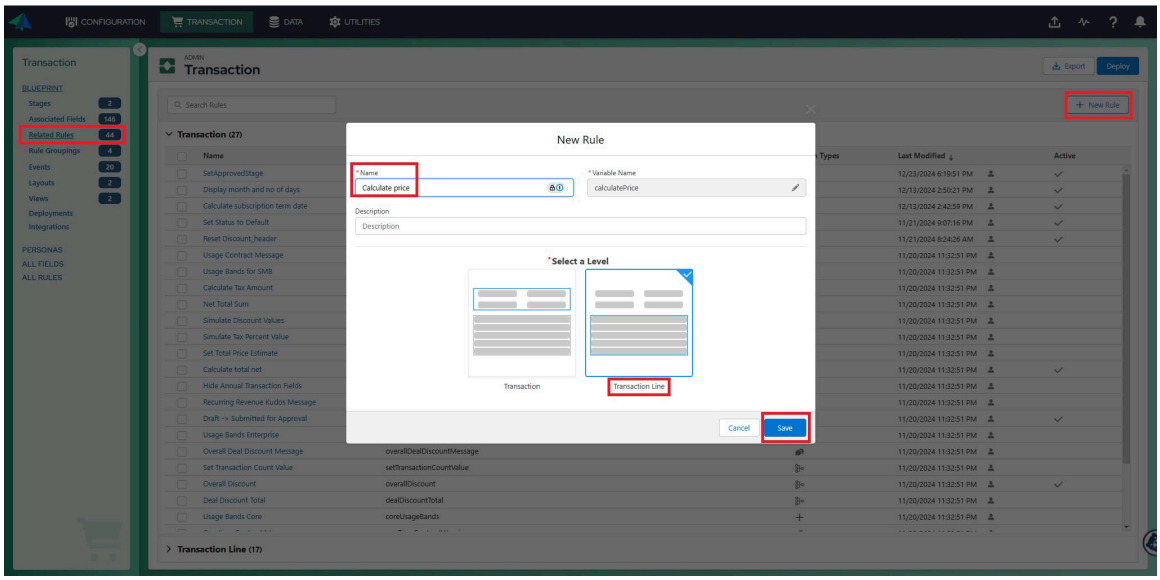
Three rules are to be created:

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- Calculate Annual List Price
- Calculate Unit Net Price
- Calculate Extended Net Price

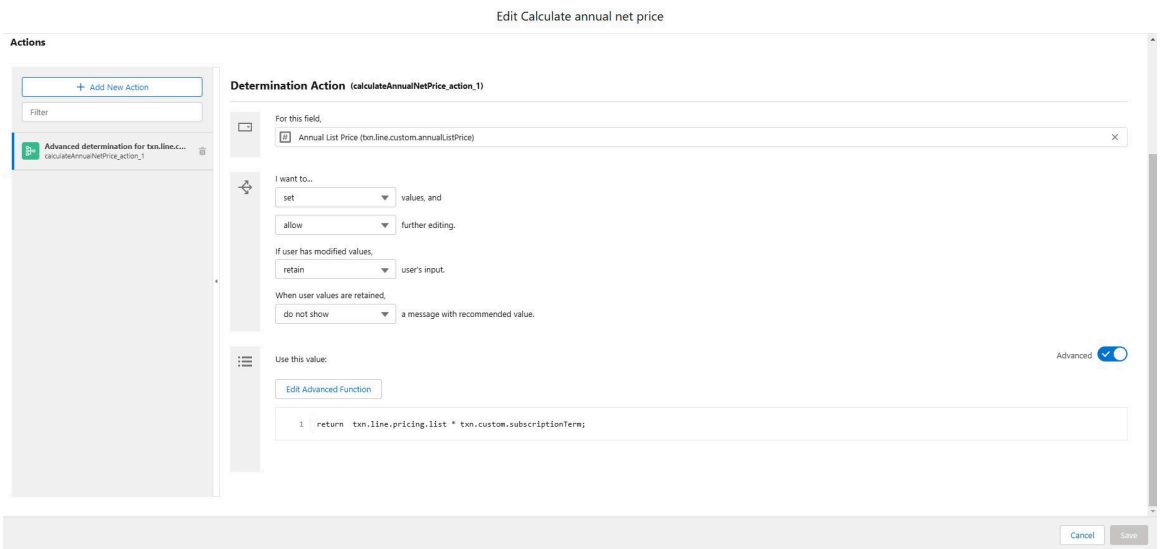
Follow these steps:

1. In **Related Rules**, click **New Rule**.
2. Enter the name of the rule and select **Transaction Line** as the rule type.
3. Click **Save**.




## Step 4: Create and configure rule actions

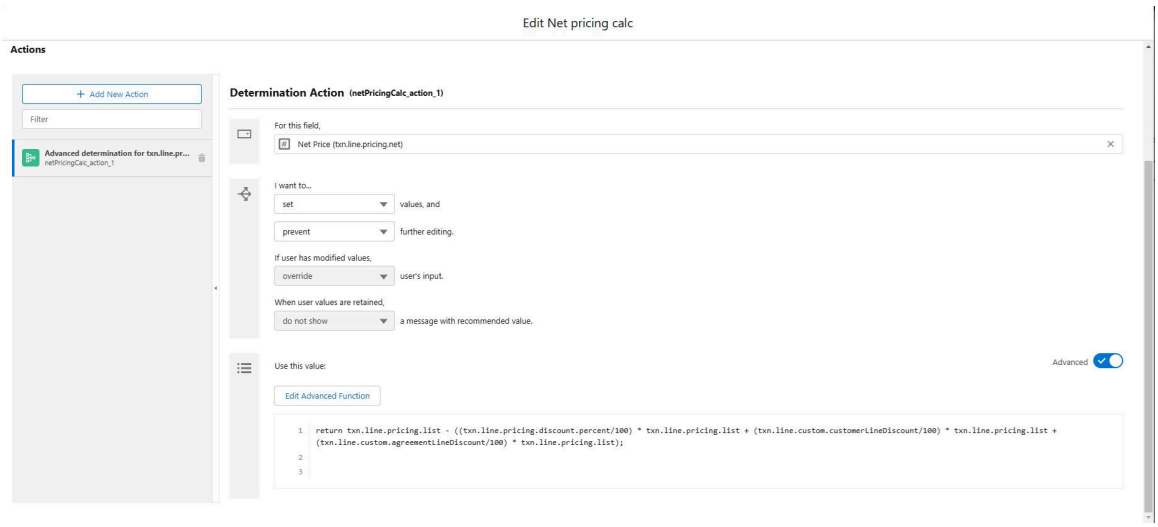
1. Select **Determination** as the action type for the rule.
2. Define the rule's conditions and action items.
3. Add the advanced script to perform the calculation for Use Case 1 (Annual List Price). Refer to the snapshot below.



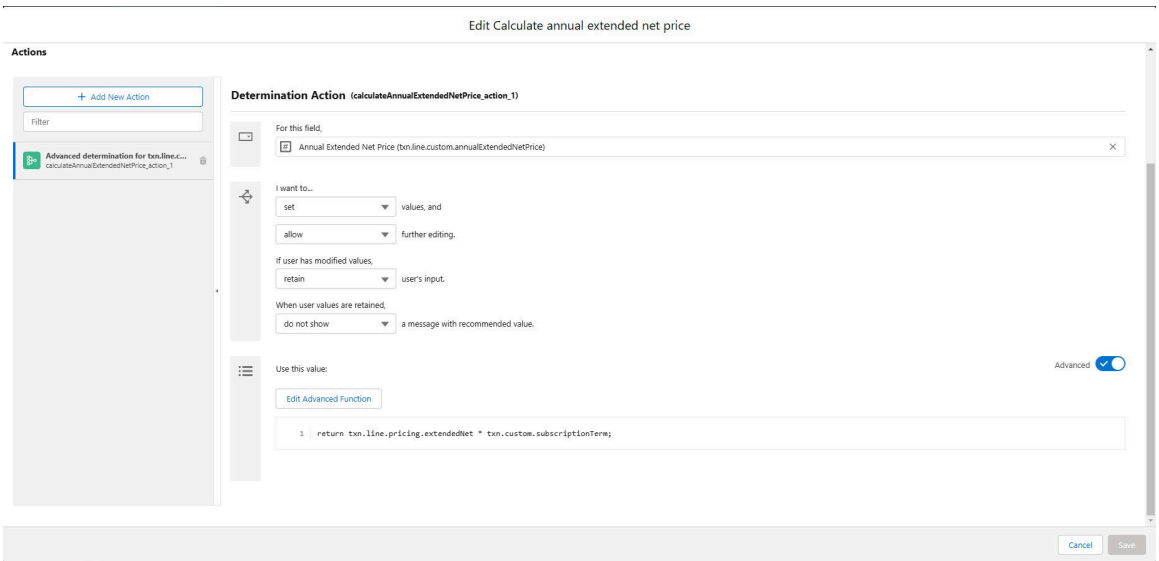

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4. Click **Save**.
5. Repeat steps 1 through 4 to configure rules for Use Case 2 (Unit Net) and Use Case 3 (Extended Net). Refer to the snapshots below.

Use Case 2 (Unit Net) - Edit Net pricing calculation:



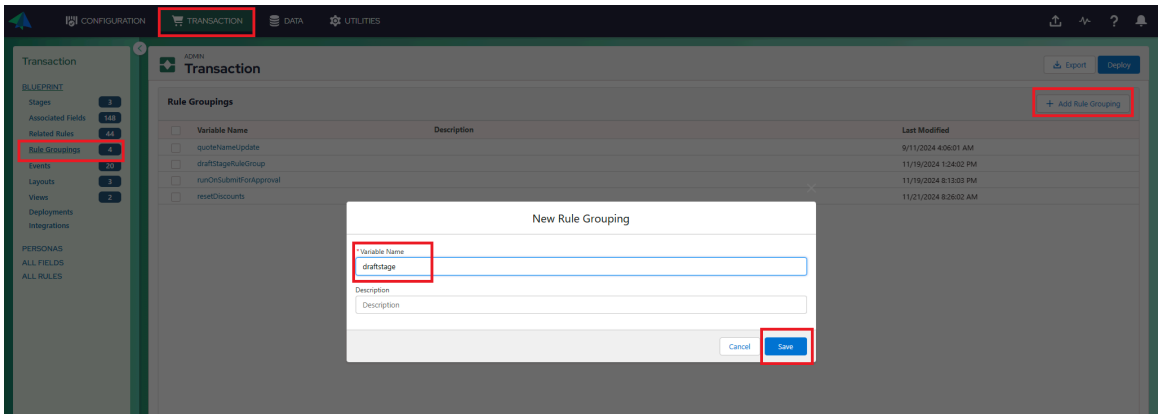

Use Case 3 (Extended Net) - Edit Calculate annual extended net price:




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## Step 5: Associate rules to rule groupings

1. On the Admin page, click **Rule Groupings**, and then click **Add Rule Grouping**. Enter the variable name as the stage in which rule should run (Draftstage), and then click **Save**.

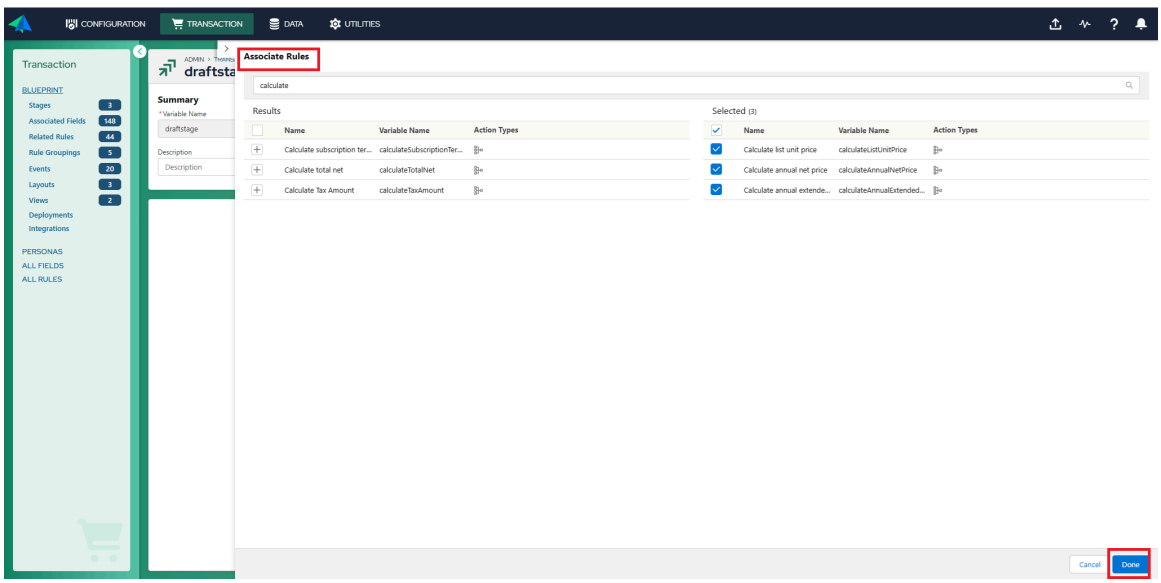



2. Associate the newly created rules:

   a. Click **Associate**.

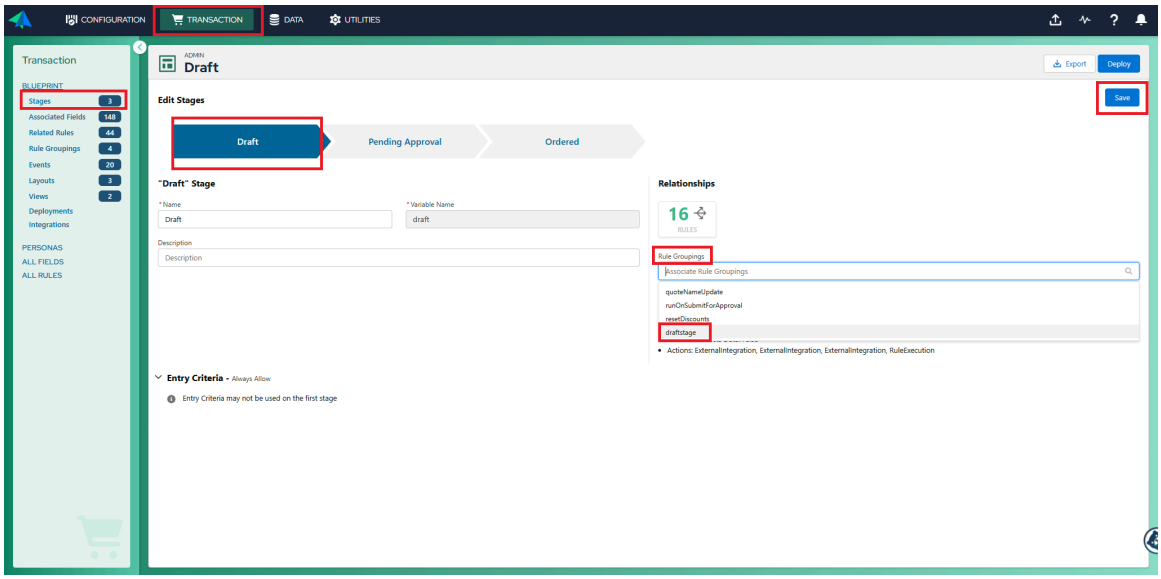
   b. Select the name of the rule you created.

   c. Click **Done**.




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3. To link the newly created rule grouping with the stage (Draft in the sample use case) where your rules should run, click **Stages** on the transaction page. Click **Draft**, and then click **Rule groupings**. Search the new rule grouping, select, and then click **Save**.




## Step 6: Deploy and test

Deploy the configured blueprint to make the rules active, and then test the implementation in the UI to confirm the scripts are working as expected.

Below is an example of the final implementation:

- Use Case 1: Entering the start date and end date header fields auto-populates Annual list price (List Price * Subscription Term i.e. $2,500.00 * 4 Months 11 Days = $10,885.00)
- Use Case 2: Setting the target line item discount as 5 %, auto-populates the unit net price [List price - Discount/100 * List price i.e. $2,500.00 - (0.05 * $2,500.00) = $2,375.00]
- Use Case 3: Setting the quantity of each entry auto-changes the Extended Net price (Unit net price * Quantity i.e. $2,375.00 * 10 = $23,750.00)

### Final output

#### ServiceNow Quote Experience use case: Calculate the total of line-level prices

ServiceNow Quote Experience can include a determination rule that calculates the sum of line-level net prices so that it can be stored in a header-level field.

In CPQ ServiceNow Quote Experience, you can use a determination rule to calculate the sum of line-level total net prices and store the result in a header-level field. This is particularly useful when multiple fields need to be aggregated from line items to the transaction header.

## Example Rule Configuration

- Rule Action Type: Determination Rule
- Trigger Point: After line-level updates (that is, when line items are added, removed, or updated)
- Scope: Transaction Header

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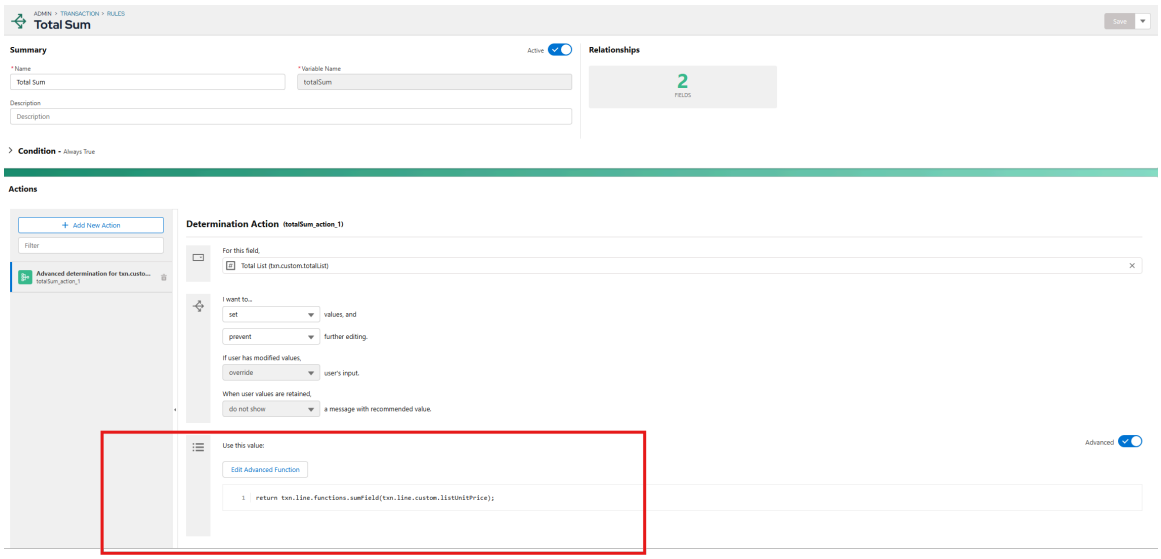
## Steps to create and use the rule

1. Ensure that there is a header-level field.

   Alternatively, you can create a custom field (for example, txn.custom.totalList) in the Associated Field section where the sum is to be stored.

2. Create a header level rule with the appropriate condition for which the rule will be executed.
3. Set the action type to determination.
4. In **Use this value**, set **Advanced** to true, and write an advanced script to calculate the fields.

   For example, calculate the sum aggregate of the list price of every line item. To calculate the total list price, we use the `sumField` function to calculate all the line-level list prices into a single field.




5. Save and activate the rule so it applies in real time during the transaction life cycle.
6. To test the rule, create a transaction and add line items with varying net prices.

   Verify that the sum of the line-level net prices is correctly calculated and displayed in the header-level field.

## More examples

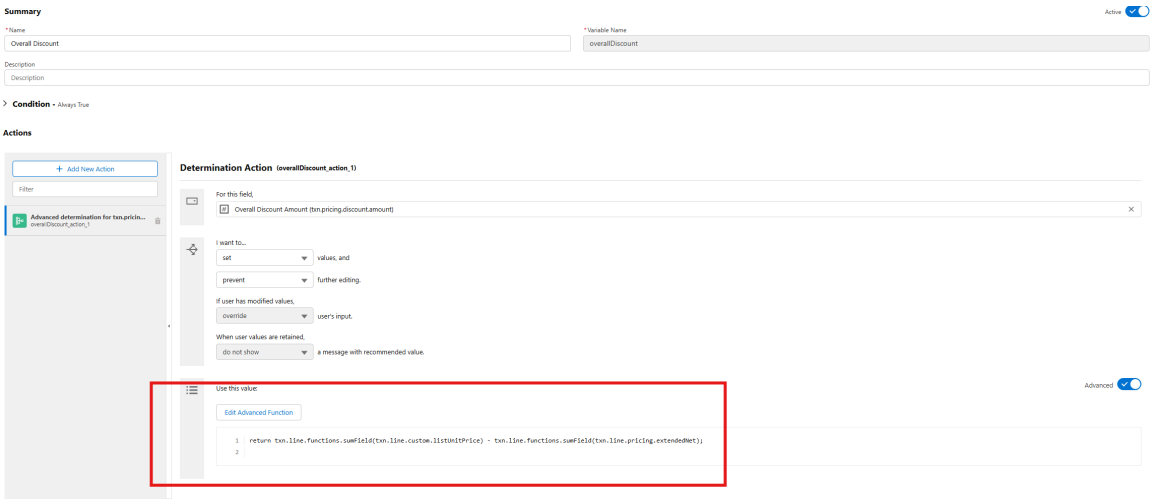
Here are two more examples of line-level calculations stored in a header-level field.

- Overall Discount Amount

  Advanced Script:

```
return
txn.line.functions.sumField(txn.line.custom.listUnitPrice) -
txn.line.functions.sumField(txn.line.pricing.extendedNet);
```

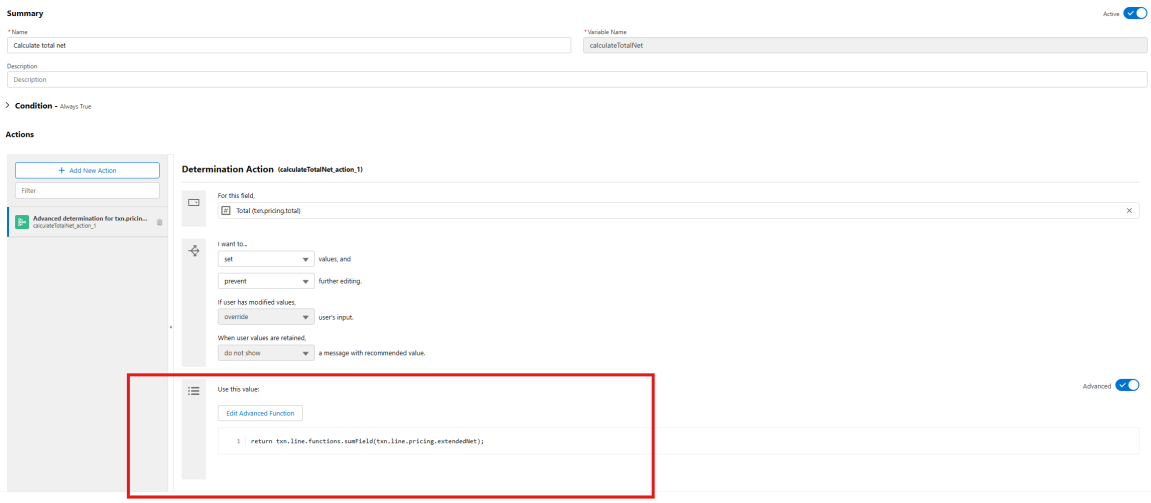
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- Total Net

  Advanced Script:

  ```
  return
  txn.line.functions.sumField(txn.line.pricing.extendedNet);
  ```




## ServiceNow Quote Experience use case: Display LIG line number on line detail

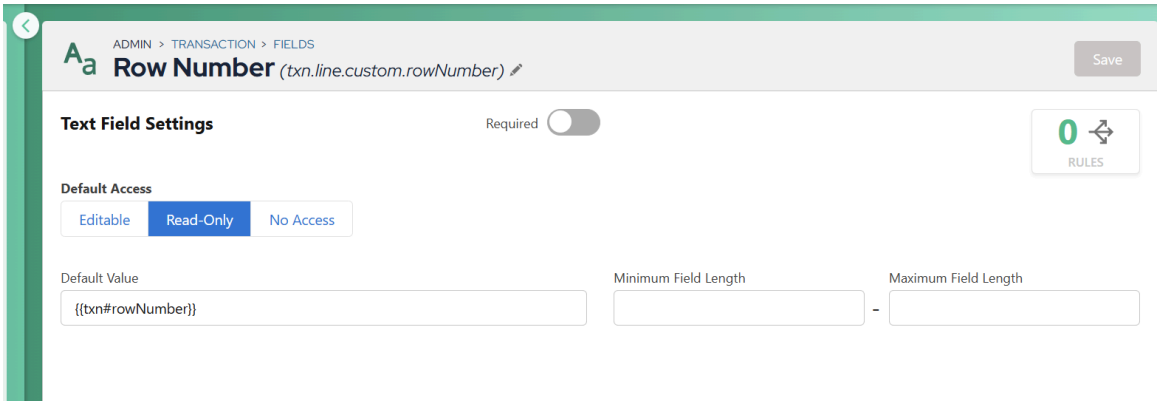
How to display the line item group line number in the line detail.

