



# Xanadu Manufacturing

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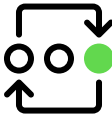
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# Manufacturing

The #Manufacturing Commercial Operations (MCO) product provides you a platform to optimize your sales, support, and service operations to enhance operational efficiency, lower costs, and improve productivity.

## Get started

<p>Explore</p>  <p>Learn how Manufacturing Commercial Operations can help you with its key features and benefits.</p>	<p>Configure</p>  <p>Plan and customize Manufacturing Commercial Operations to meet your specific needs.</p>	<p>Use</p>  <p>Learn how manufacturers, channels, and consumers can use Manufacturing Commercial Operations to manage manufacturing ecosystems.</p>
	<p>Integrate</p>  <p>Extend Manufacturing Commercial Operations capabilities by integrating with other applications.</p>	

## Troubleshoot and get help

- [Ask questions and explore other resources for in the ServiceNow Community](#) 
- [Search the Known Error Portal for known error articles](#) 
- [Contact Customer Service and Support](#) 

## Exploring Manufacturing Commercial Operations

Learn how the #Manufacturing Commercial Operations solution can help your organization speed up revenue and create differentiated customer and channel experiences while reducing operations costs.

The Manufacturing Commercial Operations (MCO) product offers a single platform to manage your sales, support, and service operations. For example, you will be able to manage the end-to-end lifecycle of your products, subscriptions, and services including creating opportunities,

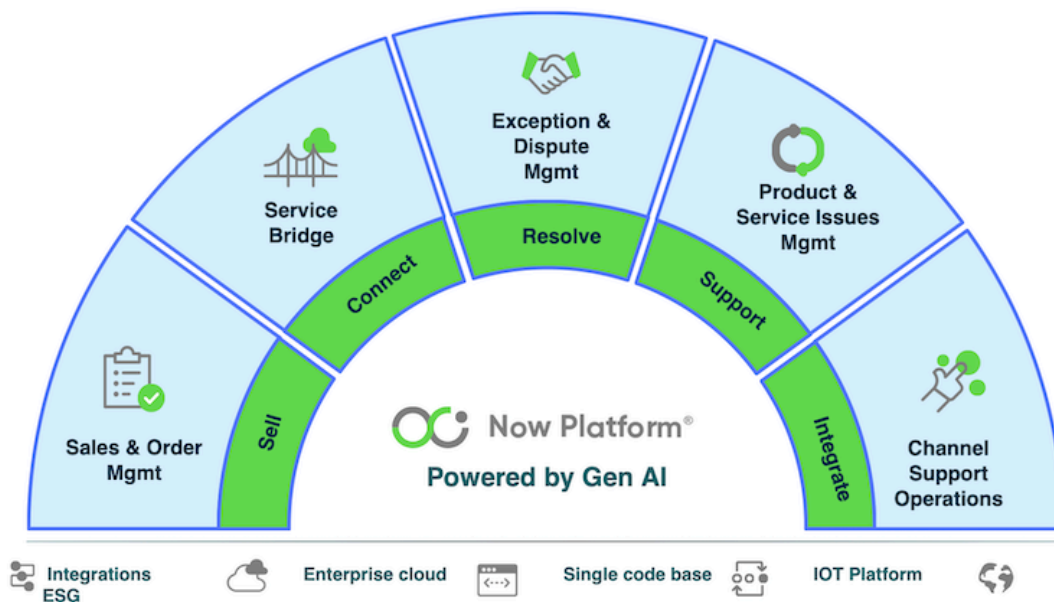
generating quotes, contracts, and orders, resolving exceptions and disputes, supporting customer complaints and product or service quality issues, and enabling seamless channel operations.

**Benefits**

With Manufacturing Commercial Operations applications combined with ServiceNow workflows, your organization can speed up revenue, improve profitability and deliver exceptional customer and channel experiences.

