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Brazil Retail Industry

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Retail

The ServiceNow® Retail product empowers managers and associates to manage daily retail operations by automating tasks and resolving issues quickly with self-service, freeing up time to serve customers. It enables seamless two-way communication and visibility between stores and HQ. It helps in delivering a great customer experience while enhancing staff productivity and reducing costs.

Get started

Explore Learn more about the benefits of Retail and how it's used.	Configure Install Retail and configure your environment.	Manage customer complaints Create, track, and close customer complaint cases in Workspace.
Manage store inquiries Create, manage, track, and resolve the store inquiries through the retail portal, workspace, or mobile app.	Manage Break-Fix cases Report, track, and resolve equipment failures through Break-Fix cases.	Manage Store Audit Create, generate, and complete store audit cases and tasks.
Track store inquiry cases Track store inquiry cases from the Retail portal.	Manage store plans Manage store plans to plan and schedule generation of cases and tasks	Track and monitor store plans Track and monitor store plans from the workspace.

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ServiceNow Otto	Reference	
Use ServiceNow Otto for Retail Service Management to help headquarters support agents efficiently manage and resolve store inquiries using generative AI.	Get details about Retail components such as fields, tables, and properties.	

Additional resources

- Learn more about what's new and changed in this release at https://www.servicenow.com/docs/access?context=retail-rn&version=brazil&pubname=brazil-release-notes&ft:locale=en-US.
- Log into your ServiceNow account and find additional information about implementing and deploying Financial Services Operations features at Best Practices.
- Work with an implementation specialist to streamline your Financial Services Operations setup process. To learn more, see ServiceNow Impact.
- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Connect with other Retail users in the Retail and Hospitality community forum.
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Retail

Whether you're starting or expanding your implementation of the Retail application, learn more about the features available to optimize your retail organization.

Retail overview

The Retail applications streamline operations and optimize communication within retail organizations and with headquarters. By building on the existing functionalities of Customer Service Management and Field Service Management, this application optimizes workflows, improves coordination, and supports both frontline and backend operations to run smoothly and efficiently.

https://player.vimeo.com/video/1163776672?badge=0&autopause=0&player_id=0&app_id=58479

Retail helps you accomplish the following:

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- Enable front-line employees and managers to report issues on behalf of the stores they're associated with.
- Help reduce calls to the call center, reduce or eliminate truck rolls, and enable store-based case management.
- Get better visibility into store performance, which can also drive improvement in metrics for store support.
- Streamline task assignment from teams at headquarters(HQ) to multiple retail organizations at once.

Retail users

Users

User	Description
Store Associate	Store associates who perform store tasks, organize the store, are often the first to notice and report issues, and engage with customers.
Store Manager	Store managers who manage the store, address issues, or request help from the central operations team if needed. If issues aren't resolved in time and manage staff and schedules, they step in to contact local vendors.
Regional Manager	Regional managers who oversee multiple retail locations, staying aware of issues and their resolution status across the area's hierarchy.
Area Manager	Area managers, also called market managers,who oversee multiple regions and stay aware of issues and resolution status across their store hierarchy.
Central Operations Support	Central Operations Support or the HQ Operations team who addresses store questions and needs, performs issue resolution, and interfaces with company field staff or third-party vendors in coordination with Store Manager. They’re responsible for creating tasks and standard operating procedures. They're acting as the fulfilling agent for cases routed to them, including the cases related to security, IT Service Management (ITSM), and Central Customer Support.

For more information on the roles that come with Retail Core, see .

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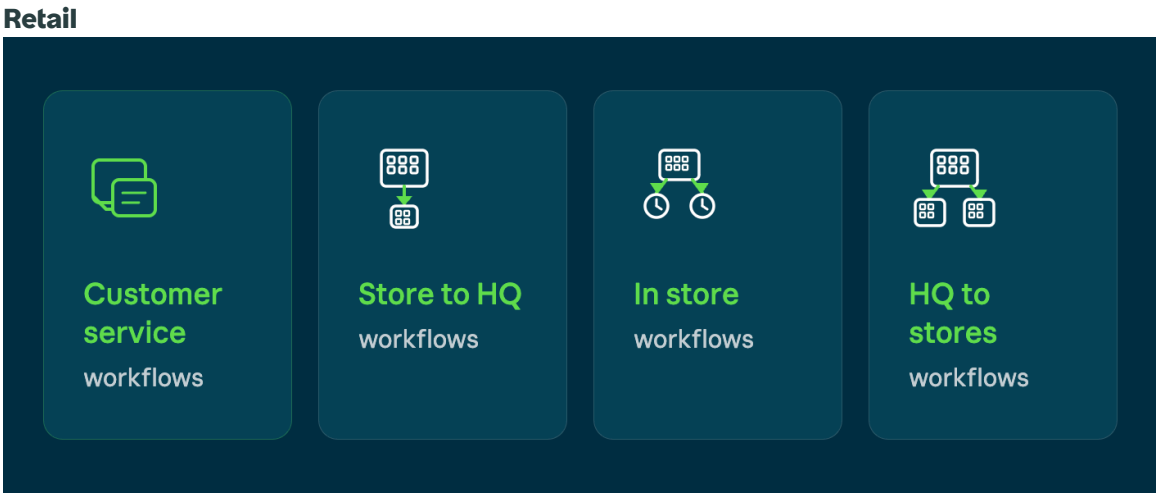
Retail workflow



Retail case types are designed to address various business needs and streamline workflows for store-level and HQ-driven task management. Each case type is essentially a new case application with its own table, workflows, and UI experience that drives the end-to-end flow from issue to resolution.

The case types available are:

- HQ communications case: Initiate and coordinate large-scale actions across multiple stores with the HQ communications case type in the Retail HQ operations plugin.
- Store inquiry case: Streamline the process for contacting HQ for store-to-HQ cases with the store inquiry case type in the Retail Store Services plugin, which provides a clearly defined workflow for resolution at HQ.
- In-store operations case: Standardize the reporting, tracking, and resolution of in-store issues with the in-store operations case type in the Retail in-store operations plugin. This case type contributes to structured assignments of store cases and tasks, reducing the time to resolution.
- Customer complaint case: Help ensure quick and efficient customer service resolutions by capturing store-related complaints from customers using the customer complaint case type in the Retail customer complaint plugin.

Retail data model

Retail benefits

Benefit	Feature
Helps to create and maintain Retail organization and Retail specific attributes on it.	Retail organization data model
Covers the unified data model of cases and tasks in Retail. It helps in solving the Retail workflows.	Retail unified case and task data model

Retail data model also includes:

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- Retail task: A retail task is an operational activity in a retail environment that ensures smooth store functioning, customer satisfaction, and compliance. These tasks can be manual or system-generated and are typically part of broader workflows managed by HQ or regional teams.
- In-store operations task: In-store operations task is used to support daily in-store activities. These tasks are typically tied to a store-level case and are executed by store associates or managers.

What to explore next

To learn more about configuring and using Retail, see:

- Configuring Retail
- Manage customer complaints
- Manage store inquiries
- Track cases and tasks from the Retail portal
- Retail reference

Retail case overview

The Retail case table stores information about your retail case types and provides the base for retail case creation. This table extends the Customer Service Management case table. All fields utilized through Customer Service Management case remain intact.

An abstract case (or abstract case type) refers to a base configuration of a case that is not meant to be used directly but is instead designed to be extended by specialized case types.

The abstract Retail case will include only the shared logic such as common fields, Business rules, flows, UI policies, and access controls (ACLs). Each specific case type will then extend this base and focus solely on its unique logic. This approach enables cleaner architecture, easier scaling, and tailored user experiences for different case types.

The retail case type introduced within retail builds on existing Customer Service Management case functionality to provide users with retail-specific fields. For more information on these changes, see the Impact analysis and guidance: Retail case table updates [KB2216547] article in the Now Support Knowledge Base.

You can extend your own case types. For information on using retail case types, see Manage customer complaints and Manage store inquiries.

For retail case table attributes, see Retail organization data model tables. For unified data model of cases and tasks, see Retail unified case and task data model.

Retail portal

Retail portal provides an enhanced experience to use self-service tools, view cases, and gain visibility into metrics for your retail organizations.

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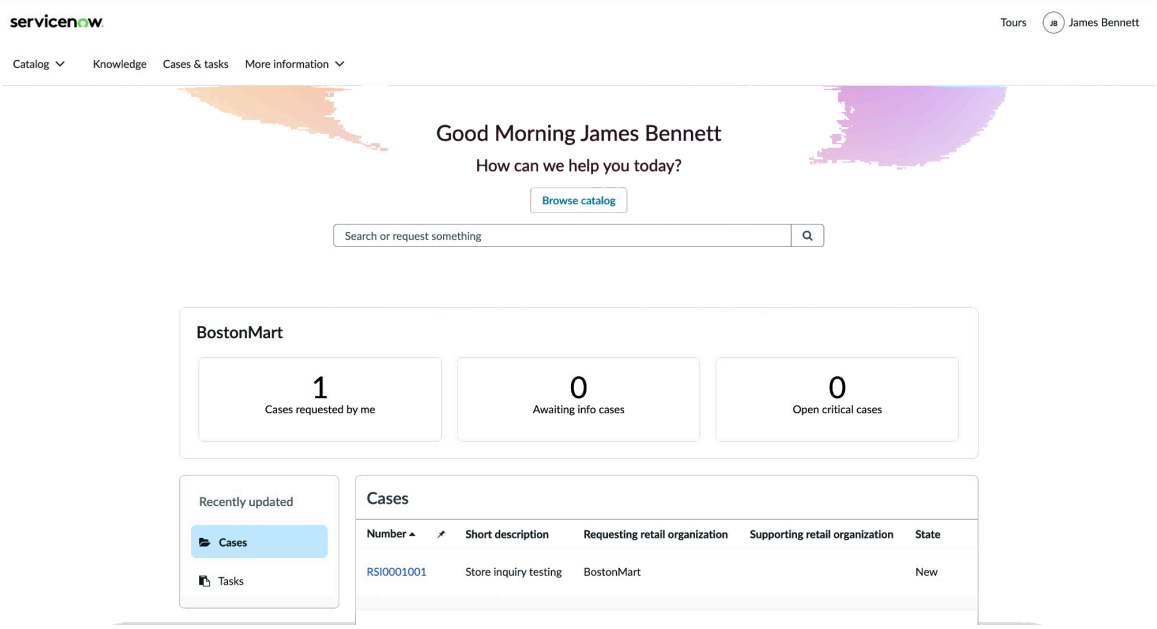

The Retail portal landing page provides the following information at a glance:

- Custom KPIs related to your retail organization's cases. Select a KPI to view a more detailed list.
- Cases and tasks recently updated by your team.
- Popular articles from your knowledge base.

The key features that are available on the home page of the Retail portal:

- Catalog: Accessing catalog items such as store inquiry
- Cases & tasks: Viewing and managing cases and tasks
  - Assign a case or task to yourself
  - Close cases
- Knowledge: Viewing knowledge articles
- More Information: Viewing your associated retail organizations

Retail portal provides a responsive portal experience that can be used by the team members of your retail organization from retail associates to retail managers.

For information on using Retail portal, see the following topics:

- Add and configure the Retail KPI widget
- Create a store inquiry case from the Retail portal
- Manage a store inquiry case from the Retail portal
- Track cases and tasks from the Retail portal

Retail mobile application

The Retail mobile plugin offers a customized mobile experience for retail operations, enabling frontline teams to manage efficiently store activities and resolve issues on the go. It provides real-time insights into key KPIs, supports issue tracking, and is compatible with both Android and iOS platforms.

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The Retail mobile app supports creation of cases through store inquiry case type. It provides real-time insights into key KPIs, supports issue tracking, and is compatible with both Android and iOS platforms.

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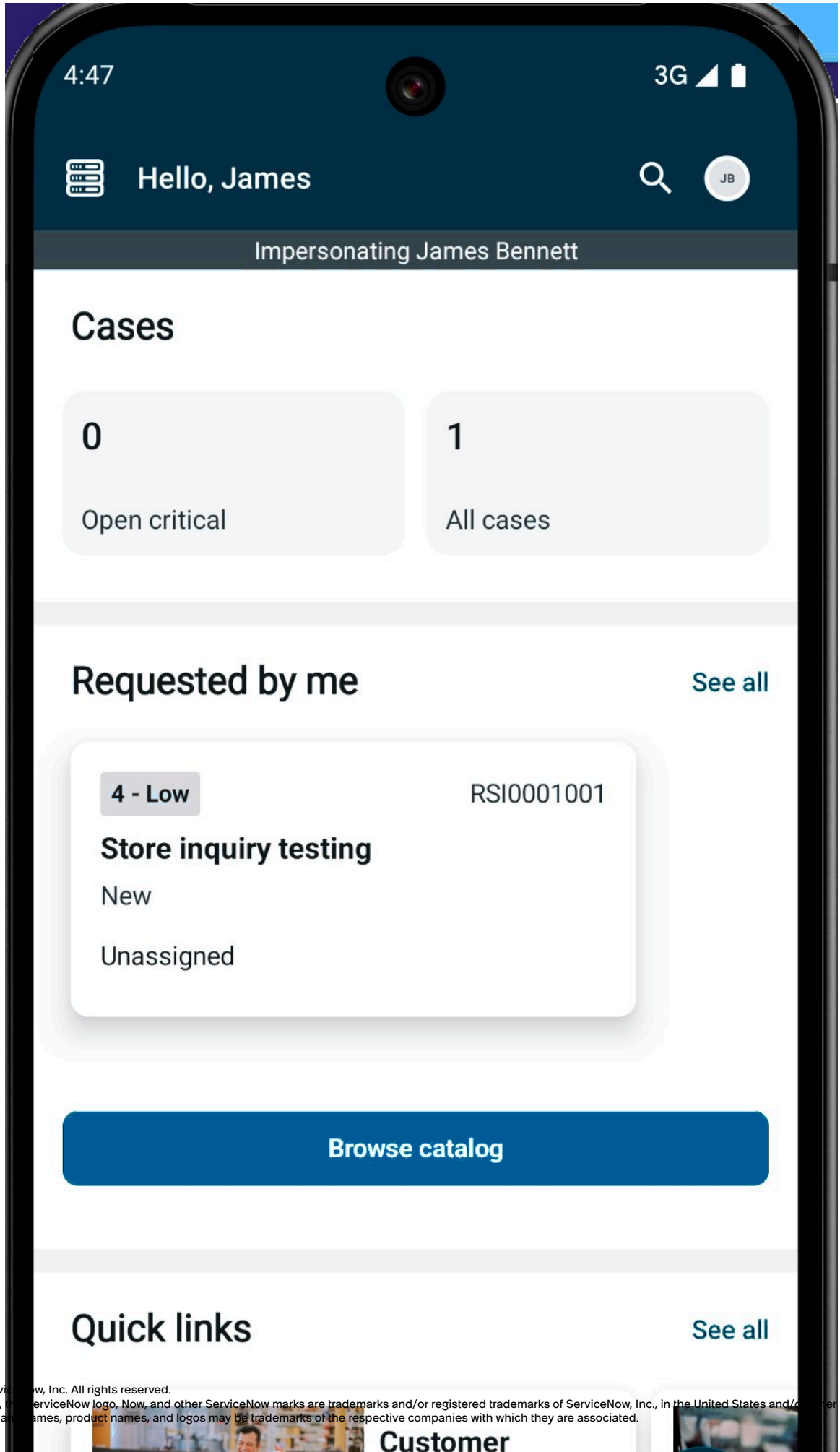

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Menu Options

The key features that are available on the home page of the Retail mobile application:

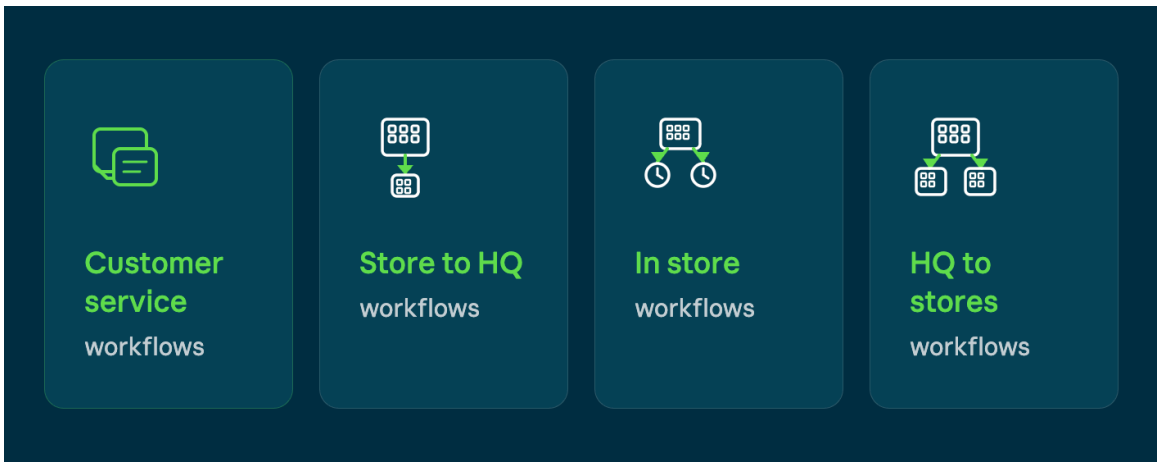
- **My Store**: includes all Store inquiry cases.
  - Cases: displays the Open Critical and All cases KPIs.
  - Requested by me: displays cases that are requested by you.
  - Quick links: displays the most frequently visited links.
  - Store details: displays the details of the store.
  - Store members: lists the members of the store.
  - Knowledge articles: lists all the knowledge articles.
- **My Work**: is available only for the fulfiller for whom the cases are assigned.
- **Notifications**: includes all notifications.
- **Saved**: includes bookmark option to save link.
- **Settings**: includes setting options for the persona.

For information on using Retail mobile app, see the following topics:

- Create a store inquiry case from a mobile app
- Manage a store inquiry case from a mobile app

Retail case types

Retail case types are designed to address various business needs and streamline workflows for store-level and HQ-driven task management.



Case types are needed when an organization has different processes for supporting customers across multiple use cases, departments, business units, or products. Case types help to separate these processes through separate applications to support each process.

Retail customers have a diverse set of processes for end customers. Depending on how distinct these processes are, each type of process could be a separate case type. In conclusion, if the extension requires capturing of newer attributes that fit the new use case, use case types. If the same attributes of the retail base case can handle slightly different use cases, use service definitions.

Example: Various issues such as reporting an issue, recall, theft at the store, reporting a crash, and safety issues can share the same set of captured attributes. They differ primarily in their

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processes. These processes include capturing attributes, following a playbook, applying business rules, and fulfillment. You can use the same case type of retail base case and define these use cases as different service definition on top of it#.

For each case type, you must create a table that extends the retail base table. You must also configure several items, such as business rules and client scripts. These configurations drive customer issues of this type from creation to resolution.

Note: Customers using the retail case table will no longer be able to create cases or update the existing cases. Customers should use case types instead.

The case types available are:

Store inquiry case

Customer complaint case

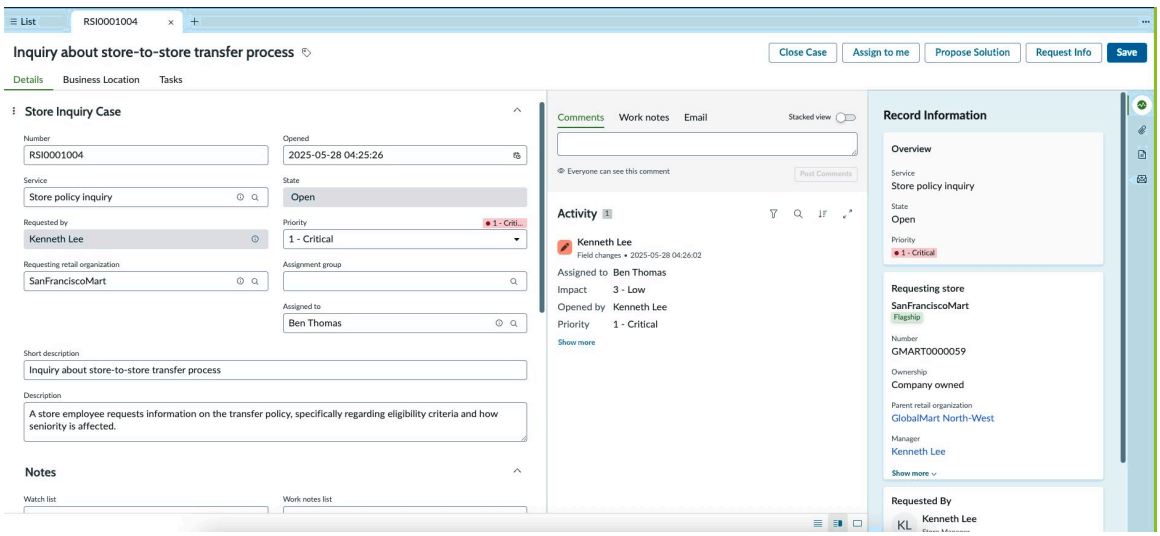
HQ communications case

In-store operations case

Customers can also extend their own case types other than the newly added case types. For more information on these changes, see KB2216547.

Store inquiry case

The store inquiry case type facilitates seamless communication between store teams and headquarters, enabling efficient exchange of operational queries, information, and issues. This case type is included in the Retail store services plugin.



The store inquiry case type, built on Retail Core. It enable store associates and managers to create store inquiry cases for operational questions or issues. These cases are then fulfilled by headquarters.

By using the store inquiry case type, retail stores can:

- Reduce errors and costs associated with operational questions, information, or issues.
- Reduce compliance issues and improves processes.
- Improve employee productivity.

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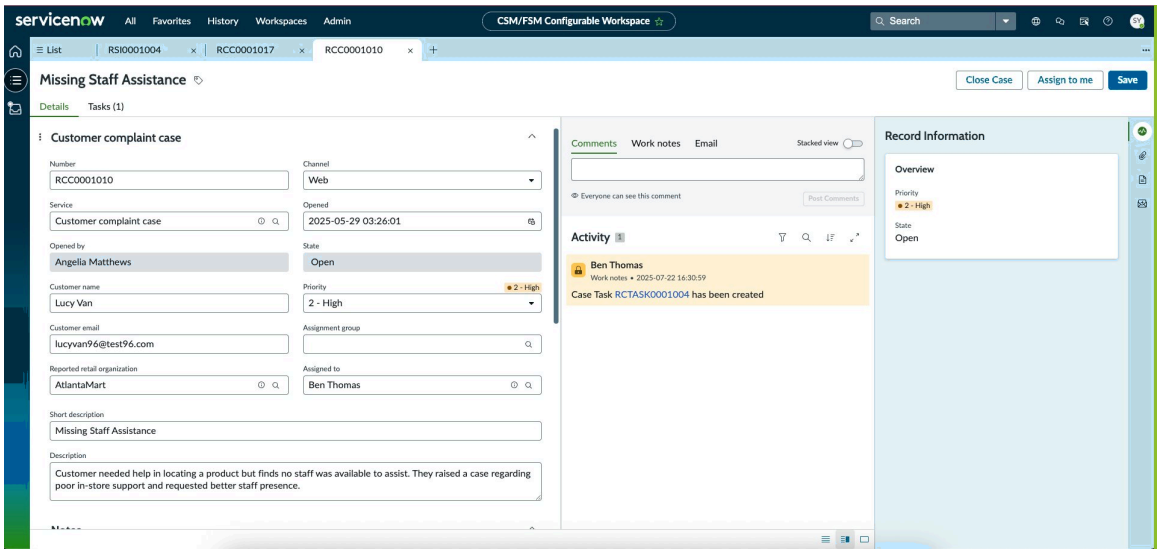
Example: Store employee creates a store inquiry case to inquire about store-to-store transfer process. This request is made to seek information on transfer policy and eligibility criteria

For information on the components installed with store inquiry case type, see Components installed with Retail Store Services.

Customer complaint case

The customer complaint case type helps manage and resolve customer feedback related to store experiences. This case type enables customers to submit complaints anonymously to encourage honest feedback and help stores improve their service. This case type is included in the Retail customer complaint plugin.



The customer complaint case feature enables back-office teams to capture, classify, route, resolve, and measure retail complaints, providing transparency and ease. Customers reach out to HQ and register complaints via email or phone call. If they provide an email address, HQ agents create a customer complaint case on their behalf and potentially share case information with them.

- Rude Employee at Store – Shoppers sometimes receive poor support from store staff, such as being ignored or treated rudely.
- Hygiene issue at Store - Shoppers sometimes encounter poor hygiene at stores, such as unclean floors, poorly handled aisles, staff not adhering to proper sanitation protocols.

For information on the components installed with customer complaint case, see Components installed with Retail customer complaint.

Note:

In accordance with the Australia Security Directive, designated fields are required to be read-only to enforce appropriate access controls. This requirement is implemented at the user interface layer through UI Policies, ensuring that restricted fields cannot be modified while preserving consistency with established platform security patterns and maintaining configuration flexibility.

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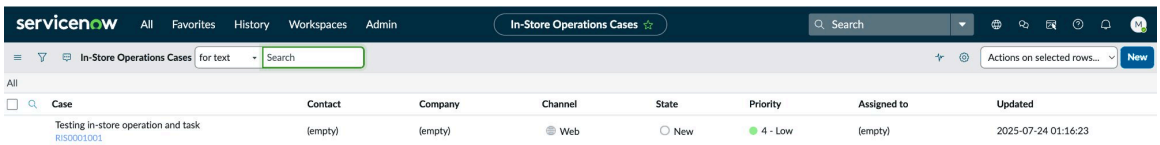
HQ communications case

The HQ communications case enables effective coordination between HQ teams. It facilitates the execution of assigned work and allows HQ teams to monitor progress. This case type is included in the Retail HQ operations plugin.

For information on the components installed with HQ communications case, see Components installed with Retail HQ Operations.

In-store operations case

The in-store operations case type allows store team members to report and track in-store operational issues, whether for routine or cyclical demands. This ensures that issues are documented and monitored for consistent execution and support. This case type is included in the Retail in-store operations plugin.



In-store operation task is used to support daily in-store activities. These tasks are typically tied to a store-level case and are executed by store associates or managers. In- Store operations Task table is installed with this case type. For more information on table details, see Components installed with Retail In-store Operations.

For information on the components installed with in-store operations case, see Components installed with Retail In-store Operations.

Retail store plans

The Retail store plan provides a centralized way to plan, schedule, and manage operational work across multiple stores, giving HQ and regional teams full visibility while simplifying execution for store teams.

Retail operations teams often need to roll out initiatives—such as audits, promotions, safety checks, or recalls—across many stores at once. Managing this work through emails, spreadsheets, or disconnected systems makes it difficult to stay organized, track execution, and ensure consistency.

Retail store plans tracking

Store plan Tracking gives headquarters and regional operations managers real-time visibility into published store plan progress, from overall completion summaries down to individual store tasks, so teams can identify and address delays before they become failures.

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Once a plan is published and cases are generated, the **Track Plan** tab gives plan authors a structured view of how each store is progressing for a selected schedule occurrence.

- Plan-level rollup - A consolidated view of execution progress across all stores assigned to a published plan, reported for one schedule occurrence at a time.
- Drill-down navigation - A structured path from a published plan through to parent HQ cases, store cases, and individual store tasks to enable managers to investigate specific delays without losing context.
- Consistent case access - Parent and child cases are accessible from the plan record, plan type list, and retail case views to eliminate the navigation friction that forces teams into ad-hoc case searches today.

Store Plan Authoring handles the design and scheduling of plans to define tasks, link store locations, and trigger case generation on a schedule. Execution Tracking picks up from the point of publication and provides the operational oversight layer that Authoring does not cover.

Stages of store plan tracking and monitoring

A store plan moves through distinct phases, each supported by specific screens and interactions. Tracking activates from the point of publication onward.

1. Plan authoring - An HQ operations manager or regional manager (for HQ communications plans), or an audit manager or location audit manager (for store audit plans), creates a store plan that defines the plan type, tasks to be completed, store locations to assign, and a schedule (immediate, one-time, or recurring). This phase exists entirely in the Store Plan Authoring capability released in March 2026. Execution Tracking does not begin here.
2. Plan publication and case generation - Once the plan is published, the system generates parent HQ cases and child store cases (audit cases and audit tasks for a store audit plan) according to the schedule. Each store assignment produces one store case containing the relevant tasks. For an immediate plan, records are generated when the plan is published. For one-time and recurring plans, records are generated when the schedule runs. For a plan that runs on a recurring schedule, each occurrence produces its own set of cases and tasks, and tracking is always scoped to one occurrence at a time.
3. Plan progress review - The Track Plan tab on the published plan reports overall completion for the selected occurrence, so an HQ operations manager can see the proportion of store cases closed and how many are open, overdue, or closed without opening individual records. The total number of store cases is also shown in the plan progress summary, and the full list of store cases for the occurrence is displayed below. Selecting a count moves straight to the matching records.
4. Store-level execution - Regional managers access the store case list for their region, drill into specific store cases, and review the tasks being worked. They can monitor task-level status, reassign work, or flag blockers. This is the primary execution layer — where stores actually complete the plan.
5. Task and case closure - Once store tasks are completed, store managers close their store tasks, and HQ managers close the HQ tasks once the underlying store tasks are complete. The HQ case closed state marks the end of the plan execution cycle for that store assignment.

Scenarios for tracking store plans

Tracking can support several operational goals.

HQ Manager:

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- Product recall oversight - When a product recall plan is published, the HQ manager needs to confirm that all assigned stores have acknowledged, actioned, and closed their recall tasks within the compliance window. This capability helps the manager can escalate directly rather than waiting for ad-hoc status emails from regional teams.
- Promotional campaign rollout - A seasonal promotional campaign requires consistent merchandising setup across 200 stores by a fixed launch date. HQ uses the plan-level view to track store-by-store progress, filter by state, and identify stores at risk of missing the launch window before the campaign goes live.

Regional Manager:

- Store-level execution review - The regional manager is responsible for a cluster of stores within a region. The manager accesses the store case list to review which stores have open tasks, drills into an individual store case to understand what is blocking progress and reassign tasks as needed from within the case record.
- Safety audit compliance - Safety audits require documented task completion at every store location. The regional manager uses tracking to verify that each store in the region has completed the required audit tasks before the compliance deadline and can confirm closure through the HQ case.

HQ Manager and Regional Manager: Recurring operational plans - For plans scheduled on a recurring basis such as weekly stock counts, monthly safety checks. Both HQ and regional managers use the Track Plan view to monitor the current cycle's execution state and compare completion rates across cycles over time.

Implementation details

The following table captures each screen in the tracking flow and the interaction pattern it uses.

Screen	Description
Plan list	Expanded plan row surfaces HQ cases inline. Serves as the unified entry point for all downstream navigation.
Plan details	Reuses the existing playbook tab view. Displays plan-level configuration and task definitions. No new interaction patterns required.
Track plan	Displays the HQ cases and the state of the cases.
HQ case - details	Store Record Page layout.
HQ case - task list	Closing Case playbook applied at the HQ level. Lists HQ tasks with state. Reuses the BPL (Best Practice Library) playbook interaction model.
Store case	Shows list of store cases under the parent HQ case.
HQ task - details	Shows list of HQ task details.
Store case - details	Shows list of store case details.
Store tasks	Shows list of store tasks with the state.
Store task - details	Shows list of store task details.

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Retail questionnaire

Create customizable questionnaire templates to collect customer feedback and survey data for retail operations. Templates can be customized for specific business needs.

Questionnaire templates in Retail Operations provide a standardized framework for conducting surveys, and gathering operational data. These templates simplify survey creation by providing predefined question types, response formats, and data fields, which can be customised for specific retail scenarios.

Benefits of questionnaire templates

Using questionnaire templates offers several advantages for retail operations:

- **Consistency**: Standardized question formats ensure uniform data collection across different surveys and locations.
- **Data quality**: Structured templates help maintain data integrity and improve response quality.
- **Scalability**: Templates can be deployed across multiple retail locations or departments.

Types of questionnaire templates

Retail Operations supports various types of questionnaire templates designed for different business scenarios:

Questionnaire template types

Template Type	Description	Common Use Cases
HQ Communication	Templates focused on creating questionnaires for selected stores	Promotional campaign rollout,Product recall oversight
Product Feedback	Templates designed to collect opinions and reviews about specific products	Product reviews, feature requests, quality assessments
Employee Engagement	Templates for gathering feedback from retail staff and employees	Job satisfaction surveys, training feedback, workplace environment assessments
Market Research	Templates for conducting market analysis and customer behavior studies	Brand awareness studies, purchasing behavior analysis, demographic research
Operational Assessment	Templates for evaluating store operations and process effectiveness	Store audits, process improvement surveys, compliance assessments

Smart Assessment questionnaires for Retail

Smart Assessment enables users with the sn_rtl_hq_ops.plan_author role to create smart assessment templates and associate them with store tasks.

Use Smart Assessment templates to enhance questionnaires for a Now Mobile Agent application.