This document outlines the implementation approach for displaying the line item group (LIG) line number in the line detail layout. This enhancement lets users easily reference and correlate the line detail with the appropriate line in the LIG.

To display the line number in the line detail view, follow the steps below. This requires using a line detail layout (for example, `default_layout_linedetail`).

1. Create a custom read-only line-level field to store the row number.
   - Variable name: `txn.line.custom.rowNumber`
   - Default value: `{{txn#rowNumber}}`

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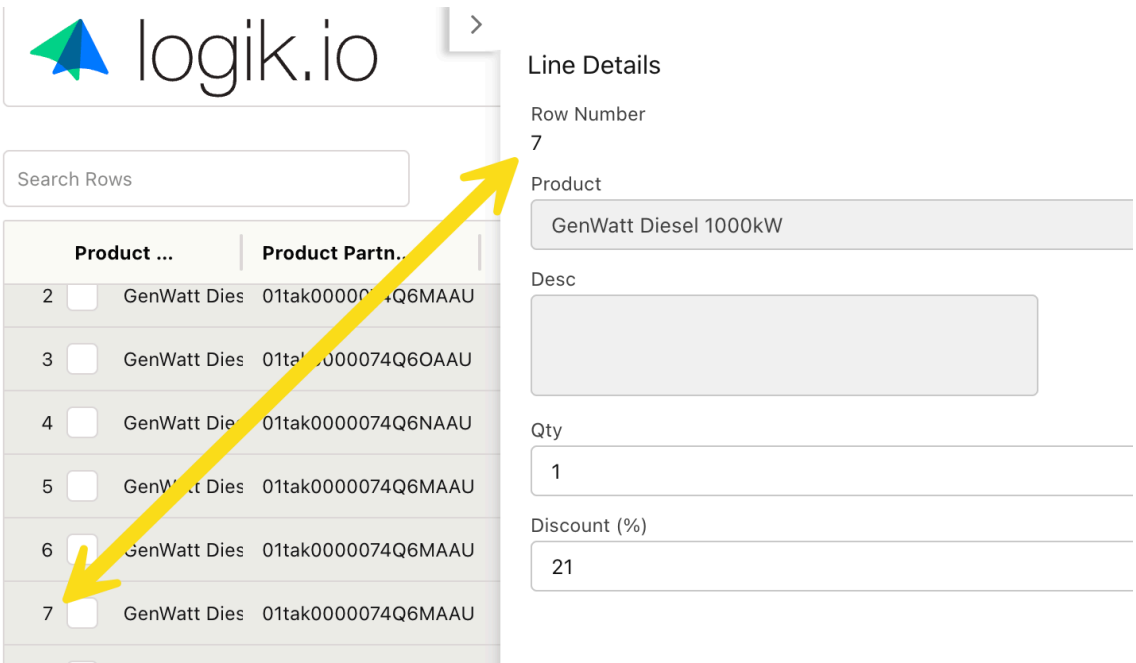



2. Add the new field to your line detail layout to make it visible when viewing line items.

   Ensure that the field has the setting `"enableMarkdown": true`. Additionally, to display the row number on the LIG line, add the `"showLineNumbers": true` property to the `lineGrid` layout object in the non-line detail layout (or layouts).

3. Save and deploy the updated blueprint with the modified layouts.
4. In the Transaction UI, create a new transaction or open an existing one.

   The line number appears in the line detail view, as in the following example:




### ServiceNow Quote Experience use case: Document generation with Google Docs

Generate documents from ServiceNow Quote Experience by using Google Docs and Google Apps Script.

To generate a document from ServiceNow Quote Experience, Google Docs combined with Google Apps Script provides an efficient and straightforward solution. By creating custom APIs using Apps Script, you can easily receive GET and POST requests from a direct URL. This eliminates the need for middleware, streamlining integration with services like CPQ or ServiceNow Quote Experience.

You can trigger document generation by either of these methods:

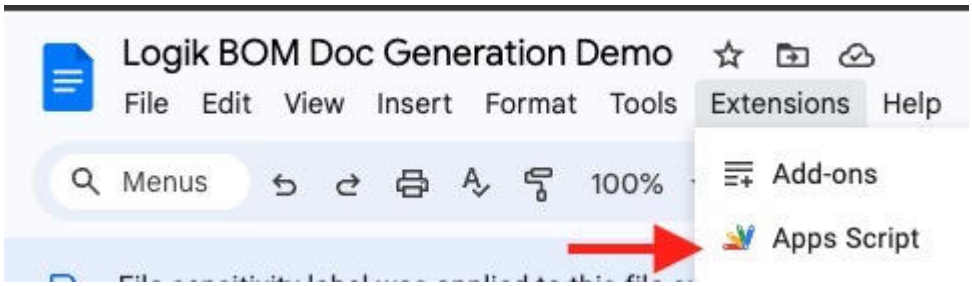
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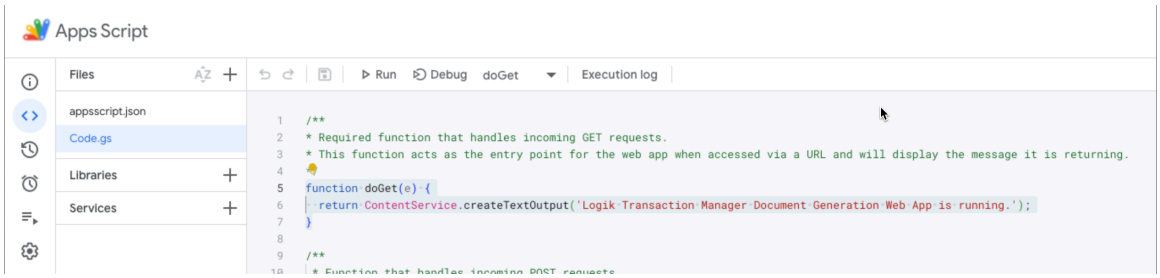
- CPQ Webhook: Automatically send POST requests to initiate document creation.
- ServiceNow Quote Experience: Use this for managing and automating processes.

## Setting up a Google doc to pull CPQ data

To access the developer window, open the Google doc where you want to integrate the script. In the menu bar, go to Extensions > Apps Script to open the development environment.

You can write custom JavaScript to process data and interact with Google Docs by using the Apps Script editor.




## Coding

Google Apps Script includes GET and POST requests.

- GET requests (`doGet`) respond with a simple text output, useful for verifying that the web app is running.
- POST requests (`doPost`) handle incoming data (usually JSON), generates the document based on the template, and returns a link to the newly created document.

This video explains how the `doGet` and `doPost` work in a Google Doc app script.

When using ServiceNow Quote Experience, you need to transform the JSON to send over to Google Docs. Below is an example template. If you are using a webhook, see Webhooks for how the data will be sent over to Google Docs.

The following code block shows an example Transform Template, sent as a POST to the doPost function.

```
{
  "transaction": {
    "uuid": "{{txn.uuid}}",
    "term": {{txn.term}},
    "stage": "{{txn.stage}}",
    "status": "{{txn.status}}",
    "account": "{{txn.account}}",
    "endDate": "{{txn.endDate}}",
    "netTotal": {{txn.netTotal}},
```

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```
    "termUnit": "{{txn.termUnit}}",
    "createdBy": "{{txn.createdBy}}",
    "quoteName": "{{txn.quoteName}}",
    "startDate": "{{txn.startDate}}",
    "accountName": "{{txn.accountName}}",
    "createdDate": "{{txn.createdDate}}",
    "opportunity": "{{txn.opportunity}}",
    "paymentTerm": "{{txn.paymentTerm}}",
    "quoteNumber": "{{txn.quoteNumber}}",
    "contractTerm": {{txn.contractTerm}},
    "contractType": "{{txn.contractType}}",
    "currencyCode": "{{txn.currencyCode}}",
    "estTaxAmount": {{txn.estTaxAmount}},
    "modifiedDate": "{{txn.modifiedDate}}",
    "billToAddress": "{{txn.billToAddress}}",
    "hardwareTotal": {{txn.hardwareTotal}},
    "servicesTotal": {{txn.servicesTotal}},
    "shipToAddress": "{{txn.shipToAddress}}",
    "softwareTotal": {{txn.softwareTotal}},
    "discountAmount": {{txn.discountAmount}},
    "expirationDate": "{{txn.expirationDate}}",
    "lastModifiedBy": "{{txn.lastModifiedBy}}",
    "primaryContact": "{{txn.primaryContact}}",
    "customerSegment": "{{txn.customerSegment}}",
    "discountPercent": {{txn.discountPercent}},
    "transactionType": "{{txn.transactionType}}",
    "estTaxPercentage": {{txn.estTaxPercentage}},
    "agreementDiscount": {{txn.agreementDiscount}},
    "taxEntityLocation": "{{txn.taxEntityLocation}}",
    "transactionNumber": {{txn.transactionNumber}},
    "totalPriceEstimate": {{txn.totalPriceEstimate}},
    "overallDealDiscount": {{txn.overallDealDiscount}},
    "annualTransactionBands": "{{txn.annualTransactionBands}}",
    "annualTransactionCount": {{txn.annualTransactionCount}},
    "accountSpecificDiscount": {{txn.accountSpecificDiscount}}
  },
  "lines": [
  {{#each lines}}
    {
      "uuid": "{{txn.line.uuid}}",
      "productInfo": {
        "productId": "{{txn.line.productId}}",
        "productSku": "{{txn.line.productSku}}",
        "productCode": "{{txn.line.productCode}}",
        "productName": "{{txn.line.productName}}",
        "productType": "{{txn.line.productType}}",
        "productDescription": "{{txn.line.productDescription}}"
      },
      "pricing": {
        "netPrice": {{txn.line.netPrice}},
        "listPrice": {{txn.line.listPrice}},
        "discountAmount": {{txn.line.discountAmount}},
        "discountPercent": {{txn.line.discountPercent}},
        "netTotal": {{txn.line.netTotal}},
        "customerLineDiscount":
{{txn.line.customerLineDiscount}},
```

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```
        "agreementLineDiscount":
 {{txn.line.agreementLineDiscount}}
      },
      "dates": {
        "startDate": "{{txn.line.startDate}}",
        "endDate": "{{txn.line.endDate}}",
        "createdDate": "{{txn.line.createdDate}}",
        "modifiedDate": "{{txn.line.modifiedDate}}"
      },
      "quantity": {{txn.line.quantity}},
      "currencyCode": "{{txn.line.currencyCode}}",
      "configUUID": "{{txn.line.configUUID}}",
      "orderDetails": {
        "globalOrder": {{txn.line.globalOrder}},
        "orderNumber": {{txn.line.orderNumber}},
        "transactionLineNumber":
 {{txn.line.transactionLineNumber}}
      },
      "termDetails": {
        "term": {{txn.line.term}},
        "termUnit": "{{txn.line.termUnit}}",
        "termMultiplier": {{txn.line.termMultiplier}}
      },
      "approvals": "{{txn.line.approvals3}}",
      "lastModifiedBy": "{{txn.line.lastModifiedBy}}"
    }
    {{#unless @last}},{{/unless}}
  {{/each}}
  ]
}
```

If you do not set the `doGet` function and try to access the URL you will receive an error. If not using the `doGet` for other purposes, it is best to always set it to the following and just modify the text.

```
function doGet(e) {
  return ContentService.createTextOutput('Document Generation
 Web App is running.');
}
```

When you access the live URL, you receive this message:

```
Logik Transaction Manager Document Generation Web App is running.
```

The `doPost` is important, because it will probably handle the Webhook or Integration payloads being sent from CPQ via POST requests.

Next, we create a function to generate a Google Doc using the `doPost` function.

In your Google Apps script, the `doPost` function will receive a POST request containing data (in JSON format) that you want to populate into a Google Doc template. The main logic for interacting with the Google Doc (i.e., replacing placeholders like `{{EXAMPLE}}` with actual values) will be placed in a separate function that is called from `doPost`.

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To set up the `doPost` function, define the `doPost` function to handle incoming POST requests and call your custom document generation function. Below is an example of how to structure it.

```
function doPost(e) {
  // Parse the JSON data from the POST request
  const postData = JSON.parse(e.postData.contents);

  // Call the function to create and populate the Google Doc
  const docLink = createGoogleDocFromTemplate(postData);

  // Return the public link to the generated document in the
 response
  return ContentService.createTextOutput(docLink);
}
```

In this code:

- The `postData` object contains the parsed data sent in the POST request.
- `createGoogleDocFromTemplate(postData)` is the function you will define to handle the Google Docs generation.
- The `docLink` is the public link to the generated Google Doc, returned to the caller.

Next, create the document generation function. The `createGoogleDocFromTemplate` function will:

1. make a copy of a Google Doc template.
2. replace placeholders (e.g., `{{EXAMPLE}}`) in the document with the corresponding data.
3. return a public link to the generated document.

The following code block shows an example `createGoogleDocFromTemplate` function:

```
function createGoogleDocFromTemplate(data) {
  // Specify the ID of the Google Doc template
  var templateId = 'YOUR_TEMPLATE_DOC_ID_HERE';
  // Make a copy of the template
  var templateDoc = DriveApp.getFileById(templateId).makeCopy();
  var doc = DocumentApp.openById(templateDoc.getId());
  var body = doc.getBody();
  // Replace placeholders with actual data from the POST request
  body.replaceText('{{ACCOUNT_NAME}}',
 data.transaction.accountName);
  body.replaceText('{{QUOTE_NUMBER}}',
 data.transaction.quoteNumber);
  body.replaceText('{{USER}}', data.transaction.createdBy);
  // Continue to replace all other placeholders...
  // Save and close the document
  doc.saveAndClose();
  // Make the document public (optional, based on your needs)
  templateDoc.setSharing(DriveApp.Access.ANYONE,
 DriveApp.Permission.VIEW);
  // Return the public link to the newly created document
  return templateDoc.getUrl();
}
```

In this function:

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- The templateId variable stores the Google Doc template's ID. You should replace `'YOUR_TEMPLATE_DOC_ID_HERE'` with the actual ID of your template.
- `makeCopy()` creates a copy of the template.
- `replaceText('{{EXAMPLE}}', data.key)` replaces each placeholder in the document with actual data from the incoming POST request. For example, `{{ACCOUNT_NAME}}` is replaced by `data.transaction.accountName`.
- The document is made public with `setSharing()`, but you can adjust the sharing settings as needed.

## Logging

Google Apps Script offers built-in logging via Logger.log() for debugging, but better logging is available in Google Cloud Logs. To access logs:

Go to > **View** > **Executions** to check outputs from your script. Then, connect your project to the Google Cloud Platform to view the logs.

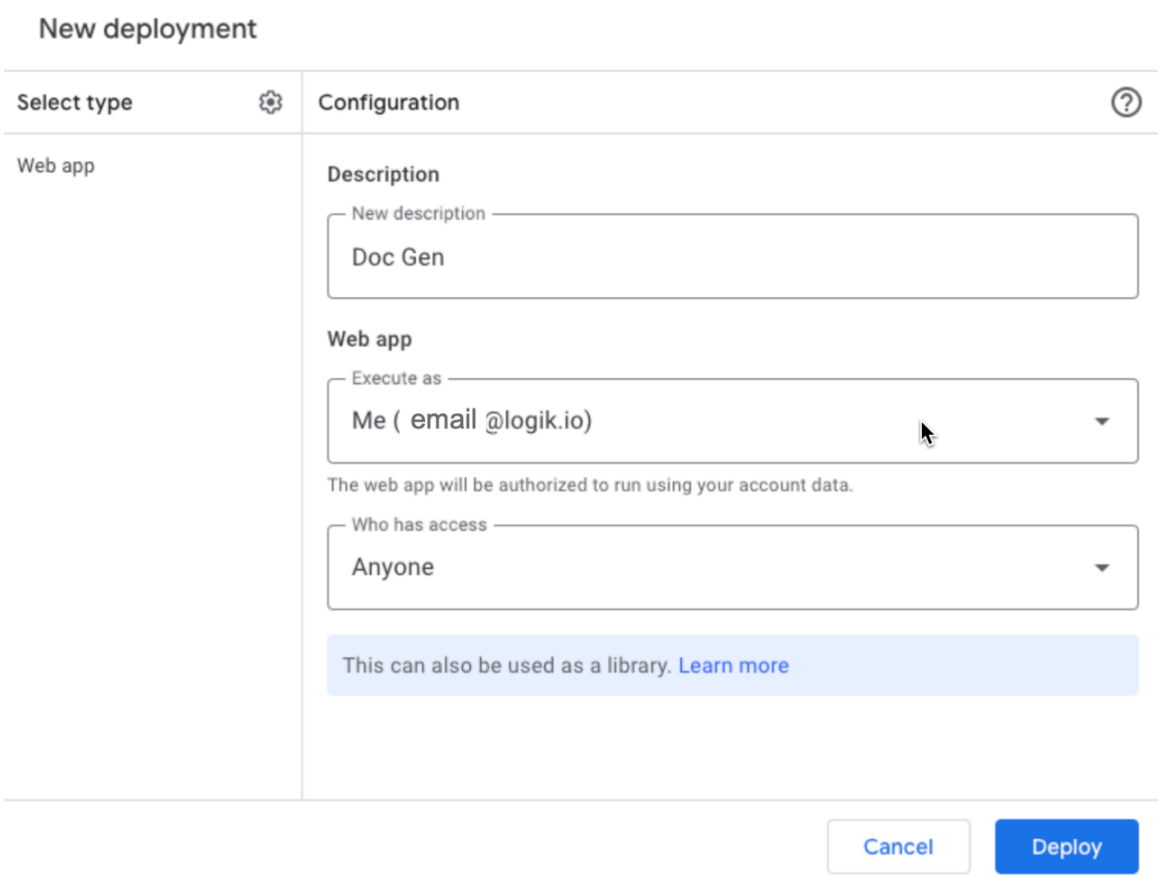
In the Google Cloud Logs Explorer, apply the filter `resource.type="app_script_function"` to view logs related to your app.

## Deploying

- Click the "Deploy" button in the top right corner of the Apps Script editor.
- Select "Deploy as web app."
- Set the project version (you can create a new one).
- Define who can access the app:

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- Execute as: This should be set to Me, so the script runs with your permissions.
- Who has access: Choose “Anyone” (public).




Once deployed, you’ll get a URL ending in `/exec` for live usage and `/dev` for testing. This is the URL that users will target to trigger the `doGet` function or send POST requests to trigger `doPost`.

In the following examples, the ellipsis (...) represents the unique App Script number for your script.

- Live: `https://script.google.com/macros/s/.../exec`
- Dev: `https://script.google.com/macros/s/.../dev`

If you want to test your changes before pushing them live, use the Dev URL to test your script with real data.

Every time you redeploy, you need to create a new version of your script. Follow these steps:

1. In the Google Apps Script editor, click the **Deploy** button in the top right.
2. Select **Manage deployments** from the menu.
3. In the Deployments window, click **Edit** on the existing deployment, or create a new deployment.
4. Click **Select Version**, and then click **New version**.

In the pop-up window, you can give your version a name or description. This is optional, but helpful for tracking changes. Click **Save** to create the new version.

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To view or manage your current deployments:

1. In the Google Apps Script editor, click the **Deploy**.
2. Select **Manage deployments**. Here you'll see all active versions of your script.
3. You can edit, delete, or redeploy any version by clicking the three-dot menu next to the version.

- Edit: Update an existing deployment to point to a new version.
- Delete: Remove the deployment entirely (Note: the live link will stop working if the deployment is deleted).

If needed, you can roll back to an older version of your web app:

1. Go to **Deploy > Manage deployments**.
2. Find the previous version you want to return to and click **Edit**.
3. Select the earlier version from the Select Version menu.
4. Click `Deploy` to activate the previous version.

This provides an easy way to revert any issues that may arise with newer versions.

### Solution configuration terminology

Terms used in solution configurations and their definitions.

**Solution configuration terminology**

| Term | Definition |
|---|---|
| Solution | The collection of blueprints and configurations linked together in a single configuration session. A configuration becomes a solution when at least one child configuration is added. |
| Solution root | The top-level configurable product in a solution. This is the product a buyer launches to start the session. All other configurations in the session are children of the solution root. |
| Solution hierarchy | The parent-child relationship between configurable products in a given solution. The solution hierarchy is independent of the BOM hierarchy. |
| Parent blueprint | A blueprint that contains a rule with a configurable product action targeting another blueprint. A parent blueprint can also be a child of another blueprint. |
| Child blueprint | A blueprint used to create a child configuration. A child blueprint must have a valid configurable product associated with it. A child blueprint can also be a parent of another blueprint. |
| Configurable product action | An extension of the product action that defines the child blueprint, the configurable product, and optional field mappings. |
| Field mapping | A definition of which fields pass data between blueprints. Data flows from the source field on the parent blueprint to the target field on the child blueprint. |
| Source field | The field on the parent blueprint whose value is passed through a field mapping. |
| Target field | The field on the child blueprint that receives the value from the source field through a field mapping. Target fields are read-only during a configuration session. |

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**Solution configuration terminology (continued)**

| Term | Definition |
|---|---|
| Solution BOM | The consolidated bill of materials that aggregates all products added across every configuration in the session, including children and grandchildren. The solution BOM is returned when a solution is saved. |

**Related topics**

- Solution configurations
- Field mapping in solution configuration
- Bill of Materials in solution configuration

### Common browser issues while using CPQ

When cookies are blocked by the browser or by browser extensions, it can interfere with the use of CPQ.

If attempting to configure in CPQ results in an error (configurator not loading, a 403 error is returned, or similar) and using another browser resolves the issue, then the issue must be with the settings of the original browser.

CPQ uses authentication cookies to track active sessions across browser tabs. These cookies do not track the user and are deleted when the user closes their web browser. Their only purpose is to validate the user and their organization for the use of the software.

If cookies are not enabled in the browser, CPQ cannot configure products. The browser itself or the extensions used by the end user in this browser could be inhibiting this active cookie.

Here are some reasons this issue might occur.

## Cookie blocking by the browser

By default, Safari and Firefox block all cross-site cookies. This behavior interferes with the authentication cookie that jumps across CPQ and Salesforce. If either of these browsers is your (or your end user's) default browser, cookies must be allowed to use the configurator.

If you have no control over what browsers end users use to access the CPQ Configurator, and you use easyXDM, submit a support case requesting a "runtimeAPI" parameter. Once the runtime clients are updated to include this parameter, the browsers should work with their default settings.

**Note:** Submit a support case by using the ServiceNow Support portal. For step-by-step instructions, see Create a case on Now Support for CPQ Customers.

Consult your browser's documentation to find the settings that affect whether cookies are blocked. These settings are often found in the privacy options sections of the browser settings.

## Cookie-blocking extensions

Cookies can also be blocked by browser extensions that are installed by the user. Some third-party cookie-blocking browser extensions include:

- uBlock Origin
- Privacy Badger
- Ghostery

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- Disconnect
- Cookie AutoDelete

Other extensions such as email templates or crypto wallets can also cause issues with cross-site third-party cookies. These extensions include:

- Briskine
- BNB Chain Wallet MetaMask
- WalkMe

Review your browser's plugins to check whether any other extensions could be interfering while using CPQ. If the end user can configure after all browser extensions are disabled, one of the extensions must be causing the issue. If you identify an extension that causes the issue and is not in the list above, please let us know.

### CPQ Support Team access to customer Salesforce sites

Learn how CPQ support team members can securely access customer Salesforce and CPQ Admin environments for troubleshooting. This article outlines recommended access methods, user-management practices, and considerations for customers with stricter security policies.

This document outlines the standard processes for CPQ support team members to gain access to customer environments. These procedures ensure secure, efficient support while maintaining appropriate access controls.

**Note:** Some enterprise customers have stricter security policies that prohibit direct access to their environments, requiring support methods other than those described here.

## Salesforce user access

When support requires access to a customer's Salesforce environment, customers can create a Salesforce user with an email address of provisioning@ServiceNow CPQ.io and system administrator permissions. This ensures that every member of our support team has access, not just the one currently working on your case.

For assistance with this process, see Salesforce's official documentation: Adding New Users in Salesforce

## CPQ Admin access

Support team members may need access to CPQ Admin in customer environments. To learn how to grant access, see User Access.

## User management

There is no standard timeline for access removal. Customers can modify access levels by changing CPQ support users to End User or by deactivating the SFDC user.

In test environments, many customers let our provisioning user stay active indefinitely. Some utilize our user as the integration user for product/pricebook synchronization, which lets us troubleshoot more quickly because we can directly investigate the issue.

During a support case, disabled user accounts can be reactivated upon request.

### Common error messages and causes

Look here for information and troubleshooting steps when you receive an error message.

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## Unable to roll back to previous state

This error is often related to a table lookup. Check to ensure that any tables in a lookup exist in your CPQ environment. Check the syntax of your lookup to ensure that the table column headers exactly match your query script. Capitalization or spelling could be off, causing a table lookup to fail, resulting in this error.

This could also involve circular logic being triggered by a field change, such as the condition and action of a rule both including the same field. If this error is seen right after selecting a field option, check the rules related to the field (by last modified date) to help isolate the cause.

## Error: Your rules are running beyond the stipulated time. Please contact your system administrator

Typically, this means that some rules are running in an infinite loop.

A rule may have the same field as part of conditions and actions. For example, a determination rule sets a field value based on a value already in that field.

Diagnose this by getting the click path to fire error and then inactivating recently modified rules one at a time to see if the error continues to be encountered.