To support end-to-end operations, Manufacturing Commercial Operations provides the following features, capabilities and applications.

## Automation designed for Manufacturers Manufacturing Commercial Operations (MCO)



**Manage an entire manufacturing ecosystem in real-time**

Securely build business workflows across the ServiceNow ecosystem using Service Exchange for Manufacturing Commercial Operations. Manufacturers can adopt new features, publish product offerings, and sync them to customers, suppliers, channels, and partners, all within one system of engagement. This allows companies to manage their entire ecosystem easily in real-time, enabling customers and partners to work within their own ServiceNow environments to make any requests they need. These requests, incidents, or cases are received by manufacturers in real-time, eliminating errors and time lags, and increasing agent efficiency and customer satisfaction, and reducing the costs of custom integrations and e-bonding. Connect OEMs, Partners, and Customers.

**Improve agility and savings with automated exceptions and disputes workflows**

Manufacturing Commercial Operations helps automate the order exception and invoice dispute management processes by fusing customers, OEMs, channels, and other value chain partners with one system of engagement and action. Intelligent guided recommendations and workflows help resolve issues and disputes quickly,

yielding improvements in agent productivity, order delivery performance and cash collection cycles, thus boosting revenue and cash flow.

### **Optimize the lead-to-cash cycle and increase revenue**

Manage leads & opportunities from start to finish and map customer needs to best offers with Order Management for Manufacturing Commercial Operations. Launch complex products and services fast with configurable catalogs. Quickly configure and price quotes and convert to orders to speed up revenue. Automate order fulfillment across front, middle, and back office teams to reduce costs. Manage post-sale changes, upgrades, and renewals to boost revenue and retention

### **Accelerate growth with new subscriptions and services**

Swiftly launch and manage new subscriptions and service offerings. Sales and order management applications, including product & pricing catalog management, opportunity to order management, post-sales activities and customer lifecycle workflows, convene on a single platform, increasing an organization's responsiveness to rapidly changing customer expectations, market conditions, and emerging opportunities, translating into increased revenue potential.

### **Provide differentiated customer and channel experiences**

Through Manufacturing Commercial Operations, manufacturers can offer seamless collaboration and enriched, personalized experiences to their customers and channel partners, fostering stronger partnerships and bolstering customer loyalty and retention. Omni-channel engagement, intelligent self-service capabilities, and proactive issues management and communications help not only increase loyalty but also improve overall brand value.

## **Key Features**

In Manufacturing Commercial Operations, there are three major areas – Sales, Support, and Service. These areas collectively contribute to the effective sales of the company's products and services. Manufacturing Commercial Operations aims to streamline, automate, and optimize these functions.

### **Establish Integrations between customer, partner, and manufacturer instances**

Establish integrations between multiple ServiceNow instances to provide seamless manufacturing support and experiences across the manufacturing ecosystem, from enterprise customers to suppliers, to channels, to partners, without having to configure and maintain custom integrations. Create and publish catalogs of manufacturing services, manage order exceptions and product issues, and establish integrations between customer instances with Service Exchange for Manufacturing Commercial Operations.

### **Subscription and services lifecycle management**

Connect end-to-end processes, verify customer contracts and entitlements at the point of service/sale, track and make post-sales changes, and proactively manage activations and potential loss of revenue. Manufacturers no longer have to rely on manual processes and legacy knowledge to manage activities across the various stages of pre-sales, sales, and post-sales processes (i.e., opportunity to renewal lifecycles). Additionally, these processes were optimized for product and parts sales and are not flexible enough to accommodate requirements of new subscriptions and services offerings.

### **Order-to-cash exceptions and disputes management**

Integrate with ERP and other point systems, capture requests from omni-channels, intelligently route the request to the right teams, and orchestrate the collaboration,

resolution and approval processes. You will be able to monitor SLAs, progress, and provide proactive communications to all stakeholders increasing auditability and visibility to all stakeholders. Provide an easier way for manufacturers to manage change requests to the orders, deliveries, and invoices, avoiding major issues and disputes that are often manually handled and go through many hand-offs, and preventing customer frustration and loss of revenue and/or cash.