Use the Smart Assessment Engine template designer to do the following:

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- Create and customize the assessment templates for questionnaires.
- Set the assessment parameters such as the question types, justifications, and conditional visibility.
- Configure conditional questions based on responses of all other types of questions and across sections.

For more information, see Smart Assessment Engine.

Configuration overview

For information on setting up Smart Assessment, see Activate and enable Smart Assessment for Field Service questionnaire.

Assessment Reader Role Field in Smart Assessment Templates

The **Assessment Reader Role** field determines which users can view questionnaire responses submitted by store associates. When responses must be accessible to other users, this field is configured in **Settings** > **General** on the Questionnaire Authoring page. Users assigned to the specified role can access the submitted responses.

HQ Communication Use Case: For scenarios where plan authors need visibility into submitted Smart Assessment responses, the sn_rtl_hq_ops.plan_author role can be leveraged, as the required persona already contains this role.

The#**Assessment Reader Role** field determines which users can view questionnaire responses submitted by fulfillers.

Category-based access to templates

Control access to templates using roles defined on the Category record.

The HQ Communication category is a predefined category configured with the role sn_rtl_hq_ops.plan_author.

Users with this role can:

- Access the HQ Communication category
- View and use templates associated with the category
- Create and manage templates within the category, based on additional permissions

Prerequisite Plugins for Questionnaire Authoring

To use the questionnaire feature released in June as part of the authoring experience, ensure that the following plugins are installed:

- Retail Playbook for Store Plan
- Retail In-Store Operations
- Smart Assessment for Field Service Questionnaire
- Smart Assessment for CSM

Create questionnaire for a store plan

Create questionnaire for a store plan on CSM/FSM Worskpace.

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Before you begin

Role required: sn_rtl_instore_ops.manager

Procedure

1. Navigate to **Store plan** > **All**.
2. Select **New** > **HQ communication** > **Create plan**.
3. Add HQ details, HQ task details, store case details, and store task details.
4. On the Store task page, select a questionnaire template in the **Questionnaire template** or select **Create new questionnaire**.
5. Enter the name of the template in **Template name**.
6. Enter the description in the **Description**.
7. Select **Create**.
8. Enter the assessment template details in **General** > **Details**.
9. Enter preferred type of questions in **Questions** > **Add question**.

Add assessment reference	
Add instructions	

10. Enter preferred type of section details in **Questions** > **Add section**.

Question	
Required toggle option	
Type > Create choices to select from	Drop-down, radio button, checkbox
Type > Allow a freeform answer	Text, number,code
Other	Reference, attachment

11. Set preferred settings in **Settings**.

Duration of the assessment	Number of days
Assessment reader role	Assessment reader role is mandatory

12. Select **Continue** to create the store task.
    Store task page displays the store task name, questionnaire template name, and priority of the task.

Using smart assessment template designer

You can create assessment templates and add instructions, questions, and reference information by using the template designer in the Smart Assessment Engine application. Smart assessments can help you to evaluate various situations, aspects, or records.

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Smart assessment template designer

If you have the template manager [sn_smart_asmt.template_manager] or assessment admin [sn_smart_asmt.assessment_admin] role, you can create and update the assessment templates by navigating to **Workspaces** > **Assessment Workspace** and opening the template designer. Create or update the templates by accessing the Assessment Workspace landing page and selecting the existing unpublished assessment template or selecting **New template**.

The following example shows the assessment workspace landing page where you can view all templates and open the template designer.

Example of assessment templates view

In the template designer, you can view and edit the assessment template details on the **General** tab. From this tab, you can access the Settings page to configure the key settings, like the assessment duration, which sets the time frame for your responders to complete the assessment.

The following example shows the settings page for a draft assessment.

Example of the settings page

Triggering assessments

After you finalize and publish these templates, you can use them to trigger the assessments. For more information on triggering the assessments, see .

Note: You can create an assessment only from a published assessment template. If there isn't an associated active assessment, you can modify and publish these published templates again.

For more information, see and .

Adding the instructions and questions to a template

You can add instructions and questions as part of a new assessment template or an existing unpublished assessment template. Add instructions and questions by opening the template designer and navigating to the **Questions** tab. You can input instructions in the instructions text box to help set the clear expectations for your responders. You can also add sections to categorize your questions by different areas. Each section requires a name and specific questions.

The following example shows how to add a section.

Example of adding a section

You can use various types of questions and include a check box, text, date, and more with customizable attributes such as visibility, response, and justification requirements.

The following example shows some question types that you can use.

Question types

You can use instructions and questions to help gather precise and relevant information from your responders. For more information, see .

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Adding reference information to a template

You can add reference information that assessors can see while they complete the assessment. The reference information can include any live data from the assessment scope. For example, you can include information on any of the associated incidents, work notes, or domain. Adding necessary reference information to assessments can help minimize the need for external references. For more information, see .

Creating categories for an assessment template

You can add an assessment template category to a new or an existing unpublished assessment template but you must create a template category before it can be used for template data segregation. The template category selected for the assessment template determines who can access the template. You can't complete the creation of template categories within the template designer. To create a template category, navigate to **All** > **Smart Assessment Engine** > **Administration** > **Template Categories**. For more information on creating assessment template categories, see .

Searching in assessment templates

Search for text within the assessment template sections, subsections, or questions. The search results appear in place of the content tree, and the first match is highlighted. If no matches are found, a "No results found" message is displayed. You can select the search icon on the navigation pane to display the search box.

Assessment search

Retail case types

A case type represents the processes, data, and automation needed to resolve a specific type of retail issue.

Tip:

For general guidelines on implementing case types, read Best Practices to Implement Case Types, which covers:

- How to identify potential case type candidates
- How to structure leaf and base-level case types to support scalability
- How to use service definitions to define processes within case types

You must log in to download the best practices document.

Common use cases in Retail include:

- A store associate needs to ask headquarters about a store-to-store transfer policy.
- A customer complains about cleanliness at a store.
- A food safety manager at HQ needs to drive a product recall across hundreds of locations at once.
- A point-of-sale break/fix or other retail support issue may need support from groups or departments whose processes don't match traditional out-of-the-box process flows.

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- A point-of-sale break/fix or other retail support issue may require records in different tables. Examples include an Incident or Request for HQ IT teams, or a Work Order for facilities or field maintenance.
- A monitoring system may create alerts that only require action under specific conditions, requiring dedicated workflows separate from normal resolution patterns to surface actionable alerts to retail agents.

If these retail use cases were built into the same table, it would create significant technical debt. Each optimization to support one process also impacts the other processes running within that case type.

Each example use case requires distinct processes, automation, fulfillers, form requirements, categorization, and access, making each a candidate for its own case type. Optimizations made within one case type remain within that scope, and the impact on other processes running within Retail is negated.

Note: Retail implementations should use case types even when you are not starting from one of the prebuilt case types. Even if you have only a single process today, start with one case type instead of working records directly in the base case. This makes it easy to adopt additional case types later, whether from the retail product or from your own custom applications. As of the Zurich Q3 '25 store release, the Retail Case (`sn_retail_case`) table is abstract and can no longer store records directly, so a case type extension is required.

For more information on extending retail case types, see Extending the Retail base case.

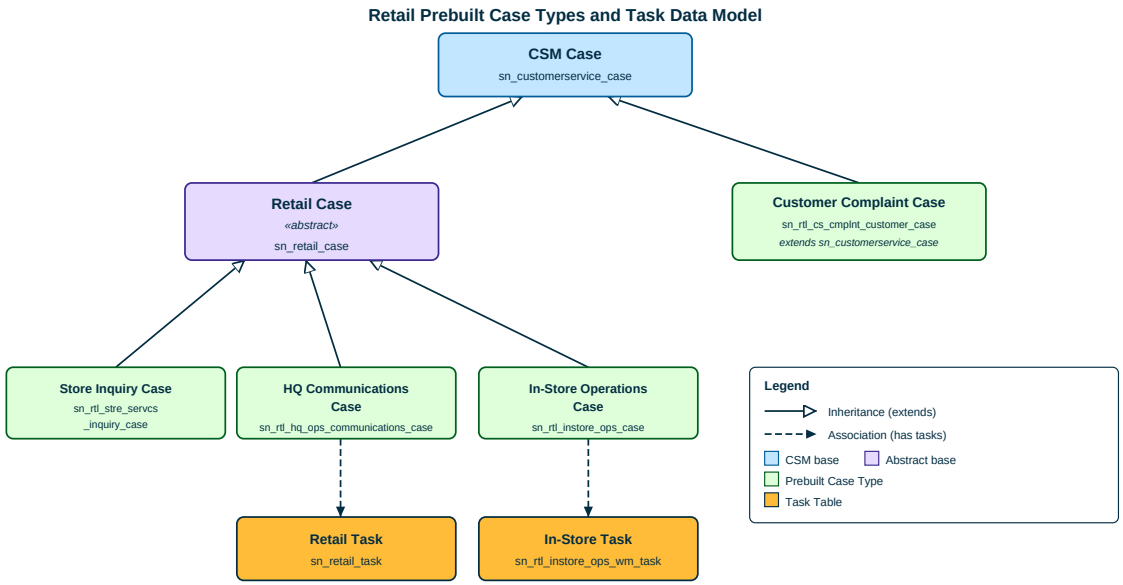
Related topics

Prebuilt Retail case types

Extending the Retail base case

Prebuilt Retail case types

Retail includes four prebuilt case types that extend the retail framework. Each is dependent on its own plugin and is tuned to a common retail scenario, so you can deploy quickly and stay consistent across locations.



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Prebuilt Retail case types

Case type	Purpose	Dependent on
Store Inquiry Case	Allows store associates and managers to raise operational questions, information requests, or issues to headquarters for fulfillment.	Retail Store Services plugin
Retail Customer Complaint Case	Captures, classifies, routes, resolves, and measures complaints about a store experience—supporting back-office transparency and efficiency.	Retail Customer Complaint plugin
In-Store Operations Case	Allows store teams to report and track in-store operational work—routine or cyclical—so execution is documented and monitored.	Retail In-store Operations plugin
HQ Communications Case	Coordinates with store teams by sending communications from HQ and, with the multi-store task plan capability, drives work from HQ to many stores at once.	Retail HQ Operations plugin

Note: As of the Zurich Q3 '25 store release, the Retail Case (`sn_retail_case`) table is abstract. Cases must be created in a case type extension, not directly in the base table.

Related topics

Extending the Retail base case

Service definitions in Retail

Extending the Retail base case

Extend the Retail Case (`sn_retail_case`) base case to create custom case types that take advantage of prebuilt roles, business rules, workflows, and the Retail data model rather than creating them manually.

For general guidelines on implementing case types, see Best Practices to Implement Case Types.

All prebuilt Retail case types—except for Retail Customer Complaint, which extends the base CSM case (`sn_customerservice_case`)—extend from the Retail Case (`sn_retail_case`) base case, which in turn extends the CSM case. Use the Retail base case as the starting point when adding a case type.

Criteria for creating a case type

Use the following questions to determine whether your organization needs a new case type or whether an existing service definition is sufficient. More "yes" answers indicate a stronger need for a new case type:

- Is a service definition not enough to support the process due to field attribute or automation requirements? If an existing case type's attributes already fit, define the new work as a service definition rather than a new case type.
- Is the process fundamentally different from every prebuilt and existing custom retail case type?

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- Are there different processes or integrations required based on work type, business unit, or the products and services being supported?
- Does the new process have a different state model than your existing ones?
- Are there meaningfully different attributes that need to be collected on the case during intake for this use case?
- Are there meaningfully different attributes for agents to capture on the case as they fulfill for this process?
- Does the fulfilling group interact with a different set of back-end systems to resolve the case?
- Do access and visibility requirements differ? For example, do the records generated for this use case have distinct view restrictions?
- Do fulfillers need a different workspace experience and guidance for this case type?
- Are there future scalability needs, or change-management considerations where shared intake forms and workflows would increase complexity across teams?

Related topics

Service definitions in Retail

Service definitions in Retail

A service definition describes a service that a retail organization offers to support its stores or customers. Service definitions build on case types to encapsulate different types of request and fulfillment processes within a single case type, without creating a new table for every variation.

Defining the services a retail service organization delivers is a foundational component of every Retail implementation. Without service definitions, the processes service definitions are meant to reflect are often incorrectly modeled in the category and subcategory field structures of cases.

Why service definitions matter

Categories and subcategories track the long-term root cause of cases—the why behind an issue. Without service definitions, category and subcategory values are commonly used to capture both the service being requested (the what) and the reason for the case (the why). This leads to category sprawl and reduced data quality because the category structure must serve two purposes.

By using service definitions to identify the requested service, category and subcategory values can focus solely on capturing the root cause of the case. This separation produces cleaner reporting data and makes it easier to identify trends over time.

Service definitions versus case types

Use a service definition when different work types share the same required attributes and automations within a single case type. Create a new case case type when the process requires fundamentally different fields, state models, or automation logic. For a full decision framework, see Extending the Retail base case.

Related topics

Service definitions

Create a service definition for multi-store cases in Retail Task Management Core

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Retail Store Audit Operations

Retail Store Audit Operations lets Plan Authors publish structured audit plans that automatically generate Store Audit Cases and Audit Tasks for field Auditors to complete across selected store locations.

Retail Store Audit Operations enables structured, repeatable store audit programs. Plan Authors author audit plans against pre-configured templates, select the store locations to audit, and publish the plan. Auditors then visit the stores, complete the generated work, and record their findings—all tracked on a single platform instead of spreadsheets or disconnected task lists.

Plan authoring and case generation

A Plan Author uses the **Store audit** playbook to configure audit template items, select store locations, and set a schedule, then publishes the plan. For an immediate schedule, the Store Audit Cases and Audit Tasks are created automatically as part of publishing—one Store Audit Case per selected store, with an Audit Task per case. For a one-time or recurring schedule, they are generated later at the scheduled time instead.

Platform assignment rules automatically set the assignment group on the new records. A Store Audit Manager can assign an individual Auditor if the automated routing needs correcting.

Auditor fulfillment

HQ Auditors complete their assigned Store Audit Cases in CSM/FSM Workspace; Location Auditors can also use Retail Mobile. Fulfillment centers on completing the questionnaire on each Audit Task, recording observations in work notes and comments, and progressing the case through New, Open, and Closed.

Note: The Store Audit Case and Audit Task list views don't have **New** or **Add** buttons—records are only created by the playbook or generation flow. Generated records remain visible from the **Retail cases** list.

Related topics

Field Service for Audit

Field Service for Audit

Field Service for Audit is a shared plugin that any product can use to create, assign, and track audit tasks on a common data model and access structure.

Field Service for Audit (`sn_fsm_audit`) provides the shared infrastructure that Retail Store Audit and other consuming products use to create and manage audit work. It defines a single audit task type, three roles, and a consistent outcome model so audit results are comparable across teams and products.

Field Service for Audit manages the underlying audit task data and access rules. Auditors read, update, and record outcomes on audit tasks. Audit Admins manage and delete audit task records. Authors create audit tasks on behalf of a workflow or process.

Note: Field Service for Audit does not include any user experience in current version.

Audit tasks

An audit task (`wm_audit_task`) is a work item that tracks and records the outcome of a single piece of audit work. It inherits standard assignment, scheduling, and lifecycle fields from the platform work-management task type and adds two audit-specific fields.

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Field	Description	Set by
Result	The Auditor's outcome — Pass or Fail. Empty until the Auditor sets it on completion.	Auditor
Task Plan Template Item	Links the audit task to a reusable task template. Visible only when the Task Plan Templates application is installed.	Author or consuming product

When an audit task is completed or cancelled, all fields become read-only for every role.

Access

Access to audit tasks is determined by role. Auditors can view and update tasks. Audit Admins can view, update, and delete them. Authors can create tasks but cannot open or edit existing ones.

Consuming products can set up additional access rules to further refine which audit tasks each Auditor can see and fulfill — for example, limiting visibility to tasks linked to cases already assigned to them.

Roles

Role	Persona	What this role enables
`sn_fsm_audit.author`	Consumer workflow or system actor	Create audit tasks. Access is limited to the creation form — cannot open or edit a task after it is saved.
`sn_fsm_audit.auditor`	Auditor or compliance reviewer	Read and update audit tasks. Set the Pass or Fail result on completion. Cannot delete tasks.
`sn_fsm_audit.audit_admin`	Privileged administrator	Full lifecycle access — create, read, update, and delete audit tasks.

Related topics

- Retail Store Audit Operations
- Grant Field Service for Audit roles
- Components installed with Field Service for Audit

Break-Fix Case Management

Break-Fix Case Management enables store staff to report and resolve hardware and IT failures through a structured workflow involving requestors, HQ support agents, and field service technicians.

Break-Fix Case Management overview

Break-Fix Case Management provides an end-to-end solution for managing equipment failures across store locations. Store staff submit cases for failed equipment (POS terminals, printers, scanners, etc.), HQ support agents diagnose and propose resolutions, and requestors accept or reject the proposed solutions.

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Three-Stage Workflow

1. **Request Submission (Portal/Mobile):** Store Manager, Store Associate, or Regional Manager submits case. Requesting store is auto-populated. Equipment is filtered by Install Base buyer organization.
2. **HQ Resolution (Workspace):** HQ Support Agent reviews case, selects service issue type, and proposes resolution (troubleshooting, incident, or work order).
3. **Requestor Response (Portal/Mobile):** Original requestor reviews proposed resolution and accepts, rejects with reason, or self-closes.

Key Characteristics

- **Auto-Population:** Requesting store automatically filled from user's service organization. Store-level users cannot change.
- **Equipment Filtering:** Equipment dropdown filtered by Install Base buyer organization. Only equipment registered to user's store appears.
- **State-Dependent Actions:** Available actions depend on case state. Close only in New state. Accept/Reject only in Resolution Proposed state.
- **Work Notes Reflect Linked Record Activity:** State changes and comments from a linked incident or work order are added as work notes on the break-fix case.
- **Role-Based Permissions:** BREAKFIX_AGENT (base) with sn_incident_write role for incident creation. sn_incident_read role for store associate, manager, or regional manager to view the incident.

Personas and Responsibilities

Store Manager / Store Associate

Submit cases via portal or mobile. Accept, reject, or self-close resolutions.

Regional Manager / Area Manager

Submit cases on behalf of managed stores. Accept, reject, or self-close resolutions.

HQ Support Agent

Resolve cases in workspace. Propose solutions via troubleshooting, incidents, or work orders.

Case State Progression

- **New:** Case created. Requestor can Close.
- **In Progress:** HQ processing. Requestor has no actions (read-only).
- **Resolution Proposed:** HQ proposed solution. Requestor can Accept or Reject.
- **Closed:** Resolved. History only.

Critical Data Relationship

Install Base Buyer Organization: Equipment is filtered based on the Install Base buyer organization field. Only equipment where buyer organization matches the user's current service organization appears in the equipment dropdown. This ensures store staff can only select equipment registered to their store.

Three Resolution Methods

Troubleshooting Steps

HQ documents instructions or KB references. For issues resolvable by store staff.

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Service Incident

HQ creates a linked incident for IT issues. Requires the sn_incident_write role, assigned to the Break-fix agent, to create the incident; the sn_incident_read role lets the store associate, manager, or regional manager view the incident. State changes and comments from the incident are added as work notes on the case.

Work Order

HQ creates a linked work order for hardware issues. State changes and comments from the work order are added as work notes on the case.

Related Tasks

- Submit Break-Fix Cases (Portal and Mobile)
- Resolve Cases in Workspace (HQ Agents)
- Respond to Resolutions (Portal and Mobile)
- Break-Fix Reference: States, Fields, and Data Model

Configuring Retail

Plan and configure your implementation of Retail.

Configuration overview

1. Activate plugins
2. Assign roles to Retail users

   Assign specific roles to give retail users visibility into organizations and the hierarchies they manage.

3. Configure related party configurations

   Configure the responsibilities of your retail staff by linking related party entity responsibilities to responsibility definitions.

4. Create a retail organization

   Create a retail organization to enable management of hierarchical stores and franchises that simplifies store associate management.

5. Add members to a retail organization

   Add members to your organization to enable them to view and complete tasks within your retail organization.

6. Configure your organizational structure

   Configure the structure of your retail organization within Retail Core.

7. Set up your retail support team

   Set up your retail support team by creating a group then assigning the sn_retail.support_agent role to members of that group.

8. Add and configure the Retail KPI widget

   Add a Retail KPI widget to your portal and modify its data, appearance, and behavior. You can use the Retail KPI widget to display report data in card format on your portal.

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Activate plugins

If you have the admin role, you can install the Retail applications.

Before you begin

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

Role required: admin

About this task

The following items are installed with Retail:

- Roles
- Tables
- Plugins
- ServiceNow® Store applications
- Related Party Configurations

For information about the components installed with each plugin, see respective associated links in Components installed with plugins.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Retail plugin using the filter criteria and search bar.
   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store 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 Store release notes.
3. If you're prompted, follow the links to the ServiceNow® Store to get any additional entitlements for dependencies.
4. Select **Install**.

   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.

Assign roles to Retail users

Assign specific roles to give retail users visibility into organizations and the hierarchies they manage.

Before you begin

Role required: user_admin

About this task

Roles control access to features, capabilities, and data in the Retail application.

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You can assign roles to individual users or groups. When you apply roles to groups, the members of those groups inherit those roles.

Note:

User roles can be configured during the initial setup process for retail organizations. The user roles can also be configured at any time thereafter as needed.

Users can log in as user_admin to assign roles.

For the list of roles included with each plugin, see the roles section in each of the plugin links in Components installed with plugins.

For instructions on assigning roles to individual users, see Assign a role to a group.

Procedure

1. Navigate to **All** > **User Administration** > **Users** then open a user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**.
4. Select **Save**.

Configure related party configurations

Configure the responsibilities of your retail staff by linking related party entity responsibilities to responsibility definitions.

Before you begin

Role required: admin

About this task

Area, regional, or store managers can be given any type of responsibility.

Name	Default responsibility
Store Associate	Location Contributor
Store Associate - Fulfiller	Location Agent
Store Manager	Location Manager Contributor
Store Manager - Fulfiller	Location Manager Fulfiller
Area Manager	Location Manager Contributor
Area Manager - Fulfiller	Location Manager Fulfiller
Regional Manager	Location Manager Contributor
Regional Manager - Fulfiller	Location Manager Fulfiller

You can add, remove, or change the responsibilities associated with your users. ServiceNow recommends that you create a new related party configuration instead of modifying existing configurations.

For more information, see the Organization Core responsibilities table in Create related party configurations.

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Related Party Configuration.**
2. To create a related party configuration, select **New**.
3. On the form, fill in the fields.
4. Select **Submit**.

Create a retail organization

Create a retail organization to enable management of hierarchical stores and franchises that simplifies store associate management.

Before you begin

Role required: sn_rtl.retail_admin

About this task

Procedure

1. Navigate to **All** > **Retail Service Management** > **Retail Organization**.
2. Select **All Organizations**.
3. Select **New**.
4. Fill in the following fields.

Field	Description
Identification number	Alphanumeric code used for identifying this retail organization. This field is optional.
Name	The name of this retail organization.
Ownership	The ownership type of this retail organization. Options are: ○ Company owned ○ Franchise
Parent Organization	The parent retail organization linked to this retail organization. Defines the hierarchy of the retail organizations that you create.
Type	The type of retail organization. Options are: ○ Business Organization ○ Business Group If you want to create a region or area, select Business Group. If you want to create a store, select Business Organization.
Retail Subtype	The retail subtype. Options are:

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Field	Description
	○ Store ○ Region ○ Division ○ Area ○ District
Business Function	Type of functions the business is involved with ○ Type: Glide List ○ Choice list values: Service, Sales ○ Default choice: Service
Manager	The manager associated with this retail organization. The user associated with this value is automatically assigned the Location Manager Contributor responsibility for this location.
Flagship	Indicates whether this retail organization is considered a flagship retail organization location.
Street	The street address at which this organization is located.
City	The city in which this organization is located.
Country	The country in which the organization is located.
ZIP/Postal Code	The ZIP/postal code associated with this organization's location.
Phone	The phone number associated with this retail organization.
Email	The email address associated with this retail organization.
Website	The website associated with this retail organization.

5. Select **Submit.**

Add members to a retail organization

Add members to your organization to enable them to view and complete tasks within your retail organization.

Before you begin

Role required: sn_rtl.retail_admin

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Procedure

1. Navigate to **All** > **Retail Service Management** > **Retail Organization**.
2. Choose the retail organization.
3. Select **Add Members** under Related Links.
4. Fill in the following fields.

Field	Description
Retail Organization	The associated retail organization that the member should be added to.
Add Member	Denotes if this user is a new member or an existing member. If this user is an existing member, you can use the Members panel to select the person from the Available panel. Then, use the right arrow to move them into the Selected panel.
First Name	Member's first name.
Last Name	Member's last name or family name.
User ID	The associated user ID of this member.
Email	The email address associated with this member.
Member Type	The type of member. Options are: ○ Store associate ○ Store associate - Fulfiller ○ Store manager ○ Area manager ○ Area manager - Fulfiller ○ Regional manager ○ Regional manager - Fulfiller

5. Click **Submit**.

What to do next

Ensure that this member has the appropriate role. For more information, see Assign roles to Retail users.

Configure your organizational structure

Configure the structure of your retail organization within Retail Core.

Before you begin

Role required: sn_rtl.retail_admin

About this task

In the retail organizational structure, physical stores, regions, and countries are organized in a hierarchy. Retailers commonly organize their structures based on these hierarchical levels.

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Depending on the size of the retailer, support teams can be organized at various levels within the hierarchy. Support teams can be distributed across regions and areas to provide the following types of support:

- Regional support
- Market support
- Central support helps across the entire retailer

Procedure

1. Navigate to **All** > **Retail Service Management** > **Retail Organization**.
2. Select the Retail organization that you want to configure the structure of.
3. Edit the **Parent Organization** field as needed.
4. In **Related Links**, you can set up your organizational hierarchy via adding a child organization to the current retail organization by selecting **New** in the Company Owned or Franchise tabs. This sets the current retail organization as the parent organization.
5. Click **Update**.

Set up your retail support team

Set up your retail support team by creating a group then assigning the sn_retail.support_agent role to members of that group.

Before you begin

Role required: user_admin

You can assign a role to a group to grant access to applications and modules to group members.

Before assigning the sn_retail.support_agent role to a group of users, you must Create a user group and then Add a user to a group.

When you assign roles to groups rather than to individual users, members of the group inherit the role.

When a user switches groups, the new group role is assigned automatically. For information about the Service Mapping roles, see Control user access to application services.

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select the group to which you want to assign a role.
3. In the **Roles** related list, select **Edit**.
4. Add the `sn_retail.support_agent` role to the group.
5. Select **Save**.

Add and configure the Retail KPI widget

Display report data in card format on your portal. You can display the report data by adding and configuring the Retail KPI widget.

Before you begin

The Retail Core [com.sn_retail_core] plugin must be activated. For more information, see Activate Retail Core.

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The page to which you want to add the widget must exist. For more information, see Create a page for Configurable Portal widgets.

Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, select a retail portal page.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button.
7. On the Widgets pane, in the#**Filter Widget** field, enter#**Retail KPI**.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Data List widget.
10. Select the Pencil icon( ).
11. On the instance options page, in the#**Data** field, paste the following JSON code to configure the lists.

```
[
 {
 "title": "KPIs for area manager and regional manager",
 "relatedPartyTypes": ["0598ebfd105a0e90f877992571046f22",
 "02a86f3510da0e90f877992571046f2e"],
 "reports": [
 {
 "report_id": "7e80564b43561210ae0a620465b8f2fc",
 "link": "/rsp?id=rsp_cases&category=escalated%20cases"
 },
 {
 "report_id": "8ec2120f43561210ae0a620465b8f253",
 "link":
 "/rsp?id=rsp_cases&category=action%20needed&sub_category=open%
20p1%20cases"
 },
 {
 "report_id": "e68538d743961210ae0a620465b8f2f2",
 "link":
 "/rsp?id=rsp_cases&category=action%20needed&sub_category=sla%2
0breached%20cases"
 }
 ],
 "order": 10
 },
 {
 "title": "KPIs for store manager fulfiller",
 "relatedPartyTypes": ["4c78677510de0e90f877992571046f17"],
 "reports": [
 {
 "report_id": "8ec2120f43561210ae0a620465b8f253",
```

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```
 "link":
 "/rsp?id=rsp_cases&category=action%20needed&sub_category=open%
20p1%20cases"
 },
 {
 "report_id": "f827385b43961210ae0a620465b8f2fe",
 "link":
 "/rsp?id=rsp_cases&category=cases&sub_category=unassigned"
 },
 {
 "report_id": "b297b45b43961210ae0a620465b8f272",
 "link":
 "/rsp?id=rsp_cases&category=cases&sub_category=my%20assigned%2
0cases"
 },
 {
 "report_id": "e68538d743961210ae0a620465b8f2f2",
 "link":
 "/rsp?id=rsp_cases&category=action%20needed&sub_category=sla%2
0breached%20cases"
 }
 ],
 "order": 20
 },
 {
 "title": "KPIs for store manager contributor",
 "relatedPartyTypes": ["36b4c8297701121080b68b457d5a9994"],
 "reports": [
 {
 "report_id": "8ec2120f43561210ae0a620465b8f253",
 "link":
 "/rsp?id=rsp_cases&category=action%20needed&sub_category=open%
20p1%20cases"
 },
 {
 "report_id": "85f7389b43961210ae0a620465b8f247",
 "link":
 "/rsp?id=rsp_cases&category=cases&sub_category=requested%20by%
20me"
 },
 {
 "report_id": "f827385b43961210ae0a620465b8f2fe",
 "link":
 "/rsp?id=rsp_cases&category=cases&sub_category=unassigned"
 },
 {
 "report_id": "e68538d743961210ae0a620465b8f2f2",
 "link":
 "/rsp?id=rsp_cases&category=action%20needed&sub_category=sla%2
0breached%20cases"
 }
 ],
 "order": 30
 },
 {
 "title": "KPIs for store associate fulfiller",
 "relatedPartyTypes": ["df267ece38f30210f8779c150ba3e504"],
```


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```
 "reports": [
 {
 "report_id": "b297b45b43961210ae0a620465b8f272",
 "link":
 "/rsp?id=rsp_cases&category=cases&sub_category=my%20assigned%2
0cases"
 },
 {
 "report_id": "f827385b43961210ae0a620465b8f2fe",
 "link":
 "/rsp?id=rsp_cases&category=cases&sub_category=unassigned"
 },
 {
 "report_id": "8ec2120f43561210ae0a620465b8f253",
 "link":
 "/rsp?id=rsp_cases&category=action%20needed&sub_category=open%
20p1%20cases"
 }
 ],
 "order": 40
 },
 {
 "title": "KPIs for store associate contributor",
 "relatedPartyTypes": ["8d046b7d105a0e90f877992571046f3b"],
 "reports": [
 {
 "report_id": "85f7389b43961210ae0a620465b8f247",
 "link":
 "/rsp?id=rsp_cases&category=cases&sub_category=requested%20by%
20me"
 },
 {
 "report_id": "ed3cfc9343d61210ae0a620465b8f294",
 "link":
 "/rsp?id=rsp_cases&category=action%20needed&sub_category=await
ing%20info%20cases"
 },
 {
 "report_id": "8ec2120f43561210ae0a620465b8f253",
 "link":
 "/rsp?id=rsp_cases&category=action%20needed&sub_category=open%
20p1%20cases"
 }
 ],
 "order": 50
 },
 {
 "title": "KPIs for all users",
 "reports": [
 {
 "report_id": "8ec2120f43561210ae0a620465b8f253",
 "link":
 "/rsp?id=rsp_cases&category=action%20needed&sub_category=open%
20p1%20cases"
 },
 {
 "report_id": "b297b45b43961210ae0a620465b8f272",
```