## "...Index '0' is out of bounds..."

This almost always means that something is trying to reference an empty list or an empty array. In a literal sense, the error message is trying to reference the first index (0) of the list or array and is finding that 0 is beyond the bounds of the list or array.

Some possible causes:

- Something is misspelled in a table query.
- The query references a cfg value that hasn't yet been set, due to the rule conditions.
- The lookup query returned no results.

Null checks on arrays are always a good idea.

## Cannot read properties of undefined (reading 'map')

This error occurs on the buyside when the user opens CPQ config.

Review the layout file. Make sure that references to set the variable names are accurate.

### CPQ Upgrade Schedule

CPQ updates customer environments on a predictable bi-weekly schedule to deliver new features, enhancements, and fixes. Test environments are upgraded first, with production updates following after at least 14 days to ensure stability. You can identify your environment's sector from its URL and refer to the Upgrade Calendar to see which version your instance is currently running.

CPQ Development iterates the application quickly, releasing new software to customers about every two weeks. Each release delivers new features, enhances existing features, and fixes bugs. The benefits of each release are outlined in the corresponding Build Notes publication. Build Notes are sent to account holders of the CPQ Support Center; they are also posted in the Support Center.

Customer environments are upgraded according to the following table:

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### Upgrade windows

| Sector | Upgrade Window | Notes |
|---|---|---|
| test | Biweekly, Thursday 8:00p CT | |
| prod | Biweekly, Friday 8:00p CT | A build is pushed to production no less than 14 days after it was introduced to test environments. To reduce the risk of upgrading prod environments as fiscal periods are ending, the schedule avoids upgrading prod environments at the ends of calendar months. |

To determine which version of CPQ your environment is on, first determine the sector of your environment by inspecting its URL. The sector precedes "logik.io" in the URL. For example, in the URL https://customName.prod.logik.io, the sector is prod. Then, find the current day in the Upgrade Calendar. Review the corresponding test or prod entry for this day.

### Glossary

A list of terms used in CPQ

**Associated Picklist (AP)**

CPQ functionality that allows a set to be generated with predetermined rows based on the selection of a picklist field.

**API (Application Programming Interface)**

A way for two or more computer programs to communicate with each other. In the context of CPQ, APIs are categorized into runtime APIs (create, update and save configurations) and admin APIs (works with blueprints, fields, rules, configurable products, managed tables, and various automation tasks).

**Bill of materials (BOM)**

A list of parts and components needed to manufacture a product.

**Blueprint**

A collection of associated CPQ rules and fields utilizing a layout that defines a configuration experience. Identifying a product as a configurable product for a blueprint means it will launch the related configuration experience when selected.

**BOM type**

A category in which products in the BOM will be organized under (such as sales or manufacturing).

**Buyside**

Refers to the CPQ experience that the end user sees.

**Configurable product**

A product that is associated with a blueprint that kicks off the CPQ configuration experience. The relationship to the blueprint differs whether CPQ is being used as a headless application or in Salesforce.

**Configuration Line Item (CLI)**

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Records that are generated from a configuration and associated with the Configuration Line Item object. A configuration ID lets related configuration line items be grouped together.

**CPQ (Configure, Price, Quote)**

A category of sales software that lets users configure products and services, apply pricing, and generate price quotes.

**CRM (Customer Relationship Management)**

Software that manages all your company#s relationships and interactions with customers and prospects. Some examples are Salesforce and Microsoft Dynamics, but there are many more.

**Enrichments**

Scripts that run outside of the rules engine that affects configurations in CPQ. Enrichments can run on configure, on reconfigure, on BOM response, or via picklist extension pricing.

**Expert Services (ES)**

Consulting hours purchased from the CPQ Expert Services team to receive design or implementation guidance, request build work to be done, etc.

**External Connections**

Allows for data for a CPQ configuration to be retrieved from outside of CPQ. Called from in an enrichment.

**Field**

Allows input to be gathered from the end user and stores data. There are several types of Fields that can be used to meet various needs, including: text, date, Boolean, number, and picklist.

**Field grid**

A series of fields displayed as a matrixed layout.

**Flightpath**

CPQ feature that allows administrators to record a configuration session tracks end-user inputs and how the CPQ rules engine responds.

**Go-Live**

When your CPQ implementation is moved to a production environment and begins to be used by end users in some capacity.

**Headless application**

An application where the backend (data, logic, and functionality) is decoupled from the frontend (user interface). CPQ is headless in the sense that customers can leverage its powerful functionality via APIs in their desired techstack.

**Layout**

The visual experience that an end user sees when configuring a product in CPQ. Every blueprint in CPQ has a layout that can be customized by the Admin. Beginning at the lowest level, layouts contain fields, which are housed in columnsets. Finally, columnsets are situated in containers called tiers, which can be nested if desired.

**Matrix Loader**

A feature in CPQ that enables the bulk upload of multiple types of data into CPQ, such as data in CSV files or entire CPQ blueprints.

**Migration**

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The act of moving your CPQ work from one environment to another. This could be from one test environment to another, or from a test environment to a production environment.

**Picklist extension (PLE)**

CPQ feature for picklist field options that allows product info or additional info to be displayed, as well as filtering options.

**Price Book Entry (PBE)**

Price books associate products with their prices in Salesforce.

**Product**

A product can refer to many things, such as the company#s product itself, a configurable product (e.g “Computer”) or product part (e.g. “Motherboard”) in CPQ, and even an entry of the company product in a CRM like Salesforce.

**Product action**

CPQ functionality used in tandem with a rule. The rule would specify the conditions that need to be met, and a product action can be defined to add a product to the BOM accordingly.

**Product ID**

A unique identifier for a product, commonly used to refer to the unique IDs for products in Salesforce. An example of a Product ID is `01tHn00000VB38mIAD`.

**Product picker (PP)**

This functionality allows you to display a number of options that represent products. When options are selected, the product will be added to the BOM. Additional columns of new or existing fields can also be appended to surface more metadata along with the ability to aggregate.

**Production environment**

A CPQ Production environment represents your live and active environment currently being utilized, and is the most sensitive. Best practices are to do any implementation work in your test/sandbox CPQ environment, test it, and then migrate the work to your production environment along with some final testing.

**Quote Calculator Plugin (QCP)**

A plugin for Salesforce CPQ that provides extra functionality in the quote line editor by means of custom JavaScript code.

**Quote Line Editor (QLE)**

When using Salesforce CPQ, this interface allows you to add/remove products, apply discounts and markups, and calculate prices for the quote.

**Rule**

Comprising conditions and actions, and associated with a blueprint, rules are the powerhouse that provides the ability to hide/show content, deliver recommendations and messages, add products to a BOM, and more.

**Rule action**

Defined in a rule, rule actions are what will fire when a rule#s conditions are met. Action types consist of hiding/showing, excluding/including, Messages, adding products, Determination (populating fields with metadata), and more.

**Sandbox environment**

A type of environment that should be used to build-out new implementations or features of CPQ according to best practices. Once built and tested, the work can

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be moved into a Production environment and tested again before use in an active workflow. Also known as a test environment.

**Service level agreement (SLA)**

The level of service expected from a vendor. An example of a CPQ SLA could be how quickly customers can expect a support case to be acknowledged after being created.

**Set**

A feature that groups fields so they can be multiply replicated in the end-user#s UI in a matrix format. Sets reduce the number of fields and rules that need to be defined in scenarios where the same fields are being repeated. Analogous to Configuration Arrays in Oracle.

**Set repeater**

Functionality that allows you to easily create new indices in a set.

**System Integration Testing (SIT)**

A QA process to ensure the compatibility of two or more systems.

**Table**

CPQ has tables (relational databases) that allow data to be stored, which can then be retrieved using able lookups.

**Table lookup**

Utilizing a programming language called SQL (Structured Query Language), tables in CPQ can be queried using scripts to retrieve specific information.

**Test environment**

See Sandbox environment.

**Twinning**

The ability to automatically pull data from a Salesforce quote field into a CPQ field by creating a CPQ quote custom field using the format “<fieldName>LGK” in Salesforce, and a matching “<fieldName>” in CPQ.

**User acceptance testing (UAT)**

Also known as end-user testing, this is a phase near the end of implementation and before going live. A small group of the end-users will run through various scenarios to validate the desired end-user experience and address any issues or bugs before the full launch.

### The CPQ Technology and Product Training Portal

The CPQ Training Portal includes self-paced video training content.

CPQ is excited to introduce the CPQ Product & Technology Training Portal. This new training portal is your one-stop shop for all things training for CPQ. On the site you will find a library of self-paced video training content that covers all current products and features available at CPQ. This is training the way you want it, on your schedule, at your pace.

You can go to the homepage of the Training Portal at ServiceNow University.

The portal is a subscription-based site where you can purchase 12 months of access to all current and future CPQ training content for one price.

On the portal you will find the following Learning Tracks:

Introduction to CPQ:

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These modules are free to view by any individual without the need to create an account on the portal. These modules provide the student with a high level overview of the CPQ Commerce Logic Engine, its purpose, its main features and advantages, as well as a review of its major components. There is also a video demonstration of the end-user interface that a sales rep or customer would use to configure products for purchase, as well as a video demonstration of the CPQ Administration user interface that system administrators use to create and maintain CPQ configurations.

Using CPQ with Salesforce:

CPQ Essentials: The student is presented with learning modules that cover the core, central features of the Commerce Logic Engine as they are used in a Salesforce application environment. These 18 modules provide you with practical knowledge of how to perform various processes in the software that an administrator will perform on a daily basis. The student is provided video-based lectures on each topic, a video-based demonstration of how to complete any practice exercise for that topic, a PDF student guide document that has all the slides, and student notes,. Also, a lab exercise is provided that will allow the student to perform the practical procedures described for the topic.

CPQ Advanced Administration: The student is presented with learning modules that cover the more, advanced features of the Commerce Logic Engine as they are used in a Salesforce application environment. These 12 modules provide you with practical knowledge of how to perform various processes in the software that an administrator will perform when implementing various advanced features. The student is provided video-based lectures on each topic, a video-based demonstration of how to complete any practice exercise for that topic, a PDF student guide document that has all the slides, and student notes,. Also, a lab exercise is provided that will allow the student to perform the practical procedures described for the topic.

Using CPQ in an eCommerce Implementation:

CPQ Essentials: The student is presented with learning modules that cover the core, central features of the Commerce Logic Engine as they are used in an eCommerce application environment. These 18 modules provide you with practical knowledge of how to perform various processes in the software that an administrator will perform on a daily basis. The student is provided video-based lectures on each topic, a video-based demonstration of how to complete any practice exercise for that topic, a PDF student guide document that has all the slides, and student notes,. Also, a lab exercise is provided that will allow the student to perform the practical procedures described for the topic.

CPQ Advanced Administration: The student is presented with learning modules that cover the more, advanced features of the Commerce Logic Engine as they are used in an eCommerce application environment. These 12 modules provide you with practical knowledge of how to perform various processes in the software that an administrator will perform when implementing various advanced features. The student is provided video- based lectures on each topic, a video-based demonstration of how to complete any practice exercise for that topic, a PDF student guide document that has all the slides, and student notes,. Also, a lab exercise is provided that will allow the student to perform the practical procedures described for the topic.

CPQ APIs:

CPQ admin APIs: These 25 learning modules provide the student with an overview of all of the available admin APIs for CPQ. Each module reviews a specific subset of the admin APIs, and gives the student the syntax of each API call, the required parameters for each call, a description of each parameter, and real world examples of what an actual call might look like in use. Also, a demonstration of the use of every API call is performed so that the student can see what the complete API request would look like, including the request payload, if needed. The response to each API call is then reviewed to allow the students to see what they should expect to get back once the call is executed.

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CPQ Run Time APIs: This set of 3 learning modules provides content that cover the various Run Time APIs for CPQ. Each module reviews a specific subset of the Run Time APIs, and gives the student the syntax of each API call, the required parameters for each call, a description of each parameter, and real world examples of what an actual call might look like in use. Also, a demonstration of the use of every API call is performed so that the student can see what the complete API request would look like, including the request payload, if needed. The response to each API call is then reviewed to allow the students to see what they should expect to get back once the call is executed.

Use Cases:

These modules cover specific use cases for CPQ and provide the student with an explanation of the use case and why you might need it, as well as a demonstration of how the use case can be implemented in CPQ, including the components that need to be set up in order to implement the use case.

New Feature Training:

These free modules are produced monthly and provide the student with an overview of the latest new features that have been added to the Commerce Logic Engine.

In the top right corner of the home page you will find the Course Catalog link. The Course Catalog provides you with course descriptions of all training modules contained on the portal. You can use the Categories checkboxes to sort the course descriptions to help you find the information that is most important to you.

In the Student Home page you can view the Course Catalog and select courses, monitor your progress, join a Group, participate in Discussions, and view Calendar events such as live, virtual Office Hours events where you can talk with a CPQ training professional to help you better understand the learning content, or help you with any issues you might with the content or the lab exercises.

ServiceNow University Training Portal Demo

For more information about the Training Portal and how to purchase a subscription to the Portal, contact CPQ Training or your CPQ Sales Representative.

### UI display components

View examples of picklist, text, and number fields as they appear to end users in the CPQ UI.

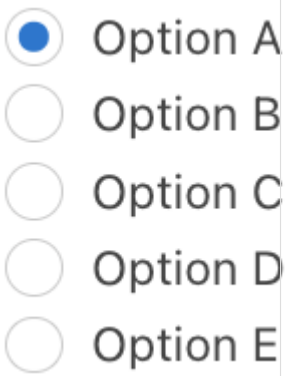
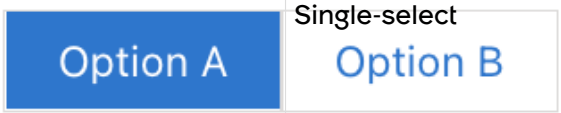
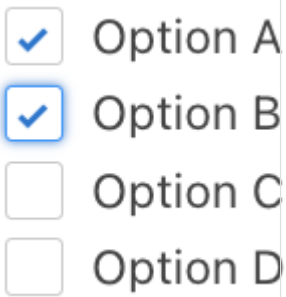
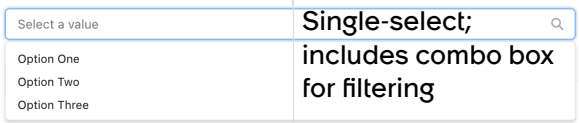
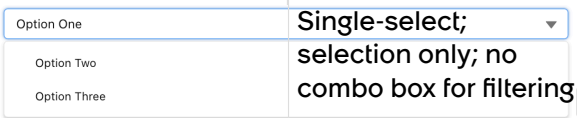
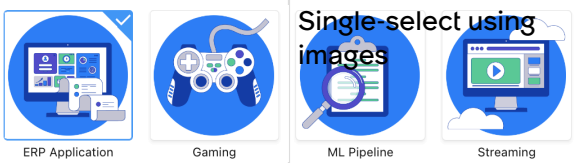
## Picklist fields

**Picklist fields**

| Name | Options | Appearance | Notes |
|---|---|---|---|
| *RadioButtons* | | Option One Option Two Option Three | Single-select |

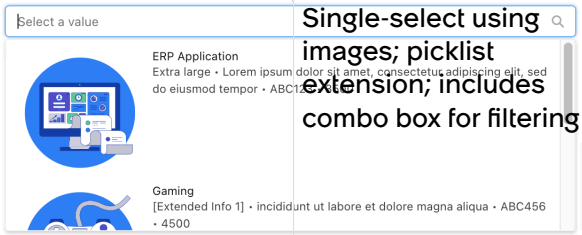
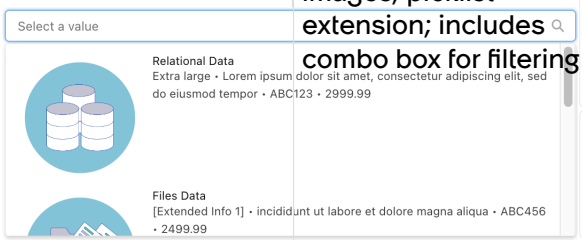
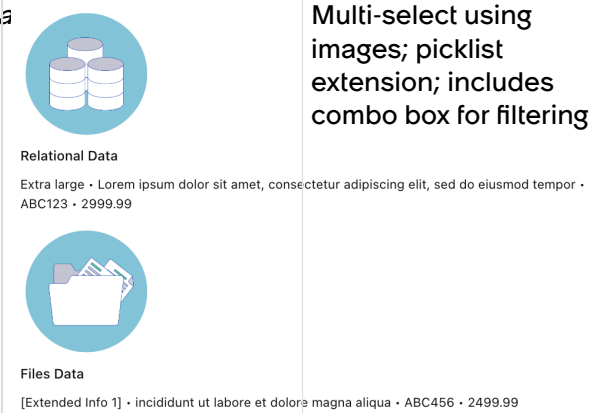
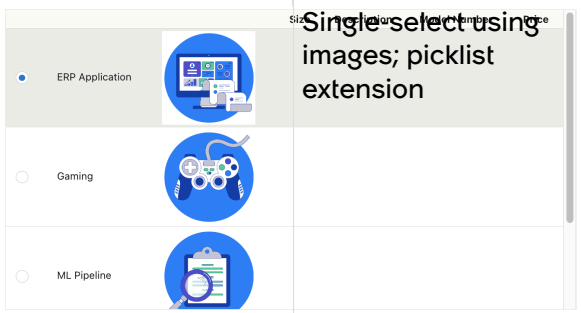
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## Picklist fields (continued)

| Name | Options | Appearance | Notes |
|---|---|---|---|
| *VerticalRadio* | |  | Single-select |
| *Radio* | |  | Single-select |
| *Checkbox* | |  | Multi-select |
| *VerticalCheckbox* | |  | Multi-select |
| *Picklist* | |  | Single-select; includes combo box for filtering |
| *BasicPicklist* | |  | Single-select; selection only; no combo box for filtering |
| *MultiSelectPicklist* | |  | Multi-select; includes combo box for filtering |
| *VisualPicker* | |  | Single-select using images |
| *MultiSelectVisualPicker* | |  | Multi-select using images |

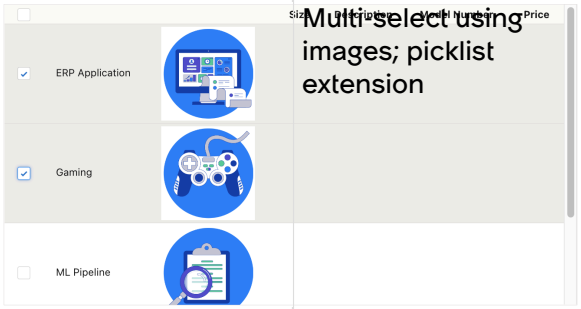
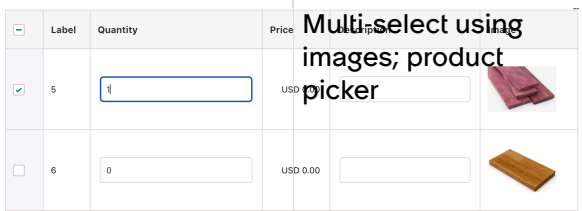
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## Picklist fields (continued)

| Name | Options | Appearance | Notes |
|---|---|---|---|
| *ExtendedPicklist* | |  | Single-select using images; picklist extension; includes combo box for filtering |
| *MultiSelectExtendedPicklist* | |  | Multi-select using images; picklist extension; includes combo box for filtering |
| *ExtendedPicklistDisplayOnly* | • Hide field label<br>• Hide option label<br>• Center content<br>• Arrange horizontally or vertically<br>• Control image size |  | Single-select using images; picklist extension; includes combo box for filtering |
| *MultiSelectExtendedPicklistDispla* | • Hide field label<br>• Hide option label<br>• Center content<br>• Arrange horizontally or vertically<br>• Control image size |  | Multi-select using images; picklist extension; includes combo box for filtering |
| *SingleSelectPicklistGrid* | • Set column headers<br>• Set column alignment<br>• Control image size<br><br>Price display (currency code or symbol) follows layout settings |  | Single-select using images; picklist extension |

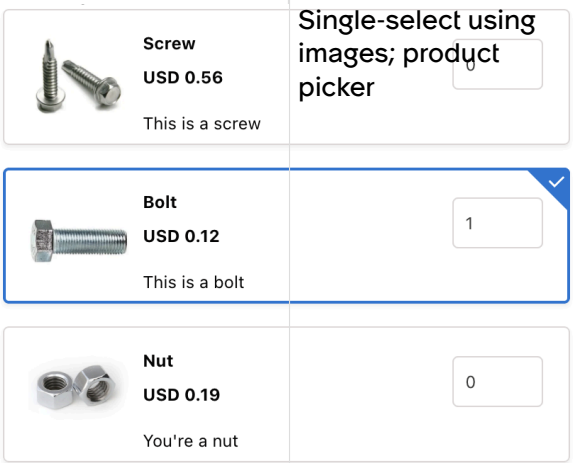
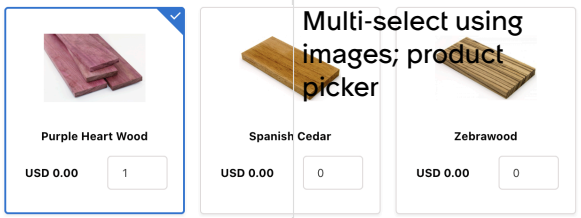
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## Picklist fields (continued)

| Name | Options | Appearance | Notes |
|---|---|---|---|
| *MultiSelectPicklistGrid* | • Set column headers<br>• Set column alignment<br>• Control image size<br><br>Price display (currency code or symbol) follows layout settings |  | Multi-select using images; picklist extension |
| *SingleSelectProductPickerGrid* | • Set column headers<br>• Set column alignment<br>• Control image size<br><br>Automatically creates product rules<br><br>Price display (currency code or symbol) follows layout settings<br><br>User can edit custom subfields - includes quantity by default<br><br>Bulk actions:<br>• Set values<br>• Include or exclude options<br>• Specify minimum and maximum quantity |  | Single-select using images; product picker |
| *MultiSelectProductPickerGrid* | • Set column headers<br>• Set column alignment<br>• Control image size<br><br>Automatically creates product rules<br><br>Price display (currency code or symbol) follows layout settings |  | Multi-select using images; product picker |

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### Picklist fields (continued)

| Name | Options | Appearance | Notes |
|---|---|---|---|
| | User can edit custom subfields - includes quantity by default<br><br>Bulk actions:<br>• Set values<br>• Include or exclude options<br>• Specify minimum and maximum quantity | | |
| *VisualProductPicker* | • Wide or tall rectangle<br>• Image, label, price, description, and quantity fields |  | Single-select using images; product picker |
| *MultiSelectVisualProductPicker* | • Wide or tall rectangle<br>• Image, label, price, description, and quantity fields |  | Multi-select using images; product picker |

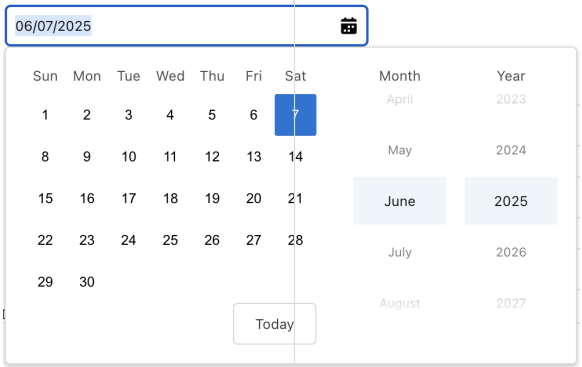
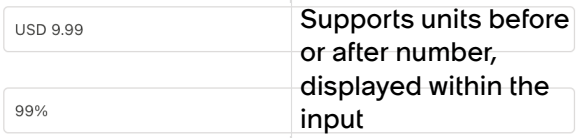
## Text fields

### Text fields

| Name | Options | Appearance | Notes |
|---|---|---|---|
| *Text* | | | |
| *TextArea* | | Text area sample content | |
| *ReadOnlyText* | | Read Only Text Value | Supports markdown formatting, including links and inserting |

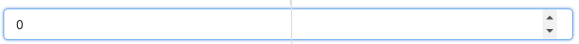
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### Text fields (continued)

| Name | Options | Appearance | Notes |
|---|---|---|---|
| | | | content from other fields |
| *Date* | |   | |
| *FormattedNumber* | |   | Supports units before or after number, displayed within the input |
| *LocationLookup* | |   | Accesses Google API and returns location data, which can be inserted into specified fields |

## Number fields

### Number fields

| Name | Options | Appearance | Notes |
|---|---|---|---|
| *Number* | Minimum and maximum values; step size<br><br>Layout value example:<br>`{"step":1,"min":0,"max":100}` |   | |
| *Slider* | Minimum and maximum values; step size<br><br>Layout value example:<br>`{"step":1,"min":0,"max":100}` |   | |
| *NumberWithSubmit* | Button label |   | |

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### Boolean fields

#### Boolean field

| Name | Options | Appearance | Notes |
|---|---|---|---|
| *Boolean* | Labels for true and false states |  true | |

## Order Management reference

Reference topics provide additional information about Order Management.

### Components installed with Order Management

Several types of components are installed with activation of the Order Management plugin, including tables and user roles.

### Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Order Fulfillment Agent<br><br>[sn_ind_tmt_orm.order_fulfilment_agent] | Views product order, product order task, service order, and resource order. Can edit some fields from the tasks. | • sn_customerservice.case_viewer<br>• sn_tmt_core.outbound_request_read<br>• sn_ind_tmt_orm.fulfillment_writer<br>• sn_customerservice.csm_workspace_user<br>• sn_prd_invt.product_inventory_relationship_write<br>• sn_sla_definition_read<br>• awa_agent<br>• sn_ind_tmt_orm.order_creator<br>• sn_fallout_mgmt.fallout_creator<br>• sn_prd_invt.product_inventory_relationship_crea<br>• sn_prd_invt.product_inventory_relationship_rea<br>• wm_basic |
| Order Fulfilment Manager<br><br>[sn_ind_tmt_orm.order_fulfilment_manager] | Views and edits product order, product order task, service order, and resource order. | • sn_ind_tmt_orm.order_fulfilment_agent<br>• sn_ind_tmt_orm.order_approver<br>• sn_prd_invt.product_inventory_relationship_dele |

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| Role title [name] | Description | Contains roles |
| --- | --- | --- |
| Service Order Agent<br>[sn_ind_tmt_orm.service_order_agent] | Views service order and resource order. Can edit some fields from the tasks. | • wm_basic<br>• sn_prd_invt.product_inventory_relationship_read<br>• awa_agent<br>• sn_sla_definition_read<br>• sn_ind_tmt_orm.order_creator<br>• sn_tmt_core.outbound_request_read<br>• sn_ind_tmt_orm.fulfillment_writer<br>• sn_prd_invt.product_inventory_relationship_crea<br>• sn_prd_invt.product_inventory_relationship_write<br>• sn_customerservice.case_viewer<br>• sn_customerservice.csm_workspace_user<br>• sn_fallout_mgmt.fallout_creator |
| Service Order Manager<br>[sn_ind_tmt_orm.service_order_manager] | Views and edits service order and resource order. | • sn_ind_tmt_orm.service_order_agent<br>• sn_ind_tmt_orm.order_approver<br>• sn_prd_invt.product_inventory_relationship_dele |
| Order Approver<br>[sn_ind_tmt_orm.order_approver] | Approves customer orders in Order Management. This role is included in the Order Management Business Stakeholder role. | sn_ind_tmt_orm.order_viewer |
| Order Viewer<br>[sn_ind_tmt_orm.order_viewer] | Views customer, product, service, and resource orders and any related order tasks in Order Management. This role is included in the Order Management | • sn_prd_invt.product_inventory_viewer<br>• sn_sales_agmt_core.sales_agreement_viewer<br>• sn_customerservice.customer_data_viewer<br>• sn_prd_pm.product_catalog_viewer<br>• sn_bus_loc.ibl_viewer<br>• agent_workspace_user<br>• sn_bus_loc.ebl_viewer<br>• sn_csm_pricing.pricelist_viewer<br>• canvas_user<br>• sn_ord_qual_mgmt.alternate_proposal_read |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| | Business Stakeholder role. | • sn_ind_tmt_orm.fulfillment_viewer<br>• sn_tmt_core.inbound_queue_read<br>• sn_prd_invt.product_inventory_operations_read<br>• sn_service_org.customer_criteria_read<br>• sn_change_read |
| Fulfillment Writer<br>[sn_ind_tmt_orm.fulfillment_writer] | Granular role to grant write access to fulfillment tasks. | • sn_ind_tmt_orm.fulfillment_viewer<br>• sn_tmt_core.outbound_request_write |
| Order Agent<br>[sn_ind_tmt_orm.order_agent] | Reads, creates, and updates access to orders, order line items, order characteristic values, and price adjustments. Also, reads order tasks, product order, service order, and resource orders. | • sn_ind_tmt_orm.order_creator<br>• sn_customerservice.csm_workspace_user<br>• sn_customerservice.sn_customer_menu_viewer |
| Order admin<br>[sn_ind_tmt_orm.order_admin] | Reads, writes, and updates access for Order tables. | • sn_ind_tmt_orm.order_agent<br>• sn_ind_tmt_orm.order_approver |
| Order Creator<br>[sn_ind_tmt_orm.order_creator] | Creates orders. Use this role to send order via REST Web Services. | • sn_ord_qual_mgmt.alternate_proposal_write<br>• sn_ind_tmt_orm.order_viewer<br>• sn_ord_qual_mgmt.alternate_proposal_create |
| Order Integrator<br>[sn_ind_tmt_orm.order_integrator] | Creates orders. Use this role | • sn_prd_invt.product_inventory_operations_creat<br>• sn_tmt_core.inbound_queue_create<br>• sn_tmt_core.inbound_queue_create |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| | to send order via REST Web Services. | • sn_tmt_core.outbound_request_write<br>• sn_ind_tmt_orm.order_creator<br>• sn_tmf_api.party_integrator |

## Tables installed

| Table | Description |
|---|---|
| Order Line Related Items<br>[sn_ind_tmt_orm_order_line_related_items] | Indicates associations between an order line item and its related items or product inventory. |
| Inflight Order Line Item Change<br>[sn_ind_tmt_orm_inflight_order_line_item_change] | Tracks changes made to order lines items whole the order is in progress. |
| External product inventory<br>[sn_ind_tmt_orm_external_product_inventory] | Tracks product inventory records managed in external systems and linked to order line items. |
| Decomposition Rule<br>[sn_ind_tmt_orm_order_decomposition_rule] | Defines the rules used to break down an order into smaller fulfillment tasks based on characteristics and specification. |
| External Sim Numbers<br>[sn_ind_tmt_orm_st_external_sim_numbers] | Stores Sim numbers managed in external systems for use in order processing. |
| Order Line Item Contact<br>[sn_ind_tmt_orm_order_line_item_contact] | Stores contact details linked to a specific order line item. |
| Resource Order<br>[sn_ind_tmt_orm_resource_order] | Represents resource level orders and their associated tasks in the fulfillment process. |
| Order Characteristic<br>[sn_ind_tmt_orm_order_characteristic_value] | Represents the characteristics and configurable attributes defined for an order. |
| Pricing Adjustments<br>[sn_ind_tmt_orm_pricing_adjustment] | Tracks adjustments such as discounts or surcharges applied to an order or order line item. |

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| Table | Description |
| --- | --- |
| Mobile Order Task<br>[sn_ind_tmt_orm_mobile_order_task] | Represents order tasks created for mobile services or mobile related fulfillment. |
| Customer Order Related Party<br>[sn_ind_tmt_orm_order_related_party] | Represents parties linked to a customer order, such as organizations or responsible entities. |
| Req Def Glide<br>[sn_ind_tmt_orm_req_def_glide] | Stores request definition data linked to variables and dictionary entries in Glide. |
| Domain Order Related Items<br>[sn_ind_tmt_orm_domain_order_related_item] | Represents items linked to a domain order, including related orders and inventory. |
| Product Order<br>[sn_ind_tmt_orm_product_order] | Represents customer product orders and their associated fulfillment tasks. |
| Covered Product<br>[sn_ind_tmt_orm_covered_product] | Represents products covered under an order line, sold product, or install base. |
| Service Order<br>[sn_ind_tmt_orm_service_order] | Represents customer service orders and their associated fulfillment tasks. |
| Decomposition Trigger<br>[sn_ind_tmt_orm_decomposition_trigger] | Defines the conditions that initiate decomposition of an order or order line. |
| Inflight Change Type<br>[sn_ind_tmt_orm_inflight_change_type] | Defines the types of changes that can be applied to inflight orders or order lines. |
| Order Stage<br>[sn_ind_tmt_orm_order_stage] | Defines the stages an order goes through in its life cycle. |
| Order To Project Relationship<br>[sn_ind_tmt_orm_order_line_rel_task] | Indicates the relationship between an order and its associated project tasks or records. |
| Request Definition Characteristic<br>[sn_ind_tmt_orm_req_def_char] | Defines the characteristics and attributes associated with a request definition. |

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| Table | Description |
|---|---|
| Domain Order<br>[sn_ind_tmt_orm_domain_order] | Represents a domain level order that consolidates product, service, or resource orders into fulfillment tasks. |
| Upgrade Inventory Job<br>[sn_ind_tmt_orm_upgrade_inventory_job] | Stores details of inventory upgrade jobs, including specifications, payload, and status. |
| Contract Product Offering<br>[sn_ind_tmt_orm_contract_m2m_product_offering] | Indicates the relationship between a contract and its associated product offerings. |
| Customer Order<br>[sn_ind_tmt_orm_order] | Represents a customer's order, including account, billing, shipping, pricing, and charge details. |
| Order Line Item<br>[sn_ind_tmt_orm_order_line_item] | Represents the individual items in a customer order, including product, pricing, quantity, and shipping details. |

## Account details form

Use the Account Details form to create or review account information for customers and partners.

| Field | Description |
|---|---|
| Name | Name of the enterprise or customer. |
| Number | Unique system-assigned account number, starting with a prefix ACCT. |
| Primary Contact | Name of the primary contact person for the account. |
| Parent Account | Name of the parent account, if any, for this account.<br>• For example, if the account is a national branch of a multinational corporation, the parent account is the multinational corporation account.<br>• If there isn't a parent account, leave this field empty. |
| Registration Code | Registration code, if any, assigned to the account. |
| Customer | Option that designates if this account is for a customer. |
| Partner | Option that designates if this account is for a business partner. |
| Website | URL of the website for this account, if any. |
| Phone | Primary phone number for the account. |
| Street | Street address for the account. |
| City | Name of the city for the account. |

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| Field | Description |
|---|---|
| State / Province | Name of the US state or Canadian province for the account. |
| Zip / Postal code | Zip or postal code for the account. |
| Country | Name of the country for the account. |
| Notes | Free-form note text for the account. |
| Industry | Sector or market in which the account operates. |
| Legal entity name | Registered business name. |
| Business structure | Indicates the legal form of the organization such as LLC or Corporation. |
| Assumed name | Trade name or doing business as (DBA) name used publicly. |
| Date of Incorporation | The date the business was legally formed. |
| Trademark | Registered brand or symbol associated with the account. |
| Tax ID | Unique tax identification number for regulatory purposes. |
| Email | Primary email address for account-related communication. |
| Sales Owner | The internal contact responsible for managing the account relationship. |

**Note:** When you create an account through the account creation API, the value you provide for **Legal entity name** is saved with the account record.

## Customer and Service order details forms

The Order details forms enable you to select, review, and modify captured customer or service orders.

### Order details page - Customer Order fields

The Orders details page - customer order section enables you to review and modify the general details for a product or service order.

| Field | Description |
|---|---|
| Number | Unique system-assigned customer order number.<br>**Note:** Both customer orders and service orders have an assigned ID with a prefix of ORD. To learn more about order types, see Order types in Sales Customer Relationship Management. |
| Account | Name of the customer account. |
| Contact | Name of the contact for the order. |

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| Field | Description |
| --- | --- |
| Channel partner | The name of the organization selling a product or service. |
| State | Indicator of the current processing state for the customer order, including all of its associated line items.<br><br>**Note:** To view a comprehensive listing of customer order states with detailed descriptions, see Customer Order form states and Customer order states. |
| Priority | The priority of completing the order. The available options are:<br>• 1 - Critical<br>• 2- High<br>• 3 - Moderate<br>• 4 - Low |
| External purchase order | A unique identifier or reference number associated with a purchase order issued to a third-party vendor outside the organization to procure goods or services. |
| Order date | Date that you received the customer order. |
| Order type | Category that indicates the type of order.<br>**Product**<br>Product order: Customer is ordering a product.<br>**Service**<br>Service order: Request for the servicing of a product or installation of a service.<br><br>**Note:** Like a captured service order, customer orders have an ID with a prefix of **ORD(nnn)**. The **Order Category** field enables you to easily identify the type of order. |
| Fulfillment type | Type of fulfillment action for the customer order.<br>**Deliver**<br>Deliver ordered items to the customer when you fulfill the order.<br>**Qualify**<br>Check the feasibility of delivering the products and services requested on the customer order. Without actually activating or delivering the products or services for the order, it usually processes with a different set of tasks. If all preceding tasks are complete, processing for the associated product, service, or resource order tasks can start. |

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| Field | Description |
| --- | --- |
| Version | Current version of the customer order. Indicates the number of times that you revised the customer order during the fulfillment process. A customer order for a product or service can go through multiple revisions during its fulfillment cycle. A new order without any revisions has a version of one, and automatically increments for each inflight revision. |
| Revision Operation | Type of revision operation, if any, that is taking place in the current version of the customer order:<br>**None**<br>No update or cancellation is taking place for the customer order. This setting is the default for new customer orders.<br>**Update**<br>A Characteristic, Contact, or Price inflight revision has been submitted for the customer order.<br>**Cancel**<br>A customer order is canceled or in the process of being canceled. |
| Sales agreement | If you're using the Sales Agreement Management application and one or more sales agreement were created by an agent, this field shows the system-generated number for the sales agreement linked to this account. The oldest active agreement is auto-populated. You can manually select any valid agreement from the list. |
| Existing contract | Reference to a previously established customer contract when creating or modifying an order. Existing contracts helps maintain a connection between the current order and the original contract, enabling accurate tracking of changes, renewals, or upsells. It facilitates scenarios where pricing or quantity changes are made to existing contract lines. The system can split line items based on effective start dates and apply delta pricing logic accordingly. |
| PONR | Option that indicates if this order is past the Point of No Return.<br>• If selected, it indicates that you can't revise the order or request a cancellation for it while the fulfillment process is in progress.<br>◦ You can't select **Revise Order** or **Cancel Order** to attempt to change the order line item or to request a cancellation for it.<br>◦ If any of the order line items are designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items |

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| Field | Description |
| --- | --- |
| | are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order.<br>• If cleared, you can still revise the order or request a cancellation for it.<br><br>The value for this option is a system-assigned flag that you can't manually update. |

### Order details page - Pricing fields

The Orders details page - pricing section enables you to review and modify the pricing details for a customer or service order.

| Field | Description |
| --- | --- |
| Order currency | Currency used to place the order. For example, USD for US dollars. |
| Price list | The price list used for applying prices to the items within your order. |
| Renewal adjustment basis | Pricing method applied during the renewal of a service contract. It enables agents to specify whether the renewal price should be based on the current market rate or the previously contracted rate. The available options are:<br>• List price: Renews the contract at the current market price of the product or service at the time of renewal.<br>• Contracted price: Renews the contract using the original contract price, with optional adjustments |
| Renewal adjustment type | Method used to adjust the renewal price of a service contract when the value of the Renewal adjustment basis field is set to Contracted price. The available options are:<br>• Markup %: Increases the renewal price by a specified percentage above the contracted price.<br>• Markdown %: Decreases the renewal price by a specified percentage below the contracted price.<br><br>The field is disabled if the value of the Renewal adjustment basis field is set to List price. |
| Renewal adjustment value | The actual adjustment value. For example, 10%. If the contracted price is $100 and the |

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| Field | Description |
| --- | --- |
| | adjustment type is Markup % with a value of 10, the renewal price will be $110.<br><br>The field is disabled if the value of the Renewal adjustment basis field is set to List price. |

### Order details page - Totals fields

The Orders details page - totals section enables you to review the final total pricing details for a customer or service order.

| Field | Description |
| --- | --- |
| Total one time price | Aggregate cost of all non-recurring charges associated with an order line item. These are typically setup fees, installation charges, or product costs that are billed once rather than on a recurring basis. |
| Total monthly price | The sum of all monthly recurring charges associated with the order. |
| Total annual price | The sum of all annual recurring charges associated with the order. |
| Total amount | Aggregate cost of all charges, both, one-time and recurring, associated with the entire order. It is a calculated field that reflects the final payable amount after applying quantity, pricing, and adjustments. |
| Total net new amount | The total value of newly added products or services in a customer order that are not part of a renewal or amendment. It helps quantify the net new revenue generated from fresh purchases. |

### Order details page - Dates fields

The Orders details page - totals section enables you to review the final total pricing details for a customer or service order.

| Field | Description |
| --- | --- |
| Expected start date | Planned start date for the order or contract. It reflects when the service or product delivery is intended to begin, based on initial scheduling or customer expectations. |
| Expected end date | Planned completion date for the order or contract. It helps in forecasting delivery timelines and aligning internal resources accordingly. |
| Actual start date | Real date when the order fulfillment or contract execution began. This field is updated |

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| Field | Description |
|---|---|
| | once the first fulfillment activity or service activation occurs. |
| Actual end date | Actual date when the order or contract was completed or terminated. It is used for performance tracking and SLA compliance analysis. |
| Payment terms | Calendar days by which the buyer must pay the full invoice amount from the invoice date. The available options are:<br>• None: No payment terms apply.<br>• Net 30<br>• Net 45<br>• Net 60<br>• Net 90<br>• Due Upon Receipt: Payment is expected immediately once the invoice is received by the buyer. |
| Auto-renew contract | Option to set the automatic renewal of the contract upon expiration. |
| Contract start date | Commencement date of the contract for applying subscription pricing to an order. |
| Contract end date | Date when the contract for a subscription is set to expire. |
| Term (months) | Shows the number of months the subscription is valid based on the contract start and end dates. |

**Related topics**

Add subscription pricing to an order

### Order details page - Address fields

The Orders details page - address section enables you to review and modify the billing and shipping details for a customer or service order.

| Field | Description |
|---|---|
| Shipping location | Designated site or facility where the order should be delivered. |
| Shipping street | Street address of the shipping destination. |
| Shipping city | City where the order is to be delivered. |
| Shipping state / Province | State or province of the shipping address. |
| Shipping country | Country where the order is being shipped. |
| Shipping zip / Postal code | Postal or zip code for the shipping location. |

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| Field | Description |
|---|---|
| Billing address same as shipping | Option to auto-populate the billing address fields with shipping details. |
| Billing location | Site or office responsible for receiving and processing the invoice. |
| Billing street | Street address for billing purposes. |
| Billing city | City associated with the billing address. |
| Billing state / Province | State or province of the billing address. |
| Billing country | Country where the invoice is sent. |
| Billing zip / Postal code | Postal or zip code for the billing location. |

### Order details page - Notes fields

The Orders details page - notes section enables you to review and modify the additional details for a customer or service order.

#### Notes fields

| Field | Description |
|---|---|
| Special instructions | Optional, custom notes or directions related to the order. These instructions are typically added during the ordering or checkout process and are intended to provide additional context or handling preferences for fulfillment agents. |
| Work notes | Free-form comment text for internal users. |
| Additional comments | Extra free-form internal comment text for the customer order. |

#### Activity and attachment fields

| Field | Description |
|---|---|
| Comments | Free-form comment text for the customer order that everyone, including the customer, can see. |
| Work notes | Free-form comment text for internal users. |
| Activity | Listing of the processing activities, and changes in field values, that have taken place for the order and order line item. This activity includes the messages that indicate the approval of the order for processing and fulfillment. |
| Attachments | File attachments for the customer or service order. Select **Select file** to add the file as an attachment. |

## Customer and service order line items forms

The Order Line Items form enables you to select, review, and modify the captured customer or service order line items.

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### Order Line items form - Details fields

The order line items form line item details section enables you to review and modify general details for a customer or service order line item.

| Field | Description |
|---|---|
| Number | Unique system-assigned number of the order line item with a prefix ORDL. |
| Order | Unique system-assigned number for the customer order. Both customer orders and service orders have an assigned ID with a prefix of ORD. |
| Product specification | Product specification that is associated with the order line item.<br><br>This field is displayed if the Order type is Product. |
| Service specification | Service specification that is associated with the order line item. This field is displayed if the Order type is Service. |
| Product model | Product offering purchased by the customer. |
| Channel partner | The name of the organization selling a product or service. |
| State | Indicator of the current processing state for this customer order line item. Unless indicated, the service order manager manually assigns the appropriate state to the service order line item, depending on where it resides in your processing and fulfillment cycle. To view a listing of the state selections, select the down arrow icon ▼.<br><br>**Note:** To view a comprehensive listing of the customer order line item states with detailed descriptions, see Order line item form states.<br><br>For service order line item states, see Service order states. |
| Priority | The priority of completing the order. The available options are:<br>• 1 - Critical<br>• 2- High |

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| Field | Description |
| --- | --- |
| | • 3 - Moderate<br>• 4 - Low |
| PONR | Option that indicates if this order line item is past the Point of No Return.<br>• If selected, it indicates that you can't revise the order line item or request a cancellation for it while the fulfillment process is in progress.<br>  ○ You can't select **Revise Order** or **Cancel Order** to attempt to change the order line item or to request a cancellation for it.<br>  ○ If any of the order line items are designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order.<br>• If cleared, you can still revise the order line item or request a cancellation for it.<br>The value for this option is a system-assigned flag that you can't manually update. |
| Order line action | Type of action that is taking place in the order line item. The available options are:<br>• Add<br>• Change<br>• Disconnect<br>• Suspend<br>• Resume<br>• No change<br>For more information, see Action types for customer and service orders. |
| Action reason | Optional description briefly describing the reason for selecting a specific order line action. |
| Account | Name of the customer account. |
| Primary contact | Name of the primary contact person for the account. |

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| Field | Description |
| --- | --- |
| Order type | Category that indicates the type of order line item.<br>**Product**<br>Product order: Customer is ordering a product.<br>**Service**<br>Service order: Request for the servicing of a product or installation of a service.<br>**Note:** Like a captured service order, customer orders have an ID with a prefix of **ORD(nnn)**. The **Order Category** field enables you to identify the type of order. |
| Service location | The location or site at which a product needs to be delivered, provisioned, or serviced. |
| Parent line item | Primary or top-level item in a hierarchical structure of related line items. It represents the main product or service being ordered, while associated child line items represent components, add-ons, or dependent services linked to that parent. |
| Ordered quantity | Line item order quantity. |
| Version | Current version of the customer order line item. Indicates the number of times that you revised the customer order line item during the fulfillment process. A new order line item without any revisions has a version of 1 (one) and automatically increments for each inflight revision. |
| Revision operation | Indicates the type of revision operation, if any, that is taking place in the current version of the customer order line item:<br>**None**<br>No update or cancellation is taking place for the customer order line item. This setting is the default for new customer orders.<br>**Update**<br>A Characteristic, Contact, or Price inflight revision has been submitted for the customer order line item. |

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| Field | Description |
| --- | --- |
| | **Cancel**<br>The customer order line item is canceled or in the process of being canceled. |
| Sales agreement line | If you're using the Sales Agreement Management application and one or more sales agreement were created by an agent, this field shows the system-generated number for the corresponding sales agreement line. |
| Existing contract | Reference to a previously established customer contract when creating or modifying an order. Existing contracts helps maintain a connection between the current order and the original contract, enabling accurate tracking of changes, renewals, or upsells. It facilitates scenarios where pricing or quantity changes are made to existing contract lines. The system can split line items based on effective start dates and apply delta pricing logic accordingly. |
| Contract Line type | Indicates the action taken on the contract line, determined by the action type of order line. For instance, 'New' for add orders and 'Amend' for change orders. The available options are:<br>• No change<br>• New<br>• Upsell<br>• Amend<br>• Cancel<br>• Renew |
| Short Description | Short description of the purchased product offering. |

### Order line items form - date fields

The Order Line Items form - dates section enables you to review and modify crucial date details for a customer order line item.

| Field | Description |
| --- | --- |
| Planned start date | Planned start date and time for the order line item. It reflects when the product delivery is intended to begin, based on initial scheduling or customer expectations. |
| Planned end date | Planned completion date and time for the order line item. It helps in forecasting delivery |

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| Field | Description |
|---|---|
| | timelines and aligning internal resources accordingly. |
| Estimated start date | Projected date and time by which work on the order line item is expected to begin. |
| Estimated end date | Projected date and time by which work on the order line item is expected to conclude. |
| Auto-renew contract | Option to set the automatic renewal of the contract upon expiration. |
| Contract start date | Commencement date of the contract for applying subscription pricing to an order. |
| Contract end date | Date when the contract for a subscription is set to expire. |
| Term (months) | Shows the number of months the subscription is valid based on the contract start and end dates. |
| Actual start date | Timestamp when the order line fulfillment or contract execution began. This field is updated once the first fulfillment activity or service activation occurs. |
| Actual end date | Timestamp when the order or contract was completed or terminated. It is used for performance tracking and SLA compliance analysis. |
| Committed due date | Confirmed timestamp by which the which the order line item is expected to be fulfilled or delivered. |
| Effective date | Date on which the order line item becomes active and its terms officially take effect. |
| Expiration date | Date after which the order line item is no longer valid or active. |

### Order line items form - shipping address fields

The Order Line Items form - shipping address details section enables you to review and modify the shipping details for a customer order line item.

| Field | Description |
|---|---|
| Shipping location | Designated site or facility where the order line item should be delivered. |
| Shipping street | Street address of the shipping destination. |
| Shipping city | City where the order line item is to be delivered. |
| Shipping state / Province | State or province of the shipping address. |
| Shipping country | Country where the order line item is being shipped. |

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| Field | Description |
| --- | --- |
| Shipping zip / Postal code | Postal or zip code for the shipping location. |

### Order line items form - notes fields

The Order Line Items form - notes section enables you to review and modify the additional details for a customer order line item.