### **Product quality Issues and post-sales services support**

Integrate with other systems, make data available to the agent at the point of service, and communicate back and forth with customers, internal teams, and stakeholders seamlessly with configurable case types, playbooks, issues management workflows, and agent workspaces. Identify all impacted install base and communicate solutions and issue resolutions. Provide the best service to customers by resolving complaints and product quality issues on time, and avoid disconnect from internal teams such engineering, production, procurement, etc. With Manufacturing Commercial Operations, keep complete, consistent information on customers, install base, orders, warranty, contracts, entitlements, and products.

### **Channel support operations**

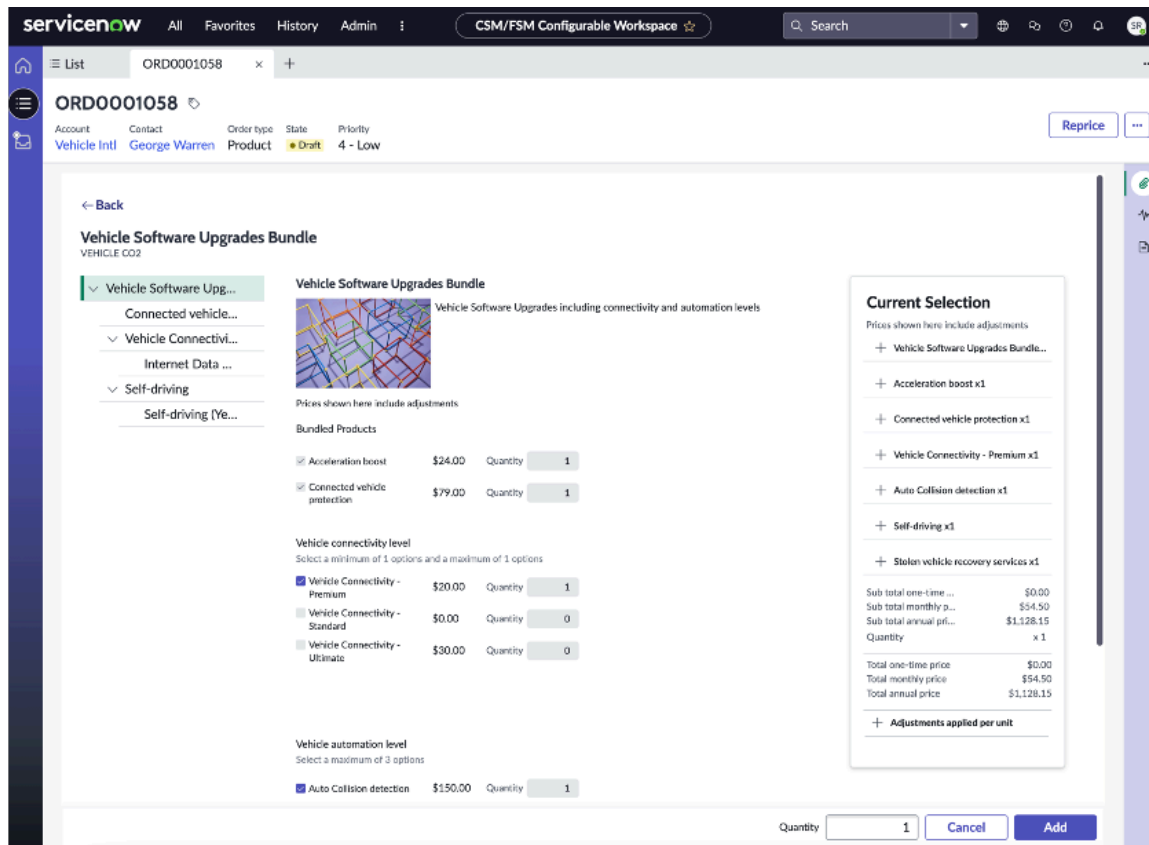
Provide self-service capabilities, support requests on products, subscriptions, and services, and provide proactive, consistent, and real-time communication. Define the organization, hierarchies, and relationships with the end customers with Service Model Foundation capabilities. Proactively send service requests to nearest the dealers and service providers for maintenance and repairs to streamline service processes such as warranty claims and recalls. Avoid frustration from channel partners, including dealers, service providers, and retailers, because of inconsistent, delayed and inadequate responses to their inquiries, requests, and issues.