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```
 "link":
 "/rsp?id=rsp_cases&category=cases&sub_category=my%20assigned%2
0cases"
 },
 {
 "report_id": "85f7389b43961210ae0a620465b8f247",
 "link":
 "/rsp?id=rsp_cases&category=cases&sub_category=requested%20by%
20me"
 },
 {
 "report_id": "7e80564b43561210ae0a620465b8f2fc",
 "link": "/rsp?id=rsp_cases&category=escalated%20cases"
 }
 ],
 "order": 60
 }
]
```

Note:

For more information, see Retail KPI JSON parameters.

Review sys_report table records to validate configurations in use with the Retail KPI widget.

12. On the Instance form, fill in the fields.
13. Select **Save**.

Retail KPI JSON parameters

JSON parameters define aspects of the Retail KPI list widget on the portal page.

Note: #This information assumes that you're familiar with the JSON code format.

Field	Description
title	Placeholder title to understand configuration done for related party types and their reports or KPIs.
relatedPartyTypes	Array of related party type sys_ids (Table: [sn_customerservice_related_party_configuration]) to whom the mentioned reports should be shown.
reports	Array of reports where each report has information about the report_id and link to navigate to.
report_id	sys_id of the report that is to be shown (Table: [sys_report]).
link	Web page that is accessed when the KPI is selected.
order	Number field that defines the order of execution. The lower value is evaluated first.

Grant Field Service for Audit roles

The Audit Admin assigns a Field Service for Audit role to a person or group to enable them to create, view, update, or delete audit tasks.

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Before you begin

The Audit Admin performing this task must have role-management access on the ServiceNow instance. Field Service for Audit must be installed.

Identify the correct role before proceeding:

Assign this role	To
`sn_fsm_audit.author`	A workflow or integration that creates audit tasks only.
`sn_fsm_audit.auditor`	An auditor or compliance reviewer who reads and updates tasks.
`sn_fsm_audit.audit_admin`	A privileged administrator who manages the full task lifecycle.

Note: An Author who also needs to work on existing tasks must receive `sn_fsm_audit.auditor` in addition to `sn_fsm_audit.author`.

Role required: `sn_fsm_audit.author`, `sn_fsm_audit.auditor`, or `sn_fsm_audit.audit_admin`.

Procedure

1. Navigate to **User Administration > Users** to assign a role to an individual, or **User Administration > Groups** to assign a role to a group.
2. Open the person or group record.
3. In the **Roles** related list, click **Edit**.
4. Search for and select the audit role.
5. Move the role to the **Roles List** column, then click **Save**.

Result

The Auditor, Audit Admin, or Author can perform operations allowed by the assigned role. Changes take effect at the recipient's next login.

Related topics

Field Service for Audit

Components installed with Field Service for Audit

Configure case and task roles and permissions

Assign roles to store associates, managers, and area managers to grant access to create, edit, and close cases and tasks in the quick case creation feature.

Before you begin

Role required: Administrator or System Security Administrator

About this task

Quick case and task creation uses three roles, one for each persona: store associate, store manager, and area or region manager. Users also need to be mapped to the stores they work with.

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Procedure

1. In the ServiceNow workspace, navigate to **System Security** > **Users and Groups** > **Users**.
2. Select a user to configure.
3. In the **Roles** section, add one or more of the following roles:

Role	Capabilities
`sn_rtl_instore_ops.associate`	Store associate. Create cases, add tasks, assign and reassign cases and tasks, use **Assign to me**, and edit and close cases and tasks for their store. The store is set automatically on new cases.
`sn_rtl_instore_ops.manager`	Store manager. Contains the `sn_rtl_instore_ops.associate` role, so store managers can do everything store associates can.
`sn_rtl_instore_ops.manager_contributor`	Area or region manager. Create cases for any store they're mapped to, add tasks, and edit and close cases and tasks across those stores. Can't assign cases or tasks or use **Assign to me**.

4. For area and region managers, add the `sn_rtl_instore_ops.manager_contributor` role.

   Users who already have the `sn_retail.manager_contributor` role get `sn_rtl_instore_ops.manager_contributor` automatically, because the retail role contains it.

5. Save the user record.
6. Repeat for all users who need access to the quick case creation feature.

Example: Role assignment examples

- **Store Associate:** Assign `sn_rtl_instore_ops.associate`
- **Store Manager:** Assign `sn_rtl_instore_ops.manager` (manager role includes associate capabilities)
- Area or region manager: Assign `sn_rtl_instore_ops.manager_contributor` (can create and monitor cases across multiple stores)

Manage customer complaints

Manage customer complaints by creating and assigning them to HQ persona.

For more information on customer complaints, see

- Create and assign a retail customer complaint case in workspace
- Track a customer complaint case in workspace
- Close a customer complaint case in workspace
- Customer complaint case

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Create and assign a retail customer complaint case in workspace

Create and assign a retail customer complain case in Workspace on behalf of a customer.

Before you begin

Roles required: sn_rtl_cs_cmplnt.agent, sn_rtl_cs_cmplnt.agent_manager

About this task

The retail customer complaint case type enables customers to submit complaints anonymously via phone or email.

Procedure

1. Navigate to **Lists** > **Retail Customer Complaints** > **All**.
2. Select **New** and fill in the information about the customer complaint.

Fields	Description
Service	Type of service request.
Customer name	Name of the customer. **Note:** The name of the customer might not get registered in the system.
Customer email	Email address of the customer.
Priority	Sequence in which this case must be re solved, based on the impact and urgency.
Assignment group	Associated assignment group that is responsi ble for working on this request.
Reported Retail Organization	Retail organization from which this request has been created.
Assigned to	Person who is responsible for working on this request.
Short description	Short description about this request.
Description	Details about this request.

3. Select **Save**.
4. Self-assign the case by selecting **Assign to me** or work on the assigned case by selecting **Accept**.

Note: Select **Task** related list to view your existing tasks and select **New** to add a task.

Track a customer complaint case in workspace

Track the status of a retail customer complaint case in Workspace.

Before you begin

Roles required: sn_rtl_cs_cmplnt.agent, sn_rtl_cs_cmplnt.agent_manager

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Procedure

1. Navigate to **Lists** > **Retail Customer Complaints** > **All**.
2. Select the case using the case number to track the case.

Close a customer complaint case in workspace

Provide a resolution and close a customer complaint case in workspace.

Before you begin

Roles required: sn_rtl_cs_cmplnt.agent, sn_rtl_cs_cmplnt.agent_manager

Procedure

1. Navigate to **Lists** > **Retail Customer Complaints** > **All**.
2. Select the case number to work on the case.
3. Select **Close Case** by adding the following resolution details.

Fields	Description
Resolution Code	The code number of the resolution.
Resolution notes	Note about the resolution.

Manage store inquiries

Manage your store inquiry cases by creating, managing, and resolving them by using the retail portal, workspace, or mobile app.

For more information on your store inquiry cases, see the following topics:

- Create a store inquiry case from the Retail portal
- Manage a store inquiry case from the Retail portal
- Track a store inquiry case from the Retail portal
- Create a store inquiry case from a mobile app
- Manage a store inquiry case from a mobile app
- Track a store inquiry case from a Retail mobile app
- Resolve a store inquiry support request from workspace
- Store inquiry case

Create a store inquiry case from the Retail portal

Create a retail store inquiry case from the Retail portal to report issues on behalf of the store that you're associated with. By using the Retail portal to create a case, you can more efficiently get updated information about your case in real time.

Before you begin

You must have the Retail Store services plugin installed.

Role required: sn_rtl_stre_servcs.contributor#, sn_rtl_stre_servcs.agent, or sn_rtl_stre_servcs.agent_manager

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About this task

If you're a store manager or associate, you can request information from headquarters (HQ) through the Retail portal, A retail HQ agent provides the necessary details to ensure that the store operations follow the policies.

Store Inquiry Case (sn_rtl_stre_servcs_inquiry_case) is extended from the abstract Retail Case (sn_retail_case).

Note: As a retail user, you can only create cases for the retail organizations that you're a member of.

Procedure

1. Navigate to **Home** > **Catalog** > **Catalog Items** > **Store policy inquiry**.
2. Fill in the information about the request, such as which store the request is for, what the priority of the request is, what the purpose of the inquiry is, and other details.

Fields	Description
Requesting store	Retail store that is making this request.
Priority	Task sequence to resolve this case. The tasks are based on the impact and urgency of this request.
Briefly describe your policy inquiry	Brief description about this request.
Detailed description of the inquiry, including any specific questions	Details about this request.

3. Select **Submit**.

Manage a store inquiry case from the Retail portal

Accept, reject, or close a store inquiry case from the Retail portal. By using the Retail portal, you can handle cases more efficiently and get updated information in real time.

Before you begin

Role required: Store associate or Store manager

Procedure

1. In the Retail portal, select **Home** > **Cases & Tasks** from the menu bar.
2. Select the case.
3. Select **Actions** > **Close case**
   If the HQ agent requests more information, add notes or more details. If the HQ agent proposes a solution with the resolution, you get options to accept the solution or reject the solution.
4. Close a case by selecting **Accept solution**.
5. Reopen a case by selecting **Reject solution**.

Track a store inquiry case from the Retail portal

Track the status of a store inquiry case from the Retail portal. By tracking your case from the Retail portal, you can immediately get visibility into the progress, issues, or status of your case.

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Before you begin
Role required: Store associate or Store manager

Procedure

1. In the Retail portal, select **Home** > **Cases & Tasks** from the menu bar.
2. Select the case number to track the case.

Create a store inquiry case from a mobile app

Create a store inquiry case from a mobile app to report issues on behalf of the store that you're associated with. By creating case from a mobile app, you can immediately get visibility into the progress, issues, or status of your case without having to use a computer.

Before you begin
Role required: Store associate or Store manager

Procedure

1. In the Retail mobile application, select **Browse Catalog** > **Store policy inquiry**.
2. Fill in the information about the request, such as which store the request is for, the priority of the request, purpose of the inquiry, and other details.

Fields	Description
Requesting store	Retail store that is making this request.
Priority	Task sequence to resolve this case. The tasks are based on the impact and urgency of this request.
Briefly describe your policy inquiry	Brief description about this request.
Detailed description of the inquiry including any specific questions	Details about this request.

Manage a store inquiry case from a mobile app

Manage a store inquiry case from a mobile app by accepting or rejecting a proposed solution. By managing a case from a mobile app, you can immediately get visibility into the progress, issues, or status of your case without having to use a computer.

Before you begin
Role required: Store associate or Store manager

Procedure

1. On the Retail mobile app, select **My Store** > **All cases** from the menu bar.
2. Select the case.
3. Select **Actions** > **Close case**
   If the HQ agent requests more information, add more details. If the HQ agent proposes a solution with the resolution, you can accept the solution or reject the solution.
4. Select **Accept** to close the case.
5. Select **Reject** to reopen the case.

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Track a store inquiry case from a Retail mobile app

Track the status of a store inquiry case from a mobile app. By tracking your case from a mobile app, you can immediately get visibility into the progress, issues, or status of your case without having to use a computer.

Before you begin

Role required: Store associate or Store manager

Procedure

1. On the Retail mobile app, select **My Store** > **All cases** from the menu bar.
2. Select the case number to track the case.

Resolve a store inquiry support request from workspace

Resolve a store inquiry case with a resolution from your workspace.

Before you begin

Role required: sn_rtl_stre_servcs.agent or sn_rtl_stre_servcs.agent_manager

Procedure

1. Navigate to **Lists** > **Retail Store Inquiry Cases** > **All**.
2. Open your cases by selecting **My Open Cases**.
3. Selecting **Assign to me** to self-assign a case or then select **Accept** to work on it.
4. Select **Request Info** to request for more information about the case details.
   The case state changes to Awaiting Info. When a store persona provide more information, the state changes to Open.
5. Select **Propose Solution** to propose a solution by adding the following resolution details.

Fields	Description
Resolution Code	Code number of the resolution.
Resolution notes	Note about the resolution.

Manage Break-Fix cases

Manage Break-Fix cases by submitting equipment failures, resolving them in the workspace, and responding to proposed resolutions.

For more information on managing Break-Fix cases, see

- Submit Break-Fix Cases through Portal or Mobile
- Resolve Cases in Workspace through HQ Agents
- Respond to resolutions through Portal or Mobile

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Submit Break-Fix Cases through Portal or Mobile

Report equipment failures using the Retail Operations portal or mobile app. Your requesting store and available equipment are automatically determined based on your user account and service organization.

Before you begin

- Equipment must be registered in install base with your store as buyer organization
- Gather failure details: brief description, symptoms, business impact, troubleshooting attempted
- **Role required:** Store Manager, Store Associate, Regional Manager, or Area Manager

About this task

Both portal and mobile app support case submission. Your requesting store is automatically populated from your service organization. Equipment is filtered based on Install Base buyer organization relationship—only equipment registered to your store appears selectable. If an open case already exists for the same store and equipment, a duplicate warning appears before submission.

Upon submission, the case is created in the "New" state and routed to HQ support queue. In this state, only the Close action is available. Other actions (Accept/Reject) become available after HQ proposes a resolution.

Procedure

1. Log in to the Retail Operations portal or open the Retail Operations mobile app
2. Navigate to **Browse Catalog > Break-fix**
3. Review the **Requesting store** field—your service organization is automatically populated

   Note: Store-level users cannot change this field. Regional and Area Managers can select a different managed store.

4. In the **Affected device (Install base)** field, select the failed equipment from the filtered list

   Note: Only equipment registered to your store (where your organization is the buyer organization) appears. If equipment is missing, verify it exists in Install Base with your organization as buyer.

5. In the **Priority** field, select a priority level (default: 3 - Moderate)

   Note: Mandatory. Options: 1 - Urgent, 2 - High, 3 - Moderate, 4 - Low.

6. In the **Issue title** field, enter a brief summary of the equipment failure

   Note: Mandatory. Example: "POS Terminal 5 not booting"

7. In the **Description** field, provide detailed failure information

   Note: Mandatory. Include: symptoms, when failure started, affected business operations, any troubleshooting already attempted.

8. **Optional:** Attach supporting files using the **Attachment** field

   Note: Recommended for complex failures (screenshots, error logs, photos).

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9. Click (portal) or tap (mobile) **Submit**

> **Note:** If an open case exists for same store/equipment, a duplicate warning appears. Click/tap Yes to proceed with new case or No to cancel and review existing case.

Result
Case created in "New" state and routed to HQ support queue. Success screen displays case number. Track case in your requested cases list. You can Close the case while in New state. After HQ proposes resolution, you can Accept or Reject it.

What to do next
HQ Support Agents will triage your case. You will receive notification when they propose resolution. See Respond to Resolutions (Portal and Mobile) for next steps.

Related topics
- Break-Fix Case Management
- Respond to resolutions through Portal or Mobile
- Resolve Cases in Workspace through HQ Agents
- Components for Break-Fix

Resolve Cases in Workspace through HQ Agents

Review assigned break-fix cases in the CSM/FSM workspace, select a service issue type, and propose resolutions using troubleshooting steps, service incidents, or work orders.

Before you begin
- Break-fix case is assigned to your queue in the workspace
- Review case details including affected equipment, store, and description
- **Role required:** HQ Support Agent (BREAKFIX_AGENT role)
- **Note:** Work order creation requires the FSM integration plugin to be installed.

About this task
The CSM/FSM workspace provides your case queue. Service issue type is mandatory before proposing resolution. Selecting "Break-fix Hardware" enables Create Work Order. Selecting "Break-fix IT" enables Create Incident. Troubleshooting steps can be added for either type. When incidents or work orders are created, their state changes and comments are added as work notes on the case.

Role Requirements: The BREAKFIX_AGENT role is required for all case resolution, including creating work orders—the Create Work Order button appears only if the FSM integration plugin is installed. Creating an incident requires the sn_incident_write role assigned to the Break-fix agent.

Procedure
1. Open CSM/FSM workspace
2. Navigate to **Retail Break-fix case** list

> **Note:** List displays all cases assigned to your queue.

3. Open the break-fix case you want to resolve

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Note: Review: Case Number, Opened at, State, Requested by, Priority, Requesting store, Affected device (Install base), Short description, Description.

4. In the **Service issue type** field, select **Break-fix Hardware** or **Break-fix IT**

Note: Mandatory. Hardware enables work order creation. IT enables incident creation. You can change this selection later if needed.

5. Propose resolution using one of three methods:

a. **Method 1 - Troubleshooting Steps:** Add step-by-step instructions in **Resolution notes** field or activity stream comments.
Include KB article links if applicable.

b. **Method 2 - Create Incident (IT Issues):** Click **Create Incident**.
Requires the sn_incident_write role assigned to the Break-fix agent. Verify short description, description, and priority carry forward to incident. Incident number appears in activity stream. Monitor the incident state and comments—they are added as work notes on the case.

c. **Method 3 - Create Work Order (Hardware Issues):** Click **Create Work Order**.
If the button does not appear, verify the FSM integration plugin is installed. Verify details carry forward. Monitor the work order state and comments—they are added as work notes on the case.

Note: The Create Work Order button appears if the FSM integration plugin is installed. Role access is based on the break-fix agent role. Contact your administrator if the button is missing and you need to create work orders.

6. Click **Propose Solution**

Note: Case state changes to "Resolution Proposed". Requestor receives notification and can Accept or Reject.

Result

Case transitions to "Resolution Proposed" state. Requestor receives notification and can Accept (closes case), Reject (reopens to your queue with reason), or Self-Close (closes without your involvement). If you created an incident or work order, its state changes and comments are added as work notes on the case.

What to do next

If requestor rejects resolution, case reopens to your queue with their reason documented. Propose an alternative resolution. See Respond to Resolutions (Portal and Mobile) to understand the requestor's actions.

Related topics

Break-Fix Case Management

Submit Break-Fix Cases through Portal or Mobile

Respond to resolutions through Portal or Mobile

Components for Break-Fix

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Respond to resolutions through Portal or Mobile

Review proposed resolutions and respond by accepting, rejecting with a reason, or self-closing your case. Available only when case is in "Resolution Proposed" state.

Before you begin

- Received notification that HQ has proposed resolution for your case
- Case must be in "Resolution Proposed" state for Accept/Reject actions to appear
- **Role required:** Store Manager, Store Associate, Regional Manager, or Area Manager

About this task

After HQ proposes a resolution, review it from the portal or mobile app. Accept/Reject actions only appear when the case is in "Resolution Proposed" state. Choose one of these mutually exclusive actions to proceed.

Procedure

1. Log in to Retail Operations portal or open Retail Operations mobile app
2. Navigate to your requested cases
3. Open the break-fix case with "Resolution Proposed" state

   Note: Accept and Reject actions only appear when the case is in the Resolution Proposed state.

4. Review the proposed resolution details

   Note: Check troubleshooting steps, incident details, or work order information provided by HQ.

5. Choose one of three actions:

   a. **Action 1 - Accept Resolution:** Click (portal) or tap (mobile) **Accept** to confirm the proposed resolution is satisfactory and close the case immediately.

   b. **Action 2 - Reject Resolution:** Click (portal) or tap (mobile) **Reject**, enter a reason in the **Rejection reason** field, then click/tap **Submit**.

      Note: Mandatory reason. Example: "Printer still not printing" or "Software issue still occurring."

      Case state changes to "New" and reopens to HQ queue with your reason documented.

   c. **Action 3 - Self-Close:** Click (portal) or tap (mobile) **Close case** if reported issue is no longer needed or resolved outside this workflow.
      Case closes without requiring HQ resolution.

Result

When you Accept: Case status changes to "Closed" and is resolved and archived.

When you Reject: Case reopens to HQ queue with state "New". HQ receives notification with your rejection reason and will propose an alternative resolution.

When you Self-Close: Case status changes to "Closed" without HQ involvement, and no notification is sent to HQ.

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What to do next

If you Accepted or Self-Closed, case is resolved and archived. If you Rejected, HQ Support Agents will receive your reason and propose an alternative resolution, which you will review similarly. See Resolve Cases in Workspace (HQ Agents) to understand HQ's resolution process.

Related topics

- Break-Fix Case Management
- Submit Break-Fix Cases through Portal or Mobile
- Resolve Cases in Workspace through HQ Agents
- Components for Break-Fix

Manage Store Audit

Manage store audit operations by audit assignments, creating and publishing audit plans, and completing store audits.

For more information on managing store audits, see

- Audit assignment from workspace
- Create and publish an audit plan
- Complete a store audit

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Audit assignment from workspace

As a Store Audit Manager, manually assign a Store Audit Case or Audit Task to a specific Auditor, or change the assignment group set by the automated assignment rules.

Before you begin

- The Store Audit Case or Audit Task to be reassigned exists and is not Closed.
- Role required: `sn_rtl_store_audit.audit_manager` or `sn_rtl_store_audit.location_audit_manager`.

About this task

Assignment rules automatically set the assignment group on Store Audit Cases and Audit Tasks when they're generated—they don't assign an individual Auditor. Use this procedure to assign a specific Auditor, correct a routing error, or redistribute workload. Store Audit Managers can view all cases and tasks regardless of assignment.

Procedure

1. Log in to CSM/FSM Workspace with your Store Audit Manager credentials and open the Store Audit Case or Audit Task you want to reassign.
   Store Audit Cases are in the Store Audit Cases list; Audit Tasks are on the **Audit tasks** tab of the parent case. Both are also visible from the **Retail cases** list.
2. Update the **Assigned to** field to the new Auditor.
3. If needed, update the **Assignment group** field.
4. Click **Save**.
   The newly assigned Auditor receives a push notification if Retail Mobile is active.

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Result
The Store Audit Case or Audit Task is reassigned to the selected Auditor and the assignment change is logged in the activity stream.

Related topics
Retail Store Audit Operations

Create and publish an audit plan

Create and publish an audit plan

Use the **Store audit** playbook in CSM/FSM Workspace to author and publish an audit plan. Publishing automatically creates the Store Audit Cases and Audit Tasks for all selected store locations.

Before you begin
- Retail Organization records for all stores you want to audit exist on the instance.
- Role required: `sn_rtl_store_audit.plan_author` assigned alongside `sn_rtl_store_audit.audit_manager` or `sn_rtl_store_audit.location_audit_manager`, and `sn_fsm_planned_wm.planned_work_admin`.

Note: Use the `sn_fsm_planned_wm.planned_work_admin` role to avail the one-time and recurring schedule options.

About this task
The **Store audit** playbook guides you through configuring the full plan in a single session, ending with a Review activity where you publish.

Procedure
1. Log in to CSM/FSM Workspace with your Plan Author credentials.
2. In the application navigator, navigate to the **Store audit** menu and click **New**.
3. In the plan type picker that opens, select **Store audit** as the plan type.
   The system creates a new `sn_task_plan_template` record and the **Store audit** playbook launches automatically.
4. In the **Store case** activity, configure the Store Audit Case template item, then click **Next**.
5. In the **Audit task** activity, configure the Audit Task template item, then click **Next**.
6. In the **Affected stores** activity, select the Retail Organizations where audit has to be done, then click **Next**.
7. In the **Schedule options** activity, fill in the mandatory fields and set the generation as immediate, one-time, or recurring, then click **Next**.
8. In the **Review** activity, confirm the plan summary, edit the details, if required and then click **Publish**.
   For an immediate schedule, the Store Audit Cases and Audit Tasks are created automatically as part of publishing. For a one-time or recurring schedule, they are created later at the scheduled time.

Result
A published audit plan exists. Click the **Track plan** tab on the plan record to see the generated Store Audit Cases once they exist.

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Related topics

Retail Store Audit Operations

Audit assignment from workspace

Complete a store audit

As an Auditor, open your assigned Store Audit Case in CSM/FSM Workspace, record observations, complete each Audit Task, then close the Store Audit Case.

Before you begin

- A Store Audit Case is assigned to you.
- Role required: `sn_rtl_store_audit.auditor` or `sn_rtl_store_audit.location_auditor`

About this task

HQ Auditors fulfil exclusively via CSM/FSM Workspace. Location Auditors can also use Retail Mobile. Close each Audit Task before closing the parent Store Audit Case.

Procedure

1. Log in to CSM/FSM Workspace and open your assigned Store Audit Case.
2. On the **Audit tasks** tab, open each Audit Task, add your observations in **Work notes**, complete the questionnaire if one is present, then click **Close Complete** and confirm.
   The **Close Complete** button is hidden until any mandatory questionnaire is complete.
3. Add your case-level observations in the **Work notes** field.
4. Once every Audit Task is Closed Complete, return to the Store Audit Case, add observations on the case.
5. Click **Close** and click **Save**.

Result

All Audit Tasks are Closed Complete, observations are recorded in the activity stream, and the Store Audit Case is Closed.

Related topics

Retail Store Audit Operations

Audit assignment from workspace

Complete a store audit from Retail Mobile

As a Location Auditor, take your assigned Store Audit Case and Audit Tasks in Retail Mobile, complete the questionnaire, and close the case.

Before you begin

Role required: `sn_rtl_store_audit.location_auditor`

About this task

Location Auditors are the only Auditor persona who can fulfill Store Audit work from Retail Mobile—HQ Auditors fulfill exclusively via CSM/FSM Workspace. Generated Store Audit Cases and Audit Tasks are automatically assigned to your team's assignment group; self-assign or ask your Store Audit Manager to assign a specific record before you start.

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Procedure

1. In Retail Mobile, go to the **My Store** page and select the **Unassigned** or **Assigned to me** stream to find your Store Audit Case.
2. Open the Store Audit Case.
   If it's unassigned, tap **Assign case**; if it's already assigned to you, tap **Accept** to take ownership. A Store Audit Manager can also assign the case to a specific Location Auditor.
3. On the case, open the **Audit tasks** tab to see its Audit Tasks.
4. Open an Audit Task.
   If it's unassigned, tap **Assign to me**, or tap **Assign task** to assign it to another Location Auditor.
5. Tap **Take questionnaire**, complete it, and submit.
   The **Close task** button stays hidden until every mandatory questionnaire on the task is complete.
6. Add any observations in the activity stream, then tap **Close task** and confirm in the popup.
   Repeat for each remaining Audit Task.
7. Once every Audit Task is closed, return to the Store Audit Case and tap **Close case**.

Result

The Store Audit Case and its Audit Tasks are fulfilled and closed from Retail Mobile. The Store Audit Manager can review the completed work in CSM/FSM Workspace.

Related topics

Retail Store Audit Operations

Complete a store audit

Audit assignment from workspace

Complete an Audit Task from Retail Mobile

As a Location Auditor, open an Audit Task in Retail Mobile, complete its questionnaire, and close the task.

Before you begin

Role required: `sn_rtl_store_audit.location_auditor`

About this task

Audit Tasks don't have their own work list in Retail Mobile—you drill into them from the **Audit tasks** tab on the parent Store Audit Case.

Procedure

1. In Retail Mobile, go to the **My Store** page, open the parent Store Audit Case, then select the **Audit tasks** tab to find the Audit Task.
2. Open the Audit Task.
   If it's unassigned, tap **Assign to me**, or tap **Assign task** to assign it to another Location Auditor.
3. Tap **Take questionnaire**, complete it, and submit.
   Tap **View questionnaire** instead to review a completed questionnaire. The **Close task** button stays hidden until every mandatory questionnaire on the task is complete.
4. Add any observations in the activity stream.
5. Tap **Close task** and confirm in the popup.

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Result
The Audit Task is closed, with the questionnaire result and your observations recorded. Once every Audit Task on a Store Audit Case is closed, close the parent case to complete the store audit.

Related topics

Retail Store Audit Operations

Complete a store audit from Retail Mobile

Complete a store audit

Quick case and task creation for in-store issues

Create lightweight cases and tasks to track everyday in-store issues separately from Store Plans, using Retail Service Portal or Retail Mobile.

Use the quick case and task creation feature to log and track everyday in-store issues without the formality of Store Plans. This feature is designed for store managers, associates, and area managers to quickly report issues like equipment problems, restock requests, or compliance findings, and assign work to team members.

Who uses this feature

- Store associates and store managers: Report issues for their own store and fulfill the cases and tasks assigned to them.
- Area and region managers: Report issues for any store they're mapped to, and own or monitor cases across those stores. They don't fulfill tasks.

When to use quick case creation

Quick case creation is best for issues that need rapid response and assignment within a single store or store team:

- Equipment failures or maintenance needs
- Inventory or restock requests
- Store safety or compliance findings
- Customer experience escalations
- Any ad-hoc work that requires team coordination

For large, multi-store initiatives with scheduled compliance activities, use Manage store plans instead.

Cases and tasks

A case is the parent work item that describes the issue. A task is a child work item that breaks the case down into actionable work. When you submit the **Create work item for store** form, the system creates one case and no tasks. You add tasks afterward from within the case.

- Case states: New when created, Open when someone is assigned, and Closed when closed.
- Task states: Pending Assignment when created, Accepted when someone is assigned, and Closed Complete when closed.
- Closing: You can close a case or a task at any time. Open tasks don't block closing the case, and no questionnaire is required.

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Role requirements

The following roles determine what you can do with cases and tasks:

- `sn_rtl_instore_ops.associate` (store associate) and `sn_rtl_instore_ops.manager` (store manager): Create cases, add tasks, edit and close cases and tasks, assign cases and tasks, and use **Assign to me**.
- `sn_rtl_instore_ops.manager_contributor` (area or region manager): Create cases, add tasks, and edit and close cases and tasks. Area and region managers can be assigned cases, but they can't assign cases or tasks and don't see **Assign to me**.