| Field | Description |
| --- | --- |
| Additional comments | Additional free-form internal comment text for the order line item. |
| Work notes | Free-form internal work order text for the order line item. |
| Comments / Work notes (Private) | Free-form comment or private work note text:<br>• Select the comments icon to enter the comment text for the order line item so that everyone, including the customer, can see. Enter the comment text, and then select **Post Comments**.<br>• Select the work notes (private) icon to enter the work note text for internal purposes only so that the customer can't see it. Enter the work note text, and then select **Post Work notes (Private)**. |
| Activity | Listing of the processing activities, and changes in field values, that have taken place for the order and order line item. This activity includes the messages that indicate the approval of the order for processing and fulfillment. To expand, collapse, or filter by activity stream, do one of the following actions:<br>• Select the activity stream filter icon to filter by post types, field changes, or flagged items.<br>• Select the search icon to search the required information in the activity stream.<br>• Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action. |
| Attachments | File attachments for the order line item. Select **Select file** to add the file as an attachment. |

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| Field | Description |
|---|---|
| | Alternatively, drag a file from your system and drop it into the Attachments pane. |

### Order line related items fields

The Order Line Related Items form enables you to review, create, and modify the related items for a customer order line item.

| Field | Description |
|---|---|
| Number | Order line related item number. |
| Order line item | Order line item number. |
| Related order line item | Target order line item that the selected order line item is associated with. |
| Specification | Specification name of the related product inventory. |
| Related product inventory | Active product inventory that the selected order line related item is associated with and has a 'Requires' relationship. |

### Price adjustment fields

The Price Adjustments tab on the order line item details enables you to review and modify manual price adjustments applied to an order line item.

| Field | Description |
|---|---|
| Number | ID of the price adjustment record. |
| Name | Name specified while creating the price adjustment. |
| Sequence | The number of the pricing plan step used to generate the adjustment. It helps the agent identify the order of operations for the pricing adjustments. |
| Adjustment source | Origin of the price adjustment.<br>• Auto: Adjustment applied automatically by pricing plan, and can be defined using standard adjustment matrices or via extension points, such as, PricingAdjustmentExtensionPoint.<br>• Manual: Manual adjustment made by agent. |
| Adjustment type | • Markdown %<br>• Markdown amount<br>• Markup %<br>• Markup amount<br>• Price override |
| Price point | Setup by the admin in the Pricing Plan for the adjustment step. This could be the List Price or Net Price. |

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| Field | Description |
|---|---|
| Adjustment value | Percentage or absolute amount of adjustment that is applied to the price. |
| Quantity | Quantity of items in the order line. |
| Amount | Price adjustment amount. |
| Total amount | Quantity multiplied by the amount. |
| Unit running price | Price calculated with the adjustment amount from the specific pricing plan step. |

## Order Tasks form

The Order Task form enables you to review and update the fulfillment tasks that are associated with the selected order.

| Field | Description |
|---|---|
| Number | System-assigned ID for the task, starting with a prefix of TASK. |
| Account | Name of the customer account. |
| Primary contact | Primary contact for the customer account. |
| Order line item | Order line item associated with the order task. |
| Parent | Parent product, service, or resource order associated with the order task. |
| Short Description | Short description of the order task. |
| State | Current state for the order task. To view a listing of selections, select the down arrow icon:<br>**Open**<br>Processing for the order task is open, and no processing is taking place.<br>**In Progress**<br>Processing for the order task is still in progress, or in fulfillment.<br>**On hold**<br>Order tasks that are on hold due to issues or errors.<br>**Scheduled**<br>Order task scheduled for processing. |

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| Field | Description |
| --- | --- |
| | **Awaiting information**<br>Order task that is stalled due to the lack of information.<br>**Resolved**<br>Issues blocking the processing of stalled order tasks have been resolved.<br>**Closed Complete**<br>Processing for the order task is complete. It is a system-assigned state.<br>**Note:** After your agents complete all fulfillment tasks for the order task, the state is automatically set to **Closed Complete**.<br>**Canceled**<br>Processing for the order task was canceled.<br>**Draft**<br>Order task that is still being created by the system or manually. |
| Priority | The priority of the order task. The available options are:<br>• None<br>• 1 - Critical<br>• 2 - High<br>• 3 - Moderate<br>• 4 - Low<br>• 5 - Planning |
| Assignment group | The group of agents to which you want to assign the order task. |
| Assigned to | Name of the agent who should be assigned to the order task. |
| Short description | Optional description for the order task. |
| Additional comments (Customer visible) | Free-form work order text that your customers can view. |
| Work notes (Private) | Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't |

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| Field | Description |
| --- | --- |
| | see it. Enter the work note text, and then select **Post Work notes**. |
| Activity | Activity stream section for viewing all processing activities that have taken place for the selected order task. It includes a message that indicates that the order has been approved for processing and fulfillment.To expand, collapse, or filter by activity stream:<br>• Select the activity stream filter icon to filter by post types, field changes, or flagged items.<br>• Select the search icon to search the required information in the activity stream.<br>• Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action. |
| Attachments | File attachments for the order task. Select **Select file** to add the file as an attachment. |

## Order Characteristics form

The Order Characteristics form enables you to review and modify order characteristics for a customer or service order.

| Field | Description |
| --- | --- |
| Specification | Specification that is associated with the order characteristics. |
| Characteristic | Selected characteristic, for example, Data Pack, for the order line item. To view and update the characteristic details, select the characteristic. These details include the characteristic name, description, and input type. |
| Characteristic value | Value that you selected for the characteristic option. For example, Unlimited, for the Data Pack Unlimited option. |
| Characteristic option | Name of the characteristic option. For example, Unlimited, for the Data Pack Unlimited option. To view and update the characteristic option details, select the |

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| Field | Description |
|---|---|
| | characteristic option. These values include the name of the characteristic option and the associated characteristics. |

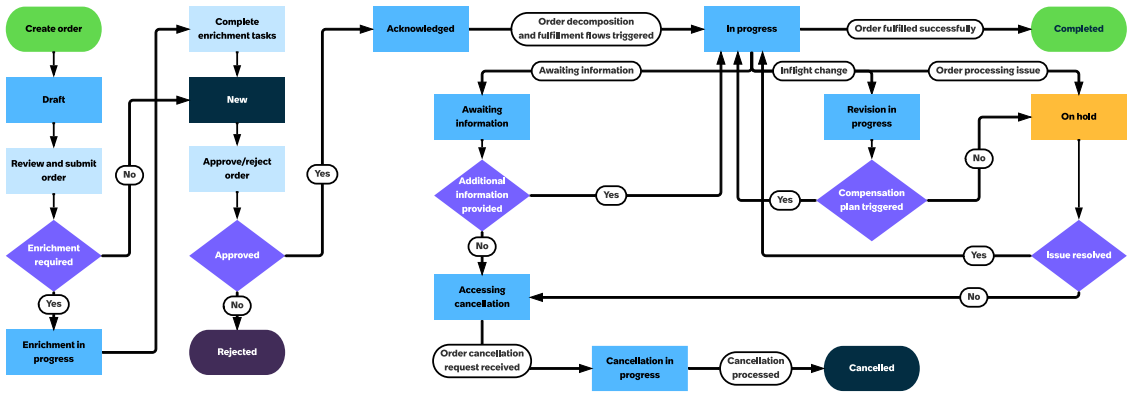
## Customer order states

Use the State fields on the customer order management forms to determine the current processing state for the customer order and to perform certain types of customer order actions, such as canceling a customer order.

## Customer Order form states

Use the **State** field on the customer order form to determine the current processing state for the order, including all of its associated line items. You can also use it to perform certain types of order actions, such as canceling an order. To learn more, see Managing post-fulfillment order changes. The following flowchart illustrates how customer and service order state processing works.

### Customer and service order state processing




| Customer order state | Description |
|---|---|
| Draft | Customer order that is still in the capture stage or the manual entry of the customer order is not complete.<br><br>The data capture phase is when an agent is capturing an order or your instance is capturing the full customer order details from an API or through Service Bridge. |
| New | Customer order capture process is complete and the entire order is awaiting approval by the fulfillment manager. After the customer order data capture completes, it automatically moves to the New state. |
| Submitted | Customer order that the order agent has submitted. |
| Enrichment in progress | Customer order for which the order enrichment process is in progress. |

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| Customer order state | Description |
|---|---|
| Enrichment on hold | Customer order for which the order enrichment process in on hold. |
| Acknowledged | Customer order that the fulfillment manager approved for fulfillment processing. |
| Rejected | Customer order that the fulfillment manager rejected for fulfillment processing. |
| In progress | Customer order that has been approved and is being actively worked on. |
| Revision in progress | Customer order revision that is in process but has not been approved. |
| Awaiting information | Customer order that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place. |
| On hold | Customer order that is on hold. No further fulfillment processing can take place until the hold is removed. |
| Canceled | Customer order that the fulfillment manager canceled. No further fulfillment processing can take place. |
| Assessing cancellation | A cancellation request has been submitted for the customer order. |
| Cancellation in progress | When the cancellation request is approved, the customer order moves to this state. |
| Canceled | Customer order that the fulfillment manager canceled. No further fulfillment processing can take place. |
| Completed | All associated customer order line items are complete.<br><br>**Note:** After your agents complete all fulfillment tasks for the entire customer order, the following actions occur:<br>• The **State** field for the customer order is automatically set to Completed.<br>• The **State** field for each of the individual customer order line items is set to Completed. |

## Order line item form states

Use the **State** field on the order line item form to determine the current processing state for an individual customer order line item. You can also use it to perform certain types of customer order actions, such as canceling a line item.

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| Customer order line item state | Description |
| --- | --- |
| Draft | Parent customer order that is still in the data capture stage or the manual entry of the customer order is not completed.<br><br>The data capture phase is when an agent is creating and configuring order line items or your instance is capturing full customer order details from an API or through Service Exchange. In this case, Draft is a system-assigned state. This state is assigned by the system. |
| Submitted | Order line item of the customer order that the order agent has submitted. |
| Enrichment in progress | Order line item of the customer order for which the order enrichment process is in progress. |
| Enrichment on hold | Order line item of the customer order for which the order enrichment process in on hold. |
| New | Data capture process for the parent customer order that is complete and the customer order line item is awaiting fulfillment approval by the fulfillment manager. After the customer order capture is complete, it automatically moves to the New state.<br><br>**Note:** When you manually enter a customer order and its order line items, you can assign a **Draft** or **New** state, based on your organization's published procedures. |
| Acknowledged | Customer order line item that the fulfillment manager approved for fulfillment processing. |
| Scheduled | Order line item that has successfully passed all validations and approvals and is queued for fulfillment. At this stage, orchestration workflows can begin, ensuring that resources are allocated and tasks are sequenced correctly before actual provisioning starts. This state acts as a control point to prevent premature execution and provides visibility that the item is ready for processing. |
| Rejected | Customer order line item that the fulfillment manager rejected for fulfillment processing. No further fulfillment processing can take place. |
| In progress | Customer order line item that is still in process but not ready for fulfillment approval. |
| Revision in progress | Customer order line item revision that is in process but has not been approved. To learn more, see the following: |

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| Customer order line item state | Description |
|---|---|
| | • <br>• |
| Awaiting information | Customer order line item that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place. |
| On hold | Customer order line item that is on hold. No further fulfillment processing can take place until the hold is removed. |
| Cancellation in progress | When the cancellation request is approved, the customer order line item moves to this state. To learn more, see the following:<br>• <br>• |
| Canceled | Customer order line item that the fulfillment manager canceled. No further fulfillment processing can take place. |
| Completed | Customer order line item and all associated domain orders and order tasks that are complete.<br>**Note:** After your agents complete all fulfillment tasks for the entire customer order, the following actions occur:<br>• The **State** field for the customer order is automatically set to Completed.<br>• The **State** field for each of the individual customer order line items is set to Completed. |

## Product Order, Service Order, and Resource Order form states

Use the **State** fields on the Product Order, Service Order, and Resource Order forms to determine the current processing state for a product order, service order, or resource order.

| State | Description |
|---|---|
| Draft | New or waiting-to-start tasks that are assigned to the product, service, or resource order. |
| Qualified | All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. |
| In progress | Product, service, or resource order processing that is still in progress. |

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| State | Description |
|---|---|
| On hold | Product, service, or resource order processing is on hold due to issues or inadequate information required for processing the order. |
| Scheduled | Product, service, or resource order that has successfully passed all validations and is queued for fulfillment |
| Closed complete | Product, service, or resource order processing that is completed.<br><br>**Note:** after your agents complete all fulfillment tasks for the product, service, or resource order, the state is automatically set to Closed Complete. |
| Canceled | Product, service, or resource order processing that was canceled. |
| Cancellation in progress | Product, service, or resource order that is in the process of being cancelled. |

## Order Task form states

Use the **State** field on the Order Task form to determine the processing state for an order task. To learn more, see Review and close fulfillment tasks.

| Order task state | Description |
|---|---|
| Open | Processing for the order task that is open and no processing is currently taking place. |
| In progress | Processing for the order task that is still in progress or in fulfillment. |
| On hold | Order task that is on hold. No further fulfillment processing can take place until the hold is removed. If you created a fallout record for it, the state of the order task changes to On Hold until the person or group that is assigned to the fallout record resolves the issue. |
| Scheduled | |
| Awaiting information | Order task that is in process but awaiting receipt of required information before any further processing takes place. |
| Resolved | An order task that was previously on hold due to an issue, which has now been resolved. |
| Closed Complete | Processing for the order task that is complete. It is a system-assigned state. |

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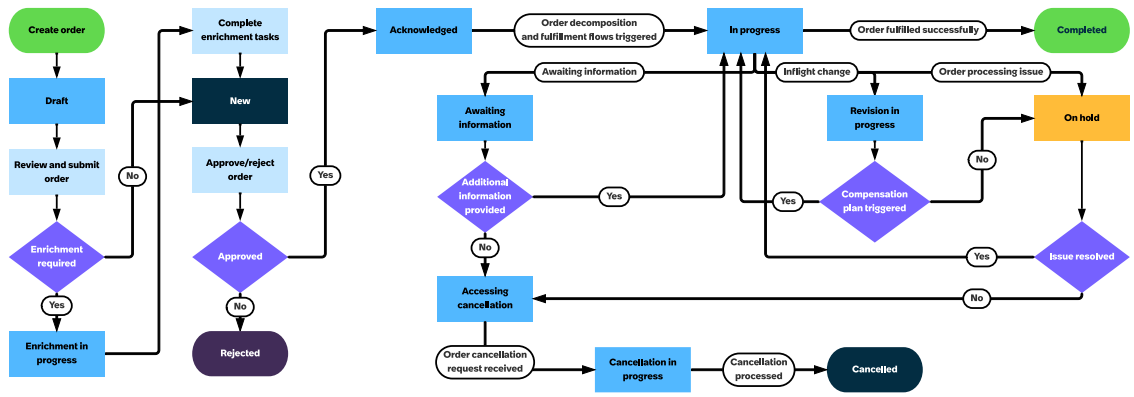
| Order task state | Description |
|---|---|
| | **Note:** After your agents complete all fulfillment tasks for the order task, the state is automatically set to Closed complete. |
| Canceled | Processing for the order task that was canceled. |
| Draft | Order task that is still in the capture stage or the manual entry of the order task is not complete. |

## Service order states

Use the State fields on the Order Management forms to determine the current processing state for the service order and to perform certain types of order actions, such as canceling an external service order.

The following flowchart illustrates how customer and service order state processing works.

### Customer and service order state processing




## Service Order form states

Use the **State** field on the Service Order form to determine the current processing state for the service order, including all of its associated line items. You can also use it to perform certain types of order actions, such as canceling a service order.

| Service order state | Description |
|---|---|
| Draft | Service order that is still in the capture stage or the manual entry of the service order is not complete. The data capture phase is when your instance is capturing full service order details from the TMF641.<br><br>**Note:** The Service Order Open API is a ServiceNow implementation of the TMForum TMF641 Service Ordering Open API specification. To learn more, see Service Order Open API. |

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| Service order state | Description |
| --- | --- |
| | In this case, Draft is a system-assigned state.<br><br>**Note:** The Draft state also applies to domain orders that are created by the decomposition process. These orders are awaiting additional information or for their turn in the initiate order fulfillment process. |
| New | Service order capture process that is complete and the entire order is awaiting approval by the service order manager. After the service order data capture completes, it automatically moves to the New state. |
| Submitted | Service order that the order agent has submitted. |
| Enrichment in progress | Service order for which the order enrichment process is in progress. |
| Enrichment on hold | Service order for which the order enrichment process in on hold. |
| Acknowledged | Service order that the service order manager approved for fulfillment processing. |
| Rejected | Service order that the service order manager rejected for fulfillment processing. |
| In progress | Service order that has been approved and is being actively worked on. To learn more, see Review and close fulfillment tasks. |
| Awaiting information | Service order that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place. |
| On hold | Service order that is on hold. No further fulfillment processing can take place until the removal of the hold. |
| Assessing cancellation | Cancellation request that has been submitted for the service order. |
| Cancellation in progress | When the cancellation request is approved, the service order moves to this state. |
| Canceled | Service order that the service order manager canceled. No further fulfillment processing can take place. |
| Completed | All associated service order line items are complete. |

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| Service order state | Description |
| --- | --- |
| | **Note:** After your agents complete all fulfillment tasks for the entire captured service order, the following actions occur:<br>• The **State** field for the captured service order is automatically set to Completed.<br>• The **State** field for each of the individual captured service order line items is set to Completed. |

## Order Line Item form states

Use the **State** field on the Order Line Item form to determine the current processing state for an individual service order line item. You can also use it to perform certain types of order actions, such as canceling a line item.

| Service order line item state | Description |
| --- | --- |
| Draft | Parent service order that is still in the data capture stage or the manual entry of the order is not complete.<br><br>The data capture phase is when your instance is capturing full service order details from the TMF641.<br><br>In this case, Draft is a system-assigned state. |
| Submitted | Order line item of the service order that the order agent has submitted. |
| Enrichment in progress | Order line item of the service order for which the order enrichment process is in progress. |
| Enrichment on hold | Order line item of the service order for which the order enrichment process in on hold. |
| New | Data capture process for the parent service order that is complete, and the service order line item is awaiting fulfillment approval by the service order manager. After the service order capture is complete, it automatically moves to the **New** state.<br><br>**Note:** When you manually enter a service order and its order line items, you can assign a Draft or New state, based on your organization's published procedures. |
| Acknowledged | Service order line item that the service order manager approved for fulfillment processing. |

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| Service order line item state | Description |
|---|---|
| Scheduled | Order line item that has successfully passed all validations and approvals and is queued for fulfillment. At this stage, orchestration workflows can begin, ensuring that resources are allocated and tasks are sequenced correctly before actual provisioning starts. This state acts as a control point to prevent premature execution and provides visibility that the item is ready for processing. |
| Rejected | Service order line item that the service order manager rejected for fulfillment processing. No further fulfillment processing can take place. |
| In progress | Service order line item that is still in process but not ready for fulfillment approval. |
| Revision in progress | Service order line item revision that is in process but has not been approved.<br><br>As part of the Inflight Order Change functions, when you are currently in the process of updating the parent service order or this service order line item, it moves to this state. |
| Awaiting information | Service order line item that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place. |
| On hold | Service order line item that is on hold. No further fulfillment processing can take place until the hold is removed. |
| Assessing cancellation | Cancellation request that has been submitted for the service order line item.<br><br>As part of the Inflight Order Change functions, when a cancellation request is submitted for the service order line item, it moves to this state. |
| Cancellation in progress | When the cancellation request is approved, the service order line item moves to this state. |
| Canceled | Service order line item that the service order manager canceled. No further fulfillment processing can take place. |
| Completed | Service order line item and all associated and external service order tasks that are complete. It is a system-assigned state.<br><br>**Note:** After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete. |

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## Order task form states

Use the **State** field on the Order Task form to determine the processing state for an order task.

| Order task state | Description |
|---|---|
| Open | Processing for the order task that is open and no processing is currently taking place. |
| In progress | Processing for the order task that is still in progress or in fulfillment. |
| On hold | Order task that is on hold. No further fulfillment processing can take place until the hold is removed. If you created a fallout record for it, the state of the order task changes to On Hold until the person or group that is assigned to the fallout record resolves the issue. |
| Scheduled | |
| Awaiting information | Order task that is in process but awaiting receipt of required information before any further processing takes place. |
| Resolved | An order task that was previously on hold due to an issue, which has now been resolved. |
| Closed Complete | Processing for the order task that is complete. It is a system-assigned state.<br>**Note:** After your agents complete all fulfillment tasks for the order task, the state is automatically set to Closed complete. |
| Canceled | Processing for the order task that was canceled. |
| Draft | Order task that is still in the capture stage or the manual entry of the order task is not complete. |

## Create records from inbound queue table async form

The Create records from inbound queue table async scheduled job form enables you to configure a scheduled job for asynchronous order processing.

| Field | Description |
|---|---|
| Name | Name of the scheduled job. |
| Next action | Timestamp of the next job action. |
| Calendar | Time window during which the scheduled job can run. The calendar restricts job execution to a defined schedule, such as business hours. If an order is submitted outside the |

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| Field | Description |
| --- | --- |
| | active window, the job will not process it until the next scheduled period. |
| Job ID | This value must be set to RunScriptJob. |
| State | State of the scheduler job. The available options are:<br>• Error<br>• Paused<br>• Permanent error<br>• Queued<br>• Ready<br>• Running |
| System ID | Active nodes of the ServiceNow instance. |
| Job context | Context of the scheduled job. |
| Trigger type | Determines when and how often the scheduled job runs. The selected trigger type controls the additional scheduling fields that appear on the form. The available options are:<br>• None<br>• Daily<br>• Day and Month in Year<br>• Day in Month<br>• Day in Week in Month in Year<br>• Days in Week<br>• Disabled<br>• Interval<br>• Repeat<br>• Run at System Startup<br>• Run Once<br>• Week in Month<br>• Business Calendar: Entry Start<br>• Business Calendar: Entry End |
| Repeat | Details of the time interval. |
| Time zone | Time zone in which you're operating your business. |

**Related topics**

Configure a scheduled job for asynchronous order creation

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## Inbound request states

An inbound request transitions through a series of states as ServiceNow AI Platform processes the asynchronous order received via an API.

| Field | Description |
|---|---|
| New | The inbound request has been received via API and is waiting to be picked up by the scheduled job. |
| In progress | The scheduled job has picked up the inbound request and is processing the order. |
| Completed | The order was created successfully. |
| Error | An error occurred while creating the order. The inbound request exits the processing cycle. |
| Pending | The inbound request is waiting for a condition to be met before processing can continue. |

### Related topics

Asynchronous order processing for large customer and consumer orders

## Domain order forms

The domain order forms enable you to review and modify the domain product orders, service orders, and resource orders for a selected customer or service order.