## **Manufacturing with Sales Customer Relationship Management**

Optimize the lead-to-cash cycle with Sales Customer Relationship Management for Manufacturing Commercial Operations.

With Sales Customer Relationship Management for Manufacturing Commercial Operations, manufacturers can:

- Launch complex products and services with configurable catalogs.
- Manage leads & opportunities from start to finish and map customer needs to best offers.
- Configure and price quotes and convert to orders to speed up revenue.
- Automate order fulfillment across front, middle, and back office teams.
- Manage post-sale changes, upgrades, and renewals.



## Manufacturing Commercial Operations with Service Bridge

Securely build business workflows across the ServiceNow ecosystem using Service Bridge for Manufacturing Commercial Operations.

## Manufacturing Commercial Operations for Providers with Service Exchange

Use the Service Exchange application with Manufacturing Commercial Operations for providers to create and publish catalogs of services, receive, and fulfill requests generated from consumers, and establish integrations with consumer instances.

A provider instance belongs to the OEM/manufacturer who provides Service Bridge to the end users such as customers, dealers, and partners.

As a manufacturing provider, you can:

- Author and publish remote service catalogs for your customers, suppliers, channels, or manufacturing partners on their instances.
- Integrate your instance with the instances within your manufacturing ecosystem.
- Receive and fulfill service requests on your instance from your customers', suppliers', channels', or manufacturing partners' ServiceNow® instance(s).

A provider in the manufacturing industry can use Service Exchange for Manufacturing Commercial Operations to provide various types of support to consumers, such as:

- Technical support
- Order and Parts fulfillment
- Claims Management
- Routing to AR team

- Dispute resolution
- Field Technician Dispatch (requires an [integration with FSM](#))

**Service Exchange for Manufacturing Commercial Operations Key Features**

Remote Catalog	Keeps the development of shared catalogs with the workflows & integrations in the providers instances while providing consumers with native catalog items in their instances.	Customers, Channels, Partners are avoiding creating their own catalogs, and can utilize the OEM’s remote catalog, leads to reduced costs and decreasing errors as well as increasing customer experience. Additionally increasing the efficiency and productivity at OEM as well as at consumer.
Remote Task	A sustainable replacement for custom eBonding. Collaborate effortlessly across the ServiceNow ecosystem. Native alternative to traditional E-Bonding. Enables task to task integration.	Avoids the need to build costly and error-prone integrations. Enhances collaboration and communication, while improving service quality.
Proactive Case	A case initiates a Provider Task through a flow on the Provider instance that can be checked proactively on the consumer instance. There is a Proactive Case flow behind to sync.	Simplifies and increases automation ratio for alerting process or notification process, like recall management. Improves the service delivery quality and streamlines tasks assignments.
Scratchpad	Scratchpad allows variables to be shared “ad hoc” between instances through Remote Tasks or Provider Tasks.	Simplifies data sync between the instances and reduces adoption efforts. Quick data entry and retrieval, leading to reduced time spend by capturing data and updating directly in scratchpad.
Authorized User	Enables user level role based access control of Remote Record Producers in the customer instance.	Avoids mismatch possibilities due to adoption of user level role based access control. Reduces compliance risks by reducing access errors through data mismatch
Provider Task (record producer)	Enables providers to be transparent and collaborative with their consumers that use ServiceNow by syncing relevant tasks, like cases, to their consumers as Provider tasks.	Simplifies data sync between the instances and avoids data mismatches between the cases in the different instances