For detailed role setup, see Configure case and task roles and permissions.

Available on mobile and portal

Start from the **Create work item for store** catalog item on either surface. The item appears only for users who are mapped to at least one store.

- **Retail Service Portal:** Desktop-friendly interface for store managers to triage and manage cases
- **Retail Mobile:** Mobile app for store associates to quickly report issues and view assigned work

Create work item for store on the Retail Portal

Create a case on the Retail Service Portal to quickly report an in-store issue, then add tasks to break down the work.

Before you begin

Role required: `sn_rtl_instore_ops.associate`, `sn_rtl_instore_ops.manager`, or `sn_rtl_instore_ops.manager_contributor`. You must also be mapped to at least one store.

About this task

If you're a store associate or store manager, the store is set from your own store mapping and doesn't appear on the form. If you're an area or region manager, you select the store.

Procedure

1. From the Retail Portal, select the **Create work item for store** catalog item.
2. On the form, fill in the fields.

Field	Description
Select store	Required for area and region managers: the store that the issue is for. The list shows only the stores that you're mapped to. Store asso ciates and store managers don't see this field.
Short Description	A brief, one-line summary of the issue (for ex ample, "Broken freezer in aisle 3").
Priority	Required. The urgency level of the issue. The default is 4 - Low.
Description	Optional. A detailed explanation of the issue, including any context or location information.

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Field	Description
Attachment	Optional. Attach a photo or document to sup port the issue report.
Assign to	Optional. The person to assign the case to. If you assign someone, the case opens in the Open state instead of New.
Due date	Optional. When the issue should be resolved. You can't select a date earlier than today.

3. Select **Submit**.

   The case details page opens, with no confirmation message. The case is in the New state and unassigned, unless you filled in **Assign to**. Everyone mapped to the store can see the case.

4. Optional: From the case details page, from the overflow menu, select **Add task** to break the work down.

   You can add multiple tasks to a single case. Each task represents a specific action item that one team member will complete. See Add a task to a case on the Retail Portal.

Add a task to a case on the Retail Portal

Create a task within an existing case to assign specific work to a team member on the Retail Service Portal.

Before you begin

Role required: `sn_rtl_instore_ops.associate`, `sn_rtl_instore_ops.manager`, or `sn_rtl_instore_ops.manager_contributor`

About this task

On the portal, **Add task** is available only from the case's overflow menu. The new task is linked to the case automatically.

Procedure

1. From the Retail Portal, open the case for which you want to add a task.
2. From the overflow menu, select **Add task**.
3. Complete the task form with the following fields:

Field	Description
Short Description	A brief summary of the work to be completed (required).
Assigned To	Optional. The store associate or store manag er who completes the task. The picker isn't re stricted by role, so area and region managers can also be selected, but they can't assign tasks themselves.
Priority	Required. The urgency of this task relative to other work.
Due Date	When this task should be completed.

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Field	Description
Description	Optional. Additional details about the task.
Assignment group	Optional. The group to assign the task to.
Attachment	Optional. A photo or file that supports the task.

4. Select **Submit**.

   The task is created under the case and appears on the case's **Tasks** tab. An unassigned task is in the Pending Assignment state. A task that's assigned when you create it starts in the Accepted state. When a task is assigned, the assignee gets a push notification in the Retail Mobile app.

5. Optional: To assign, edit, or close the task, open it from the case's **Tasks** tab.

   For details, see Work on a quick in-store task on the Retail Portal.

Work on a quick in-store case on the Retail Portal

Assign, edit, add tasks to, and close a case that was created with Create work item for store on the Retail Service Portal.

Before you begin

Role required: `sn_rtl_instore_ops.associate`, `sn_rtl_instore_ops.manager`, or `sn_rtl_instore_ops.manager_contributor`

About this task

The case page has three tabs: **Activity**, **Attachments**, and **Tasks**. On the **Tasks** tab, you can search the task list and filter it by priority, state, assigned to, and due date.

Close is always next to the overflow menu. The overflow menu contains **Assign to me**, **Add task**, and **Edit case**. **Assign to me** appears only for store associates and store managers of the case's store.

Procedure

1. From the Retail Portal, open the case from the home page, or navigate to **Cases & tasks** from the home page and select the case.
2. Do any of the following actions.
   - To take the case yourself, from the overflow menu, select **Assign to me**.
   - To change case details or assign the case to someone else, from the overflow menu, select **Edit case**. You can change **Priority**, **Assignment group**, **Assigned to**, **Short description**, and **Description**.
   - To break the work into tasks, from the overflow menu, select **Add task**. For details, see Add a task to a case on the Retail Portal.
   - To close the case, select **Close**. If you're a store associate or store manager, enter the resolution notes and confirm. If you're an area or region manager, confirm the close in the popup that asks whether you're sure.

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Result
When someone is assigned, the case moves from New to Open and the assignee gets a push notification in the Retail Mobile app. When you close the case, it moves to Closed, even if it has open tasks. Every edit, reassignment, and closure is recorded on the **Activity** tab.

Work on a quick in-store task on the Retail Portal

Assign, edit, and close a task that belongs to a quick in-store case on the Retail Service Portal.

Before you begin
Role required: `sn_rtl_instore_ops.associate`, `sn_rtl_instore_ops.manager`, or `sn_rtl_instore_ops.manager_contributor`

About this task
The task page has **Activity** and **Attachments** tabs. **Close task** is always next to the overflow menu. The overflow menu contains **Edit task** and, for store associates and store managers only, **Assign to me**.

Procedure
1. Open the parent case, select the **Tasks** tab, and select the task.
2. Do any of the following actions.
   - To take the task yourself, from the overflow menu, select **Assign to me**.
   - To change task details or assign the task to someone else, from the overflow menu, select **Edit task**. You can change **Priority**, **Assignment group**, **Assigned to**, **Short description**, and **Description**. Area and region managers can't change **Assignment group** or **Assigned to**.
   - To close the task, select **Close task** and confirm.

Result
When someone is assigned, the task moves from Pending Assignment to Accepted and the assignee gets a push notification in the Retail Mobile app. When you close the task, it moves to Closed Complete.

Create work item for store on Retail Mobile

Create a case on Retail Mobile to quickly report an in-store issue and assign tasks to team members from your phone or tablet.

Before you begin
Role required: `sn_rtl_instore_ops.associate`, `sn_rtl_instore_ops.manager`, or `sn_rtl_instore_ops.manager_contributor`. You must also be mapped to at least one store.

About this task
If you're a store associate or store manager, the store is set from your own store mapping and doesn't appear on the form. If you're an area or region manager, you select the store.

Procedure
1. In the Retail Mobile app, navigate to **Browse catalog** > **Catalog items**, and tap **Create work item for store**.
2. On the form, fill in the fields.

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Field	Description
Select store	Required for area and region managers: the store that the issue is for. The list shows only the stores that you're mapped to. Store asso ciates and store managers don't see this field.
Short Description	A brief summary of the issue (required).
Priority	Required. The urgency level of the issue. The default is 4 - Low.
Description	Optional. Additional context about the issue.
Attachment	Optional. Take a photo or attach a file from your device.
Assign to	Optional. The person to assign the case to. If you assign someone, the case opens in the Open state instead of New.
Due date	Optional. When the issue should be resolved. You can't select a date earlier than today.

3. Tap **Submit**.

   A success screen shows the case number. The case is in the New state and unassigned, unless you filled in **Assign to**.

4. Optional: To break the work down, open the case, tap the **Tasks** tab, and tap **Add task**.

   For details, see Add a task to a case on Retail Mobile.

Add a task to a case on Retail Mobile

Create a task within an existing case to delegate work to team members on Retail Mobile.

Before you begin

Role required: `sn_rtl_instore_ops.associate`, `sn_rtl_instore_ops.manager`, or `sn_rtl_instore_ops.manager_contributor`

About this task

You can add a task from the bottom of the case screen or from the case's overflow menu. Either option opens a form with the required fields. The new task is linked to the case automatically. No questionnaire changes were made on mobile for this feature.

Procedure

1. On Retail Mobile, open the case for which you want to add a task.
2. Tap **Add task** at the bottom of the case screen, or select it from the overflow menu.
3. Enter the task details:

Field	Description
Short Description	A brief summary of the work (required).
Assigned To	Optional. The store associate or store manag er who completes the task. The picker isn't re

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Field	Description
	stricted by role, so area and region managers can also be selected, but they can't assign tasks themselves.
Priority	Required. The urgency level for the task.
Due Date	When the task should be completed.
Description	Optional. Task details or instructions.
Assignment group	Optional. The group to assign the task to.
Add attachment	Optional. Take a photo or attach a file from your device.

4. Tap **Submit**.

   The task appears on the case's **Tasks** tab. An unassigned task is in the Pending Assignment state. When a task is assigned, the assignee gets a push notification.

5. Optional: To assign, edit, or close the task, tap it on the case's **Tasks** tab.

   For details, see Work on a quick in-store task on Retail Mobile.

Work on a quick in-store case on Retail Mobile

Assign, edit, add tasks to, and close a case that was created with Create work item for store in the Retail Mobile app.

Before you begin

Role required: `sn_rtl_instore_ops.associate`, `sn_rtl_instore_ops.manager`, or `sn_rtl_instore_ops.manager_contributor`

About this task

The case screen has three tabs: **Details**, **Activity**, and **Tasks**. The actions you see depend on whether the case is assigned.

- Before the case is assigned, the overflow menu shows **Assign case**, **Edit case**, **Close case**, and **Add task**. **Assign case** and **Assign to me** are at the bottom of the screen.
- After the case is assigned, **Close case** moves to the bottom of the screen.
- Area and region managers don't see **Assign case** or **Assign to me**.

Procedure

1. In the Retail Mobile app, open the case from **All cases** or the **My work** tab on the home screen.
2. Do any of the following actions.
   - To take the case yourself, tap **Assign to me**.
   - To assign the case to someone else, tap **Assign case** and select the person.
   - To change case details, open the overflow menu and tap **Edit case**. You can change **Short description**, **Priority**, **Description**, **Assigned to**, **Assignment group**, and **Due date**. **Short description** and **Priority** are required.

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- To break the work into tasks, tap **Add task** at the bottom of the **Tasks** tab or in the overflow menu. For details, see Add a task to a case on Retail Mobile.
- To close the case, tap **Close case**. Optionally, enter **Resolution notes** and add an attachment, and then tap **Submit**. If you're an area or region manager, confirm the close in the Yes/No popup.

Result

When someone is assigned, the case moves from New to Open and the assignee gets a push notification. When you close the case, it moves to Closed, even if it has open tasks. Every change is recorded on the **Activity** tab.

Work on a quick in-store task on Retail Mobile

Assign, edit, and close a task that belongs to a quick in-store case in the Retail Mobile app.

Before you begin

Role required: `sn_rtl_instore_ops.associate`, `sn_rtl_instore_ops.manager`, or `sn_rtl_instore_ops.manager_contributor`

About this task

The actions you see on a task depend on whether it's assigned.

- Before the task is assigned, the overflow menu shows **Edit task** and **Close task**. Store associates and store managers also see **Assign task** in the overflow menu, and **Assign task** and **Assign to me** at the bottom of the screen. Area and region managers don't see **Assign task** or **Assign to me**.
- After the task is assigned, **Close task** moves to the bottom of the screen.

Procedure

1. Open the parent case, tap the **Tasks** tab, and tap the task.
2. Do any of the following actions.
   - To take the task yourself, tap **Assign to me**.
   - To assign the task to someone else, tap **Assign task** and select the person.
   - To change task details, open the overflow menu and tap **Edit task**. You can change **Short description**, **Priority**, **Description**, **Assigned to**, **Assignment group**, and **Due date**. Area and region managers don't see the assignment fields.
   - To close the task, tap **Close task** and confirm.

Result

When someone is assigned, the task moves from Pending Assignment to Accepted and the assignee gets a push notification. When you close the task, it moves to Closed Complete.

Case and task field and role reference

Technical reference for case and task field descriptions, role permissions, state transitions, and system components used in the quick case creation feature.

Case fields

When you submit the **Create work item for store** form, the following fields are created on the case record:

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Case field descriptions

Field Name	Description	API Name
Short Description	Brief summary of the issue (required)	`short_description`
Description	Detailed explanation of the issue (optional)	`description`
Store	The store that the case is for (required). Set automatically for store associates and store managers. Area and region managers select it on the form. The system writes the store to both fields.	`service_organization`, `requesting_service_organizatio`
Priority	Urgency level (1–5, with 1 being highest) (required)	`priority`
State	Case lifecycle state: New, Open, Closed (read-only to users)	`state`
Assigned To	Store manager or team member responsible for the case	`assigned_to`

Task fields

When you add a task to a case, the following fields are captured:

Task field descriptions

Field Name	Description	API Name
Short Description	Brief summary of the work (required)	`short_description`
Description	Detailed instructions or context (optional)	`description`
Assigned To	Team member responsible for completing the task (optional). The picker isn't restricted by role, so area and region managers can also be selected, but they can't assign tasks themselves.	`assigned_to`
Priority	Urgency level (1–5) (required)	`priority`
Due Date	Expected completion date (optional)	`due_date`
State	Task lifecycle: Pending Assignment, Accepted, Closed Complete (read-only to users)	`state`

State transitions

Case state progression

Cases progress: **New** (created) → **Open** (assigned) → **Closed** (resolved)

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Task state progression

Tasks progress: Pending Assignment (created, unassigned) → Accepted (assigned) → Closed Complete (closed)

Any entitled user can close a case or task at any time. Open tasks don't block closing the case, and resolution notes aren't forced. On the portal, store associates and store managers enter resolution notes when they close a case, and area and region managers confirm the close in a confirmation popup that asks whether they're sure. On Retail Mobile, area and region managers confirm the close in a Yes/No popup. Closing a task asks for confirmation only.

Role and permission matrix

Role permissions for cases and tasks

Action	Store associate (sn_rtl_instore)	Store manager (sn_rtl_instore)	Area or region manager (sn_rtl_instore_ops_manager)
Create a case	Yes	Yes	Yes, for any store they're mapped to
Add a task to a case	Yes	Yes	Yes
Assign a case or task	Yes	Yes	No
Use **Assign to me**	Yes	Yes	No
Edit a case or task	Yes	Yes	Yes, except assignment fields
Close a case or task	Yes	Yes	Yes
View cases and tasks	All for their store	All for their store	All for every store they're mapped to

System components

The quick case creation feature is composed of the following artifacts:

Record producer: Create work item for store

Lightweight form on Retail Service Portal and Retail Mobile for users to report cases. Publishes to both surfaces via a single scoped definition.

SP Widget: Case Actions

Portal widget on the case detail page. Shows **Close** next to the overflow menu, and **Assign to me**, **Add task**, and **Edit case** in the overflow menu. **Assign to me** appears only for fulfillers of the case's store.

SP Widget: Task Actions

Portal widget on the task detail page. Shows **Close task** next to the overflow menu, and **Edit task** and, for fulfillers only, **Assign to me** in the overflow menu.

Retail Mobile screens and actions

Case and task record screens for the Retail Mobile app, with state-dependent action buttons in the overflow menu and at the bottom of the screen, plus the Add task, Edit case, Edit task, and Close case input forms.

Business rule: Set case state to Open when assigned_to is filled

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Moves a case from New to Open when someone is assigned. Applies only to cases created with **Create work item for store**. The store-manager auto-routing rule used by Store Plans doesn't run for these cases.

Case type selection: Create work item for store

Sets the case's service so that cases created from the record producer are identified as quick in-store cases.

UI Messages: Scoped Labels

Translatable, scoped UI messages (e.g., "Add task" in lowercase) avoid collisions with out-of-the-box labels.

Form Section: Case Edit View

Limits the portal edit modal to Priority, Assignment group, Assigned to, Short description, and Description.

Known constraints and limitations

- Ad-hoc cases (created without a task-plan-template origin) are unassigned on creation and require manual triage.
- Area and region managers can be assigned cases and tasks, but they can't assign cases or tasks.
- The state fields use integer values in scripts, not display values. Case: 1 = New, 10 = Open, 3 = Closed. Task: 10 = Pending Assignment, 17 = Accepted, 3 = Closed Complete.
- Close Case is gated by platform state-flow validity; you cannot force-close a case in an ineligible state.
- Tasks created this way never get a questionnaire, so the questionnaire close check used by Store Plans doesn't apply.
- Bulk case operations and workflows are out of scope for this feature; use Store Plans for multi-item coordination.

Track cases and tasks from the Retail portal

You can track your store inquiry cases from the Retail portal.

Track your cases and tasks, read the knowledge articles that are posted by your organization, or see the retail organizations that you are associated with all by going to the Retail portal. For more information, see the following topics:

- Track your cases and tasks from the Retail portal
- View your organization's knowledge articles from the Retail portal
- View your associated retail organizations from the Retail portal

Track your cases and tasks from the Retail portal

Track the cases that are assigned to you or your team from the Retail portal.

Before you begin

Role required: Store associate, Store Manager, Regional Manager

Procedure

1. From the Retail portal, navigate to **Cases & tasks**.
2. From the Categories list, filter the displayed cases by selecting a category.

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- Action needed: Open P1 cases, Awaiting info cases, or Service Level Agreement (SLA) breached cases.
- Cases: All cases that are assigned to your current assigned cases, unassigned cases, or cases requested by you.
- Escalated cases: Cases that are currently in an escalated state.
- Tasks: All tasks to be fulfilled by retail personas that are assigned to you, unassigned, or recently updated.
- In-Store Ops Tasks: Store Tasks for your store, including the parent case and when each task was last updated. This category appears only when Retail In-store Operations is installed.

3. Select a case to see the details about it.

View your organization's knowledge articles from the Retail portal

View the knowledge articles that were posted by your organization directly from the Retail portal.

Before you begin

Role required: Store associate, Store manager, Regional manager

Procedure

1. From the Retail portal, select **Knowledge** in the menu bar.
2. Find and select the knowledge article that you want to review.
   - In the **Search Knowledge** field, enter the keywords to search for an article and select the Search icon (🔍).
   - Select an article from the **Top Rated Articles** or **Most Viewed Articles** lists.
   - From the Categories list, filter the articles by selecting a category.

View your associated retail organizations from the Retail portal

Track your associated retail organizations from the Retail portal.

Before you begin

Role required: Store associate, Store manager, Regional manager

Procedure

1. From the Retail portal, navigate to **More information** > **Retail Organizations**.
   A list is displayed of all retail organizations that are associated with the current user.
2. Select a retail organization from the list to see a detailed view of all the cases, tasks, and members.

Manage store plans

Manage store plans to plan and schedule generation of cases and tasks to simplify manual efforts.

Fulfill In-store operations cases and tasks on the Retail Portal

Use the Retail Portal to review and complete In-store operations cases and tasks generated from store plans, including embedded questionnaires.

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Store managers and store associates often work on shared devices, back-office tablets, or handheld scanners where Workspace and Retail Mobile aren't available. On the Retail Portal, they can fulfill the Store Cases and Store Tasks generated from store plans without leaving the portal.

From a Store Case or Store Task, store staff can:

- Read and post comments in the activity stream.
- View and upload attachments.
- Reassign the record by using **Edit**.
- Complete a questionnaire linked to a Store Task.
- Close the record.

Visibility is scoped to the store. Everyone mapped to a store sees all Store Cases and Store Tasks for that store, whoever they're assigned to. Only the user assigned to a Store Task can fill in and submit its questionnaire.

Two rules control when a record can be closed:

- A Store Case can't be closed while any of its Store Tasks are open.
- A Store Task can't be closed until its required questionnaire is submitted.

Portal fulfilment is available on the Australia release and later. Questionnaires appear on the portal only when the Smart Assessment for CSM plugin is installed.

Related topics

Work on a Store Case on the Retail Portal

Work on a Store Task on the Retail Portal

Complete a questionnaire for a Store Task on the Retail Portal

Components installed with Store Plans - Fulfilment in Portal

Work on a Store Case on the Retail Portal

Review, comment on, reassign, and close a Store Case using the Retail Portal.

Before you begin

Role required: sn_rtl_instore_ops.manager or sn_rtl_instore_ops.associate

About this task

Note: You can view all Store Cases for your store. Only the assigned user or a Store Manager can close a case.

Store plan cases are assigned to the store manager automatically, so a store plan case can't be left unassigned.

Procedure

1. From the Retail Portal, navigate to **Cases & tasks**, and select the Store Case you want to work on.
2. Review the case details on the record page.

   The breadcrumb reads **Home** > **Cases & tasks** > case number. The parent HQ case isn't shown on the store case page.

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3. In the **Activity** tab, view comments and work notes, or post a new comment or work note. You can't attach a file here, but files that you add in the **Attachments** tab also appear here.
4. In the **Attachments** tab, view existing attachments or upload a new file.
5. Select the **Tasks** tab to view all Store Tasks linked to this case.

   Each task is listed as a card showing the task number, short description, assignee, priority, due date, and status. Use search and filter to narrow the list. Select a card to open that Store Task.
6. From the **Overflow** menu (three dots), select **Edit case** to reassign the case.

   Only the **Assignment group** and **Assigned to** fields are editable. All other fields are read-only.
7. From the **Overflow** menu, select **Close**.

   A dialog warns that a closed case can't be reopened. To confirm, select **Close case**.

Note:

- If any linked Store Tasks are still open, you can't close the case. The **Close** option is unavailable and its tooltip reads "Complete all tasks before closing this case." Close all linked tasks first.
- Once closed, the case shows a **Closed** badge. The **Overflow** menu is removed, but you can still view other tabs.

Work on a Store Task on the Retail Portal

Complete individual work items tied to a Store Case, including a linked questionnaire, using the Retail Portal.

Before you begin

Role required: sn_rtl_instore_ops.manager or sn_rtl_instore_ops.associate

About this task

Note: The task can also be accessed from its parent Store Case, from the **Tasks** tab.

Procedure

1. From the Retail Portal, navigate to **Cases & tasks**, and select the Store Task you want to work on.
2. Review the task details on the record page.

   The breadcrumb reads **Home** > **Cases & tasks** > case number > task number. The parent store case also appears as plain text in the **Parent case** field.
3. If the task is unassigned, select **Assign to me** from the **Overflow** menu.

   To assign the task to another store user, use **Edit task** instead.
4. In the **Activity** tab, view comments and work notes, or post a new comment.
5. In the **Attachments** tab, view existing attachments or upload a new file.
6. If a questionnaire is linked to the task, select the **Questionnaires** tab to view it.

   The tab shows a card with the questionnaire name, description, status badge, and last-updated timestamp. To complete the questionnaire, see Complete a questionnaire for a Store Task on the Retail Portal.

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7. From the **Overflow** menu, select **Edit task** to reassign the task.

   The **Assignment group** and **Assigned to** fields stay editable, even after the questionnaire is complete, until the task closes. All other fields are read-only.

8. From the **Overflow** menu, select **Close task**.

   Note:

   - If the task's required questionnaire hasn't been submitted, you can't close the task. **Close task** is unavailable and its tooltip reads "Complete the required questionnaire before closing this task."
   - If the task is unassigned and has a questionnaire, a warning explains that closing the task leaves its questionnaire incomplete. Select **Close anyway** to close the task, or select **Assign task** to assign it first.

Complete a questionnaire for a Store Task on the Retail Portal

Complete task-based questionnaires for HQ-to-store communication directly on the Retail Portal.

Before you begin

Role required: sn_rtl_instore_ops.manager or sn_rtl_instore_ops.associate

The Smart Assessment for CSM plugin (com.sn_smart_ast_csm) must be installed. Without it, the **Questionnaires** tab doesn't appear on the portal.

About this task

Note: Only the user assigned to the Store Task can fill in and submit its questionnaire. Other users can view the answers but can't edit or submit them.

Procedure

1. From the Retail Portal, navigate to **Cases & tasks**, and open the Store Task with the linked questionnaire.
2. Select the **Questionnaires** tab.

   If the task isn't assigned yet, the tab reads "The questionnaire will be available once this task is assigned."

   The tab shows a card with the questionnaire name, description, current status, and last-updated timestamp.
3. Select **Take questionnaire** from the card or the **Overflow** menu.

   If you already saved progress on this questionnaire, the button reads **Resume** instead. Either option opens the questionnaire inline.
4. Answer the questions.

   You can answer any question type supported by the embedded Smart Assessment questionnaire. You can save your progress and return later; your answers are preserved.

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5. If finished, select **Submit**.

Note:

- Submission is blocked if any required question is unanswered. The portal highlights the missing required fields.
- Once submitted, the questionnaire card updates to **Completed** with a timestamp, and the questionnaire becomes read-only.
- If the Store Task is reassigned before the questionnaire is submitted, the original questionnaire instance is abandoned and a new instance is created for the new assignee. Partial answers aren't carried over.

Manage store plans to generate cases and tasks

Manage store plans to plan and schedule generation of cases and tasks to simplify manual efforts.

Create a store plan from the workspace

The HQ manager creates a new plan for case and task generation.

Before you begin
Role required: sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager

Procedure

1. Navigate to **All Lists** > **Store plan** > **All**.
2. Select **New** > **HQ communication** and select **Create plan**.
   A new playbook gets loaded.
3. Enter the name in the **Name**.
4. Enter the short description in the **Short Description**.
5. Select **Save** to save the details and **Continue** to go the next step.

Add HQ case details to the HQ communication plan

Log the HQ case details to the new HQ communications store plan.

Before you begin
Role required: sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager

Procedure

1. On the HQ case form, select the required option from the **Priority** drop-down list.
2. Enter the assignment group name in the **Assignment group** or select it using .
3. Enter the name of the agent, the agent manager, or the location manager in the **Assigned to**.
4. Enter the short description in the **Short Description**.
5. Enter the description in the **Description**.
6. Select **Save** to save the HQ case details or select **Save & Continue** to go to the next step.

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Add HQ task details

Log the HQ task details to the new HQ communications store plan.

Before you begin

Role required: sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager

Procedure

1. Select **Add**.
   A new HQ task form appears.
2. On the HQ task form, select the required option from the **Priority** drop-down list.
3. Enter the name of the agent, the agent manager, or the location manager in the **Assigned to**.
4. Enter the subject in the **Subject**.
5. Enter the description in the **Description**.
6. Select **Continue**.
   A new prompt *`Continue without saving`* appears.
   a. Select **Yes** to continue without saving the details.
   b. Select **No** to remain in the same form.
7. Select **Cancel** to discard the details.
8. Select **Save** to save the details.
   The new HQ task added appears.
   a. Select to delete the new HQ task.
   b. Select to edit the HQ task details.
   c. Select **Continue** to go next step.

Add store case details

Log the store case details to the new HQ communications plan.

Before you begin

Role required: sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager

Procedure

1. On the Store case form, select the appropriate priority from the **Priority** drop-down list.
2. Enter the short description in the **Short Description**.
3. Enter the description in the **Description**.
4. Select the **Add file** in the Attachments, if any.
5. Select **Save** to save the details.
6. Select **Save & Continue**.
   A new form appears where you must add a task for the store.

Add store task details

Log the store task details to the new HQ communications plan.

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Before you begin

Role required: sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager

Procedure

1. Select **Add**.
   A new *Store Task* form appears where you must add the store task details.
2. On the Store task form, select the required option from the **Priority** drop-down list.
3. Enter the short description in the **Short Description**.
4. Enter the description in the **Description**.
5. Select a questionnaire template in the **Questionnaire template** or select **Create new questionnaire**.
   Once you create and fulfill the questionnaire, you can view the smart assessment instance through View Questionnaire on mobile app and the list of smart assessment templates through the Retail Questionnaire list on the workspace.
6. Select the **Add file** in the Attachments, if any.
7. Select **Save** to save the details.
8. Select **Continue**.
   A new prompt *Continue without saving* appears.
   a. Select **Yes** to continue without saving the details.
   b. Select **No** to remain in the same form.
9. Select **Cancel** to discard the details.
10. Select **Save** to save the details.
    The new store task added appears.
    a. Select to delete the new store task.
    b. Select to edit the store task details.
    c. Select **Continue** to go next step.

Add affected Retail stores

Determine the affected Retail stores from the list of retail stores.

Before you begin

Role required: sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager

Procedure

1. Select **Add**.
   A new *Select retail stores* form appears.
2. On the Select retail stores form, select the check boxes associated with the affected retail stores from the list of retail stores.
3. Select **Add** to continue or **Cancel** to stay on the same form.

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Schedule the store plan

Schedule the store plan based on the requirement- immediate, one time, or recurring. Once the store plan gets scheduled, it automates the case and task generation which reduces manual work.

Before you begin

Role required: sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager, and sn_fsm_planned_wm.planned_work_admin