### Related topics

View domain orders

Order types in Sales Customer Relationship Management

### Product Order form fields

The Product Order form enables you to review and modify the domain product orders that are associated with a selected customer order.

| Field | Description |
|---|---|
| Number | Unique system-assigned product order number starting with a prefix PO. |
| Priority | The priority of the product order. The available options are:<br>• None<br>• 1 - Critical<br>• 2 - High<br>• 3 - Moderate<br>• 4 - Low<br>• 5 - Planning |
| Account | Name of the customer account. |

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| Field | Description |
| --- | --- |
| Primary contact | Name of the primary contact person for the account. |
| Order line Item | Unique system-assigned order line item number associated with the domain product order. |
| Location | Customer's site or location where the product must be delivered. |
| State | Current state for the product order. To view a listing of selections, select the down arrow icon ▼:<br>**Draft**<br>Product, service, or resource that has assigned new or waiting-to-start tasks.<br>**Qualified**<br>All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start.<br>**On hold**<br>Stalled product, service, or resource orders due to issues or errors.<br>**Scheduled**<br>Product, service, or resource orders that are scheduled for processing.<br>**In Progress**<br>Product, service, or resource order processing that is still in progress.<br>**Closed Complete**<br>Product, service, or resource order processing that is complete. It is a system-assigned state.<br>**Note:** After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete.<br>**Canceled** |

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| Field | Description |
| --- | --- |
| | Product, service, or resource order processing that was canceled.<br>**Cancellation in progress**<br>Indicates that a product, service, or resource order is being cancelled. |
| Action | Indicator of the order line item action type, such as Add, Disconnect, Suspend. |
| Product inventory | Associated Product inventory record. |
| Assignment group | Name of the group that the product order is assigned to for completion of any remaining work. |
| Assigned to | Name of the person that the remaining work is assigned to. |
| Parent | Parent product order, if any, to this product order. |
| Record version | Version of the product order record. If the product order is revised, the version number is incremented. |
| Short description | Optional brief description for the product order. |
| Description | Optional extended description for the product order. |
| Additional comments (Customer visible) | Free-form product order text that your customers can view. |
| Work notes (Private) | Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then select **Post Work notes**. |
| Activity | Activity stream section for viewing that all the processing activities and changes in field values have taken place for the product order. To expand, collapse, or filter by activity stream: |

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| Field | Description |
| --- | --- |
| | • Select the activity stream filter icon to filter by post types, field changes, or flagged items.<br>• Select the search icon to search the required information in the activity stream.<br>• Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action. |
| Attachments | File attachments for the product order. Select **Select file** to add the file as an attachment. |

### Service Order form fields

The Service Order form enables you to review and modify domain service orders that are associated with a selected customer order.

| Field | Description |
| --- | --- |
| Number | Unique system-assigned service order number starting with the prefix SO. |
| Priority | The priority of the service order. The available options are:<br>• None<br>• 1 - Critical<br>• 2 - High<br>• 3 - Moderate<br>• 4 - Low<br>• 5 - Planning |
| Account | Name of the customer account. |
| Primary contact | Name of the primary contact person for the account. |
| Order line Item | Unique system-assigned order line item number associated with the domain service order. |
| Location | Customer's site or location where the product or service must be delivered. |
| State | Current state for the service order. To view a listing of selections, select the down arrow icon : |

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| Field | Description |
| --- | --- |
| | **Draft**<br>Product, service, or resource that has assigned new or waiting-to-start tasks.<br>**Qualified**<br>All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start.<br>**On hold**<br>Stalled product, service, or resource orders due to issues or errors.<br>**Scheduled**<br>Product, service, or resource orders that are scheduled for processing.<br>**In Progress**<br>Product, service, or resource order processing that is still in progress.<br>**Closed Complete**<br>Product, service, or resource order processing that is complete. It is a system-assigned state.<br>**Note:** After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete.<br>**Canceled**<br>Product, service, or resource order processing that was canceled.<br>**Cancellation in progress**<br>Indicates that a product, service, or resource order is being cancelled. |
| Action | Indicator of the order line item action type, such as Add, Disconnect, Suspend. |
| Product inventory | Associated Product inventory record. |

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| Field | Description |
| --- | --- |
| Assignment group | Name of the group that the service order is assigned to for completion of any remaining work. |
| Assigned to | Name of the person that the remaining work is assigned to. |
| Parent | Parent service order, if any, to this service order. |
| Record version | Version of the product order record. If the product order is revised, the version number is incremented. |
| Short description | Optional brief description for the service order. |
| Description | Optional extended description for the service order. |
| Additional comments (Customer visible) | Free-form product order text that your customers can view. |
| Work notes (Private) | Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then select **Post Work notes**. |
| Activity | Activity stream section for viewing all processing activities that have taken place to date for the service order. This listing has the processing activities and changes in the field values that have taken place for the service order. To expand, collapse, or filter by activity stream:<br>• Select the activity stream filter icon to filter by post types, field changes, or flagged items.<br>• Select the search icon to search the required information in the activity stream.<br>• Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action. |

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| Field | Description |
| --- | --- |
| Attachments | File attachments for the service order. Select **Browse** to add the file as an attachment. |

### Resource Order form fields

The Resource Order form enables you to review and modify domain resource orders associated with a selected customer order.

| Field | Description |
| --- | --- |
| Number | Unique system-assigned resource order number starting with the prefix RO. |
| Priority | The priority of the service order. The available options are:<br>• None<br>• 1 - Critical<br>• 2 - High<br>• 3 - Moderate<br>• 4 - Low<br>• 5 - Planning |
| Account | Name of the customer account. |
| Contact | Name of the primary contact person for the account. |
| Order line item | Unique system-assigned order line item number associated with the domain resource order. |
| Location | Customer's site or location where the product or service must be delivered. |
| State | Current state for the resource order. To view a listing of selections, select the down arrow icon ▼:<br>**Draft**<br>Product, service, or resource that has assigned new or waiting-to-start tasks.<br>**Qualified**<br>All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. |

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| Field | Description |
| --- | --- |
| | **On hold**<br>Stalled product, service, or resource orders due to issues or errors.<br>**Scheduled**<br>Product, service, or resource orders that are scheduled for processing.<br>**In Progress**<br>Product, service, or resource order processing that is still in progress.<br>**Closed Complete**<br>Product, service, or resource order processing that is complete. It is a system-assigned state.<br>**Note:** After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete.<br>**Canceled**<br>Product, service, or resource order processing that was canceled.<br>**Cancellation in progress**<br>Indicates that a product, service, or resource order is being cancelled. |
| Action | Indicator of the order line item action type, such as Add, Disconnect, Suspend. |
| Product inventory | Associated Product inventory record. |
| Assignment group | Name of the group to which the resource order is assigned for completion of any remaining work. |
| Assigned to | Name of the person that the remaining work is assigned to. |
| Parent | Parent resource order, if any, to this resource order. |

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| Field | Description |
| --- | --- |
| Record version | Version of the product order record. If the product order is revised, the version number is incremented. |
| Short description | Optional brief description for the resource order. |
| Description | Optional extended description for the resource order. |
| Additional comments (Customer visible) | Free-form product order text that your customers can view. |
| Work notes (Private) | Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then select **Post Work notes**. |
| Activity | Activity stream section for viewing all processing activities and changes in the field values that have taken place for the resource order. To expand, collapse, or filter by activity stream:<br>• Select the activity stream filter icon to filter by post types, field changes, or flagged items.<br>• Select the search icon to search the required information in the activity stream.<br>• Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action. |
| Attachments | File attachments for the resource order. Select **Select file** to add the file as an attachment. |

## Components installed Fallout Management

Several types of components are installed with activation of the Fallout Management plugin, including tables and user roles.

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## Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Fallout Manager<br>[sn_fallout_mgmt.fallout_manager] | Creates, views, assigns, and edits fallout records. A user with this role can also view order tasks and domain orders. | sn_fallout_mgmt.fallout_agent |
| Fallout Agent<br>[sn_fallout_mgmt.fallout_agent] | Views order fallout records. A user with this role can also update the state of fallout records and create work notes on them. The user can also view task and domain orders. | • sn_fallout_mgmt.fallout_creator<br>• sn_customerservice.case_viewer |
| Fallout viewer | Views order fallout records. A user with this role can also update the state of fallout records and view order tasks and domain orders. | • sn_ind_tmt_orm.order_viewer<br>• agent_workspace_user |
| Fallout Creator | Creates fallout records. | None. |

## Tables installed

| Table | Description |
|---|---|
| Fallout<br>[sn_fallout_mgmt_fallout] | Tracks order processing or fulfillment exceptions that require monitoring and resolution. |
| Fallout type<br>[sn_fallout_mgmt_fallout_type] | Defines categories of fallout to classify order processing or fulfillment exceptions. |

## Fallout Management data model

Manage and fix the processing issues that occur during the fulfillment of a customer or service order. With Fallout Management, you can identify the order processing exceptions and create a fallout record to investigate and resolve the underlying processing issue. Fallout Management enables a customer or service order to continue until it's completed.

The Fallout Management data model extends the Task [task] table. The following table lists the attributes that apply to order fallout processing.

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### Order fallout table attributes

| Field | Description |
|---|---|
| Number | Unique system-assigned fallout number, starting with a prefix of FO, up to seven digits in length. |
| Assigned to | Identifier for the assigned person responsible for acting on the fallout record. |
| Created by | Identifier for the fallout administrator who created the fallout record. |
| Created on | Timestamp that includes the date and time that the fallout record was created. |
| State | Indicator of the current processing state for the fallout record. Unless otherwise indicated, the fallout manager or agent manually assigns the appropriate state to the fallout record, depending on where it currently resides in the processing cycle.<br>**Open**<br>Fallout record that is new and not currently assigned to a person to work on.<br>**In progress**<br>Fallout record that is assigned and currently being worked on.<br>**On hold**<br>Fallout record that is on hold. No further fallout processing can take place until you release the hold.<br>**Awaiting information**<br>Fallout record that is on hold and waiting for more information before processing can proceed.<br>**Resolved**<br>Fallout issue that has a resolution but you have not formally closed it.<br>**Closed complete**<br>Fallout record that is complete and closed.<br>**Canceled**<br>Fallout record that the fulfillment manager canceled. No further fulfillment processing can take place. |

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**Order fallout table attributes (continued)**

| Field | Description |
|---|---|
| Originated from | Identifier of the originating order task record that the fallout record is associated with. |
| Activity | Listing of the processing activities and changes in the field values that have taken place for the fallout record. To expand, collapse, or filter by activity stream:<br>• Select the activity stream filter icon to filter by post types, field changes, or flagged items.<br>• Select the search icon to search the required information in the activity stream.<br>• Select the sort descending icon to sort the activity from oldest to newest or select the sort ascending icon for the opposite action. |
| Attachments | File attachments for the fallout record. Select **Browse** to add the file as an attachment. |

**Related topics**

- Managing order fallout
- Creating automated fallout records
- Flow Designer
- Flows
- Create a flow

## Fallout form fields

The Fallout form enables you to manually create, review, and modify the order fallout records.

| Field | Description |
|---|---|
| Number | Unique system-assigned fallout number, starting with a prefix of FO. |
| Fallout Type | Category that indicates the type of fallout activity.<br>**Billing Issue**<br>Billing issues and disputes that exist for the ordered item.<br>**Inventory Allocation Failure**<br>Inadequate inventory. An ordered item can't be fulfilled. |

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| Field | Description |
| --- | --- |
| | **Provisioning Failure**<br>Associated system that is unavailable due to connectivity problems, timeouts, or other issues.<br><br>**Note:** You can also create additional fallout types, as per the requirements of your enterprise. To learn more, see Create additional fallout types.<br><br>To view the associated details or search for another fallout type:<br>• Select the detail icon to view the associated details for the fallout type.<br>• Select the search icon to search and select another fallout type. |
| Related order task | Identifier of the order task that the fallout record originated from. |
| Order Line Item | Identifier of the customer or service order line item that the fallout record originated from. |
| State | Indicator of the current processing state for the fallout record. Unless otherwise indicated, the fallout manager or agent manually assigns the appropriate state to the fallout record, depending on where it currently resides in the processing cycle.<br>**Open**<br>Fallout record that is new and not currently assigned to a person to work on.<br>**In progress**<br>Fallout record that is assigned and currently being worked on.<br>**On hold**<br>Fallout record that is on hold. No further fallout processing can take place until you release the hold.<br>**Awaiting information**<br>Fallout record that is on hold and waiting for more information before processing can proceed.<br>**Resolved** |

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| Field | Description |
| --- | --- |
| | Fallout issue that has a resolution but you have not formally closed it.<br>**Closed complete**<br>Fallout record that is complete and closed.<br>**Canceled**<br>Fallout record that the fulfillment manager canceled. No further fulfillment processing can take place. |
| Priority | Relative priority or importance of the fallout record.<br>**1-Critical**<br>Fallout record that has urgent time criticality that requires immediate attention.<br>**2-High**<br>Fallout record that has a high time criticality, though not as urgent as a Critical priority fallout.<br>**3-Moderate**<br>Fallout record that has a medium time criticality and urgency.<br>**4-Low**<br>Fallout record that has a low time criticality and urgency.<br>**5-Planning**<br>Fallout record that was created for planning purposes. |
| Assignment group | Name of the assigned group that is responsible for acting on the fallout record. |
| Assigned to | Name of the assigned person who is responsible for acting on the fallout record. |
| Short description | Short description of the fallout task. |
| Work notes (Private) | Free-form private work note text for internal purposes only. The customer can't see this detail. |

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| Field | Description |
| --- | --- |
| Attachments | File attachments for the fallout record. Select **Select file** to add the file as an attachment. |

## Jeopardy Management roles and personas

Learn more about how the roles and personas in Order Management may change by adopting Jeopardy Management.

## Roles in Jeopardy Management

The following table lists the roles and personas in Order Management when Jeopardy Management is enabled.

### Personas and roles in Jeopardy Management

| Persona | Responsibilities | Role |
| --- | --- | --- |
| System administrator | • Configures fulfillment flows for Jeopardy Management.<br>• Configures all jeopardy-related decision table rule sets that define jeopardy fulfillment policies.<br>• Configures service level agreements (SLA) definitions for tasks.<br>• Reviews and updates existing workflows and adds jeopardy actions when updates are required.<br>• Reviews and updates jeopardy decision tables. | Admin |
| Order fulfillment manager | • Reviews order jeopardy data for order impacts.<br>• Assigns task jeopardy priorities to appropriate skilled agent for resolution.<br>• Tracks and monitors timely fulfillment of customer order using jeopardy information.<br>• Proactively mitigates jeopardy risks.<br>• Escalates order jeopardy-related issues as needed. | sn_ind_tmt_orm.order_fulfilment_manager |

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**Personas and roles in Jeopardy Management (continued)**

| Persona | Responsibilities | Role |
|---|---|---|
| Order fulfillment agent | • Tracks, monitors, and reviews order task progressions for jeopardy data and proactively acts on potential jeopardy-related issues.<br>• Escalates jeopardy issues as appropriate to fulfillment managers. | sn_ind_tmt_orm.order_fulfilment_agent |
| Service order manager | • Reviews service order jeopardy data for potential service order impacts.<br>• Assigns task jeopardy priorities to appropriate skilled agent for resolution.<br>• Tracks and monitors timely fulfillment of customer orders by leveraging jeopardy information.<br>• Proactively mitigates jeopardy risks.<br>• Escalates jeopardy-related issues as needed. | sn_ind_tmt_orm.service_order_manager |
| Service order agent | • Tracks, monitors, and reviews order task progressions for jeopardy data.<br>• Escalates order jeopardy impacts to the fulfillment manager. | sn_ind_tmt_orm.service_order_agent |

## Domain separation and Order Management

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

## Support level: Basic

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

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

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

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### Overview of domain separation in Order Management

The order fulfillment module in Order Management supports domain separation at an account level. All customer orders, order line items, and order tasks have account (customer) level separation.

### How domain separation works in Order Management

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

### Domain separated tables

- Customer Order
- Customer Order Line Item
- Customer Order Characteristic Value
- Service Order
- Service Order Line Item
- Service Order Characteristic Value
- Order Tasks
- Product Order
- Resource Order
- Contract product offering

### Use cases

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

If fulfillment agents or managers are assigned to a domain, an administrator can assign them to work on customer orders, service orders, and order tasks for a specific domain (account).

**Related topics**

Using Order Management

Configuring Order Management

Managing service orders

## Order operations reference

Reference for order operations applications.

Components installed with Order Operations Case Management

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Several types of components are installed with the Order Operations Case Management application, including tables, roles, and service definitions.

## Lead-to-Cash Process Management reference

Reference topics provide additional information about Lead-to-Cash Process Management.

### Components installed with Lead-to-Cash Process Management

Several types of components are installed with activation of the Lead-to-Cash Process Management plugin, including tables and user roles.

## Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Sales process record viewer<br>[sn_l2c_cockpit.sales_process_record_viewer] | Views tables related to the sales process record. | • sn_customerservice.csm_workspace_user<br>• sn_bo_core.business_process_record_viewer |
| Sales process record writer<br>[sn_l2c_cockpit.sales_process_record_writer] | Views and writes tables related to the sales process record. | • sn_l2c_cockpit.sales_process_record_viewer<br>• sn_bo_core.business_process_record_writer |
| Sales process manager<br>[sn_l2c_cockpit.sales_process_manager] | Views, creates, and edits sales process records. | sn_l2c_cockpit.sales_process_record_writer |

## Tables installed

| Table | Description |
|---|---|
| Sales Process Record<br>[sn_l2c_cockpit_sales_process_record] | Stores records used for monitoring sales-specific entities. |

### Properties installed with Lead-to-Cash Process Management

Properties for Lead-to-Cash Process Management node map visualization.

These properties are available for Lead-to-Cash Process Management.

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**Note:** To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

### Properties for Lead-to-Cash Process Management

| Property | Description |
|---|---|
| sn_l2c_cockpit.node_default_levels | • Type: integer<br>• Default value: 3<br>• Location: System Property [sys_properties] table<br>• Learn more: Customize hierarchical node map le |
| glide.ui.sn_l2c_cockpit_sales_process_record_activity.fields | • Type: string<br>• Value: short_description,state,assigned_to,assignment discussion**,**EmailAutogenerated**,**Sidebar poste<br>• Location: System Property [sys_properties] table |

### Components installed with Business Object Core

Several types of components are installed with activation of the Business Object Core plugin, including tables and user roles.

## Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Business object viewer<br>[sn_bo_core.business_object_viewer] | Views tables related to a business object. | • sn_quote_mgmt_core.quote_viewer<br>• sn_ind_tmt_orm.order_viewer<br>• sn_opty_mgmt_core.opportunity_viewer |
| Business process record viewer<br>[sn_bo_core.business_process_record_viewer] | Views tables related to the business process record. | sn_bo_core.business_object_viewer |
| Business process record writer<br>[sn_bo_core.business_process_record_writer] | Views and writes tables related to the business | sn_bo_core.business_process_record_viewer |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| | process record. | |
| Business object writer<br>[sn_bo_core.business_object_writer] | Views and writes tables related to a business object. | sn_bo_core.business_object_viewer |

## Tables installed

| Table | Description |
|---|---|
| Business Process Resource<br>[sn_bo_core_process_resource] | Tracks the objects and documents associated with a business process. |
| Business Object Relationship<br>[sn_bo_core_obj_rel] | Indicates how entities are structurally connected in a process and outlines the relationships between different business object types. For example, a lead is linked to an opportunity through the **Lead** column in the Opportunity [sn_sales_opportunity] table. |
| Business Object Group Members<br>[sn_bo_core_obj_group_members] | Defines the relationship between business object groups and their corresponding object types, specifying which entities belong to each group. |
| Business Process Task<br>[sn_bo_core_process_task] | Tracks individual tasks in a process. |
| Business Object Type<br>[sn_bo_core_obj_type] | Contains the entities involved in a process and its table. For example, for order-to-cash group, the entities can be lead, opportunity, quote, order, and their respective tables. |
| Business Process Record<br>[sn_bo_core_process_record] | Stores records that are used for monitoring various business entities. |
| Business Object Group<br>[sn_bo_core_obj_group] | Represents the logical grouping of entities involved in a process and the category for different types of business entities. |

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# Return Merchandise Authorization Case Management

Reference topic provides additional information about lists and forms that you can use to configure Return Merchandise Authorization (RMA) Case Management.

## Return Merchandise Authorization case table fields

Information about Return Merchandise Authorization (RMA) case table fields.

### RMA case table fields

*List of fields on the rma case table. This table extends the case table. It defines and manages RMA Case.*

| Field | Type | Description |
|---|---|---|
| Request reason code | integer | Reason for RMA request.<br>• Other<br>• Defective<br>• Wrong quantity<br>• Damaged<br>• Outdated<br>• Not satisfied<br>• Wrong item<br>• Not as described |

## Return Merchandise Authorization case line table fields

Information about Return Merchandise Authorization (RMA) case line table fields.

### RMA case line table fields

*List of fields on the rma case line table. This table extends the case line table. It defines and manages RMA Case Lines.*

| Field | Type | Description |
|---|---|---|
| Original quantity [original_quantity] | integer | Original quantity of the purchased item. |
| Defective quantity [defective_quantity] | integer | Quantity of defective items. |
| Approved quantity [approved_quantity] | integer | Quantity of items approved for RMA. |
| Customer expected resolution [customer_expected_resolution] | integer | Customer's preferred resolution. Options are: |

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### RMA case line table fields

*List of fields on the rma case line table. This table extends the case line table. It defines and manages RMA Case Lines.*

**(continued)**

| Field | Type | Description |
|---|---|---|
| | | • Repair<br>• Replacement<br>• Refund |
| Proposed resolution<br>[proposed_resolution] | integer | Proposed resolution by the seller. Options are:<br>• Return<br>• Replacement<br>• Refund<br>• Reject<br>. |
| Repair type<br>[repair_type] | integer | Location of repair. Options are:<br>• Onsite<br>• Off-site |

### RMA case line form

Fields on the Return Merchandise Authorization (RMA) case line form.

### Case line form

| Field | Description |
|---|---|
| Number | Number associated to the case. |
| Account | Account associated to the case. |
| Contact | Contact associated to the case. |
| Channel | Channel associated to the case. |
| Request source | Source through which a case can be initiated, whether install base item or sold product. |
| Short description | Description of the case. |
| State | State of the case, whether closed, new, or draft. |
| Priority | Level of importance assigned to the case. |
| Assignment group | Assignment group associated to the case. |
| Assigned to | Agent to whom the case is assigned. |

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**Case line form (continued)**

| Field | Description |
|---|---|
| Needs attention | Check box to signify whether case needs immediate attention. |

# Partner Relationship Management

Reference topics provide additional information about Partner Relationship Management.

## Fill in the General Inquiry form

Use the General Inquiry form on the Partner portal to raise queries and get in touch with the enterprise.

### Before you begin

Role required: none.

### Procedure

1. In the **Partner Organization** field, select the partner organization to which you belong.
2. In the **Requested by** field, confirm the user raising the request.
3. From the **Priority** list, select the level of importance of the inquiry.
4. In the **Subject** field, enter an overview of the inquiry.
5. In the **What can we help you with** field, enter a detailed explanation of the inquiry.

### Related topics

Using Partner Relationship Management

## Channel partner table fields

Use the fields on the channel partner [sn_prm_channel_partner] table to manage and store information related to channel partners.

**Fields on the Channel Partner table**

*Fields on the channel partner table and their descriptions.*

| Field | Description |
|---|---|
| Number | Automatically generated number of the channel partner table.<br>**Note:** By default, channel partner numbers start with the prefix CHPRTNR. |
| Name | Name of the channel partner. |
| Business function | Business function associated with the channel partner, either sales or service. |
| Enterprise partner manager | Manager from the enterprise who is associated with the channel partner. |

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**Fields on the Channel Partner table**

*Fields on the channel partner table and their descriptions.*

**(continued)**

| Field | Description |
|---|---|
| | When an enterprise manager is added on the channel partner form, they are also added as a member of the enterprise with a role and responsibility. |
| Partner manager | Manager from the channel partner that supervises partner member activities.<br><br>When an enterprise manager is added on the channel partner form, they are also added as a member of the enterprise with a role and responsibility. |
| Status | Status of the channel partner, whether **Suspended** or **Terminated**. |
| Parent channel partner | Parent entity of the channel partner. |
| Type | |
| Company | Company that is associated with the channel partner. |
| Activity | Updates and information related to the channel partner. |

**Related topics**

Configure Channel Partner table

## Roles and components of Deal Registration Management

The Deal Registration Management application (com.snc.deal_registration_management) uses roles to provide access to information, identify internal and external users, and maintain data security.

The Deal Registration Management application (com.snc.deal_registration_management) comes with a set of functional roles, each with varying levels of access to deals and their line items.

## Functional and granular roles

Functional roles help authorized partners maintain data and records in the deal registration table. A granular model helps to protect data by granting the required level of access to the relevant enterprise or channel partner entities. With this functionality, each role is associated with a set of privileges that determine users' access to certain information.

You can assign granular policies that authorize individuals to do their jobs efficiently and effectively, which helps to improve customer experience.

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## Roles and descriptions

Functional roles are a set of granular roles that are required to perform a function that requires access to multiple entities. The following table lists the functional roles for Deal Registration Management.

### Functional roles

*List of functional roles, their descriptions, and contained roles for deal registration management.*

| Role | Description | Contains roles |
|---|---|---|
| Deal registration admin (sn_prm_dr.deal_reg_admin) | This user can configure the deal registration data model and can create and edit all deal registrations across multiple partner types. | • Deal registration type writer (sn_prm_dr.deal_reg_type_writer)<br>• Deal registration writer (sn_prm_dr.deal_reg_writer) |
| B2B deal registration initiator (sn_prm_dr.partner_b2b_deal_reg_initiator) | This user can create, view, and track deal registrations for all B2B customers with their associated channel partners. | Partner data viewer (sn_prm.partner_data_viewer), sn_bus_org_opptym.org_opportunity_viewer |
| B2C deal registration initiator (sn_prm_dr.partner_b2c_deal_reg_initiator) | This user can create, view, and track deal registrations for all B2C customers with their associated channel partners. | Partner Data Viewer (sn_prm.partner_data_viewer), sn_bus_org_opptym.org_opportunity_viewer. |
| Deal registration initiator (sn_prm_dr.partner_deal_reg_initiator) | This user can create and view deal registrations for both B2B and B2C customers for their | • B2B deal registration initiator (sn_prm_dr.partner_b2b_deal_reg_initiator)<br>• B2C deal registration initiator (sn_prm_dr.partner_b2c_deal_reg_initiator) |

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### Functional roles

*List of functional roles, their descriptions, and contained roles for deal registration management.*

**(continued)**

| Role | Description | Contains roles |
|---|---|---|
| | associated channel partners. | |
| Deal registration manager (sn_prm_dr.partner_deal_reg_manager) | This user can create and view deal registrations for all the partners across their associated partner hierarchy. | Deal registration initiator (sn_prm_dr.partner_deal_reg_initiator) |
| Enterprise deal registration relationship contributor (sn_prm_dr.enterprise_deal_reg_rel_contributor) | This user can create, edit, and approve deal registrations for associated channel partners. | Partner data viewer (sn_prm.partner_data_viewer),sn_bus_org_op |
| Enterprise deal registration relationship manager (sn_prm_dr.enterprise_deal_reg_rel_manager) | This user can create, edit, and approve deal registrations for channel partners in their assigned hierarchy. | Enterprise deal registration relationship contributor (sn_prm_dr.enterprise_deal_reg_rel_contribut |
| B2B deal registration agent (sn_prm_dr.enterprise_b2b_deal_reg_agent) | This user can create, qualify, approve, and convert B2B deals into opportunities.<br><br>A B2B deal registration agent can manage the full life cycle for B2B deal registrations. | Partner data viewer (sn_prm.partner_data_viewer) |

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### Functional roles

*List of functional roles, their descriptions, and contained roles for deal registration management.*

**(continued)**

| Role | Description | Contains roles |
|---|---|---|
| | To learn more about converting deals to opportunities, see Update deal registration record | |
| B2C deal registration agent (sn_prm_dr.enterprise_b2c_deal_reg_agent) | This user can create, qualify, approve, and convert B2C deals into opportunities.<br><br>A B2C deal registration agent can manage the full life cycle for B2C deal registrations.<br><br>To learn more about converting deals to opportunities, see Update deal registration record | Partner Data Viewer (sn_prm.partner_data_viewer) |
| Deal registration agent (sn_prm_dr.enterprise_deal_reg_agent) | This user can create, qualify, approve, and convert any deal registration into an opportunity.<br><br>A deal registration agent can manage the | • B2B deal registration agent (sn_prm_dr.enterprise_b2b_deal_reg_agent<br>• B2C deal registration agent (sn_prm_dr.enterprise_b2c_deal_reg_agent<br>• sn_bus_org_opptym.org_opportunity_creato |

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**Functional roles**

*List of functional roles, their descriptions, and contained roles for deal registration management.*

**(continued)**

| Role | Description | Contains roles |
|---|---|---|
| | full life cycle of submitted deal registrations, both B2B and B2C.<br><br>To learn more about converting deals to opportunities, see Update deal registration record | |

The following table lists the set of granular roles associated with deal registration.