**Service Exchange for Manufacturing Commercial Operations Key Features (continued)**

<p>Configuration Revisions</p>	<p>The configurations of remote record producers, remote task definitions, and foundation data sync offerings can be updated to create new revisions that can be entitled to consumers. New revisions of entitlements with updated functionality can be deployed to compatible consumers without impacting consumers who have not upgraded their Service Bridge applications.</p>	<p>New revisions of Service Bridge entitlements that offer updated functionality can be developed and deployed to compatible consumers without negatively impacting consumers who have not yet updated their application. The provider delivers an improved customer experience with improved efficiency and scalability.</p>
<p>Mismatch Version Support</p>	<p>Providers and consumers can run different versions of the Service Bridge applications (within N-2) without impacting their ability to exchange data.</p>	<p>This feature eliminates the need for providers to coordinate Service Bridge applications updates with their consumers and allows providers to adopt new features while supporting consumers who have yet to upgrade. Service Bridge supportability and scalability are improved, and the Provider is able to deliver an improved customer experience.</p>
<p>Order Management Support</p>	<p>When a Product Offering is defined in Sales and Order Management (SOM), the administrator can specify a Remote Catalog Item, and the offering will be published as a Remote Record Producer in entitled Service Bridge connected customers' service catalogs.</p>	<p>A customer can order a Sales and Order Management (SOM) product offering from a connected Service Bridge provider using a Service Bridge Remote Record Producer, enabling faster order fulfillment, improved accuracy, and improved customer satisfaction.</p>

For information on setting up Service Exchange for Providers with Manufacturing Commercial Operations, see [Install Service Bridge for Providers in Manufacturing Commercial Operations](#).

**Manufacturing Commercial Operations for Consumers with Service Exchange**

Use the Service Exchange application with Manufacturing Commercial Operations so your consumers can make any requests they need.

As a consumer, you can do the following using the Manufacturing Commercial Operations Service Exchange consumer portal:

- View the service catalog and create requests (i.e., report product issues)
- See remote choices and case updates in real time

- Receive resolution comments.
- See all employee related items in one place (HR issues, product issues)

A consumer instance is one that contains a B2B customer, channel, supplier or 3PL, who is receiving the Service Bridge connection. A consumer with a consumer instance can use Manufacturing Commercial Operations with Service Exchange for Consumers to:

- Submit product issues (hardware & software)
- Order parts
- Replace equipment
- Submit issues with an invoice
- Change orders
- File a warranty claim

### Service Exchange for Consumers Key Features

Remote Choice	Provides direct access to provider data in real time during the submission of a Remote Catalog item.	Removes the need to replicate foundation data into the consumer instance. Having the right information at the right time reduces the chances of errors and reduces costs.
Transformation Framework	Enables a provider or consumer to transform inbound and outbound data for Remote Tasks. Easily transform fields with static choices like State, and Priority. Advanced scripted transforms allow for complex logic.	Simplifies the communication with each other (OEM, consumer), that agents can focus more on resolving the incidents, cases, and consumer requests.
Mismatch Version Support	Providers and consumers can run different versions of the Service Bridge applications (within N-2) without impacting their ability to exchange data.	This feature eliminates the need for providers to coordinate Service Bridge applications updates with their consumers and allows providers to adopt new features while supporting consumers who have yet to upgrade. Service Bridge supportability and scalability are improved, and the Provider is able to deliver an improved customer experience.
Consumer Pre-Flows	Consumers can control if and when data should be synced between the provider tasks on the consumer and provider. A flow can be associated with a Service Bridge Remote Record	Consumer Pre-Flows will enable Service Bridge providers to improve their service for current consumers and expand to additional