Note: Use sn_fsm_planned_wm.planned_work_admin role to avail the one-time and recurring schedule options.

Procedure

1. On the Schedule form, select **Immediate** to generate a case immediately.
   a. Select the date by selecting the calendar and enter the time in the **Due date and time**.
2. Select **One time** to generate a case in future at the scheduled time.
   a. Select the date by selecting the calendar and enter the time in the **Schedule details** > **Effective Start**.
   b. Enter the number of days for the case to be due from the effective start date in the **Schedule details** > **Lead time**.
3. Select **Recurring** to generate recurring cases in future.
   a. Select the starting date by selecting the calendar and enter the time in the **Schedule details** > **Effective Start**.
   b. Select the ending date by selecting the calendar and enter the time in the **Schedule details** > **Effective End**.
   c. Select the trigger type from the **Recurrence details** > **Trigger Type** drop-down list.
   d. Enter the number of days, hours, minutes, and seconds in the **Recurrence details** > **Repeat** section.
   e. Enter the number of days for the case to be due from the effective start date in the **Recurrence details** > **Lead time**.
4. Select **Save** to stay on the window and select **Save & continue** to go to the next step.

Result

The summary gets generated based on the store plan schedule.

Review store plan details

Review the details logged for the store plan and make any updates in any of the sections, if required.

Before you begin

Role required: sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager

Procedure

1. On the Review form, select **Edit** in each of the sections to edit the details under the respective sections.
2. Select **Delete Plan** to delete the store plan.

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The *Delete task plan template?* confirmation prompt appears.

a. Select **Delete** to confirm the plan deletion.

3. Select **Publish** to generate the store plan as per the schedule selected.

   If you select the schedule as Immediate, the record generation begins immediately on publish. Otherwise, the record generation begins as per the selected schedule. If there are any changes to published plans, you must deactivate the plan and clone it to set up a new schedule.

Result

The store plan template state gets updated from Draft to Published. Once the store plan gets published, the review activity will be in read only state.

Monitor a published store plan across multiple stores

Audit or review previously published schedules as needed using the CSM/FSM Configurable Workspace.

Before you begin

Role required: sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager

Procedure

1. In **CSM/FSM Configurable Workspace**, navigate to **Store Plans**.
2. Select **All**.
3. Select an existing plan.
4. Within the playbook, review the following steps:
   - HQ cases
   - HQ tasks
   - Store cases
   - Store tasks
   - Affected stores

Clone a store plan

Clone an existing store plan to create a new store plan that includes the items, conditions, and hierarchy.

Before you begin

Role required: sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager

About this task

When you clone a store plan, the system creates a new store plan with a unique record number and opens the cloned store plan in a new tab. The system creates the new store plan in Draft status and in the active state. The cloned store plan is also added to the store plan list.

The cloned store plan includes the store plan items.

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Note:

- The Clone button is disabled if more than one store plan is selected.
- The clone option is available only for HQ details, HQ task details, store case details, and store task details. The clone option is not available for affected retail stores or scheduled store plans and questionnaires.

Procedure

1. Navigate to one of the following lists.
   - **All** > **Store Plan** > **Draft Store Plan**
   - **All** > **Store Plan** > **Published Store Plan**
   - **All** > **Store Plan** > **All Store Plan**
2. Select a store plan by selecting the check box next to the record number.
3. Select **Clone** from the Edit menu.

Result

The system creates a copy of the selected Store plan and opens the cloned store plan in a new tab.

Delete or deactivate a store plan

A store plan can be deleted when it is active and in the Draft state or deactivated when it is active and is in the Published state.

Delete a store plan

Select one or more task plan templates in the list and then select **Delete**. Only task plan templates in the Draft state can be deleted.

Deleting a task plan template requires the sn_task_plan.delete role.

Note: The system displays a confirmation message when deleting a template. When the user confirms the action, the system deletes the task plan template.

Deactivate a store plan

Select the store plan in the list and then select Deactivate to disable the Active field on the Store Plan.

Deactivating a Store plan requires the sn_rtl_hq_ops.agent, sn_rtl_hq_ops.agent_manager, sn_rtl_hq_ops.location_manager roles.

Note: The system displays a confirmation message when deactivating a store plan. When the user confirms the action, the system deletes the store plan.

Track In-store operations cases and tasks

Monitor progress, completion rates, or delays across all stores for a single plan by tracking and monitoring in-store operations case and task progress.

Track an In-store operations case created from a store plan

Monitor the progress of an In-store operations case from the CSM/FSM Configurable Workspace.

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Before you begin
Role required: sn_rtl_instore_ops.manager

Procedure

1. In **CSM/FSM Configurable Workspace**, navigate to **Retail cases**.
2. Select **All**.
3. Select an In-store operations case to monitor.
4. Review the case details.
   You can edit and save case details, or select **Close case** to close the case.

Track an In-store operations task created from a store plan

Monitor the progress of an In-store operations task from the CSM/FSM Configurable Workspace.

Before you begin
Role required: sn_rtl_instore_ops.manager

Procedure

1. In **CSM/FSM Configurable Workspace**, navigate to **Retail cases**.
2. Select **All**.
3. Select an In-store operations case to monitor.
4. Navigate to the **Tasks** related list.
5. Review the list of tasks created for that store.
6. Select a task to open the **Details** view and take action as needed.

Track an In-store operations task on Retail mobile app

Monitor the progress of an In-store operations task on Retail mobile app.

Before you begin
Role required: sn_rtl_instore_ops.manager

Procedure

1. On the Retail mobile app, select **My Store** > **All cases** from the menu bar.
2. Select an In-store operations case to monitor.
3. Navigate to the **Tasks** related list.
4. Review the list of tasks created for that store.
5. Select a task to open the **Details** view and take action as needed.

Fulfill In-store operations cases and tasks in Retail Mobile

Use Retail Mobile to review, track, and complete In-store operations cases and tasks generated from store plans.

Complete a questionnaire for a store task on Retail mobile app

Complete task-based questionnaires for HQ-to-store communication directly on the mobile app.

Before you begin
Role required: sn_rtl_instore_ops.associate or sn_rtl_instore_ops.manager

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Procedure

1. In **Retail Mobile**, select **My Work**.
2. Open the store case and select **Tasks** related list to view the associated unassigned store tasks.
3. As a store manager, select **Assign to me** to self-assign the task or **Assign task** to assign the task to store associate.
4. Select **Take Questionnaire**.
   The Questionnaire page opens and displays the questionnaire associated with the task record. Each questionnaire is listed as an individual tile under Pending tab, if the questionnaire is yet to be completed or under Completed tab, if the questionnaire is complete.
5. Select the questionnaire tile and complete the questionnaire.
6. If finished, select **Submit**.

Note:

- Once you create and fulfill the questionnaire, you can view the smart assessment instance through View Questionnaire option on mobile app and the list of smart assessment templates through the Retail Questionnaire list on the workspace.
- Only users assigned to the corresponding store task or smart assessment instance can perform fulfillment actions.

View your assigned In-store operations cases and tasks in Retail Mobile

Review all of your assigned In-store operations cases and tasks within Retail Mobile.

Before you begin

Role required: sn_rtl_instore_ops.manager or sn_rtl_instore_ops.associate

Procedure

1. In **Retail Mobile**, select **My Work**.
2. Select one of the following tabs:
   - Cases - Store cases that are assigned to you.
   - Tasks - Store tasks that are assigned to you.
3. Select a case or task to review its details and take action as needed.

Filter your In-store operations cases and tasks in Retail Mobile

Use the filter within Retail Mobile to limit displayed cases or tasks based on specified keywords.

Before you begin

Role required: sn_rtl_instore_ops.manager or sn_rtl_instore_ops.associate

Procedure

1. In **Retail Mobile**, select **My Work**.
2. Select the **Filter** icon.
3. Choose a filter type:

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- All - Filters both cases and tasks.
- Cases - Filters only cases.
- Tasks - Filters only tasks.

4. Enter your filter criteria as needed in the fields which display.

   For example, if there was a product recall on biscuits, you could enter **Biscuit recall** to search for all cases and/or tasks with **Biscuit recall** in the short description.

5. Select **Apply**.

Result

My Work now displays case and tasks as based on your specified filter criteria. To reset these filters, select **Clear**.

Work on an In-store operations case

Work on an In-store operations case using Retail Mobile.

Before you begin

Role required: sn_rtl_instore_ops.manager or sn_rtl_instore_ops.associate

Procedure

1. In **Retail Mobile**, select **My Work**.
2. In **Cases**, select the store case you want to work on.
3. From the **Actions** dropdown, select the following as needed:
   - Assign case - Assign the case to someone else within your team or store location.
   - Assign to me - Assign the case to yourself.
   - Edit case - Edit the case details.
4. In the Activity tab, add comments as needed.
5. Select **Close case** to mark the case as complete.

Work on an In-store operations task in Retail Mobile

Complete individual work items tied to a store case using Retail Mobile.

Before you begin

Role required: sn_rtl_instore_ops.manager or sn_rtl_instore_ops.associate

About this task

Note: The tasks can also be accessed from their parent case.

Procedure

1. In **Retail Mobile**, select **My Work**.
2. In **Tasks**, select the store task you want to work on.
3. From the **Actions** dropdown, select the following as needed:
   - Assign task - Assign the task to someone else.
   - Assign to me - Assign the task to yourself.
   - Edit task - Edit the task details.

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4. In the Activity tab, add comments as needed.
5. Select **Close task** to mark the task as complete.

Search for assigned cases and tasks using AI Search in Retail Mobile

Use the Search function in Retail Mobile to find cases or tasks based on relevant keywords or descriptions.

Before you begin
Role required: sn_rtl_instore_ops.manager or sn_rtl_instore_ops.associate

Note: This requires AI search to be enabled within the Retail Mobile instance. For more information, see AI Search.

Procedure

1. In Retail Mobile, navigate to the **Search** bar.
2. Enter a keyword or description related to a case or task.
3. Select a matching store case as task as needed.

Project tasks in Retail

Store associates and managers can view and act on the project work behind a store opening, closing, renovation, or relocation without leaving the Retail.

Note:

SPM Retail Suite and Retail are separate applications, each deployable on its own, and this feature is the integration between them. SPM Retail Suite remains where the project is planned and tracked, Retail becomes where store-level tasks are worked. SPM Retail Suite does not require Retail.

A store opening, closing, renovation, or relocation is planned at headquarters as a project in Retail Strategic Portfolio Management Suite. The project breaks the work down into project tasks, and the tasks for a particular store appear in Retail so that the store team can complete them. Store personas see the project work for their own store. They act on the tasks assigned to them and record progress where they manage their other work.

Project and project task records stay owned by the Customer Service Management (CSM) and Retail Strategic Portfolio Management Suite applications. Retail reads those records and presents them to store personas without adding tables, roles, or access control rules of its own. The project data that store teams act on is the same data that headquarters plans with. For information about creating and managing the projects themselves, see Explore retail projects.

Where project tasks appear

Project tasks appear in two places, and the tasks are the same records in both:

Find a project task in the Retail Portal

Store personas open the **Projects** category for their store, drill into a project, and open a project task. To act on it, see Assign or close a project task in the Retail Portal.

Find a project task in Retail Mobile

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Store personas reach project tasks either through their store details or through the **Tasks** filter in **My Work**. To act on a task, see Assign or close a project task in Retail Mobile.

The experience is available only when the App SPM Retail plugin is active. When the plugin isn't active, the project and project task surfaces don't appear in the portal or the mobile application. There is no separate setting to turn the feature on or off.

How project tasks differ from in-store operations tasks

A store opening, closing, renovation, or relocation involves work across several teams, such as legal, finance, procurement, and operations. Part of that work happens in the store itself. Project tasks and in-store operations tasks both reach store teams through Retail, but they are different records:

- A project task belongs to a headquarters project for a store life cycle event, such as opening or closing a store. The project manager authors it, and it stays part of the project schedule.
- An in-store operations task supports day-to-day store activity and is usually tied to a store case. For more information, see In-store operations case.

A project task isn't copied or converted into an in-store task. The store team acts on the project task itself, so the project manager sees store progress in the project without asking for a separate status update.

What controls the project tasks a store persona sees

Two rules determine whether a project task reaches a store persona:

- The project manager decides which project tasks the store team can see by setting the **Visible to customer** field on each project task. A project task without this field set doesn't appear in the portal or the mobile application.
- Project tasks are scoped to the retail organization that a store persona belongs to. A persona associated with one store doesn't see the project tasks of another store.

Record-level access to project and project task records is owned by the Customer Service Management (CSM) and Retail Strategic Portfolio Management Suite applications. Retail adds no access control rules or query rules of its own on those tables. Its portal lists filter on the **Visible to customer** field as well, so an unflagged task is excluded before the list reaches the browser.

A store persona also needs the right roles. Access requires a retail contributor or fulfiller responsibility together with a project stakeholder role, scoped to the store that the persona belongs to. Which surfaces a persona reaches, and which actions they can take, depend on which stakeholder role they hold. For the full breakdown, see Roles and visibility for project tasks.

Reference information

For the tables and fields behind these surfaces, including the three fields that Retail writes, see Project task data model.

Related links

- Explore retail projects
-

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Make project tasks available to a store team

Install the App SPM Retail plugin and give your store personas the roles and organization membership they need before project tasks appear in Retail.

Before you begin

Role required: sn_customerservice.projectmanager, sn_service_org.project_manager or sn_customerservice.projectstakeholder

About this task

Project tasks reach a store team only when three things are true: the plugin is installed, the persona holds a project stakeholder role, and the persona belongs to the retail organization for their store. Retail has no separate setting that turns the feature on or off.

Procedure

1. Install the App SPM Retail application on your instance.

   The project task surfaces install with the plugin. When the plugin isn't present, none of the artifacts are installed and no activation errors occur.

2. Grant a project stakeholder role to each store persona who needs project task access.

   Assign sn_bus_loc.location_project_stakeholder to a store associate, or sn_bus_loc.location_manager_project_stakeholder to a store manager. These roles come from the App SPM Retail dependency. No retail role includes them, so a persona who holds only a retail role sees nothing. For the procedure, see Assign roles to Retail users.

3. Confirm that each persona belongs to the retail organization for their store.

   Project task access is scoped to the persona's service organization, so a persona who isn't a member of their store's organization sees no project tasks. For the procedure, see Configure your organizational structure.

4. Ask the project manager to set the **Visible to customer** field on the project tasks that the store team should work.

   This is done on the headquarters side. A project task without the field set doesn't appear in the portal or the mobile application, whatever roles the persona holds. For more information, see Explore retail projects.

Result

Store personas see the project tasks for their own store, and can act on them in the portal and in the mobile application. For what each persona can do, see Roles and visibility for project tasks.

Find a project task in the Retail Portal

Open the projects for your store in the Retail Portal and drill into the project task you want to work on.

Before you begin

Role required: a retail contributor or fulfiller responsibility, and either sn_bus_loc.location_project_stakeholder or sn_bus_loc.location_manager_project_stakeholder for your store

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About this task

Note: The **Projects** category appears only when the App SPM Retail plugin is active. You see only the project tasks that the project manager made visible to your store. For more information, see Project tasks in Retail.

Procedure

1. In the Retail Portal, navigate to **More information** > **Retail organizations**, and then select your store.
2. On the *Retail Org Details* page, select the **Projects** category.

   The projects for your store are listed with their number, project name, state, and project manager.
3. Select a project.

   The project page shows the project number and state, followed by the project name, project manager, planned end date, and description. The **Project tasks** list shows the tasks for the project with their number, short description, planned end date, priority, state, and assignee. You can search the list and filter it by state, priority, or assignee.
4. Select the project task you want to work on.

   The task page shows the task number and state. Below that, it shows the task title, assignee, priority, planned end date, assignment group, and the project that the task belongs to. Select the project name to open the project. The **Project task** tab lists any child tasks of this task.

Result

The project task page is open. To assign or close the task, see Assign or close a project task in the Retail Portal.

Find a project task in Retail Mobile

Reach the project tasks for your store from your store details or from **My Work**, and open the one you want to work on.

Before you begin

Role required: a retail contributor or fulfiller responsibility, and either sn_bus_loc.location_project_stakeholder or sn_bus_loc.location_manager_project_stakeholder for your store. **My Work** is available to fulfillers only.

About this task

Note: The **Projects** entry and the **Tasks** filter appear only when the App SPM Retail plugin is active. You see only the project tasks that the project manager made visible to your store. For more information, see Project tasks in Retail.

Procedure

1. Open the project task using one of the following options.
   - To work through your store, open your store details, select **Projects**, select a project, and then select a project task. Each project shows its state, number, name, and project manager.
   - To work from your own queue, open **My Work**. The list shows your cases and your project tasks together. Select the **Tasks** filter to show only the project tasks assigned to you or to an assignment group that you belong to.

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Project task cards show the state, priority, task number, short description, assignee, and due date.

Note: The **Projects** entry appears only when you have project tasks assigned for your store. **My Work** is available to fulfillers, so a contributor reaches project tasks through their store details instead.

2. Review the task details.

   The task screen shows the project number, due date, and description. Select **Show more** to expand a long description, and select the project number to open the project. Any child tasks of this task are listed below the activity stream.

Result

The project task is open. To assign or close it, see Assign or close a project task in Retail Mobile.

Assign or close a project task in the Retail Portal

Comment on a project task, assign it to someone in your store, or close it when the work is done.

Before you begin

Role required: a retail contributor or fulfiller responsibility, and either sn_bus_loc.location_project_stakeholder or sn_bus_loc.location_manager_project_stakeholder for your store

Open the project task page as described in Find a project task in the Retail Portal.

About this task

Note: The **Actions** button appears only while the task is open and at least one action is available to you.

Procedure

1. To add a comment or an attachment, use the **Activity** or **Attachments** tab.
2. To assign or close the task, select **Actions**, and then select one of the available options.

   Which options are available depends on your permissions and on the task:

   Assign task

   Available when you can change the assignee and the assignment group of the task. Enter an assignment group, select an assignee, and then select **Save**. A task that is already assigned to someone can still be reassigned.

   Assign to me

   Available on the same condition, and only when the task isn't already assigned to you.

   Close task

   Available when the task is assigned to you. You can close only a task that has no open child tasks. Close the child tasks first.

Result

Your update is saved to the project task. The project manager at headquarters sees the current state of the work without asking the store for a status update.

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Note: Each action is checked again before the update is applied. If you don't have permission, the portal reports it instead of failing silently.

Assign or close a project task in Retail Mobile

Comment on a project task, assign it, or close it from the task screen in Retail Mobile.

Before you begin

Role required: a retail contributor or fulfiller responsibility, and either sn_bus_loc.location_project_stakeholder or sn_bus_loc.location_manager_project_stakeholder for your store

Open a project task as described in Find a project task in Retail Mobile.

About this task

Note: The task actions are offered only while the task is open.

Procedure

1. To add a comment or an attachment, use the activity stream.
2. To assign the task, select **Assign task** or **Assign to me**.

   These actions are available while the task is open, you can change the assignee and assignment group, and the task isn't already assigned to you. Select **Assign task** to choose an assignment group or an assignee. **Assign task** is also available from the overflow menu, where it appears even when the task is already assigned to you.
3. To complete the task, select **Close task**.

   This action is available while the task is open and assigned to you. If you don't have write access to the task, the action reports that the update wasn't permitted instead of failing silently.

Result

Your update is saved to the project task. The project manager at headquarters sees the current state of the work without asking the store for a status update.

Track and monitor store plans

HQ and regional managers lack real-time insight into how published store plans are progressing. This capability bridges that gap by providing visibility from overall plan status down to individual store tasks.

Tracking begins once a plan is published and its cases and tasks have been generated. The **Track Plan** tab on a published plan brings the execution state of that plan into one place, so a manager can see overall progress and then move down to the record that is holding things up.

The tab provides two views:

- The plan progress summary reports completion for a selected schedule occurrence, for the plan types provided with the base system.
- The hierarchical list view presents the plan's generated records as a navigation tree with state tabs, and works with any plan type.

For details on when cases and tasks are generated, see Stages of store plan tracking and monitoring.

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Plan progress summary

The plan progress summary gives headquarters and regional managers a single view of how a published plan is progressing for a selected schedule occurrence, without opening individual cases.

The plan progress summary appears on the **Track Plan** tab of a store plan. The tab is displayed as the first tab on the template and appears only when the template is in the Published state.

The tab requires both the Planned Work Management and Multi Case Creation plugins to be active. If either plugin is inactive, the tab is not displayed.

The summary supports the plan types provided with the base system, HQ Communications and Store Audit. Custom plan types that use complex configuration might require additional configuration before the summary reports on them accurately.

Selecting a schedule occurrence

Plans that run on a schedule generate a separate set of cases and tasks for each occurrence. The occurrence selector lists the occurrences that are in the Scheduled state and scopes everything on the tab to the occurrence that you select.

- The latest occurrence is selected when the tab loads. If no occurrence is currently running, the most recently completed occurrence is selected.
- The selector is not displayed for plans with a One-Time or Immediate schedule, because those plans produce a single set of records.
- The due date for the selected occurrence is shown in the summary header. It is omitted for plans where a due date doesn't apply.

Progress metrics

The summary reports the following metrics for the selected occurrence. Selecting a case count opens the matching tab in the hierarchical list view, with the tree positioned on the store case node.

Progress metrics

Metric	Description	Selectable
Store Cases Closed (%)	The proportion of generated store cases that are closed, calculated as the total closed store cases divided by the total store cases generated. The value is rounded to the nearest whole number and shown without decimal places.	No
Open Store Cases	The number of store cases in an open state for the selected occurrence.	Yes
Overdue Store Cases	The number of store cases in an open state for the selected occurrence whose due date and time have passed.	Yes
Closed Store Cases	The number of store cases in a closed state for the selected occurrence.	Yes
All Store Cases	The total number of store cases generated for the selected occurrence.	Yes

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For the states that count as open, closed, and overdue for each type of record, see Hierarchical list view.

Note: For plans with a Recurring or Immediate schedule type, an empty state shows the schedule details until cases and tasks are generated, or start generating, for a schedule occurrence.

After you manually refresh the page, the data view appears if cases and tasks have been generated for at least one schedule occurrence.

Hierarchical list view

The hierarchical list view on the Track Plan tab presents a plan's generated cases and tasks as a navigation tree, so managers can move from the plan down to an individual store task without losing context.

Unlike the plan progress summary, the hierarchical list view is not restricted to particular plan types. It is driven by the plan type configuration, so it supports the plan types provided with the base system and any plan types added later. Custom plan types that use custom case or task states might require additional configuration.

Navigation tree

The name of the store plan appears above the tree. The tree lists the records generated for the selected schedule occurrence, as separate nodes for each type of record. Node labels follow the plan type: a store audit plan shows its audit case and audit tasks in place of the HQ case and HQ tasks.

- HQ case
- HQ tasks, listed individually
- Store cases
- Store tasks, listed individually

When the tab loads, the store case node is selected and the list on the right shows that node's records. Selecting a different node updates the list.

The tree lists a maximum of 100 template items. A plan with more than 100 items isn't fully represented in the tree.

State tabs and counts

The list is organized into All, Open, Closed, and Overdue tabs. Each tab shows a count in brackets for the selected node and the selected occurrence.

The tab filter and the tree selection combine rather than replace each other:

- Selecting a different node keeps the active tab and applies to the states that correspond to that node's type of record.
- Selecting a different occurrence keeps both the selected node and the active tab. If the node no longer exists for the new occurrence, the store case node is selected instead.
- When a node or an occurrence has no matching records, the list shows an empty state.

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States behind each tab

States behind each tab

Type of record	Tab	States included
HQ case, store case, and store audit case	Open	New, Open, Awaiting info
HQ case, store case, and store audit case	Closed	Closed, Resolved, Cancelled
HQ task	Open	Open, Awaiting information, In Progress
HQ task	Closed	Closed
Store task and audit task	Open	Pending assignment, Accepted
Store task and audit task	Closed	Closed complete
All types	Overdue	Any open state where the due date and time have passed. A record is overdue when its due date and time are in the past and it is in one of the open states for its record type.

Filtering and record details

Store cases and store tasks can be filtered by store name to narrow the list to a particular part of the retail organization.

The columns shown for each type of record are configured in the list view for plan tracking. The organization column depends on the plan type. For store audit plans, audit cases show the auditee organization and audit tasks show the requestor organization. For HQ communications plans, store cases show the supporting retail org and store tasks show the provider organization. No organization column is configured for the HQ case or the HQ task, because each is a single record per node.

An information icon marks records that have a questionnaire attached, with a **Questionnaire added** tooltip. The icon is informational only.

The list is read-only. Records are opened from the tree and the list rather than created or edited in place, so no new record action, row actions, or inline editing are available.

Track a store plan on the workspace

Enable plan creators to track published plan execution end-to-end, overall completion status, parent (HQ) cases, HQ tasks, store cases, and store tasks.

Before you begin
Role required: HQ communications: sn_rtl_hq_ops.agent_manager or sn_rtl_hq_ops.location_manager. Store audit plans: sn_rtl_store_audit.plan_author with sn_rtl_store_audit.audit_manager or sn_rtl_store_audit.location_audit_manager.

About this task
Enable operations teams to view, filter, and close cases, and to access cases consistently from multiple entry points, so they can drive on-time completion across all stores.

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Procedure

1. Navigate to **Store Plans** and open the required Store Plan record.
2. Select the **Track Plan** tab.
   The tab displays the plan progress summary and the hierarchical list view for the plan. The tab is available only when the plan is published.
3. If the plan runs on a schedule, select an occurrence from the occurrence selector.

   The latest occurrence is selected when the tab loads. Everything on the tab is scoped to the occurrence that you select. The selector isn't displayed for One-Time or Immediate plans. For more information, see Plan progress summary.
4. Review the progress metrics for the selected occurrence.
   The summary reports the percentage of store cases closed, and the number of open, overdue, closed, and total store cases.
5. Select a count in the summary to open the matching tab in the hierarchical list view, or select a node in the navigation tree to review a specific part of the plan.

   The tree contains nodes for the HQ case, each HQ task, the store cases, and each store task. The store case node is selected when the tab loads.
6. Select **All**, **Open**, **Closed**, or **Overdue** to filter the list by state.
   Each tab shows a count for the selected node. The state filter and the tree selection apply together, and the active tab is kept when you select a different node. For the states behind each tab, see Hierarchical list view.
7. Filter store cases and store tasks by store name to narrow the list.
8. Open a record from the list to view its details.

   The list is read-only. Records can't be created or edited from the list.

Track a store case from an HQ case

Track a store case from an HQ case to view the status.

Before you begin

Role required: HQ communications: sn_rtl_hq_ops.agent_manager or sn_rtl_hq_ops.location_manager. Store audit plans: sn_rtl_store_audit.plan_author with sn_rtl_store_audit.audit_manager or sn_rtl_store_audit.location_audit_manager.

Procedure

1. Navigate to **Store Plan** > **All**.
2. Select a store plan, and then select the **Track Plan** tab.
3. In the navigation tree, select the node for the records that you want to review.