**Granular roles**

*List of granular roles, their descriptions, and contained roles for deal registration management.*

| Role | Description | Contains roles |
|---|---|---|
| Deal registration data viewer (sn_prm_dr.deal_reg_data_viewer) | This granular role provides users read access to all deal registrations. | Partner data viewer (sn_prm.partner_data_viewer) |
| Deal registration type writer (sn_prm_dr.deal_reg_type_writer) | This granular role allows users to create, write, and edit all deal registration types.<br><br>With this granular role, users can also create mapping records in the partner program and deal registration type tables. | Deal registration data viewer (sn_prm_dr.deal_reg_data_viewer) |
| Deal registration writer (sn_prm_dr.deal_reg_writer) | This granular role provides users create, write, and edit access to all deal registrations. | Deal registration data viewer (sn_prm_dr.deal_reg_data_viewer) |

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### Granular roles

*List of granular roles, their descriptions, and contained roles for deal registration management.*

**(continued)**

| Role | Description | Contains roles |
|---|---|---|
| Experience (sn_prm_dr.deal_reg_ui) | This role provides granular access to organization staff to provide a consistent experience across all user interfaces. | NA |
| Approver (sn_prm_dr.deal_reg_approver) | This granular role provides read access to users for the deal registration to which they are added as an approver. | Partner data viewer (sn_prm.partner_data_viewer) |

**Related topics**

- Partner Relationship Management
- Using Partner Relationship Management

## Quote creation via Self-Service fields for Channel Partners

Store the main details related to a quote submitted by a partner and track the life cycle of the quote through its stages on the self-service quote (sn_quote_mgmt_core_quote) table. Use the fields to manage and store information related to quote creation by channel partners.

**Note:**

The fields displayed on this form are pre-defined. You can configure the form to add or remove fields, and update the table to show or hide columns to match the partner experience.

### Quote details

| Field | Description |
|---|---|
| Channel partner | Reference to the channel partner (sn_prm_channel_partner) table. |
| Account | The customer account for which the quote is created. |
| Consumer | Reference to consumer (csm_consumer). |
| Contact | Primary customer contact associated with the quote. |
| Short description | A brief description that summarizes the quote. |

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### Additional details

| Field | Description |
|---|---|
| Source opportunity | The opportunity record associated with this quote. |
| Currency | The currency for the price matches the currency stated in the account information. |
| Renewal adjustment basis | Specifies the price reference used to calculate renewal pricing adjustments, such as contracted price or price list. |
| Price list | The **Standard Price List** field is the default price list for the product catalogs referenced in the quote. |
| Renewal adjustment type | Specifies the method used to adjust the renewal price, such as applying a markup percentage to the selected renewal adjustment basis. The adjustment type is applied after the renewal adjustment basis is determined. |
| Quote date | Date from which the quote is considered valid. This date is used as the reference point for quote lifecycle and pricing calculations. |
| Contract start date | Date on which the contract associated with the quote becomes effective. This date is used to calculate subscription pricing, term, and contract end date. |
| Expiration date | Date after which the quote is no longer valid. This date defines the offer validity period and is used on generated quote and order documents. |
| Contract end date | Date on which the contract term ends. This date is derived from the contract start date and term, and is used to determine renewal eligibility and renewal quote generation. |
| Payment Terms | Specifies the payment conditions agreed for the quote, such as when payment is due after invoicing. Payment terms are applied to the quote document and downstream orders. |
| Term (months) | Duration of the contract or subscription in months. When a start and end date are provided, the system automatically calculates the term value. |
| Auto-renew contract | Indicates whether the contract is enabled for automatic renewal. When selected, the system automatically generates renewal opportunities and renewal quotes based on configurable rules before the contract end date. |
| Shipping/Billing location | Reference to the shipping/billing location associated with the quote. This location |

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**Additional details (continued)**

| Field | Description |
|---|---|
| | identifies where products or services are delivered. |
| Shipping/Billing street | Street address of the shipping location. |
| Shipping/Billing city | The city of the shipping address. |
| Shipping/Billing state / Province | The state or province of the shipping address. |
| Shipping/Billing country | The country of the shipping address. |
| Shipping/Billing Zip / Postal code | The postal code or ZIP of the shipping address. |

## Product offerings catalog

Enter the products that the customer is interested in the **Select a catalog** field.

## Line items

Apply a header discount across all line items, or delete line items in the **Apply header discount**.

## Partner program table fields

Enable channel partners to participate in structured initiatives designed to drive revenue, enhance market reach, and build customer relationships by using the Partner Program [sn_prm_partner_program] table.

**Fields on the Partner Program table**

*Fields on the partner program table and their descriptions.*

| Field | Description |
|---|---|
| Number | Number of the program. |
| Name | Name of the program. |
| Description | Description of the program. |
| Active | Current state of the program, whether active or not. |
| Status | Status of the program. A partner program can have one of the following statuses.<br>• Draft<br>• Approved<br>• Rejected<br>• Retired |
| State date | Start date to associate partners to a program. |
| End date | Date at which a program is deactivated. |

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**Fields on the Partner Program table**

*Fields on the partner program table and their descriptions.*

**(continued)**

| Field | Description |
|---|---|
| Activity | Updates and information related to the program. |
| Domain | Domain to which the data belongs. |

**Related topics**

Configure Partner Program table

## Partner program relationship table fields

Establish a relationship between channel partners and partner programs with the Partner Program Relationship [sn_prm_partner_program_relationship] table.

**Fields on the Partner Program Relationship table**

*Fields on the partner program relationship table and their descriptions.*

| Field | Description |
|---|---|
| Number | Unique number of the relationship. |
| Channel partner | Channel partner associated with this relationship.<br>**Note:** This field is populated from the Channel partner [sn_prm_channel_partner] table. |
| Program | Program associated with this relationship.<br>**Note:** This field is populated from the Partner program Program [sn_prm_partner_program] table. |
| Active | State of the program, whether active or not. |
| Status | Status of the partner program relationship. |
| Onboarded date | Onboarding date of a partner into the program. |
| Off-boarded date | Offboarding date of a partner from the program. |
| Activity | Updates and information related to the partner program relationship. |

**Related topics**

Configure Partner Program Relationship table

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## Domain separation for Partner Relationship Management

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

All partner program records, partner program relationships, and channel partners are present in the domain of the associated program.

**Related topics**

- Configure Partner Program table
- Partner program table fields

## Program segment mapping table fields

Establish a mapping between a program and a segment on the program segment mapping (sn_prm_program_segment_mapping) table to determine whether a segment belongs to the appropriate partner program.

**Fields on the program segment table**

*Fields, types, and their descriptions on the program segment mapping table*

| Field | Type | Description |
|---|---|---|
| Number | String | Number of the program<br><br>The **Number** field is auto-generated and is read-only. |
| Program | Reference | Reference to the program configured in the partner program (sn_prn_partner_program) table |
| Segment | Reference | Reference to the segment configured in the segment (sn_seg_segment) table |
| Active | True/False | Current state of the program segment mapping, whether active or not |
| Is Default | True/False | Determines if a segment is marked as default for a program.<br><br>**Note:** At any given time, there can be only one **is_default** entry for a program and segment relationship record. |

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**Related topics**

- Program segment criteria table fields
- Program criteria table fields

## Program segment criteria table fields

You can establish a mapping between the program segment mapping table and the criteria using the program segment criteria (sn_prm_program_segment_criteria) table.

**Fields on the program segment criteria table**

*Fields, types, and their descriptions on the program segment criteria table*

| Field | Type | Description |
|---|---|---|
| Program Segment Mapping | Reference | Reference to the records in the program segment mapping (sn_prm_program_segment_mapping) table |
| Criteria | Reference | Reference to the entity criteria (sn_req_criteria_customer_condition) table |
| Active | True/False | Current state of the program segment criteria, whether active or not |

**Related topics**

- Program segment mapping table fields
- Program criteria table fields

## Program criteria table fields

Establish a mapping between the partner program (sn_prm_partner_program_relationship) table and the entity criteria (sn_req_criteria_customer_condition) table.

**Program Criteria table fields**

*Fields, types, and their descriptions for the program criteria table fields*

| Fields | Type | Description |
|---|---|---|
| Program | Reference | Reference to partner program (sn_prm_partner_program) table |
| Criteria | Reference | Reference to the entity criteria (sn_req_criteria_customer_condition) table. |

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**Program Criteria table fields**

*Fields, types, and their descriptions for the program criteria table fields*

**(continued)**

| Fields | Type | Description |
|---|---|---|
| | | **Note:** The mapping is possible only if the criteria of the channel partner is **Condition on**. |
| Active | True/False | Current state of the program criteria, whether active or not |

**Related topics**

Program segment mapping table fields

Program segment criteria table fields

## Deal registration table fields

Store the main details related to a deal submitted by a partner and track the life cycle of the deal through its stages on the deal registration (sn_prm_dr_deal_registration) table.

**Deal registration fields**

*Fields on the deal registration table and their descriptions.*

| Field | Type | Description |
|---|---|---|
| Number | String | Number assigned to the deal registration |
| Channel partner | Reference | Reference to the channel partner (sn_prm_channel_partner) table |
| Submitted by | Reference | Reference to the user and the initiator of the channel partner |
| Partner program | Reference | Reference to partner program (sn_prm_partner_program) table |
| Deal registration type | Reference | Reference to deal registration type (sn_prm_dr_deal_registration_type) table |
| Account | Reference | Reference to account (customer_account) |
| Contact | Reference | Reference to contact (customer_contact) |
| Short description | String | Summary of the details of the deal |

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**Deal registration fields**

*Fields on the deal registration table and their descriptions.*

**(continued)**

| Field | Type | Description |
|---|---|---|
| Description | String | Detailed information about the deal |
| State | Choice | Current state of the deal registration<br>• Draft<br>• Pending approval<br>• Approved<br>• Submitted<br>• Closed<br>• Under-review<br>• Canceled |
| Sales cycle type | Reference | Choice of sales cycle type field in the Opportunity (sn_opty_mgmt_core_opportunity) table |
| Estimated deal size | Currency | Estimated size of the deal |
| Estimated close date | Date/Time | Estimated end date of the deal |
| Assignment group | Reference | Reference to the user group |
| Assigned to | Reference | Reference to the user (sys_user) that the deal is assigned to.<br>If the deal registration is a B2B deal, only B2B agents are visible in this list. If the deal registration is a B2C deal, only B2C agents are visible in this list. |
| Consumer | Reference | Reference to consumer (csm_consumer) |
| Account name | String | Name of the account |
| First name | String | First name of the contact or consumer |
| Last name | String | Last name of the contact or consumer |
| Email | String | Email of the contact or consumer |
| Opportunity | Reference | Reference to the Opportunity (sn_oppty_mgmt_core_opportunity) |

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**Deal registration fields**

*Fields on the deal registration table and their descriptions.*

**(continued)**

| Field | Type | Description |
|---|---|---|
| Closure code | Choice | State of the closure code.<br>• Rejected<br>• Duplicate<br>• Converted<br>• Incomplete |
| Active | Boolean | Determines whether the deal registration is active or not |
| Comments | Journal input | Comments and important information related to the deal, visible to channel partner and enterprise personas |
| Work notes | Journal input | Comments and important information related to the deal, only visible to enterprise personas |
| Domain | Domain id | Domain to which the deal registration belongs |

## Deal registration line table fields

The deal registration line table contains line items linked to a deal registration, each referencing a specific product offering.

**Deal registration line table fields**

*Fields, type, and their description on the deal registration line type table.*

| Field | Type | Description |
|---|---|---|
| Number | String | Auto-generated number of the deal registration line item |
| Deal registration | Reference | Reference to the deal registration (sn_prm_dr_deal_registration) table |
| Product offering | Reference | Reference to product offering (sn_prd_prm_product_offering) table |

## Deal registration type table fields

Configure the deal registration type table to define how a channel partner can be associated with a deal or is contributing to the associated deal.

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**Deal registration type fields**

*Field, field type, and descriptions for the deal registration type table*

| Field | Type | Description |
|---|---|---|
| Name | Translated text | Auto-generated number of the deal registration type |
| Description | Translated text | Description of the deal registration type |
| Active | Boolean | Current state of the deal registration type, whether active or not |
| Details URL | URL | URL to the details page of the deal registration type.<br><br>The details URL page hosts additional details associated with the deal registration type. |
| Domain | Domain ID | Domain to which the deal registration type belongs |
| Applicable to all programs | True/False | Determines whether the deal registration is applicable to all programs or not |

## Partner program deal type relationship table fields

Configure the Partner Program Deal Type Relationship (sn_prm_dr_pp_deal_type) table to ensure that the correct deal types are associated with the correct partner programs.

**Partner program deal type relationship table**

*Field, field type, and descriptions for the partner program deal type relationship table*

| Field | Type | Description |
|---|---|---|
| Partner program | Reference | Reference to partner program (sn_prm_partner_program) table |
| Deal registration type | Reference | Reference to deal registration type (sn_prm_dr_deal_registration_type) table |
| Active | Boolean | Determines whether the partner program and deal type relationship is active or not |

## Channel Partner components on workspace

View the various components on the channel partner form to get a consolidated overview of all the entities associated with the channel partner.

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### Channel partner info

| UI component | Description |
|---|---|
| Business Profile | Details associated with the channel partner.<br><br>To learn more information about the details, see Create Channel Partner record. |
| Channel Partner Company Info | Information associated with the channel partner. You can view the following information in the **Overview** tab of the record.<br>• Point of contact - Designated point of contact for the channel partner.<br>• Staff - Staff member associated with the channel partner.<br>• Products installed - List of products that are installed at the channel partner location. |
| Company Address | Address of the company |
| Notes | Work notes |
| Register Partner Staff | Register staff to an enterprise.To learn more about registering partner staff, see Register Partner Staff on workspace. |

### Channel partner tabs and components on the workspace

| UI component | Description |
|---|---|
| Members | Members associated with the channel partner. |
| Cases | Cases associated with the channel partner. |
| Partnerships | Partnerships between the channel partner and partner program. |
| Child Channel Partners | Channel partners that have the current channel partner as their parent. |
| Sold Products | Products and services that have been sold to an account or a consumer. A sold product can have child and parent sold items in a hierarchical structure. |
| Install Base Items | Install base items associated with the channel partner. |
| Deal registrations | Deal registrations associated with the channel partner. |
| Opportunities | Opportunities associated with the channel partner. |
| Quotes | Quotes associated with the channel partner. |
| Customer Orders | |

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**Channel partner tabs and components on the workspace (continued)**

| UI component | Description |
|---|---|
| Partner Criteria | Filtering rules for accounts and consumers that partners can access when raising deals, orders, quotes, and opportunities. |

# Lead-to-cash foundation reference

Reference for lead-to-cash foundation applications.

## Product Catalog Management reference

Reference topics provide additional information about Product Catalog Management.

### Components installed with Product Catalog Management

Several types of components are installed with activation of the Product Catalog Management plugin, including tables and user roles.

## Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Characteristics viewer<br>[sn_prd_pm.characteristics_viewer] | Reads characteristics and characteristic values. | None |
| Characteristics writer<br>[sn_prd_pm.characteristics_writer] | Granular role for creating characteristics and characteristic values. | sn_prd_pm.characteristics_viewe |
| External product viewer<br>[sn_prd_pm.external_product_viewer] | Reads Product Specification Name and Product Offering Name at the field level. | sn_prd_pm.characteristics_viewe |
| Product catalog admin<br>[sn_prd_pm.product_catalog_admin] | Creates, reads, and updates products, resources, services, product, service, and | • sn_prd_pm.characteristics_wri<br>• sn_prd_pm.product_catalog_m<br>• import_admin<br>• sn_gd_core.decision_tree_auth<br>• sn_gd_guidance.guidance_ma |

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| Role title [name] | Description | Contains roles |
| --- | --- | --- |
| | resource categories, characteristics, and characteristic options.<br><br>Exports and imports catalog entities and set up any catalog-related system properties. | • decision_table_admin<br>• cmdb_read<br>• sn_export_entities.export_user<br>• ais_admin<br>• category_manager |
| Product catalog manager<br><br>[sn_prd_pm.product_catalog_manager] | Creates, reads, and updates product specifications, resource specifications, and service specifications. | • sn_tmt_core.inbound_queue_r<br>• decision_table_admin<br>• sn_prd_pm.product_catalog_v<br>• model_manager<br>• sn_configrule_mgt.rule_writer<br>• sn_customerservice.customer_<br>• sn_csm_ctxrul_mgt.rule_matrix |
| Product catalog viewer<br><br>[sn_prd_pm.product_catalog_viewer] | Views products, resources, services, product, service, and resource categories, characteristics, and characteristic options. | • canvas_user<br>• decision_table_reader<br>• sn_prd_pm.product_model_ch<br>• sn_gd_core.decision_tree_use<br>• sn_prd_pm.characteristics_vie |
| Product model characteristic granular viewer<br><br>[sn_prd_pm.product_model_characteristic_granular_viewer] | Views records in the Product Model Characteristics table where the product model's Customer Visible field is true. | None |

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| Role title [name] | Description | Contains roles |
|---|---|---|
| Product model characteristic viewer<br><br>[sn_prd_pm.product_model_characteristic_viewer] | Granular role for viewing records in the Product Model Characteristics table. | None |

## Scheduled jobs installed

| Scheduled job | Description |
|---|---|
| Channel availability sweep for product offerings | Recomputes which sales channels a published product offering is available on, based on its channel-specific release dates. Runs nightly and can also be run on demand. |

## Tables installed

| Table | Description |
|---|---|
| Catalog Category<br><br>[sn_prd_pm_catalog_category_relationship] | Stores relationships between catalogs and categories. |
| Category To Category Relationship<br><br>[sn_prd_pm_category_category_relationship] | Stores relationships between categories. |
| Characteristic<br><br>[sn_prd_pm_characteristic] | Stores characteristic records. |
| Characteristic Option<br><br>[sn_prd_pm_characteristic_option] | Stores the options available for a characteristic. |
| Quantity Mapping<br><br>[sn_prd_pm_characteristic_option_quantity_mapping] | Stores quantity mapping records for characteristic options. |
| Characteristic Relationship<br><br>[sn_prd_pm_characteristic_relationship] | Stores relationships between characteristics. |
| Characteristic Group<br><br>[sn_prd_pm_configuration] | Stores characteristic group records. |

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| Table | Description |
| --- | --- |
| Distribution Channel<br>[sn_prd_pm_distribution_channel] | Stores distribution channel records. |
| Needs Template<br>[sn_prd_pm_needs_template] | Stores needs template records. |
| Needs Template Relationship<br>[sn_prd_pm_needs_template_relationship] | Stores relationship records for needs templates. |
| Product Price<br>[sn_prd_pm_pricing] | Stores pricing records for products. |
| Product Characteristics<br>[sn_prd_pm_product_characteristics] | Stores characteristics associated with a product. |
| Product Model Characteristic<br>[sn_prd_pm_product_model_characteristic] | Stores characteristics associated with a product model. |
| Product Offering<br>[sn_prd_pm_product_offering] | Stores product offering records. |
| Product Offering Catalog<br>[sn_prd_pm_product_offering_catalog] | Stores catalog records for product offerings. |
| Product Offering Category<br>[sn_prd_pm_product_offering_category] | Stores category records for product offerings. |
| Product Offering Category Relationship<br>[sn_prd_pm_product_offering_category_relationship] | Stores relationships between product offering categories. |
| Product Offering Channel Override<br>[sn_prd_pm_product_offering_channel_override] | Stores the channel-specific release date for a published product offering. One row overrides one channel. |

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| Table | Description |
| --- | --- |
| Product Offering Characteristic<br>[sn_prd_pm_product_offering_characteristic] | Stores characteristics associated with a product offering. |
| Product Offering Family<br>[sn_prd_pm_product_offering_family] | Stores product offering family records. |
| Needs Based Offering Recommendation<br>[sn_prd_pm_product_offering_recommendation] | Stores recommendation records for product offerings based on customer needs. |
| Product Offering Relationship<br>[sn_prd_pm_product_offering_relationship] | Stores relationships between product offerings. |
| Product Offering Relationship Characteristic<br>[sn_prd_pm_product_offering_relationship_characteristic] | Stores characteristics for product offering relationships. |
| Product Offering Relationship Group<br>[sn_prd_pm_product_offering_relationship_group] | Stores group records for product offering relationships. |
| Unit of Measure<br>[sn_prd_pm_product_offering_uom] | Stores unit of measure records for product offerings. |
| Product Specification<br>[sn_prd_pm_product_specification] | Stores product specification records. |
| Resource Specification<br>[sn_prd_pm_resource_specification] | Stores resource specification records. |
| Service Specification<br>[sn_prd_pm_service_specification] | Stores service specification records. |
| Specification<br>[sn_prd_pm_specification] | Stores specification records. |
| Specification Category<br>[sn_prd_pm_specification_category] | Stores category records for specifications. |

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| Table | Description |
| --- | --- |
| Specification Product Instance Mapping<br>[sn_prd_pm_specification_char_product_instance_mapping] | Stores mapping records between specification characteristics and product instances. |
| Specification Characteristic<br>[sn_prd_pm_specification_characteristic] | Stores characteristic records for specifications. |
| Specification Relationship<br>[sn_prd_pm_specification_relationship] | Stores relationship records between specifications. |
| Template<br>[sn_prd_pm_template] | Stores template records. |
| Template Characteristic<br>[sn_prd_pm_template_characteristic] | Stores characteristic records for templates. |
| Template Characteristic Option<br>[sn_prd_pm_template_characteristic_option] | Stores characteristic option records for templates. |
| Unit of Measure<br>[sn_prd_pm_uom] | Stores unit of measure records. |
| Unit of Measure Class<br>[sn_prd_pm_uom_class] | Stores unit of measure class records. |
| Product Visuals<br>[sn_prd_pm_visuals] | Stores visual asset records for products. |
| Product Offering Translation<br>[sn_prd_pm_product_offering_translation] | Stores the locale-specific product offering Configuration JSONs. |
| Product Offering Catalog Translation<br>[sn_prd_pm_product_offering_catalog_translation] | Stores locale-specific product catalog hierarchy Configuration JSONs. |

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### Product Catalog Management properties

System properties available with Product Catalog Management that enable you to test and manage the visibility of product offerings and specifications to catalog consumers before they're published.

| Property | Description |
|---|---|
| sn_prd_pm.supported_language_translations | • Type: String<br>• Default value: Empty<br>• Other possible values: Comma-separated list of language ISO codes. For example, en,fr,de.<br>• Location: System Property [sys_properties] table<br>• Learn more: Enable localized product catalogs and product offerings. |
| sn_prd_pm.enable_extended_product_lifecycle | • Type: Boolean<br>• Default value: false<br>• Other possible values: true. Turns on the In Test and Staged life cycle statuses for product offerings and specifications.<br>• Location: System Property [sys_properties] table |
| sn_prd_pm.enable_product_lifecycle_prepublish_visibility | • Type: Boolean<br>• Default value: false<br>• Other possible values: true. Makes In Test and Staged product offerings and specifications visible to catalog consumers before they're published. Has no effect unless sn_prd_pm.enable_extended_product_lifecycle is also turned on.<br>• Location: System Property [sys_properties] table |

For more information, see Enable extended life cycle states for product offerings.

**Related topics**

Validating product offerings before publishing

product/tmt-order-mgt/task/move-offering-spec-states.dita

### Multilingual product catalog entities

Starting with Product Catalog Management Core release v19.0.0, certain Product Catalog Management tables have product catalog fields that support multilingual text. In the Data Dictionary, these fields have changed from type string to type translated_text. As an admin, you can display these fields in multiple languages in the product catalog interface.

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### Multilingual product catalog fields

| Product Catalog Management table | Supported multilingual fields |
|---|---|
| Product Offering<br>[sn_prd_pm_product_offering] | Name, Display name, Description |
| Product Offering Catalog<br>[sn_prd_pm_product_offering_catalog] | Name, Description |
| Product Offering Characteristics<br>[sn_prd_pm_product_offering_characteristic] | Name |
| Product Offering Relationships<br>[sn_prd_pm_product_offering_relationship] | Display name |
| Specifications<br>[sn_prd_pm_specification] | Name, Display name, Description |
| Specification Categories<br>[sn_prd_pm_specification_category] | Name |
| Product Offering Specification Relationship<br>[sn_prd_pm_specification_relationship] | Display name |
| Product Visuals<br>[sn_prd_pm_visuals] | Name |
| Characteristics<br>[sn_prd_pm_characteristic] | Name, Description |
| Characteristic Options<br>[sn_prd_pm_characteristic_option] | Option |

**Related topics**

- Enable localized product catalogs and product offerings
- ServiceNow AI Platform translation and localization

## Business Portal reference for Sales Customer Relationship Management

Reference topics provide additional information about the components such as roles and tables that are installed with various Business Portal plugins.