Navigation tree nodes

Node	Description
HQ case	Lists the HQ case generated for the selected occurrence.
HQ tasks	Each HQ task template item is displayed as a separate node, showing the HQ tasks created from that template item.
Store cases	Lists the store cases generated under the plan for the selected occurrence.

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Node	Description
Store task	Lists the store tasks for the selected occurrence. Each store task template item is displayed as a separate node, showing the store tasks created from that template item.

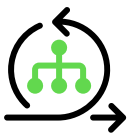
4. Open a store case from the list to view its details.

   For the states behind the **All**, **Open**, **Closed**, and **Overdue** tabs, and the filters available on store cases and store tasks, see Hierarchical list view.

ServiceNow Otto for Retail Service Management (RSM)

The store inquiry AI agent is an intelligent assistant designed to support the headquarters (HQ) support agents in efficiently managing and resolving cases.

Get started

Explore	Configure	Use
		
Learn more about the store inquiry AI agent and it's capabilities.	How to enable the trigger to leverage the store inquiry AI agent.	Use store inquiry AI agent to improve and enhance the store inquiry processes.

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.

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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. In addition, this application will collect case information (for chat summarization, resolution notes generation, knowledge generation, call summarization), chat transcripts (for chat recommendation), and email information (for email response). Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Explore ServiceNow Otto for Retail Service Management

ServiceNow Otto for Retail Service Management is an intelligent assistant that helps headquarters support agents efficiently manage and resolve store inquiries and service requests using generative AI.

The Store inquiry AI agent helps in retrieving and analyzing case-related information from knowledge bases, documents, and case repositories. By providing accurate and context-aware support, the AI agent reduces manual effort and improves accuracy, particularly in interpreting store policy queries and drafting relevant responses.

The Store inquiry AI agent understands store agent intents and performs relevant actions, such as data retrieval or record updates. It provides clear and helpful responses based on available information. This enables efficient support for HQ agents, streamlining interactions and improving the overall experience.

Store inquiry AI agent capabilities

The Store inquiry AI agent is equipped with the following capabilities:

- Retrieve case details: Access and return information about a specific case, ensuring that AI agent has the necessary details to proceed with the inquiry.
- Identify similar cases: Find and retrieve cases that share similarities with a given case, facilitating the identification of patterns or relevant precedents.
- Retrieve documents: Find and retrieve documents that have semantic similarities with the short description of the case.

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- Analyze all the available sources: Analyze past cases, knowledge base articles, and documents to generate accurate answers to store agent queries. This ensures that HQ agents receive relevant and precise information.
- Update case information: Modify or update the details of an existing case as needed, allowing for the maintenance of accurate and up-to-date case information.

Configure ServiceNow Otto for Retail Service Management (RSM)

The collection comprises of ServiceNow Otto for Retail Service Management (RSM) and RSM AI agent collection. The ServiceNow Otto for Retail Service Management (RSM) and RSM AI agent collection together enable the store inquiry AI agent.

- The HQ agent can leverage the store inquiry AI agent either manually or by enabling or configuring the trigger.
- A trigger allows the AI agent to launch automatically without requiring a HQ agent request when the trigger condition is met.
- The trigger that is shipped with this release is configured to launch for the HQ agent when the case state changes to Open from New and Assigned to field is not empty.
- By default, the trigger being shipped is disabled and HQ agent can navigate to the AI agent and enable the trigger.
- Now Assist for doc Intel should be upgraded to 6.0.0.

Enable store inquiry AI agent trigger

The HQ agent can leverage the store inquiry AI agent either manually or by enabling or configuring the trigger.

About this task

ServiceNow Otto for Retail Service Management and the AI Agents for Retail Service Management together enable the store inquiry AI agent. The HQ agent can leverage the store inquiry AI agent either manually or by enabling or configuring the trigger.

- A trigger allows the AI agent to launch automatically without requiring a HQ agent request when the trigger condition is met.
- The trigger shipped with this release launches for the HQ agent when the case state changes from New to Open and the Assigned to field is not empty.
- By default, the trigger being shipped is disabled and HQ agent can navigate to the AI agent and enable the trigger.

Before you begin

Role required: sn_rtl_stre_servcs.agent

You must have the Retail Core, Retail Mobile application, and Retail Store Inquiry.

Procedure

1. Install the ServiceNow Otto for Retail Service Management plugin and AI Agents for Retail Service Management from the application manager.
2. Navigate to **Manage agentic workflows and AI agents** > **Store inquiry AI agent** on the AI Agent Studio.
3. Select the **Trigger** > **Add a new trigger** or select the existing trigger and toggle the **Trigger if ON** option to enable the trigger and save it to launch the AI agent automatically.

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What to do next

Configure AI agent security

You can enable security implementation on AI agents and agentic workflows through access control lists (ACLs) and user identities. These ACLs determine which users have permissions to discover and invoke an agentic workflow or AI agent.

Configure and manage these ACLs for agentic workflows and AI agents in the AI Agent Studio.

See Implement access control in AI agents for more information on implementing security for AI agents.

ServiceNow Otto for Break-Fix and Store Audit overview

The ServiceNow Otto conversational interface connects to Break-Fix Case Management and Store Audit Plans workflows. Store staff can submit, troubleshoot, and track cases without accessing the RSM portal.

How ServiceNow Otto relates to Break-Fix and Store Audit

ServiceNow Otto as frontend interface

ServiceNow Otto is an alternative conversational UI to the RSM portal for Break-Fix and Store Audit case operations. All data flows to and from the existing ServiceNow RSM backend (no new system required).

Break-Fix integration

Store staff submit equipment failure cases via ServiceNow Otto chat (natural language) instead of RSM portal forms. ServiceNow Otto automatically extracts metadata (store ID, equipment type, severity) and creates RSM break-fix cases with correct categorization. HQ support receives cases with full context in RSM workspace.

Store Audit integration

Store staff track Store Audit plan progress via ServiceNow Otto chat. After a plan is published and audit cases auto-generated in RSM, auditors can ask ServiceNow Otto about plan status, completion progress, and Pass/Fail results without logging into the RSM portal.

Break-Fix and Store Audit: workflows: portal vs ServiceNow Otto

Workflow	RSM Portal (Original)	ServiceNow Otto
Break-Fix Case Creation	Navigate portal → Select from dropdowns → Fill structured form → Submit	Open ServiceNow Otto → Describe issue → Answer clarifying questions → ServiceNow Otto creates case
Break-Fix Troubleshooting	Search KB separately, then submit case	ServiceNow Otto surfaces KB steps in chat before case creation
Break-Fix Tracking	Log in to the portal, click each case individually	Ask ServiceNow Otto "Show my cases" → Consolidated view + actions in chat

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Workflow	RSM Portal (Original)	ServiceNow Otto
Store Audit Tracking	Log in to the portal, navigate to the Track plan tab	Ask ServiceNow Otto about plan progress → View Pass/Fail summary in chat

Multi-channel deployment

Both Break-Fix and Store Audit workflows are accessible through the following channels:

ServiceNow Otto web portal

Standalone access

Microsoft Teams

Organizational chat

Slack

Organizational chat

Embedded retail portal

Chatbot widget within the familiar portal

Store staff use their preferred channel for all case operations.

Backend systems unchanged

Break-Fix

Cases are still created in ServiceNow RSM, triaged by HQ support in RSM workspace, using the same workflows and business logic. Only the submission interface changes from the portal form to the ServiceNow Otto chat.

Store Audit

Plans are still created in RSM, published to auto-generate cases, and auditors still complete tasks on mobile. ServiceNow Otto adds an optional tracking interface for status checks.

Data sync

ServiceNow Otto reads from and writes to RSM via the NOW MCP server. All data resides in ServiceNow (no replication).

Integrated benefits

Unified experience

Store staff use a single conversational interface for Break-Fix case operations and Store Audit tracking. No need to toggle between the portal and ServiceNow Otto.

Reduced portal login

Staff no longer need RSM portal login for routine operations (submit cases, check status, add comments, view audit progress).

Natural language

Describe equipment issues naturally ("printer won't print") and audit queries ("what's my audit progress?") instead of using structured forms.

Contextual intelligence

ServiceNow Otto surfaces troubleshooting steps for Break-Fix before escalation, reducing unnecessary cases and floor downtime.

Faster triage

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HQ support receives Break-Fix cases with proper categorization and full context .

What stays the same

- Break-Fix case category, priority, and resolution workflows remain identical
- HQ support triage, dispatch, and resolution process unchanged
- Store Audit plan creation, task definition, and execution unchanged
- Mobile app for auditors executing Store Audit tasks unchanged
- ServiceNow RSM as system of record for all data

Related topics

- Submit and track Break-Fix cases via ServiceNow Otto
- Track Store Audit progress via ServiceNow Otto
- ServiceNow Otto integration technical reference
- Break-Fix Case Management overview
- Store Audit Plans overview

Submit and track break-fix cases via Moveworks Chat

Use Moveworks as an alternative to the RSM portal to submit, troubleshoot, and track break-fix cases using natural language in chat.

Before you begin

- Access to Moveworks (web, Teams, Slack, or embedded Retail portal)
- Equipment failure or issue requiring assistance
- No role is required.

Role required: none.

About this task

Instead of logging in to the RSM portal and using dropdown menus to create break-fix cases, you can use Moveworks chat. Describe your equipment issue naturally, and Moveworks automatically extracts store ID, equipment type, and severity. You can check troubleshooting steps before escalating. Moveworks creates the RSM case with proper categorization, and you can track status or add comments in chat instead of navigating the portal.

Procedure

1. Open Moveworks and describe your equipment issue.

   Example
   For example: "My POS terminal won't start" or "The printer in checkout is stuck." Moveworks understands natural language.

2. Answer Moveworks's clarifying questions, if any.

   Note: Moveworks may ask about store location, how long the issue has lasted, or whether equipment is currently in use to better understand context.

3. Review auto-extracted case details (store ID, equipment type, and severity).

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Note: Correct any details if needed. For example: "Change severity to Critical" or "This is Store 45, not Store 44."

4. Select whether to view troubleshooting steps from the RSM knowledge base.

   Select **Yes** to see troubleshooting steps, or **No** to skip and create the case immediately. If you choose troubleshooting:

   - Follow 3–5 steps provided by Moveworks.
   - If resolved: Tell Moveworks "It's fixed" (no case created).
   - If not resolved: Tell Moveworks "Create the case" (case created with troubleshooting history documented).

5. Confirm case creation or skip if resolved.

   Note: If you proceed to escalation, Moveworks creates the RSM case and provides the case number in chat.

6. Track your case status anytime.

   Ask Moveworks any of the following:

   - "What's the status of case CS0123456?"
   - "Show me my open break-fix cases"
   - "Add a comment: The issue started after the update"
   - "Can you extend the due date?"

7. Review proactive notifications in Moveworks.

   Note: Moveworks automatically notifies you when the case is acknowledged, a technician is assigned, or the case is resolved. You do not need to log in to the portal to check status.

Result

Break-fix case created in RSM with proper categorization and full context from your Moveworks conversation. The case is immediately available for HQ support triage.

From chat, you can do the following:

- Receive the case number in chat.
- Check status anytime via chat.
- Add comments or take actions without portal login.
- Receive automatic notifications when status changes.

HQ support receives a properly categorized case with complete context, enabling faster triage and dispatch than portal-submitted cases.

What to do next

The case is now in RSM for HQ support to manage. If you want to check case status, add comments, or extend due dates, ask Moveworks in chat. For a comparison with the traditional portal-based break-fix submission, see Submit break-fix cases (portal and mobile).

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Related topics

- ServiceNow Otto for Break-Fix and Store Audit overview
- Track Store Audit Progress Using Moveworks Chat
- Break-Fix Case Management
- Submit Break-Fix Cases through Portal or Mobile
- Components Moveworks Integration for Break-Fix and Store Audit

Track Store Audit Progress Using Moveworks Chat

After Store Audit plans are published and audit cases are created in RSM, auditors can ask Moveworks about plan progress, task completion status, and Pass/Fail results without accessing the RSM portal.

Before you begin

- A Store Audit plan has been created and published (see Create and Publish Store Audit Plans)
- Audit cases have been auto-generated in RSM for your store
- You are an auditor assigned to execute the audit tasks
- Access to Moveworks (web, Teams, Slack, or embedded Retail portal)
- Role required: none.

About this task

After a Store Audit plan is published, RSM auto-generates one Audit Case per selected store with all associated tasks. Auditors execute tasks on mobile (see Execute Store Audit on Mobile). To check overall plan progress, task completion status, or Pass/Fail results without navigating the portal, use Moveworks chat.

Procedure

1. Ask Moveworks about your Store Audit plan.
   - "What's the status of my Store Audit plan for June?"
   - "How many tasks do I have left in my audit?"
   - "Show me my audit progress"
   - "What store audit cases am I assigned to?"
2. Review the audit plan and case status that Moveworks retrieves from RSM.

   Moveworks displays the following information:

   - **Plan Name**: for example, "June Monthly Compliance Audit"
   - **Total Tasks**: Number of tasks in the plan
   - **Completed**: Tasks marked Pass/Fail
   - **Remaining**: Tasks not yet executed
   - **Pass Count / Fail Count**: Results breakdown
   - **Overall Progress**: Percentage complete
3. Ask Moveworks for details on specific tasks if needed.
   - "What does Task 3 require?"
   - "Which tasks failed in my audit?"

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- "Show me tasks that are pending"
- "What's the deadline for completing this audit?"

4. To execute tasks, use the mobile app instead of Moveworks.

   While Moveworks provides status tracking, actual task execution (marking Pass/Fail, taking photos, adding notes) happens in the mobile app. See Execute Store Audit on Mobile for the task execution workflow.

5. Use Moveworks to check audit progress between mobile sessions.

   You can check Moveworks anytime (web, Teams, Slack) to see updated progress after completing tasks on mobile. No portal login is required.

Result

You now have quick visibility into Store Audit plan progress without a portal login. You can see the overall plan completion percentage, view the Pass/Fail breakdown, identify remaining tasks, check task details and deadlines, and monitor progress from any device (web, Teams, Slack).

What to do next

To execute audit tasks and mark them Pass/Fail, use the mobile app as described in Execute Store Audit on Mobile. For managers tracking audit results across stores, see Track Store Audit Results (Manager).

Related topics

- ServiceNow Otto for Break-Fix and Store Audit overview
- Submit and track break-fix cases via Moveworks Chat
- Retail Store Audit Operations
- Complete a store audit from Retail Mobile
- Manage Store Audit
- Components Moveworks Integration for Break-Fix and Store Audit

Configure the ServiceNow Otto webhook connection

Configure the otto_webhook Connection & Credential Alias so ServiceNow can deliver webhook events to the ServiceNow Otto listener.

Before you begin

Obtain the listener endpoint URL and the API key from the ServiceNow Otto team. The webhook connection supports API key authentication only.

Role required: admin

Procedure

1. Navigate to **Connections & Credentials** > **Connection & Credential Aliases** and open `otto_webhook`.
2. In the **Connections** related list, click **New**.
   Set **Connection URL** to the ServiceNow Otto listener endpoint and save.
3. In the **Credentials** related list, select **New** and then select **API Key Credentials**.
   Set **API Key** to the key from the ServiceNow Otto team, set **API Key Header Name** to `Authorization`, and set **API Key Prefix** to `Bearer`. Leave **MID Servers** blank.
4. Save the credential.

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5. Open the connection record, set its **Credential** field to the new credential, and save.
6. On a non-production instance, transition a BF case (with `contact_type = otto`) to Resolved and verify the payload appears in the ServiceNow Otto listener logs.
   If the call does not arrive, check **System Logs** > **Outbound HTTP Requests**.

ServiceNow Otto integration overview

The ServiceNow Otto integration sends outbound webhook events to the ServiceNow Otto listener when a Break-Fix case changes to a key state. This enables ServiceNow Otto to proactively notify store associates on their desktop messaging platform.

Events are dispatched when a `sn_rtl_stre_servcs_bf_case` transitions to a trigger state and `contact_type = moveworks`. No event is sent if the `opened_by` user has no email address — a warning is logged and the call is skipped.

Trigger conditions and events

Transition	Event	Extra payload
New (1) → Open (10)	`case_assigned`	—
Any → Resolved (6)	`case_resolved`	Resolution code
Any → Awaiting Info (18)	`case_awaiting_info`	Latest agent comment

Failure behavior

HTTP call failures are caught and logged. Case state is never affected by webhook delivery failures.

Customer prerequisites (ServiceNow Otto side)

Install these plugins from the ServiceNow Otto plugin marketplace. Without them, ServiceNow dispatches events but ServiceNow Otto does not act on them.

Plugin	Purpose
`Retail_Create_Breakfix_Case`	Case creation via ServiceNow Otto. Built on Moveworks.
`Retail_Get_Breakfix_Case_Detail`	Case detail retrieval
`Retail_Update_Breakfix_Case_Details`	Case field updates
`Retail_Notify_Breakfix_Case_Lifecycle`	Handles assigned/resolved/awaiting-info events

Components Moveworks Integration for Break-Fix and Store Audit

Technical details on data flow, integration points, API usage, and supported operations for Moveworks with Break-Fix Case Management and Store Audit Plans.

Data Integration Model

System of Record: ServiceNow RSM remains the authoritative source for all Break-Fix and Store Audit data. Moveworks reads/writes via NOW MCP server; no data replication occurs.

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Integration Layer: NOW MCP server provides API bridge between Moveworks and ServiceNow RSM. All Moveworks operations (case creation, status lookup, tracking) route through NOW MCP.

Operation	Break-Fix	Store Audit
Create Case	Moveworks → NOW MCP → RSM Break-Fix Case	Plan published via RSM UI (auto-generates cases)
Read Status	Moveworks ← NOW MCP ← RSM Break-Fix Case	Moveworks ← NOW MCP ← RSM Audit Case
Update Case	Add comment, extend date, reassign → NOW MCP → RSM	Task completion (Pass/Fail) → Mobile → RSM (via FSM)
Notifications	RSM status change → NOW MCP → Moveworks → Chat	Plan/Task status change → NOW MCP → Moveworks → Chat

Break-Fix Case Integration with Moveworks

Case Creation: Moveworks extracts store ID (from user profile), equipment type (from NLP), and severity (from conversation context). Sends to RSM via NOW MCP. Case created with category=Break-Fix, correct priority, and full conversation context attached.

Metadata Mapping:

- **Store ID:** User profile → Buyer Organization (Service Organization match)
- **Equipment Type:** NLP extraction → RSM equipment category
- **Severity:** Conversation analysis → Priority (Critical/High/Medium/Low)
- **Requester:** Moveworks identity → User lookup in RSM
- **Context:** Full conversation transcript → Case description field

Knowledge Base Integration: Moveworks queries RSM KB via NOW MCP for troubleshooting steps matching equipment type and issue keywords. Steps ranked by relevance and presented in chat before case escalation.

Case States and Transitions: Cases follow standard Break-Fix state machine (New → Acknowledged → In Progress → Resolution Proposed → Closed). Moveworks displays current state and available actions (add comment, extend due date, reassign).

HQ Support Integration: Cases arrive in RSM with proper categorization and full context, reducing triage time compared to portal submissions with dropdown errors.

Supported Operations by Workflow

Break-Fix via Moveworks:

- Create case (natural language submission)
- View troubleshooting steps (KB search)
- View case status (single or consolidated list)
- Add comments to case
- Extend due date
- Reassign fulfiller
- Receive status change notifications

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- Doesn't create incident/work order (stays in RSM workflow)
- Doesn't directly dispatch technician

Channels and Availability

All Moveworks operations for Break-Fix and Store Audit available across:

- **Web Portal:** Full chat, case creation, status tracking
- **Microsoft Teams:** Full chat, case creation, status tracking via bot
- **Slack:** Full chat, case creation, status tracking via bot
- **Embedded Retail Portal:** Chatbot widget within Retail portal for Break-Fix and Store Audit queries

Mobile Access: Teams and Slack mobile apps provide Moveworks access on mobile. Store Audit task execution still occurs on dedicated mobile app.

Data Scope and Limitations

Store Data Isolation: Users can only see/manage cases and audits for their assigned store. Moveworks enforces store-level access control via user profile (Buyer Organization).

Role-Based Access: Store staff can submit Break-Fix cases and view audit progress. HQ support views all cases in queue (role-based access in RSM enforced via NOW MCP).

Conversation History: Moveworks conversation transcripts retained in Moveworks; full case context also stored in RSM case description and comments.

Historical Data: Moveworks can retrieve and display past cases and audit results from RSM up to 12 months (configurable).

Error Handling and Fallback

NOW MCP Unavailable: If NOW MCP server is down, Moveworks informs users that case operations are temporarily unavailable and suggests using RSM portal instead.

Metadata Extraction Failure: If Moveworks cannot extract equipment type or severity from conversation, it prompts user to clarify (example: "What type of equipment is failing?") before case creation.

Portal Fallback: All Break-Fix and Store Audit operations remain available in RSM portal. Moveworks is alternative interface; users can switch to portal anytime.

Related topics

Components for Break-Fix

Components installed with Store Audit Operations

Components for ServiceNow Otto integration for break-fix

Technical reference for webhook events, authentication types, platform artifacts, and troubleshooting.

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Webhook events

Event	State transition	Condition	Extra payload field
`case_assigned`	New (1) → Open (10)	`contact_type = otto`	None
`case_resolved`	Any → Resolved (6)	`contact_type = otto`	Resolution code
`case_awaiting_info`	Any → Awaiting Info (18)	`contact_type = otto`	None

Note: No event is dispatched if the `opened_by` user has no email address. The call is skipped silently and a warning is written to the system log.

Note: API Key Credentials is the only supported credential type. The key is sent in a single header, by default `Authorization: Bearer <key>`. If the credential has no API key, the webhook call fails instead of being sent without authentication.

ServiceNow Otto AI Agent Marketplace

Customize your ServiceNow Otto AI Assistant with installable agents from the AI Agent Marketplace.

- Create: Create a break-fix case
- Update: Update break-fix case details
- Notify: Get notified on break-fix case updates
- Get: Get break-fix case details

Troubleshooting

Symptom	Where to check / action
Webhook call not arriving at the ServiceNow Otto listener	Navigate to **System Logs** > **Outbound HTTP Requests** and filter by URL or time. Confirm the `otto_webhook` connection URL is set correctly
No event dispatched despite a qualifying state change	Verify `contact_type = otto` on the case and that `opened_by` has a non-empty email address
Authentication error in outbound logs	Confirm the credential on the `otto_webhook` connection is an API Key credential with the API key filled in and the header name and prefix set. Re-enter the API key and retest.
ServiceNow dispatches the event but ServiceNow Otto does not act on it	Verify all four side plugins from ServiceNow Otto are installed in the ServiceNow Otto environment (see ServiceNow Otto integration overview)

Retail MCP Server

The Retail MCP Server exposes Retail Service Management capabilities as Model Context Protocol (MCP) tools, so store staff can find their store and devices and raise, track, and update Store Services cases from their AI assistant.

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Without the Retail MCP Server, a store associate who uses an AI assistant has to leave the conversation and open the portal to find their store, check on a case, or report broken equipment. The Retail MCP Server lets the assistant do this work on the associate's behalf, using the associate's own identity and access rights.

One server for all retail tools

The application registers a single MCP server, **Retail MCP Server**. MCP-compatible AI clients, such as ServiceNow Otto, Now Assist, and Claude, discover and connect to this one server. Every retail tool registers under it, so new retail capabilities become available to the assistant without a new server being set up.

Available tools

The Retail MCP Server provides six tools. The assistant usually chains them: it identifies the store first, then the device, and then the case.

Get my retail store

Returns the stores the signed-in user belongs to.

Get store devices

Returns the devices registered to a store, so the assistant can match "the freezer in aisle 3" to a real device.

Create store break-fix case

Reports a broken or faulty device to HQ.

Create store inquiry case

Sends HQ a question about store policy, process, or operations.

Get my store services cases

Lists the break-fix and store inquiry cases the user raised.

Update store services case

Comments on, accepts or rejects a proposed resolution for, or closes one of the user's cases.

The four case tools install only when the Retail Store Services plugin is active. The store and device tools work without it.

Access and identity

Each tool runs as the calling user. The tools identify the user from the authenticated session, never from a user name or ID that the assistant supplies, and they return only records that the user can already read in the platform. Each tool also requires a specific role before it can be invoked. For details, see Retail MCP Server roles and data access.

What the Retail MCP Server doesn't do

- It provides no user interface. Store staff work entirely in their AI assistant.
- It doesn't create, update, or delete devices. Device access is read-only.
- It supports only break-fix and store inquiry cases.
- It doesn't let callers change a case's state directly, or its priority, assignment, or resolution code. Callers can only comment, respond to a proposed resolution, or close the case.
- It doesn't choose a primary store for a user who belongs to several stores. The assistant asks the user which store to use.

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Related topics

- Set up the Retail MCP Server
- Retail MCP Server tools
- Retail MCP Server roles and data access
- ServiceNow Otto for Break-Fix and Store Audit overview
- Components Moveworks Integration for Break-Fix and Store Audit

Set up the Retail MCP Server

Install the Retail MCP Server, connect your AI client to it, and give store staff the roles they need, so they can work with Retail Service Management from their AI assistant.

Before you begin

These plugins must be active on the instance:

- CSM MCP Server (com.sn_csm_mcp_server). It also provides the platform MCP framework (com.sn_mcp_server).
- Retail Core (com.sn_retail_core)
- Optional: Retail Store Services (com.sn_rtl_stre_servcs). The four case tools install only when this plugin is active.

Role required: admin

About this task

The Retail MCP Server doesn't ship its own OAuth configuration. The platform MCP framework generates an OAuth provider and client for the server when the app is installed. Your AI client connects with that OAuth client.

Procedure

1. Install the Retail MCP Server application from the ServiceNow Store.

   The Retail MCP Server and its tools are registered. If Retail Store Services isn't active, only **Get my retail store** and **Get store devices** are registered.

2. Locate the OAuth client that the platform MCP framework generated for the Retail MCP Server, in the global scope.
3. Add callback URLs as required for MCP clients.
4. Give the OAuth client ID and secret to the administrator of your MCP-compatible AI client, and configure the client to connect to your instance.
5. Assign roles to the store staff who will use the tools.
   - To find their store and devices: sn_retail.associate_contributor or sn_retail.associate_fulfiller
   - To create, track, and update cases: sn_rtl_stre_servcs.contributor

   For instructions, see Assign roles to Retail users.

6. Make sure each user is a member of the retail store they work in.

   The tools look up a user's store from their store membership. A user who isn't a member of any store gets an empty result. For instructions, see Add members to a retail organization.

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Result
The AI client discovers the Retail MCP Server and its tools. Store staff who hold the required roles can invoke the tools from their assistant.

Related topics
- Retail MCP Server
- Retail MCP Server roles and data access

Report a broken device from your AI assistant

Create a break-fix case for broken or faulty equipment in your store by describing the problem to your AI assistant, without opening the portal.

Before you begin
Your AI assistant must be connected to the Retail MCP Server, and you must be a member of the store where the device is located.

Role required: sn_rtl_stre_servcs.contributor, and sn_retail.associate_contributor or sn_retail.associate_fulfiller

About this task
You don't need to use words like "case" or "ticket." Describe the problem the way you would to a colleague, for example, "The freezer in aisle 3 isn't cooling" or "My handheld scanner won't turn on."

For a question to HQ that isn't about equipment, see Ask HQ a question from your AI assistant.

Procedure
1. In your AI assistant, describe the equipment problem.
2. If you belong to more than one store, tell the assistant which store the device is in.

   If you belong to only one store, the assistant uses it without asking.
3. Confirm the device, or choose it from the list that the assistant shows you.

   The assistant matches your description to the devices registered to your store. You can also read out the asset tag on the device.
4. Confirm or change the priority that the assistant proposes.

   For example, a device that stops the store from trading is Critical, and a cosmetic fault is Low.
5. Review the case details that the assistant shows you, and confirm that it should create the case.

   The assistant writes the short description and description from what you've told it. Ask it to change anything that isn't right before you confirm.
6. Optional: To add a photo or file, open the attachment link that the assistant gives you.

   The link opens the case in the portal. You can't send files through the assistant.

Result
A break-fix case is created for the device, and the assistant gives you the case number and state. HQ receives the case in the usual break-fix workflow.

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What to do next
To check on the case later, see Track and update your cases from your AI assistant.

Related topics
- Retail MCP Server
- Submit Break-Fix Cases through Portal or Mobile
- Submit and track break-fix cases via Moveworks Chat

Ask HQ a question from your AI assistant

Get an official answer from HQ about store policy, process, or operations by raising a store inquiry case from your AI assistant.

Before you begin
Your AI assistant must be connected to the Retail MCP Server, and you must be a member of a store.

Role required: sn_rtl_stre_servcs.contributor, and sn_retail.associate_contributor or sn_retail.associate_fulfiller

About this task
Ask your question the way you normally would, for example, "What are the holiday trading hours?" or "Who approves overtime?" For a problem with equipment, see Report a broken device from your AI assistant.

Procedure
1. In your AI assistant, ask your question for HQ.
2. If you belong to more than one store, tell the assistant which store the question is for.
3. Confirm or change the priority that the assistant proposes.
4. Review the question as the assistant will send it to HQ, and confirm that it should create the case.
5. Optional: To attach supporting files, open the attachment link that the assistant gives you.

Result
A store inquiry case is created, and the assistant gives you the case number and state. An HQ agent answers the case.

What to do next
To see HQ's answer or reply to a question from HQ, see Track and update your cases from your AI assistant.

Related topics
- Retail MCP Server
- Manage store inquiries

Track and update your cases from your AI assistant

Check the status of your break-fix and store inquiry cases, answer questions from HQ, respond to proposed resolutions, and close cases, all from your AI assistant.

Before you begin
Your AI assistant must be connected to the Retail MCP Server. You can track and update only cases that you raised.

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Role required: sn_rtl_stre_servcs.contributor

About this task

By default, the assistant shows only your open cases. Ask for your closed cases or case history if you need them. What you can do with a case depends on its state, and the assistant offers only the actions that are currently allowed.

Procedure

1. Ask the assistant about your cases.

   Example
   For example, "Show me my open cases," "Did HQ reply?", or "What's the status of RBF0001234?"
2. If the assistant asks, tell it which case you mean.
3. Review the case details and the actions that the assistant offers, and tell it what to do.
   - To add information, tell the assistant what to add. It's added to the case as a comment.
   - If the case is Awaiting Info, HQ has asked you a question. The assistant shows you the question. Give your answer, and the assistant adds it as a comment and the case moves back to Open.
   - If the case is Resolved, HQ has proposed a resolution. The assistant shows it to you. Accept it to close the case, or reject it and give a reason to reopen the case.
   - If you no longer need the case, ask the assistant to close it. You can close a case that's New, Open, or Awaiting Info.
4. If the assistant asks you to confirm the action, confirm it.

Result

The case is updated, and the assistant confirms the outcome and shows the case's current state. If the action isn't allowed, or the case doesn't exist or isn't yours, the assistant tells you, and the case isn't changed.

What to do next

You can't change a case that's Closed or Cancelled. You also can't change a case's priority or assignment from the assistant.

Related topics

Retail MCP Server roles and data access

Respond to resolutions through Portal or Mobile

Submit and track break-fix cases via Moveworks Chat

Retail MCP Server tools

The Retail MCP Server provides six tools. Each entry lists the tool's purpose, inputs, what it returns, whether it changes data, and what it requires.

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Tool summary

Retail MCP Server tools at a glance

Tool	Changes data	Requires plugin	Invoke role
`sn_rtl_mcp_server.get_my_store`	No	Retail Core	sn_retail.associate_contributor or sn_retail.associate_fulfiller
`sn_rtl_mcp_server.get_store_devices`	No	Retail Core	sn_retail.associate_contributor or sn_retail.associate_fulfiller
`sn_rtl_mcp_server.create_store_break_fix_case`	Yes	Retail Store Services	sn_rtl_stre_servcs.contributor
`sn_rtl_mcp_server.create_store_return_case`	Yes	Retail Store Services	sn_rtl_stre_servcs.contributor
`sn_rtl_mcp_server.get_my_store_cases`	No	Retail Store Services	sn_rtl_stre_servcs.contributor
`sn_rtl_mcp_server.update_store_case`	Yes, except for `get_actions`	Retail Store Services	sn_rtl_stre_servcs.contributor

Get my retail store

Returns the stores the signed-in user belongs to. The tool takes no inputs; it identifies the user from the authenticated session. For each store, it returns the store's sys_id and name. If the user belongs to no store, it returns an empty list with a message, not an error. The tool returns up to 100 stores.

Get store devices

Returns the active devices (install base items) registered to a store, up to 100 devices. Each device is returned with its sys_id, name, identifier (the asset tag on the unit), and model category. Results that match on device name are listed before matches on identifier or product. If the search term matches nothing, the tool returns the store's full device list with a message that the search didn't match.

Get store devices inputs

Input	Required	Description
`store`	Yes	The sys_id of the store, from Get my retail store.
`search_term`	No	Words to narrow a long list. Each word is matched against device name, identifier, number, and product.

Create store break-fix case

Creates a break-fix case for a broken or faulty device. The tool description instructs the assistant to confirm every value with the user before creating the case. It returns the case number, sys_id, short description, state, priority, store, device, and an attachment URL. The user can open the attachment URL in the portal to add photos or files, because files can't be sent through the tool.

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Create store break-fix case inputs

Input	Required	Description
`requesting_services_organization`	Yes	The sys_id of the store, from Get my retail store.
`short_description`	Yes	A one-line summary of the fault.
`description`	No	Details of the fault.
`priority`	No	1 (Critical), 2 (High), 3 (Moderate), or 4 (Low).
`install_base`	Yes	The sys_id of the device, from Get store devices.

Create store inquiry case

Creates a store inquiry case that asks HQ a question about store policy, process, or operations. It takes no device. It returns the case number, sys_id, short description, state, priority, store, and an attachment URL.

Create store inquiry case inputs

Input	Required	Description
`requesting_services_organization`	Yes	The sys_id of the store, from Get my retail store.
`short_description`	Yes	A one-line summary of the question.
`description`	No	Details and context for the question.
`priority`	No	1 (Critical), 2 (High), 3 (Moderate), or 4 (Low).

Get my store services cases

Lists the break-fix and store inquiry cases the signed-in user raised, most recently updated first, up to 40 cases. Each case is returned with its number, case type, and short description. If no cases match, the tool returns an empty list with a message.

Get my store services cases inputs

Input	Required	Description
`case_type`	No	breakfix or inquiry. Omit to return both types.
`open_only`	No	true (default) excludes Closed and Cancelled cases. false includes them.
`number`	No	A case number, to return only that case.
`search_term`	No	Words matched against case number, short description, and description.

Update store services case

Reads or acts on one case the signed-in user raised. Called with the `get_actions` action, it returns the case and the actions allowed in its current state, including HQ's pending question when the case is Awaiting Info and the proposed resolution when the case is Resolved. Every other action changes the case and returns the updated case with a new list of allowed actions. For the actions allowed in each state, see Retail MCP Server roles and data access.

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Update store services case inputs

Input	Required	Description
`case_type`	Yes	breakfix or inquiry.
`number`	Yes	The case number.
`action`	Yes	get_actions, comment, accept_resolution, reject_resolution, or close.
`comment`	No	The comment text. Required for comment and reject_resolution.

Related topics

Retail MCP Server

Retail MCP Server roles and data access

Retail MCP Server roles and data access

Access to the Retail MCP Server is controlled at two levels: roles determine who can invoke each tool, and the caller's own record access determines what data each tool returns or changes.

Roles that can invoke the tools

The Retail MCP Server creates no roles. Each tool has an access control of type `flow_action` with the `invoke_from_ai` operation, named after the tool. A caller without one of the listed roles is denied, and the tool doesn't run.

Roles by tool

Role	Tools
sn_retail.associate_contributor, sn_retail.associate_fulfiller	Get my retail store, Get store devices
sn_rtl_stre_servcs.contributor	Create store break-fix case, Create store inquiry case, Get my store services cases, Update store services case

These roles aren't granted, by design:

- sn_retail.support_agent. A support agent assists retail customers and partners rather than working in a store. An administrator can add this role to the access control if needed.
- Store Services HQ agent roles, such as sn_rtl_stre_servcs.agent and sn_rtl_stre_servcs.breakfix_agent, and their manager variants. HQ agents work cases in the agent workspace; these tools expose only store-side actions.

Data visibility

Each tool runs as the calling user and reads and writes data through secure queries, so the platform's existing access controls apply to the caller. A tool returns only the stores, devices, and cases the caller can read in the platform, and a write is refused if the caller can't write the case. The Retail MCP Server adds no record-level access controls of its own. Store and case tools identify the caller from the session, never from an identifier the assistant supplies.

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What the update tool can change

Update store services case is the only tool that changes existing records. It supports these actions, and nothing else:

Update store services case actions

Action	Effect	Allowed when the case is
`get_actions`	None (read only)	Any state
`comment`	Adds a comment	New, Open, or Awaiting Info
`accept_resolution`	Adds a comment and sets the case to Closed	Resolved
`reject_resolution`	Adds a comment and sets the case to Open	Resolved
`close`	Sets the case to Closed with a resolution code and close notes chosen by the system	New, Open, or Awaiting Info

Callers can't set the state directly, or the priority, assignee, assignment group, or resolution code. Closed and Cancelled cases reject every action. The rules match the ones the portal and mobile app apply.

Related topics

- Retail MCP Server
- Retail MCP Server tools
- Respond to resolutions through Portal or Mobile

Use ServiceNow Otto for Retail Service Management

Use ServiceNow Otto to improve and enhance the store inquiry processes in Retail Service Management (RSM). The store inquiry AI agent—now part of the ServiceNow Otto brand—enables intelligent automation for store inquiries.

Store inquiry agent capabilities

AI agent capabilities	Description
Automated inquiry parsing	Analyzes incoming questions from stores and identifies key topics like discount policy, returns, and exceptions. It accurately categorizes and tags these inquiries, streamlining the processing and response to store queries
Intelligent policy look-up	Searches across multiple sources—such as past resolved cases, knowledge base articles, and their attached documents—to deliver precise and contextually relevant guidance
Response drafting with policy references	Automatically generates a suggested reply using clear policy language and provides the accurate source of the suggested reply for traceability by attaching or linking it

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Store inquiry agent capabilities (continued)

AI agent capabilities	Description
Learning from resolved cases	Continuously improves by indexing newly resolved inquiries, which expands its ability to respond to similar future cases
Update case information	Enables the HQ agent to accept, edit, or reject the suggested resolution. It automatically updates the case resolution notes and status for accepted or edited responses, or add work notes for rejected ones

This workflow begins when a store associate or manager creates a store inquiry case. The case gets assigned to an HQ agent. The HQ agent can then leverage ServiceNow Otto to automate parsing of store questions, intelligently search the KB articles and past cases, and draft responses with policy references. It prompts the HQ agent to select preferred options like Accept, Edit, or Reject solution.

The HQ agent can select the below options:

- Accept: The case state is set to Resolved. The proposed solution gets added to resolution notes automatically.
- Edit: The AI agent prompts the HQ agent to provide custom response. Then, the case state is set to Resolved. The custom response gets added to resolution notes automatically.
- Reject: The proposed solution is not added to the resolution notes. The AI agent asks the agent whether they would like to update the work notes with the resolution provided. If the HQ agent accepts, the proposed solution gets added to the work notes automatically.

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

For more information on modifying an agentic workflow, see.

Looking for an AI agent?

- There may be AI agents installed with the ServiceNow Otto application that aren't used in agentic workflows. To learn how to see all agents that are available on your instance, see Find AI agents.
- To find agents that may not be installed on your instance, visit the AI Agent Marketplace on the ServiceNow Store.

AI agents security

For security implementation guidance on AI agents and agentic workflows, see Enable store inquiry AI agent trigger.

Retail reference

Reference topics provide additional information about Retail components.

Components installed with plugins

Several types of components such as tables, user roles, and business rule are installed when you activate the plugins in Retail.

To see the components installed with each plugin, see:

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- Components installed with Retail core overview
- Components installed with Retail Mobile
- Components installed with Retail Store Services
- Components installed with Retail customer complaint
- Components installed with Retail HQ Operations
- Components installed with Retail In-store Operations

Components installed with Retail core overview

Several types of components such as tables, user roles, and business rule are installed when you activate the Retail Core.

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

Tables installed with Retail Core

Table name	Description
Retail Task sn_retail_task	Stores information about the task details.

Base roles installed with Retail Core

For information on configuring these roles for retail, see Assign roles to Retail users.

Role	Description	Contains roles
sn_retail.associate_contributor	Create, review, and comment on retail cases for the location in which the user is associated.	• sn_customerservice.service_organization_co • sn_retail.case_creator • sn_retail.org_viewer • sn_retail.report_viewer
sn_retail.associate_fulfiller	Creates, updates, and resolves retail cases associated with the location in which the user is associated.	• sn_customerservice.svc_location_agent • sn_retail.case_creator • sn_retail.org_viewer • sn_retail.report_viewer
sn_retail.support_agent	Creates, updates, resolves, and tracks retail cases across organizations at the system level.	• sn_customerservice_agent • sn_retail.case_creator • sn_retail.org_viewer • sn_retail.report_viewer

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Role	Description	Contains roles
sn_retail.manager_contributor	Creates, reviews, and monitors all retail cases for the location and hierarchy for the location in which the user is associated.	• sn_customerservice.svc_location_manager_c • sn_retail.associate_contributor • sn_retail.report_viewer
sn_retail.manager_fulfiller	Creates, updates, and resolves retail cases for the location and hierarchy in which the user is associated.	• sn_customerservice.svc_location_manager • sn_retail.associate_fulfiller • sn_retail.report_viewer

Related Party Configurations installed with Retail Core

Name	Default responsibility
Store Associate	Location Contributor
Store Associate - Fulfiller	Location Agent
Store Manager	Location Manager Contributor
Store Manager - Fulfiller	Location Manager Fulfiller
Area Manager	Location Manager Contributor
Area manager - Fulfiller	Location Manager - Fulfiller
Regional Manager	Location Manager Contributor
Regional manager - Fulfiller	Location Manager - Fulfiller

Plugins installed with Retail Core

Name	Description
Business Organization [com.snc.business_location]	This plugin supports the Service Model Foundation, where the corporation does business with customers through physical channels such as stores and branches. For more information, see Configure Service Model Foundation.
Case Management Core [com.sn_customerservice]	The Customer Service Management application enables you to provide service and support for your external customers using several communication channels, such as email, web, and telephone. A case is created to track the issue reported or service requested and assigned to groups or agents. Customer service agents in your organization work on the cases and resolve issues.

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Name	Description
	For more information, see Customer Service Management.
CIWF UI Components (sn_ciwf_ui_cmpnt)	Includes common themes, widgets, and code artifacts for customer and industry workflow applications.

Table installed with Retail task

Retail task table

Field	Example
Name	RT00001
Subject	HQ creating a task to verify store tasks
Description	Verify if stores have completed tasks as per instructions
Requested by	HQ Agent
Due date	1 week from now (date/time)
Priority	Critical/High/Medium/Low
Assigned to	HQ Agent

Business rules installed with Retail Core

Business rule	Table	Rule criteria	Description
Add manager member for retail org	sn_customer_service_organization	After update or insert	Assigns the sn_retail.manager role to the user added as a manager in a retail organization.
Restrict SO update	sn_retail_organization	Before update	Restricts the user from updating the Organization Core field in the Retail Organization [sn_retail_organization] table.
Hide multistore child cases	sn_retail_case	Before Query	Filters retail cases whose parent's child case creation state is either none or Completed successfully.

Components installed with Retail Mobile

Certain dependencies must be considered when using the Retail Mobile plugin.

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Plugins installed with Retail Mobile

Plugin Name	Description	Plugin Dependencies
Retail Mobile [com.sn_retail_mobile]	The Retail Mobile plugin offers a tailored mobile experience for retail operations, enabling frontline teams to efficiently manage store activities and resolve issues on the go. It provides real-time insights into key KPIs, supports issue tracking, and is compatible with both Android and iOS platforms.	• com.glide.sg • com.glide.sg.offline • com.glide.sg.agent_native_client • com.sn_retail_core

Components installed with Retail Store Services

Certain roles and dependencies must be considered when using the Retail Store Services plugin.

Note:

- The Retail Store Services application installs the dependencies Retail Core and Retail Mobile.
- If Retail Core and Retail Mobile are already installed, then, only the com.sn_rtl_stre_servcs plugin gets installed with Retail Store Services.

Plugins installed with Retail Store Services

Plugin Name	Description	Plugin Dependencies
Retail Store Services [com.sn_rtl_stre_servcs]	This plugin facilitates streamlined communication between store teams and headquarters (HQ) regarding operational questions or issues. Store team members can request help directly from HQ, ensuring their day-to-day.	• com.sn_retail_core • com.sn_retail_mobile

Roles installed with Retail Store Services

Role	Description	Contains roles
sn_rtl_stre_servcs.agent	Create, update, and close store inquiry case across organizations.	sn_retail.support_agent
sn_rtl_stre_servcs.agent_manage	Create, update, and close store inquiry case across organizations.	• sn_rtl_stre_servcs.agent • sn_customerservice_manager

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Role	Description	Contains roles
sn_rtl_stre_servcs.contributor	Create, update store inquiry case for their location.	

Components installed with Retail customer complaint

Certain roles and dependencies must be considered when using the Retail customer complaint plugin.

Plugins installed with Retail customer complaint

Plugin Name	Description	Plugin Dependencies
Retail Customer Complaint [com.sn_rtl_cs_cmplnt]	The customer complaint case type helps manage and resolve customer feedback related to store experiences. This case type enables customers to submit complaints anonymously to encourage honest feedback and help stores improve their service. This case type is included in the Retail customer complaint plugin.	• com.sn_customerservice • com.sn_retail_core

Roles installed with Retail Customer Complaint

Role	Description	Contains roles
sn_rtl_cs_cmplnt.agent	Create, update, and resolve retail complaint cases.	sn_retail.support_agent
sn_rtl_cs_cmplnt.agent_manager	Create, update, resolve, and manage retail complaint cases.	• sn_rtl_cs_cmplnt.agent • sn_customerservice_manager

Components installed with Retail HQ Operations

Certain roles and dependencies must be considered when using the Retail HQ Operations plugin.

Plugins installed with Retail HQ Operations

Plugin Name	Description	Plugin Dependencies
Retail HQ Operations [com.sn_rtl_hq_ops]	The Retail HQ Operations plugin enables effective coordination between HQ teams. It facilitates the execution of assigned work and allows HQ teams to monitor progress.	• com.sn_retail_core • com.sn_multi_case_creation • com.fsm_planned_work_management • com.sn_task_plan_templates

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Roles installed with Retail HQ Operations

Role	Description	Contains roles
sn_rtl_hq_ops.agent	Create, update, and resolve HQ communications case.	sn_retail.support_agent
sn_rtl_hq_ops.agent_manager	Create, update, and resolve HQ communications case. The agent manager also manages the agents.	• sn_rtl_hq_ops.agent • sn_customerservice_manager
sn_rtl_hq_ops.location_agent	Create, update, and resolve HQ communications case for their location.	sn_retail.associate_fulfiller
sn_rtl_hq_ops.location_manager	Create, update, and resolve HQ communications case for their location.	• sn_rtl_hq_ops.location_agent • sn_retail.manager_fulfiller
sn_rtl_hq_ops.plan_author	Create, update, and track questionnaire and store plan.	• sn_fsm_smart_asmt.questionnaire_feature_a • sn_task_plan.delete • sn_task_plan.report_viewer • sn_rtl_instore_ops.plan_author • sn_case_creation.org_editor • sn_task_plan.creator

Components installed with Retail In-store Operations

Certain roles and dependencies must be considered when using the Retail In-store Operations plugin.

Plugins installed with Retail In-store Operations

Plugin Name	Description	Plugin Dependencies
Retail In-store Operations [com.sn_rtl_in_store_ops] [com.sn_rtl_instore_ops]	The Retail In-store Operations plugin allows store team members to report and track in-store operational issues, whether for routine or cyclical demands. This ensures that issues are documented and monitored for consistent execution and support.	• com.sn_retail_core • com.sn_retail_mobile • com.snc.fsm_work_types

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Roles installed with Retail In-store Operations

Role	Description	Contains roles
sn_rtl_in_store_ops.associate sn_rtl_instore_ops.associate	Create, update, and close Store Operations case for their stores. Can view and close Store tasks for their stores.	• sn_retail.associate_fulfiller • wm_location_agent
sn_rtl_in_store_ops.manager sn_rtl_instore_ops.manager	Can Create, update, and close Store Operations case for the stores and associated child locations they manage. Can create, update, and close Store tasks and assign tasks to others in the stores and associated child locations they manage.	• sn_rtl_in_store_ops.associate • sn_rtl_instore_ops.associate • sn_retail.manager_fulfiller • wm_location_assignment_manager

Table for in-store operations task

In-store operations task table

Field	Example
Number	RIS00001
Short description	Aisle 2 and 9 needs clean-up
Description	Aisle 2 and 9 is cluttered and lot of products are on the floor
Priority	High/Medium/Low
Assignment Group	Store Managers Group
Assigned to	Store Manager
Requesting retail Organization	Store of the persona, who is creating the case
Supporting retail organization	Same as requesting retail organization
Due Date	2 hours from now (date/time)

Components installed with Retail Playbook for Store Plan

Certain roles and dependencies must be considered when using the Retail Playbook for Store Plan.

Plugins installed with Retail Playbook for Store Plan

Plugin Name	Description	Plugin Dependencies
Retail Playbook for Store Plan [com.sn_rtl_str_plan_pb]	The Retail playbook for store plan enables HQ and regional managers to easily create structured operational plans	• com.sn_retail_core • com.sn_csm_playbook • com.sn_tsk_plan_pb_act

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Plugin Name	Description	Plugin Dependencies
	with tasks and cases, linked to store locations and schedules.	• com.sn_pwm_pb_act • com.sn_rtl_hq_ops

Activities associated with Retail Playbook for Store Plan

Activity Name	Activity Description
Create Template item	Allows to create only one record through this activity. Displays a form based on the table and form view configured in the corresponding template item configuration, and creates the corresponding template item record. The form runs any UI policies that apply. The system displays any validation error messages in the Workspace playbook.
Create template items	Allows to create only multiple records through this activity. Displays the form based on the table and form view configured in the corresponding template item configuration, and creates the corresponding template item records. The form runs any UI policies that apply. The system displays any validation error messages in the Workspace playbook.
Select multiple records	Specify the template item to attach multiple records and activity experience configurations to render modal for record selection and insertion into an m2m table.
PWM Schedule	Allows creation of a schedule for task creation using a task plan template through the PWM scheduler.
Plan Summary	A summary view of the all activities configured in a playbook together for users to be able to edit before they publish the plan

Retail Playbook for Store Plan details

Playbook	Description
HQ communication	Allows to create a plan with cases and tasks for multiples stores by a HQ/Regional manager.

Components installed with Task Plan Template Playbook

Certain roles and dependencies must be considered when using the Task Plan Template Playbook.

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Plugins installed with Task Plan Template Playbook

Plugin Name	Description	Plugin Dependencies
Task Plan Template Playbook Activities [com.sn_tsk_plan_pb_act]	The task plan template playbook activities plugin enables task plan templates to be integrated into playbook experiences.	• com.sn_task_plan_templates • com.playbook_experience

Components installed with PWM Playbook Activities

Certain roles and dependencies must be considered when using the PWM Playbook Activities.

Plugins installed with PWM Playbook Activities

Plugin Name	Description	Plugin Dependencies
PWM Playbook Activities [com.sn_pwm_pb_act]	The PWM playbook activities plugin integrates PWM scheduling capabilities into playbook activities linked to task plan templates.	• com.snc.fsm_planned_work_management • com.sn_task_plan_templates • com.playbook_experience

Components installed with Store Plans - Fulfilment in Portal

Certain roles, plugin dependencies, and fields must be considered when fulfilling Store Cases and Store Tasks from the Retail Portal.

Plugins used by Fulfilment in Portal

Fulfilment in Portal introduces no new plugin. It extends the existing Retail In-store Operations plugin so that Store Cases and Store Tasks generated from store plans can also be viewed and fulfilled from the Retail Portal, in addition to Retail Mobile and Workspace. The embedded questionnaire reuses the existing Smart Assessment components; see Components installed with Smart Assessments for CSM.

Plugin Name	Description	Plugin Dependencies
Retail In-store Operations [com.sn_rtl_instore_ops]	Reused plugin. Enables the portal record pages, the Tasks tab on a Store Case, and the Questionnaires tab on a Store Task. Portal fulfilment supports the Australia platform version and above; it is not available on Zurich or earlier.	• com.sn_retail_core
Smart Assessment for CSM [com.sn_smart_ast_csm]	Optional. Provides the **Questionnaires** tab and the page where store users take or view a questionnaire. Without it, the portal shows no **Questionnaires** tab and no	• com.snc.fsm_smart_asmt_questionnaire • com.sn_smart_assessment_connected • com.glide.ux.embeddables

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Plugin Name	Description	Plugin Dependencies
	Take questionnaire or **View questionnaire** action.	

The questionnaire on the portal relies on Web Embeddables. Retail Core enables Web Embeddables on the Retail Portal automatically when it's installed or upgraded.

Roles used by Fulfilment in Portal

Portal fulfilment uses the Retail In-store Operations roles. Area and regional managers with the contributor role (sn_rtl_instore_ops.manager_contributor) can't claim or reassign store plan tasks on the portal.

Role	Description	Contains roles
sn_rtl_instore_ops.associate	On the portal, views all Store Cases and Store Tasks for their store. Can comment, upload attachments, and reassign a case or task via Edit. Can close a case or task only if assigned to it. Can fill in and submit a questionnaire only if assigned to the linked task.	• sn_retail.associate_fulfiller • wm_location_agent • questionnaire_user
sn_rtl_instore_ops.manager	All associate capabilities, plus: can close a case or task on behalf of the assigned associate. Sees cases and tasks for their store and the stores below it in the organization hierarchy. Store plan cases are assigned to the store manager automatically.	• sn_rtl_instore_ops.associate • sn_retail.manager_fulfiller • wm_location_assignment_manager

Store Case fields on the portal

Store Case record fields

Field	Editable on portal	Example
Short description	Read-only	Daily Store Opening - HQ Oversight
Case number	Read-only	RIS0001037
Status	Read-only (badge)	Open
Description	Read-only	Plan-authored. Collapsed by default on the standard header.
Assigned to	Editable via Edit modal	Store Manager or Associate
Assignment group	Editable via Edit modal	Retail store members
Priority	Read-only	3 - Moderate

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Store Case record fields (continued)

Field	Editable on portal	Example
Due date	Read-only	2026-08-02 00:00:00
Supporting retail org	Read-only	Solana San Diego
Requesting retail org	Read-only	Solana California

Store Task fields on the portal

Store Task record fields

Field	Editable on portal	Example
Short description	Read-only	Complete daily store opening questionnaire
Task number	Read-only	SOTASK001
Status	Read-only (badge)	Open
Description	Read-only	Collapsed by default on the standard header.
Assigned to	Editable via Edit modal; stays editable after questionnaire completion, until the task closes	Store Associate
Assignment group	Editable via Edit modal only; stays editable until the task closes	Store Associates Group
Priority	Read-only	Set by plan author
Due date	Read-only	Set by plan author
Parent case	Read-only, plain text (not hyperlinked)	RIS0001037
Supporting retail org	Read-only	Solana San Diego
Requesting retail org	Read-only	Solana California

Related topics

- Fulfill In-store operations cases and tasks on the Retail Portal
- Work on a Store Case on the Retail Portal
- Work on a Store Task on the Retail Portal
- Complete a questionnaire for a Store Task on the Retail Portal
- Components installed with Retail In-store Operations

Components installed with Smart Assessments for CSM

Smart Assessment support in Customer Service Management (CSM) and Field Service Management (FSM) workspaces provides a unified experience for creating, configuring, and viewing assessment templates and instances.

The following enhancements are available in these workspaces:

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- Smart Assessment functionality is available in Customer Service Management (CSM) and Field Service Management (FSM) workspaces.
- Users can create Smart Assessment templates by using a modal dialog within the workspace experience.
- The Template Overview page is available in CSM and FSM workspaces for defining and managing Smart Assessment questions.
- Interoperability configurations enable the Template Overview experience from the Smart Assessment workspace to be reused in CSM and FSM workspaces.
- The integration supports the complete Smart Assessment template creation workflow within CSM and FSM workspaces.
- A dedicated Smart Assessment Instance record page variant is available in CSM and FSM configurable workspaces.
- The Smart Assessment Instance record page enables users to view Smart Assessment instance details within the workspace experience.

Components installed with Store Audit Operations

Reference information for roles, tables, fields, and workspace configuration artifacts for Retail Store Audit Operations.

Plugin dependencies

Plugin Name	Description	Plugin Dependencies
Retail Store Audit [sn_rtl_store_audit]	The Retail Store Audit plugin enables store teams to plan, execute, and track audit activities. It facilitates the creation and management of audit tasks and allows teams to monitor compliance and progress.	• com.sn_retail_core • com.sn_retail_mobile • com.sn_multi_case_creation • com.snc.fsm_work_types • com.sn_rtl_str_plan_pb • com.sn_smart_ast_csm • com.snc.fsm_smart_asmt_questionnaire • com.sn_fsm_audit

Roles

The application defines six scoped roles. All `sys_name` values are prefixed `sn_rtl_store_audit.`

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Scoped roles

Role sys_name	Display name	Contains roles
sn_rtl_store_audit.plan_author	Audit Plan Author	sn_task_plan.creator, sn_task_plan.delete, sn_task_plan.report_viewer, sn_case_creation.org_editor, sn_fsm_smart_asmt.questionnaire_feature_ sn_fsm_audit.author
sn_rtl_store_audit.auditor	HQ Auditor	sn_retail.support_agent, questionnaire_user, sn_fsm_audit.auditor
sn_rtl_store_audit.location_auditor	Location Auditor	sn_retail.associate_fulfiller, questionnaire_user, sn_fsm_audit.auditor
sn_rtl_store_audit.audit_manager	HQ Audit Manager	sn_smart_asmt.assessment_reader, sn_rtl_store_audit.auditor
sn_rtl_store_audit.location_audit_manager	Location Audit Manager	sn_smart_asmt.assessment_reader, sn_retail.manager_fulfiller, sn_rtl_store_audit.location_auditor
sn_rtl_store_audit.admin	Audit Admin	sn_task_plan.admin, sn_rtl_store_audit.plan_author, sn_fsm_planned_wm.planned_work_admin, sn_fsm_audit.admin

Tables

Tables introduced by this application

Display name	sys_name	Extends	Number prefix
Store Audit Case	sn_rtl_store_audit_cas	sn_retail_case	SAC

Tables additionally used by this application

Display name	sys_name	Extends	Number prefix
Audit Task	wm_audit_task	wm_task	SACTK

Note: wm_audit_task is an out-of-the-box FSM Audit table, not a custom extension introduced by this application.

Related topics

Retail Store Audit Operations

Complete a store audit

Components for Break-Fix

Technical reference for Break-Fix case states, available actions, critical fields, tables, and data relationships.

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Case States and Available Actions

State	Description	Available Actions
New	Case just created by requestor. Awaiting HQ triage.	Requestor: Close (cancel case)
In Progress	HQ agent reviewing and working on resolution.	Requestor: None (read-only). HQ Agent: Resolve
Resolution Proposed	HQ agent has proposed resolution.	Requestor: Accept or Reject. HQ Agent: Modify resolution
Closed	Case resolved or rejected. Complete.	View history only