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## Components installed with Sales Cart

Several types of components are installed with activation of Sales Cart including tables, user roles, and scheduled jobs.

### Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| Cart editor<br><br>[sn_sales_cart.cart_editor] | Creates, deletes, and edits sales cart and sales cart-related entities. | sn_sales_cart.cart_viewer |
| Cart integrator<br><br>[sn_sales_cart.cart_integrator] | Controls access to the cart records, separately from the access control on the REST endpoints. This role is installed and used only when you have configured a CPQ instance with Sales CRM. | sn_sales_cart.cart_editor |
| Cart viewer<br><br>[sn_sales_cart.cart_viewer] | Views sales cart and sales cart-related entities. | |

### Scheduled jobs installed

| Scheduled job | Description |
|---|---|
| Migrate proxy orders to sales cart | On-demand job that migrates draft proxy order carts to the new sales cart experience and sets the value of the *sn_sales_cart.show_cart_migration_msg* system property to true.<br><br>**Note:** If you used the Business Portal and are upgrading to the Zurich release, then you must run the Migrate proxy orders to sales cart job after installing the Sales Cart plugin (sn_sales_cart). Customers then don't lose products added to their carts on the Business Portal. |

### Tables installed

| Table | Description |
|---|---|
| Sales Cart<br><br>[sn_sales_cart] | Stores the main sales cart record, including customer, billing, shipping, pricing, and state details. |
| Sales Cart Line Characteristic<br><br>[sn_sales_cart_line_characteristic] | Stores characteristics and options associated with individual sales cart line items. |

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| Table | Description |
|---|---|
| Sales Cart Line Item<br>[sn_sales_cart_line_item] | Represents individual line items in a sales cart, including products, pricing, quantities, and hierarchical relationships. |
| Sales Cart Pricing Adjustment<br>[sn_sales_cart_pricing_adjustment] | Stores pricing adjustments applied to a sales cart or its line items, including adjustment type, value, and related references. |

**Related topics**

Configuring Sales Cart for Business Portal

## Components installed with Customer Request for Quote

Several types of components are installed with activation of the Customer Request for Quote (RFQ) plugin, including tables, user roles, and plugins.

## Roles installed

| Role title [name] | Description | Contains roles |
|---|---|---|
| RFQ writer<br>[sn_cust_rfq_core.rfq_writer] | Provides write and update access to all RFQ tables. | sn_cust_rfq_core.rfq_viewer |
| RFQ viewer<br>[sn_cust_rfq_core.rfq_viewer] | Provides read-only access to all RFQ tables. | None |

## Tables installed

| Table | Description |
|---|---|
| Customer Request for Quote<br>[sn_cust_rfq_core_rfq] | Stores RFQ headers with customer information, shipping/billing addresses, pricing totals, and status tracking. |
| Customer Request for Quote Pricing Adjustment<br>[sn_cust_rfq_core_pricing_adjustment] | Stores discounts, surcharges, and other price modifications applied to the RFQ or individual RFQ line items. |
| Customer Request for Quote Line Item<br>[sn_cust_rfq_core_line_item] | Stores individual products requested in an RFQ, including quantities, pricing details, and hierarchical relationships between line items. |

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| Table | Description |
| --- | --- |
| Customer Request for Quote Line Characteristic<br><br>[sn_cust_rfq_core_line_characteristic] | Stores product specifications and configurable attributes for each RFQ line item. |

## Plugins installed

The following applications are installed as dependencies with the Customer Request for Quote application (sn_cust_rfq):

- Customer Request for Quote Data Model (com.sn_cust_rfq_core)
- Product Catalog Management Core (com.sn_prd_pm)
- Price Management (com.sn_csm_pricing)
- Sales common (com.sn_l2c_sales_common)
- Product Catalog Management Portal (com.prd_pm_portal)
- Agent Workspace (com.agent_workspace)
- Playbooks for CSM (com.sn_csm_playbook)

## Request for quote (RFQ) states

An RFQ can move through different states during its life cycle after being submitted by the customer based on agent activity in the CRM Workspace.

| State (Business Portal) | Status (Workspace) | Description |
| --- | --- | --- |
| Submitted | New | Customer has submitted an RFQ through the Business Portal. |
| Submitted | In review | Agent has provided values for the **Assignment group** and **Assigned to** fields for the RFQ in the CRM Workspace. |
| Completed | Completed | Agent has converted the RFQ to a quote in the CRM Workspace and has changed the status of the RFQ record to Pending Customer Acceptance. |
| Canceled | Canceled | Agent has manually changed the status of the RFQ to Canceled. |

## Invoice states on Business Portal

Invoices move through different states during its life cycle after an accounts payable specialist processes the invoice.

| State | Description |
| --- | --- |
| Draft | The invoice has been created but not yet finalized or sent to the customer. |
| Received | The invoice has been delivered to the customer and is awaiting action. |
| Accepted | The customer has reviewed and accepted the invoice. |
| Rejected | The customer has disputed or declined the invoice. |

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| State | Description |
|---|---|
| Pending payment | The invoice has been accepted and is awaiting payment from the customer. |
| Canceled | The invoice has been voided and is no longer valid. |
| Paid | The customer has submitted payment in full for the invoice. |
| Partially paid | The customer has submitted partial payment, and a balance remains outstanding. |

## Invoice case states on Business Portal

An invoice case moves through different states during its life cycle after an accounts payable specialist processes it.

### Invoice case states

| State | Description |
|---|---|
| Draft | The invoice case has been created. |
| New | The invoice case has been submitted for processing. |
| Work in Progress | The assigned agent is working on the invoice case. |
| Awaiting Info | The assigned agent is waiting for the named contact to provide requested information for the invoice case. |
| Resolved | The assigned agent has proposed a resolution for the invoice case to the contact. |
| Closed | The invoice case has been resolved and the resolution has been accepted by the contact.<br><br>When all the case lines for an invoice case are in a Final state, the case can be set to Closed. Final states include:<br>• Resolved - Accepted<br>• Resolved - Denied<br>• Canceled |
| Cancelled | The invoice case has been cancelled.<br><br>**Note:** Only invoice cases in the Draft state can be cancelled. |

**Related topics**

Invoice case and invoice case line states

## Invoice case details on the Business Portal

Field descriptions for invoice case headers and invoice case line list views on the Business Portal.

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## Invoice case header fields

| Field | Description |
|---|---|
| Account | Customer account associated with the invoice dispute case. |
| Contact | Name of the customer contact for the invoice case. |
| Invoice | Unique, system-generated invoice number being disputed, starting with the prefix ARINV. |
| Invoice date | Date the invoice was issued. |
| Priority | Urgency level assigned to the invoice case. The available options are:<br>• 1 - Critical<br>• 2 - High<br>• 3 - Moderate<br>• 4 - Low (default) |
| Request source | Scope selected when creating the invoice case from the Business Portal using the playbook experience. The available options are:<br>• Specific invoice line and single invoice<br>• Invoice header details and multiple invoices |

## Invoice case line list view

| Field | Description |
|---|---|
| Number | Unique, system-generated invoice case line starting with the prefix INVCSL. |
| Invoice | The invoice number associated with this case line. This field is displayed for an invoice case created with **Invoice header details, multiple invoices** as the request source. |
| Invoice line | The invoice line number associated with one of the invoices in this case line. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source. |
| Description or Short description | A brief summary of the invoice case line item. |
| State | The current status of the invoice case line. The available options are:<br>• Draft<br>• New<br>• Work in Progress<br>• Awaiting Info<br>• Resolved - Accepted |

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| Field | Description |
|---|---|
| | • Resolved - Denied<br>• Canceled |
| Invoiced quantity | The quantity that was originally billed on the invoice. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source. |
| Disputed quantity | The quantity being disputed by the customer. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source. |
| Approved quantity | The quantity approved for adjustment or credit after dispute resolution. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source. |
| Invoiced billing location | The billing address that appears on the original invoice. |
| Invoiced shipping location | The shipping address that appears on the original invoice. |
| Disputed billing location | The billing address that the customer claims should have been used. |
| Disputed shipping location | The shipping address that the customer claims should have been used. |
| Expected start | The planned or expected start date for service or product delivery. |
| Actual start | The actual date when service or product delivery began. |
| Product offering | The product or service offering associated with this invoice line. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source. |
| Sold product | The specific product that was fulfilled and invoiced. This field is displayed for an invoice case created with **Specific invoice lines, single invoice** as the request source. |
| Contact | Customer contact for the invoice case. |

## Add invoices to case list

Add invoices to case form on the Business Portal enables you to a.

| Field | Description |
|---|---|
| Number | Unique, system-generated invoice number starting with the prefix ARINV. |
| Short description | A brief summary of the invoice. |
| Invoice date | Date on which the invoice was created. |

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| Field | Description |
|---|---|
| Due date | Date on which the invoice is due for payment. |
| Status | The current status of the invoice line. For more information, seeInvoice states on Business Portal. |
| Account | Name of the customer or business entity in the business-to-business (B2B) model. |
| Customer contact | Any customer contact for your account. |
| Primary contact | Primary contact for your account. |
| Billing location | The billing address that appears on the original invoice. |
| Shipping to location | Reference to the location to which the order on the invoice is shipped. |

**Related topics**

Dispute multiple invoices against your account using the Business Portal

## Invoice line item details on Business Portal

Invoice line list view details on the Business Portal.

| Field | Description |
|---|---|
| Number | Unique, system-generated invoice line starting with the prefix ARINVL. |
| Invoice number | The invoice number associated with this invoice line starting with the prefix ARINV. |
| Description | A brief summary of the invoice line item. |
| Invoice date | Date on which the invoice was created. |
| Due date | Date on which the invoice is due for payment. |
| Status | The current status of the invoice line. For more information, seeInvoice states on Business Portal. |
| Account | Name of the customer or business entity in the business-to-business (B2B) model. |
| Customer contact | Primary contact for your account. |
| Product offering | The product or service offering associated with this invoice line. |
| Invoice line quantity | The quantity that was originally billed on the invoice. line |
| Line unit price | Unit price of the line item in the invoice. |
| Sold product | The specific product that was fulfilled and invoiced. |
| Billing location | The billing address that appears on the original invoice. |
| Shipping to location | Reference to the location to which the order on the invoice is shipped. |

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**Related topics**

Dispute a specific line item on an invoice against your account using the Business Portal

# Sales Customer Relationship Management glossary

Learn about terms and concepts that are unique to Sales Customer Relationship Management.

Glossary terms are listed alphabetically.

## A

### account

A customer or organization record in ServiceNow Sales CRM.

### attract

The phase where sales agents identify and engage potential customers through marketing efforts to generate interest and leads.

### automated fallout records

Records created automatically when an order fulfillment workflow includes a "Create fallout action" due to issues like downstream system failures, data problems, or inventory shortages.

## B

### backorder

An item that can't be delivered immediately due to being out of stock.

### business portal

Self-service web portal for B2B customers, providing integrated access to knowledge articles, community forums, service catalogs, and chat bots, enabling customers to browse products, place orders, and manage order cases.

To learn more about using the business portal, see Using the Business Portal.

## C

### campaign

A coordinated marketing effort to generate leads and promote products or services.

### change order

A request to modify an existing order, such as changing quantity, product, or fulfillment details.

### channel partners

External organizations like resellers or system integrators that collaborate with an enterprise to sell products and services, and can be managed through Partner Relationship Management.

### characteristics and characteristic options

Characteristics define product attributes, while characteristic options are the available values for these attributes, based on customer preferences.

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**commit**

Sales opportunities that representatives are confident will close in the current forecast period.

**committed time frame**

The deadline for delivering products and services to a customer, often specified in a contract.

**competitor**

A record capturing information about companies or products competing for the same customer deal within an opportunity.

**contact**

A person associated with a customer account or partner organization, serving as the primary communication point.

**contract**

A legal agreement between a seller and buyer outlining sale terms, including products/services, pricing, quantities, and delivery.

**contract management**

The process of creating, managing, and executing legal sales contracts from completed quotes.

**covered products**

Covered products refer to offerings that act as entitlements or contracts linked to a primary product, such as a warranty purchased with a phone.

For more information, see Add Covered Products using Contracts and Entitlement Workflow.

**configurable pricing plans**

Customizable plans defining the sequence of pricing calculations and adjustments to determine final product prices.

**configure, price, quote (CPQ)**

A process that intelligently guides every product, pricing, and quoting decision across every channel to deliver fast, accurate, and customer-centric deals. CPQ enables faster sales cycles and a better buyer experience, with less manual work.

**cross-sell**

A sales strategy for selling related products that differ from the customer's current purchases.

**customer engagement sequence (or sequence)**

A playbook guiding sales agents in engaging leads across multiple channels.

**customer order**

Orders for products (tangible or digital) that a customer wants to purchase or change.

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## D

### deal prioritization

Analyzing opportunities based on financial impact to focus on high-value deals.

### discount

A price reduction for a product or service offered to customers.

### disqualified lead

A lead that is no longer viable for sales engagement.

### DocuSign

An external service for electronic signatures, enabling customers to sign documents digitally.

### domain orders

Product, service, and resource orders generated during customer order decomposition, each with a corresponding fulfillment flow and order tasks.

## E

### enrichment

Enhancing customer orders with additional technical data or attributes necessary for accurate processing and fulfillment.

## F

### fallout management

A process that identifies, investigates, and resolves order issues, tracking fallout and triggering automated resolution actions.

### fallout record

A record created to investigate and resolve processing issues during order fulfillment, generated automatically or manually.

### forecast category

Classification of opportunities by closure certainty, with default categories including Won, Commit, Strong Upside, Upside, Pipeline, and Omitted.

For more information, see Sales Forecasting terminology.

### forecast model

A framework predicting future sales.

For more information, see Sales Forecasting terminology.

### forecast roll-up method (single/cumulative)

Defines opportunity aggregation into forecasts, with "Single" showing each category separately and "Cumulative" aggregating previous categories.

### forecast schedule

A process generating the latest forecast data from all system opportunities.

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**fulfill**

Completing customer orders by executing order tasks.

**fulfillment flow**

The sequence of steps for decomposed orders, including order tasks.

## G

**gap (Sales Forecasting)**

The difference between Quota and Won sales, indicating the amount needed to meet targets.

## H

**hierarchical node map**

A visual representation of hierarchical structures, showing relationships and levels.

**horizontal relationship**

A relationship between different product specifications, defined using compatibility rules.

## I

**inflight change**

Modifications made to customer orders during fulfillment.

**inventory allocation**

Assigning available inventory to customer orders based on configuration, quantity, and eligibility.

## J

**jeopardy alert**

Notifications generated when fulfillment tasks risk missing deadlines.

## L

**lead**

A potential customer created from information captured through various channels.

For more information, see Lead Management.

**lead management workflow**

A structured process guiding lead progression from creation to opportunity conversion.

**lead nurturing**

Engaging with leads over time to build relationships and increase conversion likelihood.

**lead qualification**

Determining if a lead meets criteria to be considered sales-qualified.

**lead routing**

Automatically assigning leads to sales representatives based on criteria.

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### lead scoring

Prioritizing leads based on predefined criteria or assigning numerical values based on conversion potential.

### lead segmentation

Categorizing leads based on parameters like industry or behavior for targeted marketing.

### lead source

The channel through which a lead was acquired.

### lead task

Follow-up actions created to progress a lead.

### lead-to-cash cycle

A business process encompassing all activities and tasks involved in selling to customers, fulfilling orders, and delivering ongoing services.

## M

### MACD (move, add, change, delete/disconnect)

Order action types managing changes to customer orders and service inventories.

For more information, see Action types for customer and service orders.

### matrix validations

Rules ensuring data accuracy in pricing and product eligibility matrices.

### monthly recurring charge (MRC)

A pricing method with monthly charges for products/services.

### multiple configurations

A feature allowing multiple variations of child product offerings.

For more information, see Multiple configurations.

## N

### needs analysis

A process using needs templates to gather customer requirements and generate product recommendation.

### needs templates

Questionnaires associated with needs decision trees for product recommendations.

### needs decision tree

A guided decision process presenting questions to agents for product recommendations.

### negotiation enhancement (Opportunity Management)

Providing real-time pricing insights to tailor customer offers while maintaining profitability.

### non-product attribute pricing adjustment

Pricing adjustments based on non-product characteristics.

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## O

**open state model**

A framework controlling product options in the product configurator.

**opportunity**

A qualified lead with high potential to become a customer.

**opportunity line items**

Products/services added to an opportunity.

**opportunity management**

Analyzing customer needs and generating product recommendations.

For more information, see Opportunity Management

**orchestration**

Coordinating order fulfillment through fulfillment flows.

**orchestration plans for order fulfillment**

User interfaces tracking domain orders and tasks, providing hierarchical representations.

**order capture**

Receiving product or service orders through various methods.

For more information, see Methods of creating orders in Sales Customer Relationship Management.

**order case**

Cases created for order-related issues or changes.

**order decomposition**

Breaking down customer orders into product, service, and resource orders.

For more information, see Order decomposition.

**order fallout**

Failures during order fulfillment due to errors or exceptions.

For more information, see Managing order fallout.

**order fulfillment**

Completing tasks to fulfill orders, guided by orchestration plans.

For more information, see Order fulfillment.

**order hierarchy**

The structure of an order, including decomposed orders and tasks.

**order life cycle**

Stages a customer order progresses through in Order Management including order creation, enrichment, decomposition, and orchestration, and fulfillment.

For more information, see Using Order Management.

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**order line items (Order Management)**

Individual items in customer and service orders.

**order management**

Process of capturing and fulfilling customer orders.

**order states**

The current stage of an order or an order line item in its life cycle, from initial creation through fulfillment and closure. Each state indicates what actions have been completed and what steps remain in the order processing workflow.

For more information, see Order life cycle states.

**order tasks**

Tasks needed to fulfill domain orders.

For more information, see Order decomposition.

**order tracking**

Monitoring order locations and statuses.

## P

**pipeline**

Early-stage opportunities with uncertain closure.

**pipeline analysis**

Analyzing sales pipeline progression.

**point of no return (PONR)**

The point after which orders can't be changed or canceled.

For more information, see .

**price list**

Definitions identifying pricing features and product or service prices.

**price list defaulting matrix**

Specifying conditions for default price list usage.

**price list line**

Entries within price lists identifying list prices.

**price point (pricing plan)**

Prices calculated after specific pricing plan steps.

**pricing adjustments**

Modifications to standard list prices.

**pricing adjustments for bundled products**

Price adjustments defined for product offerings when they are sold as part of a product bundle.

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**pricing engine**

A component calculating and applying pricing strategies.

**pricing entities**

Pricing-related elements exportable between ServiceNow instances.

**pricing extension points**

Integration points for customizing the pricing engine.

**pricing matrix**

Frameworks for complex pricing adjustments.

**pricing plan**

A customizable sequence of steps that determine the final price of a product or service. It includes various pricing calculations and adjustments, such as base price determination, discounts, and markups.

**pricing plan step**

Stages within pricing plans applying specific calculations.

**pricing strategies**

Methods determining product and service prices.

**product**

Items or services offered, configured, quoted, and ordered.

**product attribute-based pricing adjustment**

Adjustments based on certain product characteristics.

**product configurator**

A user interface embedded within various ServiceNow Sales CRM applications (Opportunity, Quote, and Order Management) that enables agents to dynamically configure complex products or services according to customer requirements, displaying product hierarchy, option selection, and current pricing.

**product hierarchy (product configurator)**

A section within the product configurator that lists the parent and child product relationships for configurable products, helping agents navigate nested bundles.

**product data model**

A structured representation of a business's offerings that separates commercial, service, and technical attributes to support the entire lead-to-cash process.

**product offer bundling**

Allows for the creation of product offer bundles with an offer hierarchy using product offer relationships and relationship groups. These bundles can reference a product specification or specification hierarchy at any level.

**product offer eligibility**

Dynamically filters product catalogs, product offering categories, and product offerings to display only eligible items for a specific customer, based on context such as customer accounts, location, and sales contracts.

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### product offering catalog

The top-level entity in the catalog hierarchy. Catalogs can contain categories, which in turn can have subcategories or product offers.

### product offering category

Logical groupings of product offerings within a catalog, making it easier for agents to browse and navigate product offerings.

### product offering recommendations

Suggestions for additional products that agents can use to up-sell or cross-sell to customers in quotes, displayed as cards in the contextual side panel.

### product offerings

Configurable, order-able products and services with pricing.

### product offering version

New iterations of published product offerings.

### product specification

Definitions of product options and fulfillment details, containing information such as the product description, pricing, eligibility, and product options.

### propose

Presenting offers to potential customers.

## Q

### qualified lead

A customer whose needs have been analyzed, resulting in the creation of an opportunity.

### quotas

Specific sales targets or goals that individual sales representatives are expected to achieve within a defined time frame, helping to measure performance and drive sales efforts.

### quote

A formal offer for products or services with specific prices and payment terms.

### quote expiration

The date after which a quote becomes invalid, requiring customers to request a new one.

### quote line items

Individual quote entries representing specific products or services, where characteristics and pricing can be updated.

### quote management

Process of creating and managing quotes for products and services.

### quote PDF documents

PDF documents created from quotes for customer review and electronic signatures.

### quote revision

Modifying a previously generated quote to reflect changes in price, products, or terms.

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### quote versions

Different quote iterations managed through the Revisions tab with sequential version numbers.

## R

### renew/expand

A classification indicating sales engagement nature: "Renew" for continuing contracts or subscriptions and "Expand" for up-selling or adding products or services.

### renewal

Extending an existing customer contract.

### resource specification

Technical information for resources, including visuals and activation guides, supporting product and service delivery.

### Return Merchandise Authorization (RMA)

Formal authorization for customers to return unwanted or defective items.

### revenue forecasting

Projecting future sales volumes or revenue based on opportunities, historical performance, and pipeline analysis.

### risk level (jeopardy)

Classification of fulfillment task risk based on delay percentage. Levels include Low, Medium, High, and Critical.

## S

### sales agreement

A binding agreement between seller and buyer for future transactions.

In the context of quote management, it is a binding agreement changing quote workflow to set products or services according to agreement terms.

### salesforce automation

A software that automates a business's sales processes, including lead and opportunity management, sales forecasting, and territory management.

### sale cycle

Lead progression through stages until becoming a qualified opportunity and resulting in a sale.

### sales cycle type

Classification of opportunity into different sales cycles such as New Customer, Renewal, or Up-sell (to name a few).

### sales forecast dashboard

A visualization tool displaying sales forecast information and targets.

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**sales forecasting**

Projecting future sales or revenue based on opportunities, historical performance, and pipeline analysis.

**sales process record**

A ServiceNow record tracking potential sales through stages.

**sales-qualified lead**

A lead meeting specific criteria, ready for sales engagement.

**sales quota management**

Assigning sales quota targets to representatives or managers based on hierarchy, role, and forecast period.

For more information, see Set up sales quota.

**sales targets**

Specific goals or objectives for sales teams, territories, or representatives.

**self-service**

Customer capability to perform tasks and access information independently via Business Portal.

**sequence step**

Individual activities within sequence tasks, such as customer calls or emails.

**sequence task**

System-generated tasks including predefined activities for sales agents while engaging with a prospect or customer.

**service order**

Orders for activating new services or post-sales requests.

For more information, see Order types in Sales Customer Relationship Management.

**shipment**

Delivering ordered products to specified locations.

**signers (quote PDF)**

Individuals designated to sign quote PDF documents.

For more information, see Set up PDF document signers.

**staggered decomposition**

Breaking down customer orders in multiple iterations.

For more information, see Staggered decomposition.

**strong upside**

Opportunities with high potential to close but minor uncertainty.

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## T

### telesales

Process of engaging with prospects or customers via phone calls with the goal of generating leads, making direct sales, and building customer relationships.

### total annual contract value (ACV)

Total annual contract value representing yearly revenue.

### total annual recurring revenue (ARR)

Cumulative annual recurring revenue for recurring products or services.

### total monthly recurring revenue (MRR)

Cumulative monthly recurring revenue for recurring products or services.

### total contract value (TCV)

Total revenue expected over a contract's lifetime.

### transaction header

Top-level line of Sales CRM transactions providing basic information.

### transaction line

Detailed records in orders and quotes representing specific products or services.

### transient products

Single-use products and services that are identified as transient to differentiate them from persistent products.

## U

### unit of measure

Standard quantity/increment defining product offering amounts.

### up-sell

Sales strategy encouraging customers to upgrade products.

### upside

Opportunities with potential to close but lower certainty.

## V

### versioning

Tracking or managing different versions of entities in Sales Customer Relationship Management.

### volume pricing

Pricing adjustments based on item quantity.

For more information, see Configure volume pricing.

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## W

**weighted amount**

Total revenue adjusted by the probability percentage of closing the opportunity.

**win rate**

Performance metric reflecting successfully closed opportunities as "Won" compared to the total number of opportunities.

**won**

Forecast category for successfully closed opportunities.

**workflow**

Defined sequence of steps automating processes in Sales Customer Relationship Management.

## X

## Y

## Z

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