Key Tables and Relationships

Table	Description
Break-Fix Case	Extends CSM Case. Represents equipment failure report. Contains: requestor, equipment, store, priority, state, resolution info.
Service Incident	Linked for IT issues. Pre-populated with case details. Requires the sn_incident_write role assigned to the Break-fix agent. State changes and comments are added as work notes on the case.
Work Order	Linked for hardware issues. Assigned to field technicians. Pre-populated with case details. State changes and comments are added as work notes on the case.
Install Base	**CRITICAL:** Registry of installed equipment. Key field: Buyer Organization (Service Organization). Equipment filtered by this relationship.
Service Organization	Represents store/location. Equipment registered with organization as buyer.

Key Relationships:

- **Install Base → Buyer Organization:** FILTERS equipment dropdown to user's store. Only equipment where buyer org = user's service org appears selectable.
- **Break-Fix Case → Incident:** One-to-One link for IT issues. State changes and comments are added as work notes on the case.
- **Break-Fix Case → Work Order:** One-to-One link for hardware issues. State changes and comments are added as work notes on the case.
- **Break-Fix Case → Install Base:** Reference to track which equipment failed.

Critical Fields

Install Base Buyer Organization

KEY FILTERING MECHANISM. Field on Install Base table. Determines which equipment users can select. Only equipment where buyer organization matches user's current service organization appears in the case form's Affected device (Install base) dropdown.

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Service Organization

Represents the store. Auto-populated in case form from user's service organization. Cannot be changed by store-level users.

Service Issue Type

Hardware or IT. Mandatory before HQ proposes resolution. Hardware enables work order creation. IT enables incident creation.

Case State

New | In Progress | Resolution Proposed | Closed. Determines available actions for requestors and HQ agents.

Role-Based Permissions

BREAKFIX_AGENT

Base role for HQ Support Agents. Grants queue access, case triage capabilities, and resolution proposal actions, including creating work orders when the FSM integration plugin is installed.

sn_incident_write

Required by the Break-fix agent to create a linked incident.

sn_incident_read

Required by the store associate, manager, or regional manager to view a linked incident.

WM_INITIATOR (Conditional)

Enables work order creation. The Create Work Order button appears only if the FSM integration plugin is installed.

Typical Case Data Flow

1. Requestor creates case in "New" state with auto-populated store and filtered equipment
2. Case routed to HQ queue
3. HQ agent picks up case and selects Service Issue Type
4. HQ agent creates Incident (IT) or Work Order (hardware) or documents troubleshooting steps
5. HQ agent clicks Propose Solution → case state = "Resolution Proposed"
6. State changes and comments from the Incident/Work Order are added as work notes on the case
7. Requestor receives notification and reviews proposed resolution
8. Requestor accepts (closes case), rejects (reopens to HQ), or self-closes
9. Case state = "Closed" (accepted/self-closed) or "New" (rejected, reopens to HQ)

Related topics

Break-Fix Case Management

Resolve Cases in Workspace through HQ Agents

Submit Break-Fix Cases through Portal or Mobile

Respond to resolutions through Portal or Mobile

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Components installed with Field Service for Audit

Reference information for the plugin dependencies, roles, and tables installed with the Field Service for Audit plugin.

Plugin dependencies

Plugin Name	Description	Plugin Dependencies
Field Service for Audit [sn_fsm_audit]	Field Service for Audit enables field service teams to plan, execute, and track audit activities as part of field service management workflows.	com.snc.work_management

Roles

Role	Description
`sn_fsm_audit.author`	Allows Authors to create audit tasks. Limited to the creation form — cannot read or edit existing records unless `sn_fsm_audit.auditor` is also granted.
`sn_fsm_audit.auditor`	Allows Auditors to read and update audit tasks and record the Pass or Fail result. Cannot delete tasks.
`sn_fsm_audit.audit_admin`	Allows Audit Admins to create, read, update, and delete audit tasks. Access to specific tasks may be further refined by custom access rules set up by the consuming product.

Tables

Display name	sys_name	Extends
Audit Task	`wm_audit_task`	`wm_task`

Related topics

Field Service for Audit

Components installed with Store Audit Operations

Retail organization data model

Learn about the Retail Core application by viewing the data model and role relationship diagrams. This diagram shows the relationship between the tables and roles within the application.

Data model

Retail Core provides you with a flexible data model that you can extend and leverage to fit your needs.

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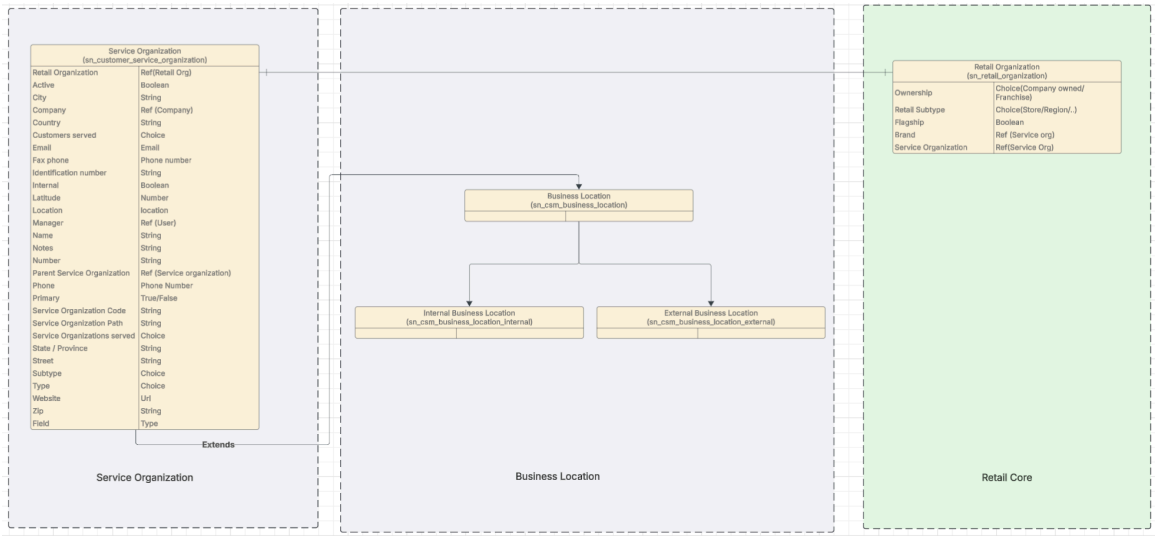

Retail organization data model tables

Tables configured within the Retail Operations application enable you to determine the data model, tasks, and product offerings for your Retail Operations workflows.

Retail organization table

The Retail organization [sn_retail_organization] table stores information about your retail organizations.

The Retail organization [sn_retail_organization] table has a one-to-one relationship with the Organization Core [sn_customer_service_organization] table.

Organization Core [sn_customer_service_organization] has an attribute of Retail Organization.

Retail-specific attributes should be maintained in this table.

Field	Description
Ownership	The ownership type of this retail organization. Options are: • Company owned • Franchise
Brand	The associated brand of this retail organization.
Organization Core	The associated organization core.
Retail Subtype	The retail subtype. Options are: • Store • Region • Division • Area • District

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Field	Description
Flagship	Indicates whether this is considered a flagship retail organization location.

Retail case table

The Retail case [sn_retail_case] table stores information about your retail case types and provides the basis for retail case creation.

The Retail case [sn_retail_case] table extends the Customer Service Management case table. All functionality used through the Customer Service Management case remains intact.

The Retail case [sn_retail_case] table can be extended to expand the flow and logic for retail use cases.

Field	Description
Number	Numerical code indicating the case number for this request.
Requested by	Internal user associated with this request.
Requesting Retail Organization	Retail organization this request is being created for.
Supporting Retail Organization	Retail organization responsible for fulfilling this request.
Short description	A short description of this request's purpose.
Description	A detailed description of this request's purpose.
Opened	Date and time at which this request was opened.
Priority	Sequence in which this case must be resolved, based on impact and urgency.
Assignment Group	The associated assignment group responsible for working on this request.
Assigned to	Person primarily responsible for working on this request.

Retail unified case and task data model

Learn about the unified retail case and task data model which helps understand the relationships between various case and task tables within retail. These extensions are designed to support distinct operational needs such as managing customer complaints, store inquiries, in-store operations, and HQ communications.

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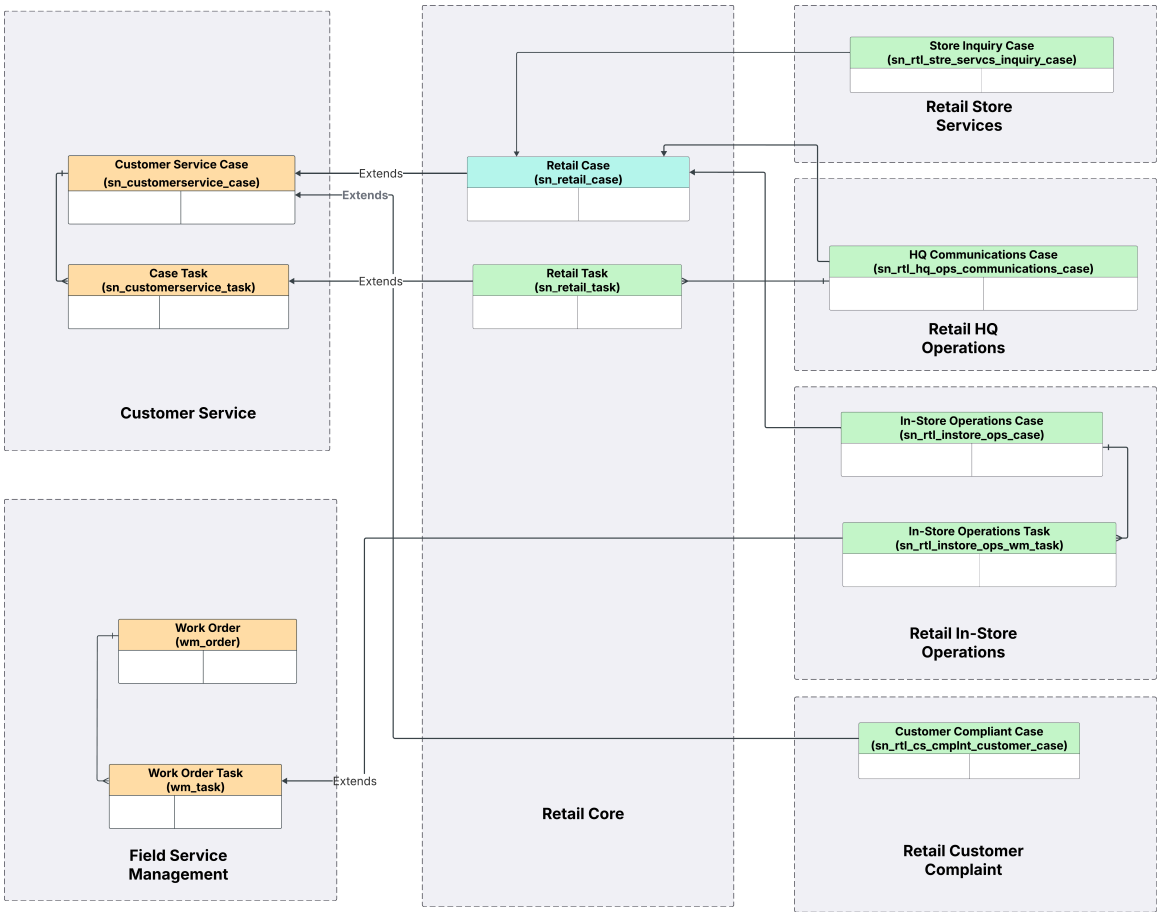
Data model



Domain Separation in Retail Core

Domain separation is supported for Retail Core. 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: Verify 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.

Retail use case

- For the retail case, the domain column is inherited from the customer service case.
- For retail organization, the 'domain_master' attribute receives information from the Organization Core.

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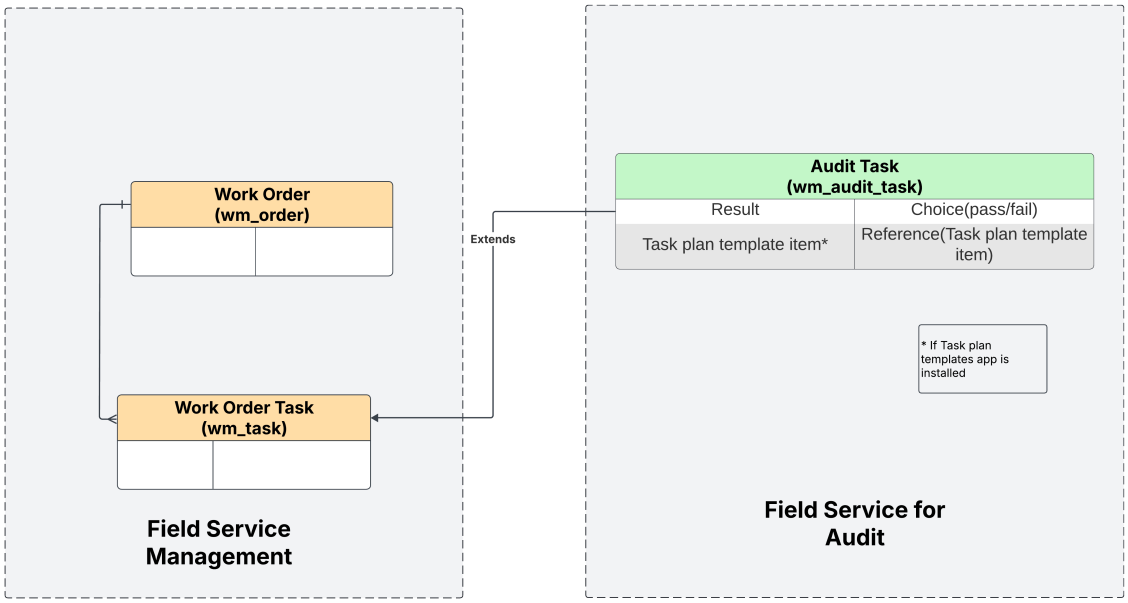
Field Service for Audit data model

The Field Service for Audit data model shows how the audit task table extends the work-management task type provided by Field Service Management.

Data model

The `wm_audit_task` table extends `wm_task` from Field Service Management, inheriting all standard assignment, scheduling, and lifecycle fields. Field Service for Audit adds two audit-specific fields: Result and Task Plan Template Item.



Related topics

- Field Service for Audit
- Components installed with Field Service for Audit

Roles and visibility for project tasks

Roles determine which store personas see project tasks in Retail, which surfaces they reach, and which actions they can take on a task.

Roles required

To see project tasks, a store persona needs a retail responsibility and one of the project stakeholder roles. The stakeholder roles are defined by the App SPM Retail dependency. Retail neither defines nor assigns them, and no retail role inherits them.

Roles that grant access to project tasks

Role	Persona	Grants
A retail contributor or fulfiller responsibility	Store associate or store manager	Base requirement. A persona needs one of these before a stakeholder role has any effect.

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Roles that grant access to project tasks (continued)

Role	Persona	Grants
`sn_bus_loc.location_project_associate`	Store associate	Access to the project task surfaces for the persona's service organization.
`sn_bus_loc.location_manager_project_stakeholder`	Store manager	The same access as the associate role, plus the actions that change assignment.

Note: Access is scoped to the persona's service organization. A persona at one store doesn't see the project tasks of another store, even when they belong to an assignment group that includes members of that store.

Surfaces by persona

The surfaces aren't all available to the same personas, and the two mobile paths differ from each other.

Note: A stakeholder role is always required, and access is scoped to the persona's own store. A persona holding a retail role but no stakeholder role sees none of these surfaces.

Project task surfaces and who reaches them

Surface	Available to	Notes
Projects category in the portal	Contributor or fulfiller with a stakeholder role	The category appears whenever the plugin is active and the persona holds a stakeholder role. It isn't hidden when no project tasks are assigned.
Projects entry on mobile	Contributor or fulfiller with a stakeholder role	Hidden when the persona has no project tasks assigned to their store. This differs from the portal.
Tasks filter in **My Work** on mobile	Fulfiller with a stakeholder role	A contributor never reaches this filter, because the **My Work** tab is itself limited to fulfillers. A stakeholder role doesn't override that.

Actions by persona

Project task actions by persona

Action	Store associate	Store manager
View projects and project tasks for their store	Yes	Yes
Add a comment or an attachment	Yes	Yes
Close a task	Yes, when the task is assigned to them and has no open child tasks	Yes, on the same conditions

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Project task actions by persona (continued)

Action	Store associate	Store manager
Assign task and **Assign to me**	Yes, when the persona can change the assignee and the assignment group of the task	Yes, on the same condition, including reassigning a task that is assigned to an assignment group

Each action is checked separately, so an action appears only when the persona can perform it. The check runs again on the server before the update is applied, and a persona without permission receives a message rather than a silent failure.

Note: Whether these actions appear depends on the persona's permission to change the assignee and assignment group fields. That permission is granted by the Customer Service Management (CSM) and Retail Strategic Portfolio Management Suite applications, not by Retail. The requirements expect it to sit with the store manager. The portal and the mobile application apply the same rule.

What makes an individual task visible

The Visible to customer field

The project manager sets this field on each project task. A task without it set doesn't appear on any store-facing surface, whatever roles the persona holds.

Service organization scoping

A persona sees only the project tasks of the store they belong to.

Record-level access to project and project task records is owned by the Customer Service Management (CSM) and Retail Strategic Portfolio Management Suite applications. Retail adds no access control rules or query rules of its own on those tables. Its portal lists filter on the **Visible to customer** field as well, so an unflagged task is excluded before the list reaches the browser.

Related topics

Project tasks in Retail

Project task data model

Project task data model

The project and project task records that Retail reads, the fields it displays, and the three fields it writes.

Table ownership

Project tasks are stored on tables that the Customer Service Management (CSM) and Retail Strategic Portfolio Management Suite applications own. Retail defines no columns on either table.

Tables used for project tasks

Table	Access	Purpose
`customer_project`	Read	The store life cycle project. Shown in the project list and on the project page.

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Tables used for project tasks (continued)

Table	Access	Purpose
customer_project_task	Read and write	The work items within a project. Shown in the task lists and on the task page.

Retail writes only three fields, and only through the task actions: `state`, `assigned_to`, and `assignment_group`. Every other field is read-only from a store persona's perspective. The artifacts that surface these tables install only when the App SPM Retail plugin is present.

Fields used by this feature

Project and project task fields

Field	Table	Used for
service_organization	customer_project	Identifies the store that the project belongs to. Used to build the portal breadcrumb.
project_manager, state, description, end_date	customer_project	Project card and project page fields.
visible_to_customer	customer_project_task	The visibility gate. Portal lists filter on this field, so an unflagged task never reaches a store persona.
customer_project	customer_project_task	Links a task to its project. Rendered as a link in the task header.
parent	customer_project_task	Child tasks. Also walked to build the breadcrumb chain of ancestor tasks.
rollup, top_task	customer_project_task	Determine whether a task can be closed.
state	customer_project_task	Gates the task actions, and is set when a persona closes a task.
assigned_to, assignment_group	customer_project_task	Gates the assignment actions.
number, short_description, priority, end_date	customer_project_task	Task list columns and task card fields.

Tip: The task field labeled **Due date** on the mobile task card reads the `end_date` field, not `planned_end_date`. The `planned_end_date` field is inherited but isn't populated on project task records.

Task states that close a task

A project task is treated as closed, and its actions are withdrawn, in three states:

- Closed Complete
- Closed Incomplete
- Closed Skipped

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In any other state, including Pending, the task is open and its actions remain available subject to the persona's access.

Relationships

- A project task references its project through the `customer_project` field.
- A project task can have child project tasks on the same table, through the `parent` field. The task page lists the immediate children.
- A project is associated with a store through its `service_organization` field, which resolves to a retail organization.

Related topics

Project tasks in Retail

Roles and visibility for project tasks

Retail Task Management

Use the ServiceNow® Retail Task Management application to optimize the planning, organizing, and assigning of tasks to staff in your retail environment. The broader ServiceNow® platform offers many tools to streamline and optimize task management. The Retail Task Management application enables specific retail use cases with a case generator that can create cases for multiple retail locations at once.

Get started

Explore Learn more about Retail Task Management and how it's used.	Configure Install Retail Task Management and configure your environment.	
Multi-store case Create a multi-store case.	Reference Get details about Retail Task Management components such as fields, tables, and properties.	

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Troubleshoot and get help

- Ask questions and explore other resources for Retail Task Management Core in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Retail Task Management

Whether you're starting or expanding your implementation of the Retail Task Management application, learn more about the features available to optimize your retail tasks.

Retail Task Management overview

Retail Task Management builds on the Retail Core application to optimize processes around planning, organizing, assigning, and executing tasks in retail environments.

By using the Retail Task Management application, retail organizations can:

- Reduce errors and costs associated with tasks.
- Reduce compliance issues.
- Improve employee productivity.

Retail Task Management users

Users

User	Description
Store Associate	Store associates are responsible for on the ground task completion, along with standard job duties. They're often assigned tasks by store management, but if issues are found during task process they can be empowered to create work orders.
Store Manager	Store managers assign tasks to individual associates and coordinates between key parties. They're often responsible for logging issues and key paperwork.
Regional Manager	Regional managers oversee key issues involving the stores in their region. They're generally made aware of ad-hoc tasks being created, and can also be informed for issues found during routine tasks.
HQ Manager	Author of multi-store cases. Can create, monitor, and close multi-store cases.
Central Operations Support Agent	Central Operations support agents are responsible for making sure that stores are completing tasks on time, and if possible, helping resolve issues that arise.
Field Maintenance Technician	Field technicians are responsible for fixing some of the issues that can come up during tasks (for example, a store safety fix required).

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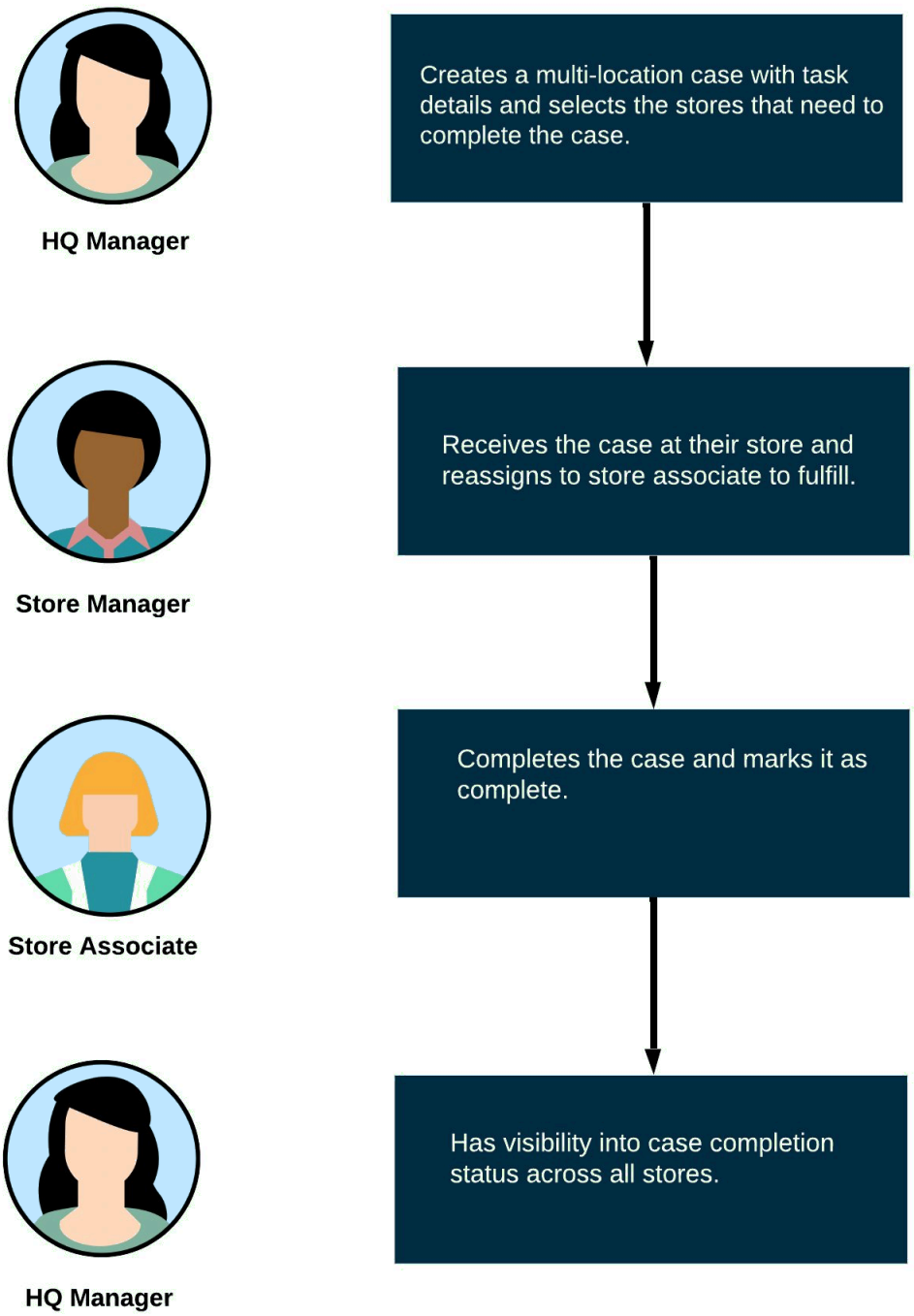
Retail Task Management workflow



1. A Retail Task Management administrator configures the application.
2. An HQ manager creates a multi-location case with case details and selects the stores that must complete the case.
3. A store manager receives the case at the store and reassigns to store associates for fulfillment.
4. A store associate completes the case and marks it as complete.
5. The HQ manager has visibility into case completion status across all stores.

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Retail Task Management benefits

Benefit	Feature	Users
Use the multi-store case generator to assign work from HQ to multiple retail locations simultaneously. View and track these cases in the retail portal alongside other requests, monitoring completion status across all assigned locations.	Retail multi-store case	HQ Manager, Store Manager, Store Associate

What to explore next

To learn more about configuring and using Retail Task Management Core, see:

- Exploring Retail Task Management
- Configuring Retail Task Management
- Create multi-store cases in Retail Task Management Core
- Retail Task Management reference

Retail multi-store case

The retail multi-store case enables the creation of child cases along with relevant tasks for affected stores. The retail multi-store case also enables tracking at the store level granularity.

Multi-store cases can be leveraged for task management use cases such as promotions, freshness, product recall, and product counting.

This framework enables for a selection of affected retail stores which are participating in the multi-store use cases.

The retail multi-store case relies on the CSM table map entries created as part of the multi-case configuration in the new service definition that you create for creating multi-store cases.

For information on the setup process, see Configuring Retail Task Management.

Retail multi-store case process

Using Retail Task Management Core, you can create a multi-store case for their retail organization using the CSM/FSM Configurable Workspace.

Once the case is saved, the **Affected Retail Stores** tab appears where you can select the stores for which child cases should be created.

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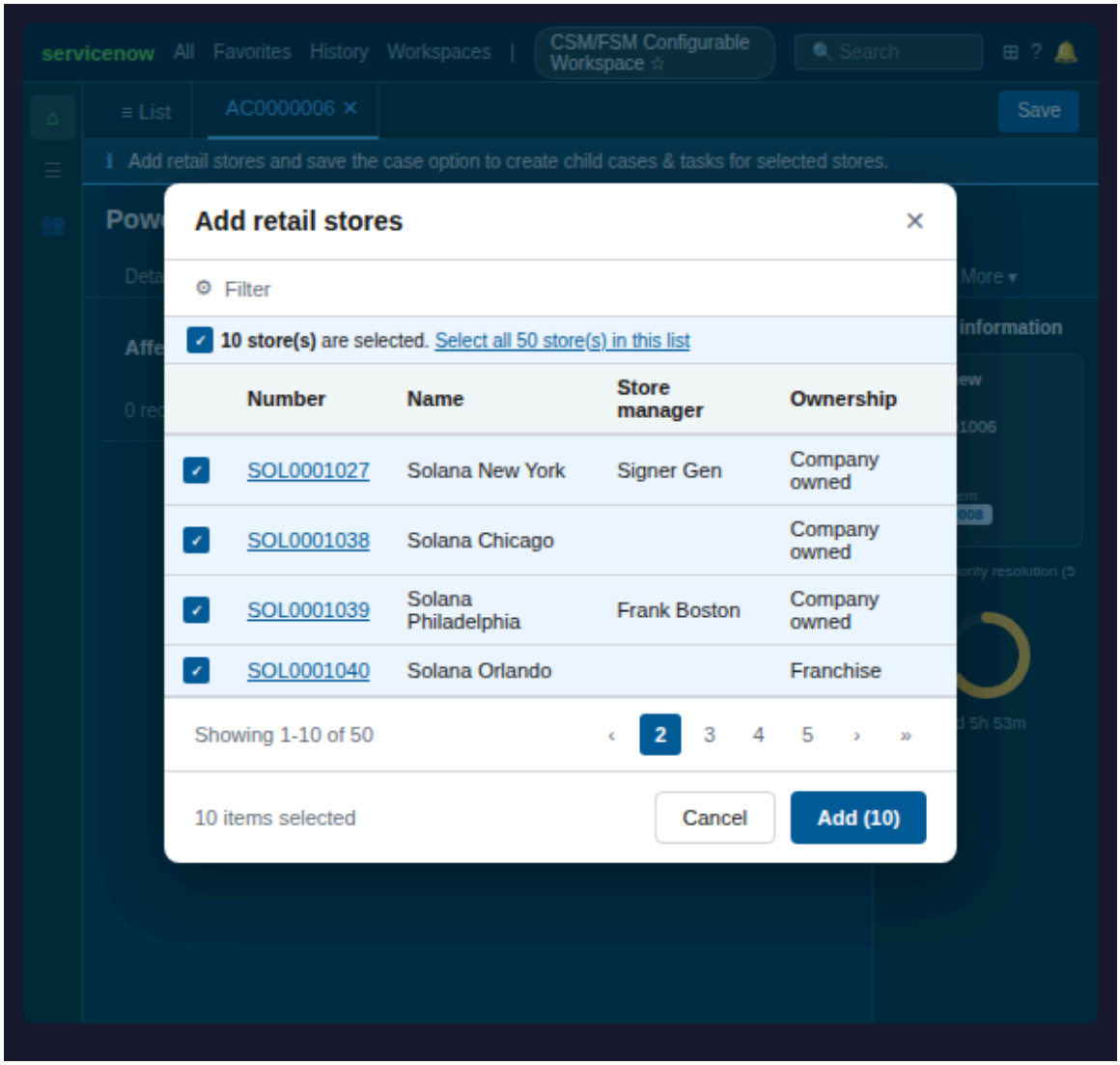
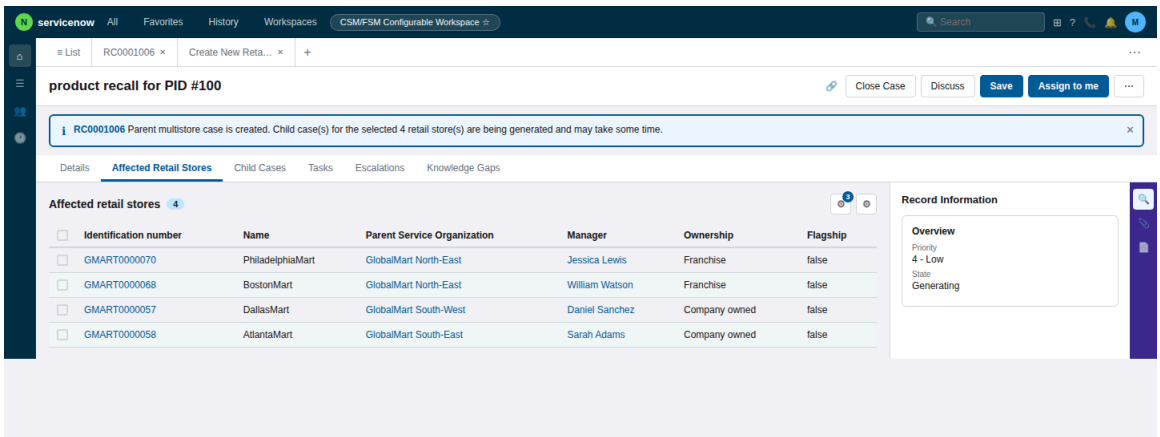


After selecting the **Submitted case,** the parent multi-store case is saved and the child case creation process begins.



For more information on this process, see Create multi-store cases in Retail Task Management Core.

Configuring Retail Task Management

Set up Retail Task Management Core.

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Configuration overview

1. Install Retail Task Management Core
2. Enable service selector for Retail Task Management Core
3. Configure service definitions for multi-store case creation for Retail Task Management Core
4. Create a CSM Table Map for Retail Task Management Core
5. Create an entity in the Multiple Case Configuration table for multi-store creation in Retail Task Management Core
6. Create a service definition for multi-store cases in Retail Task Management Core

Install Retail Task Management Core

If you have the admin role, you can install the Retail Task Management Core application.

Before you begin

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

Role required: admin

About this task

The following items are installed with Retail Task Management Core:

- Roles
- Tables
- Plugins

For more information, see Components installed with Retail Task Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Retail Task Management 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, you might have to request it from the ServiceNow® Store. Visit the

   ServiceNow Store website to view all the available apps and for information about submitting requests to the store.
3. If you're prompted, follow the links to the ServiceNow® Store to get any additional entitlements for dependencies.
4. Select **Install**.

Enable service selector for Retail Task Management Core

Activate the service selector to set up multi-store case capabilities.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Now Experience Framework** > **Declarative Actions** > **List Actions**.
2. Search for **Case Type Selector** under the **Specify Client Action** attribute.
3. Set **Active** to **true**.
4. Select **Update**.
5. **Note:** For users on releases prior to Utah only, the following additional steps must occur:

   Navigate to **All** > **System Properties** > **All Properties**.
6. Search for the **sn_csm_case_types.service_definition_select** property.
7. Set **Value** to **true** to enable the 'Product Service Select' version of the Case Type Selector.
8. Select **Update**.

Result

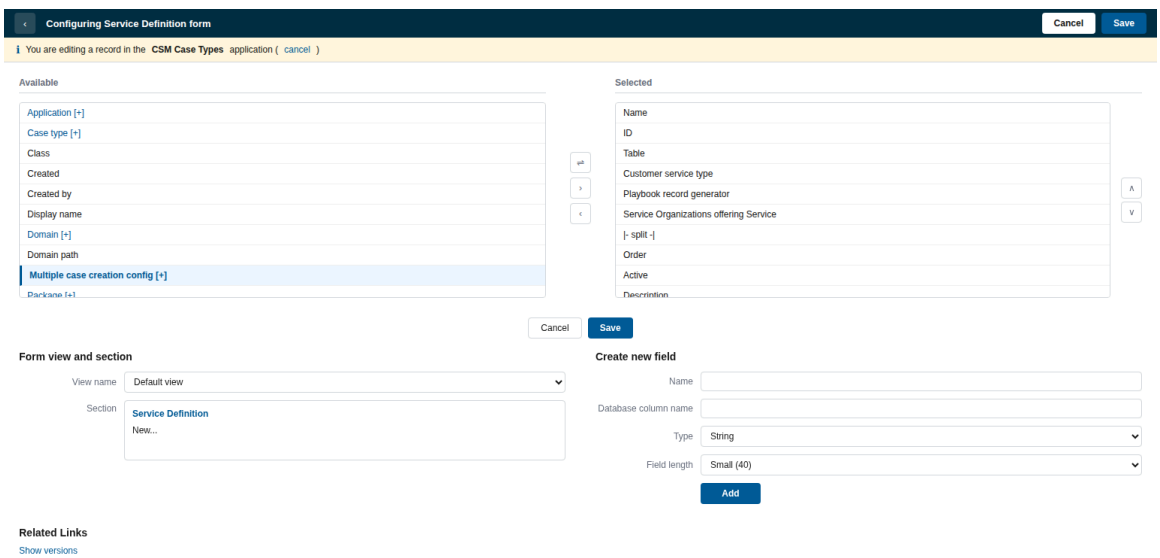
The service selector is now active within the CSM/FSM Configurable Workspace for use with Retail Task Management Core.

Configure service definitions for multi-store case creation for Retail Task Management Core

Configure service definitions to include the Multiple case creation configuration field to create multi-store cases.

Before you begin

Role required: admin



Procedure

1. Navigate to **All** > **Service Definitions**.
2. Select and hold (or right-click) on the form header and select **Configure** > **Form Layout**.
3. Move the **Multiple case creation config** field from **Available** into **Selected**.
4. Select **Save**.

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Result

Service definitions leveraging the multi-store case creation capability are enabled through use of the Multiple case creation config field.

Note: Ensure that the list view is configured to include the Parent Case related list and configure the form view to remove the “assigned to” field in the Parent Case.

Create a CSM Table Map for Retail Task Management Core

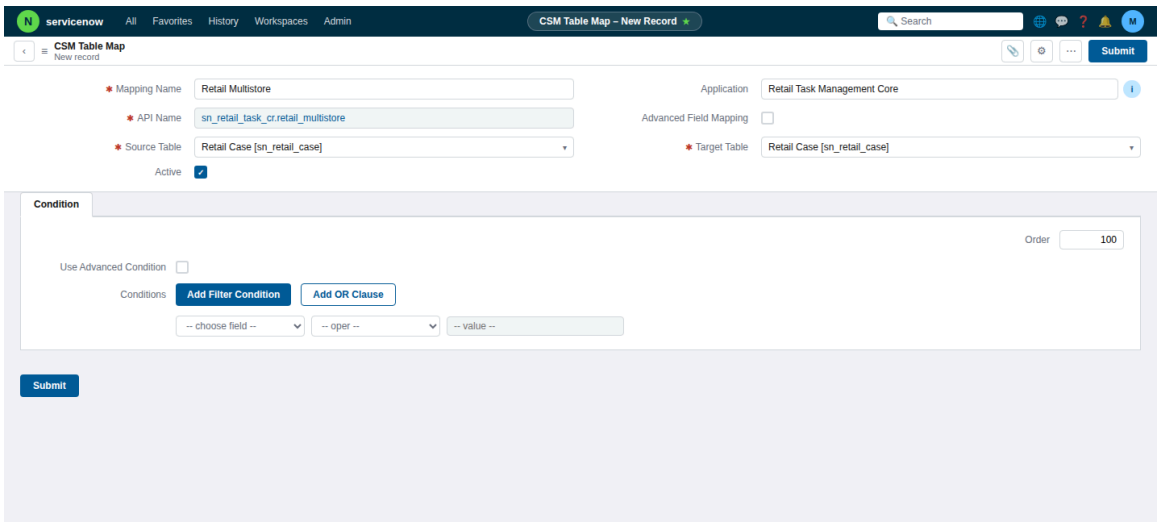
Create a CSM table map to create multi-store case configurations for use with your service definitions.

Before you begin

Role required: admin

Scope required: Retail Task Management Core.

About this task



In the preceding example, Retail Case is both the parent and child case type for this table mapping. This means that for parent cases of type Retail Case, child cases will also be of this type.

Procedure

1. Navigate to **All** and search for **csm_table_map.do**

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2. Press enter.
3. In **CSM Table Map**, enter a mapping name.
4. In **Source Table**, select the desired parent table for your multi-store cases.
5. In **Target Table**, select the desired child table type for your multi-store cases.
6. Select **Submit**.

Result

Service definitions leveraging the multi-store case creation capability are now enabled through utilization of the Multiple case creation config field.

Once this mapping has been created, use the field mapping to define which fields are mapped from the parent to child case. This mapping should occur, at a minimum, for the following fields:

- Description
- Short description
- Priority

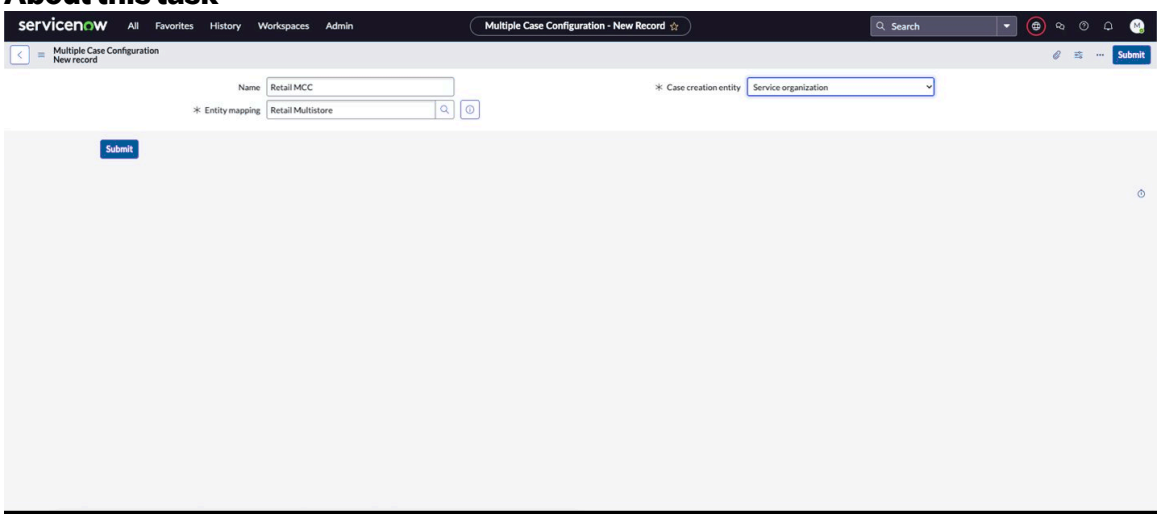
Create an entity in the Multiple Case Configuration table for multi-store creation in Retail Task Management Core

Create an entity in the multiple case creation configuration table based on the mapping that you created.

Before you begin

Role required: admin

About this task



Procedure

1. Navigate to **All** and search for **sn_case_creation_config.do**
2. Press enter.
3. In the **Multiple Case Configuration** table, fill in the following fields:

Field	Name
Name	A name for this multiple case configuration.

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Field	Name
Entity mapping	Select the entity mapping for this multiple case configuration. This value determines what the source table and target tables are for this configuration.
Case creation entity	Specifies which field should create multiple cases. Select **Organization Core**.

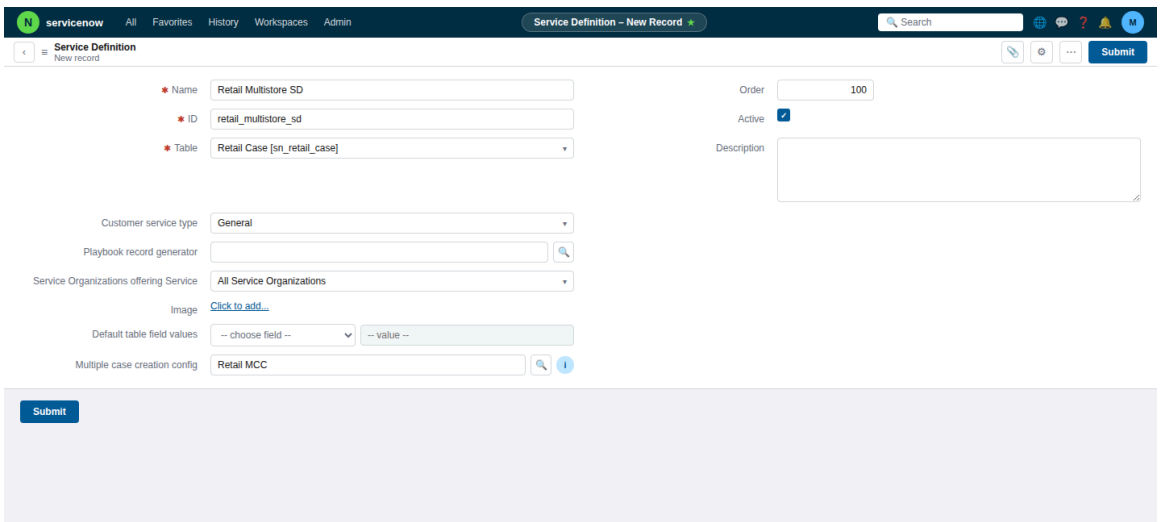
4. Select **Save**.

Result
An entity has been created in the Multiple Case Configuration table.

Create a service definition for multi-store cases in Retail Task Management Core

Create a service definition that leverages the multi-store creation engine to create multi-store retail cases.

Before you begin
Role required: admin

About this task


Procedure
1. Navigate to **All** > **Service Definitions**.
2. Fill in the **Name** and **ID** fields.
3. In the **Table** field, select **Retail Case [sn_retail_case]**.
4. In **Multiple case creation config**, select the Multiple Case Creation created for this service definition.

> **Note:** For information, see Create an entity in the Multiple Case Configuration table for multi-store creation in Retail Task Management Core.

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5. Fill in other fields as needed.
   For information on these fields, see .

Result
A new service definition has been created that can be leveraged to create multiple cases.

Create multi-store cases in Retail Task Management Core

Create multi-store cases that assign work from HQ to multiple retail locations simultaneously.

1. Create a parent multi-store case in Retail Task Management Core
2. Manage child cases in Retail Task Management Core
3. Retail multi-store case states

Create a parent multi-store case in Retail Task Management Core

Create a parent multi-store case for your retail organization using Retail Task Management Core.

Before you begin
Role required: sn_retail.support_agent

> **Note:** If the child case creation fails due to platform or instance issues, there's no retry mechanism in place. As a result, the parent case is marked as **Canceled with error(s)**. In this situation, create a parent case from the beginning.

Procedure

1. In **CSM/FSM Configurable Workspace**, navigate to **Retail Cases**.
2. Select **New**.
3. In the service selector, select the service definition with multi-store case creation capabilities then select **Create case**.
4. In the multi-store retail case, fill in initial details as needed.
5. Select **Save**.

   Once the initial case information is filled in and you save the case, the **Affected Retail Stores** tab appears. The **Affected Retail Stores** tab enables you to create child cases for the stores you select.

6. In the multi-store retail case, navigate to **Affected Retail Stores**.
7. Select **Add retail stores**.
8. Select the stores that you want added as child cases using the check box column and select **Add**.

   Only retail stores are available for selection here as multi-store case creation doesn't include areas, regions, districts, or divisions.

   You can also choose to select all.

9. Select **Save**.

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Note:

Selecting Save doesn't submit the cases for creation. You can still add, edit, or remove cases until you select the **Submit case.** Then, the parent retail case is submitted, and the child cases creation process begins.

10. Once all child cases are added and reviewed, select **Submit case** to submit the parent case. The child cases then begin to generate.
11. Once the case has been submitted, a new related list called **Child cases** appears which will display all child cases created for this parent case after the generation process has completed.
12. **Optional:** Use the Tasks related lists to add any tasks to this parent case.
13. **Optional:** Use the Escalate case or Report Knowledge Gap from the more menu as needed.
14. Once all child cases have been sufficiently closed, use **Close Case** to close the parent case.

Manage child cases in Retail Task Management Core

You can manage child cases created from a parent multi-store case in Retail Task Management Core.

Before you begin

Role required: sn_retail.manager_fulfiller

Responsibility required: Store Manager – Fulfiller.

For information on adding roles and responsibilities, see Assign roles to Retail users.

About this task

Child cases created from a multi-store case can be reassigned to users with the sn_retail.associate_fulfiller role for fulfillment, or fulfilled by mangers themselves.

Procedure

1. In CSM/FSM Configurable Workspace, navigate to **Retail Cases**.
2. Select the Retail case that you want to manage.
3. Use the **Assigned to** field to assign the case as needed.
4. Note that in the **Activity** panel, the parent case number is listed.
5. Fulfill the case and manage as needed.

Retail multi-store case states

The following table lists all possible states for the Retail multi-store parent case.

Retail multi-store parent case states

The following table lists all possible states for the Retail multi-store parent case.

State	Description
Draft	Indicates that parent case is still in draft state and hasn't yet been submitted.
Generating	Indicates that the parent case has been submitted, and child cases are currently being generated.

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Open	Indicates that the parent case is open.
Canceled with error(s)	Indicates that the parent case has been canceled, typically due to an instance or platform issue. Any child cases that were generated will be canceled automatically, and this parent case must be re-created.
Closed	Indicates that the parent case is closed.

Retail multi-store child case states

State	Description
New	Indicates that the child case is newly created.
Open	Indicates that the child case is open.
Canceled with error(s)	Indicates that the parent case has been canceled, typically due to an instance or platform issue. Any child cases that were generated are automatically, and this parent case must be re-created.
Resolved	Indicates that the child case has been marked as resolved.
Closed	Indicates that the child case is closed.

Retail Task Management reference

Reference topics provide additional information about Retail Task Management components.

Components installed with Retail Task Management

Several types of components such as tables, user roles, and business rule are installed when you activate the Retail Task Management plugin.

Plugins installed with Retail Task Management Core

Name	Description
Retail core com.sn_retail_core	Provides the retail base case functionality and roles used in Retail Task Management Core.
Multi-case creation com.sn_multi_case_creation	Provides the framework for multi-store case creation.

Note:

If Retail Core is already installed, then only the **com.sn_multi_case_creation** plugin installs with Retail Task Management Core.

Retail Task Management Core data model

Learn about the Retail Task Management application by viewing the data model and role relationship diagrams. These diagrams show the relationships between the tables and roles

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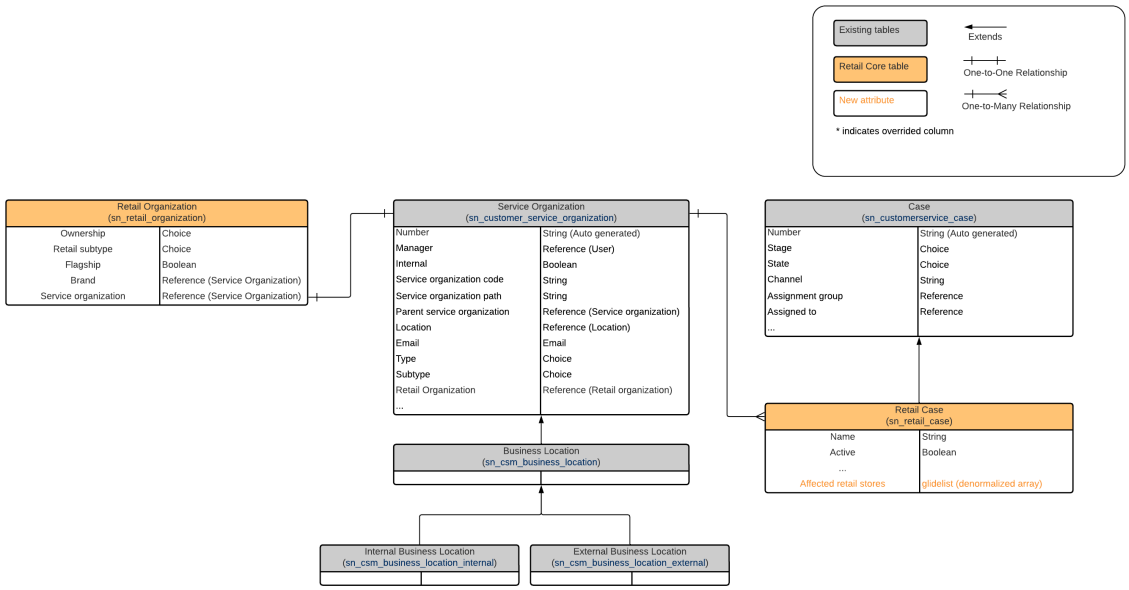
within the application and provide an overall picture of how the Retail Task Management application operates.

Retail Task Management data model



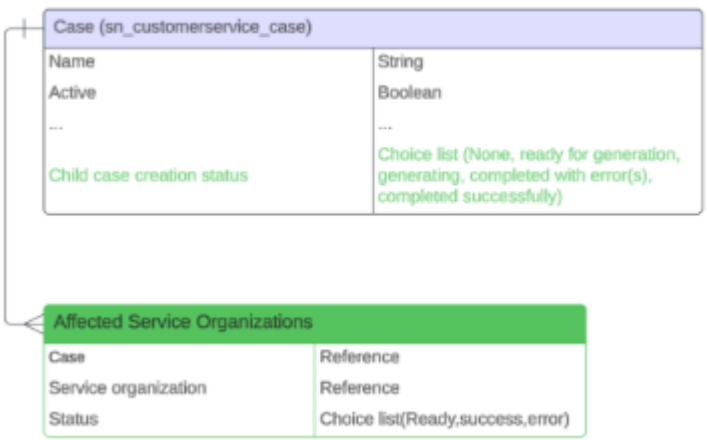
Installing Retail Task Management Core introduces the **Affected retail stores** field into the Retail case [sn_retail_case] table.

The **Affected retail stores** field in the Retail case [sn_retail_case] table is used to generate affected retail stores within a list for the multiple case creation context.

Changes introduced by the Multi-case creation framework plugin

Installing Retail Task Management Core automatically installs the Multi-case creation plugin, adding a new internal field child case creation status to track the state of child case creation. If child case creation is completed successfully, the main State field of the parent case is set to Open.

The Multi-case creation plugin also introduces a new internal table Affected Organization Core. This table maintains a many-to-one mapping between Organization Core and Cases.



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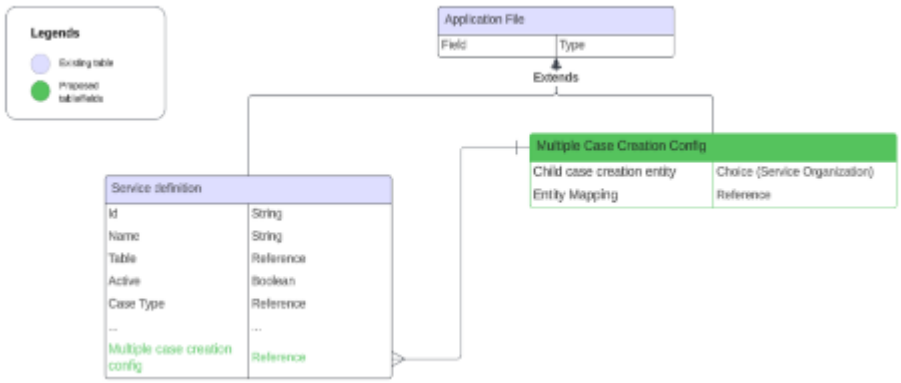
Note: Both the child case creation status field and the Affected Organization Core table are hidden from end users. They're only used internally by the multi-case engine to manage and track case creation processes.



Installing the Multi-case creation plugin adds the Multiple case creation config field into the Service Definition table. This field references a new table, Multi Case Creation Config, which is also created during the plugin installation.

The Multi Case Creation Config table holds the necessary information for multiple case creations.

For more detailed information on how these fields are involved with the multi-store creation process, refer to Configuring Retail Task Management.

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