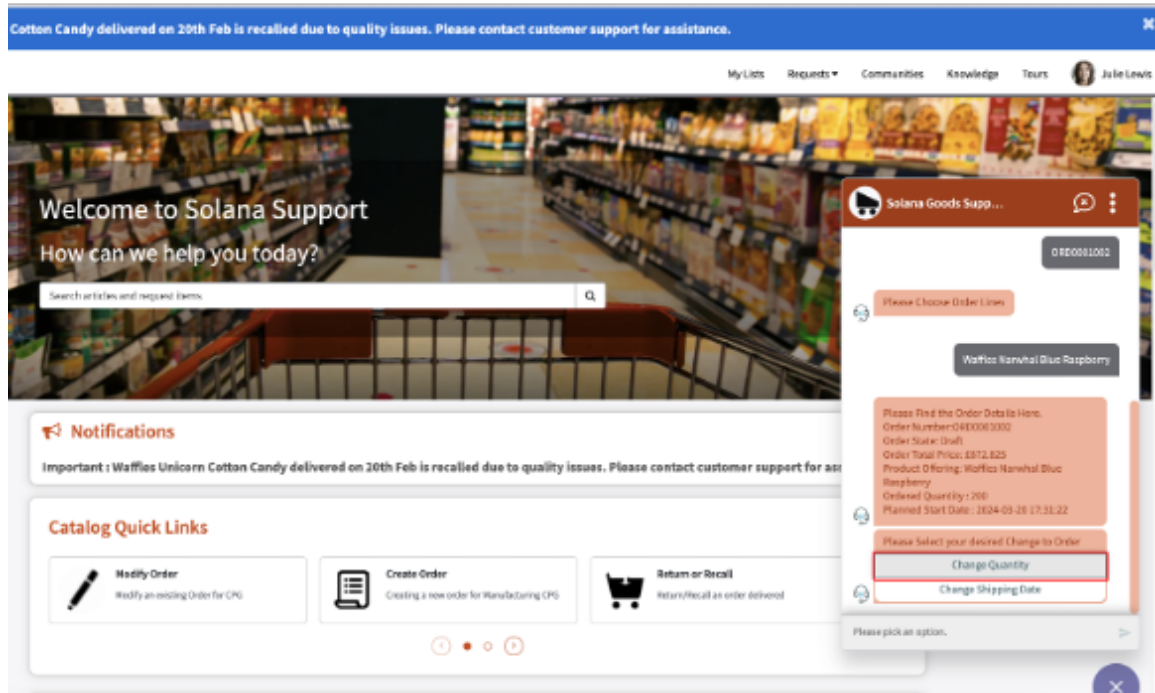
**Service Exchange for Consumers Key Features (continued)**

	Producer (RRP) and run consumer-defined processes, such as approvals, before the request/task is synchronized to their provider.	customers for whom this feature is a requirement.
Order Management Support	When a Product Offering is defined in Sales and Order Management (SOM), the administrator can specify a Remote Catalog Item, and the offering will be published as a Remote Record Producer in entitled Service Bridge connected customers' service catalogs.	A customer can order a Sales and Order Management (SOM) product offering from a connected Service Bridge provider using a Service Bridge Remote Record Producer, enabling faster order fulfillment, improved accuracy, and improved customer satisfaction.

For information on setting up Service Exchange for Providers with Manufacturing Commercial Operations, see [Install Service Exchange for Consumers in Manufacturing Commercial Operations](#).

**Manufacturing Commercial Operations Exception and Dispute Management**

Automate the order exceptions and invoice disputes management processes with Exception and Dispute Management for Manufacturing Commercial Operations.



With Exception and Dispute Management for Manufacturing Commercial Operations, manufacturers can:

- Unify related issues and effectively track the status with case lines on a single case.
- Capture order change requests and invoice disputes efficiently via omni-channels.

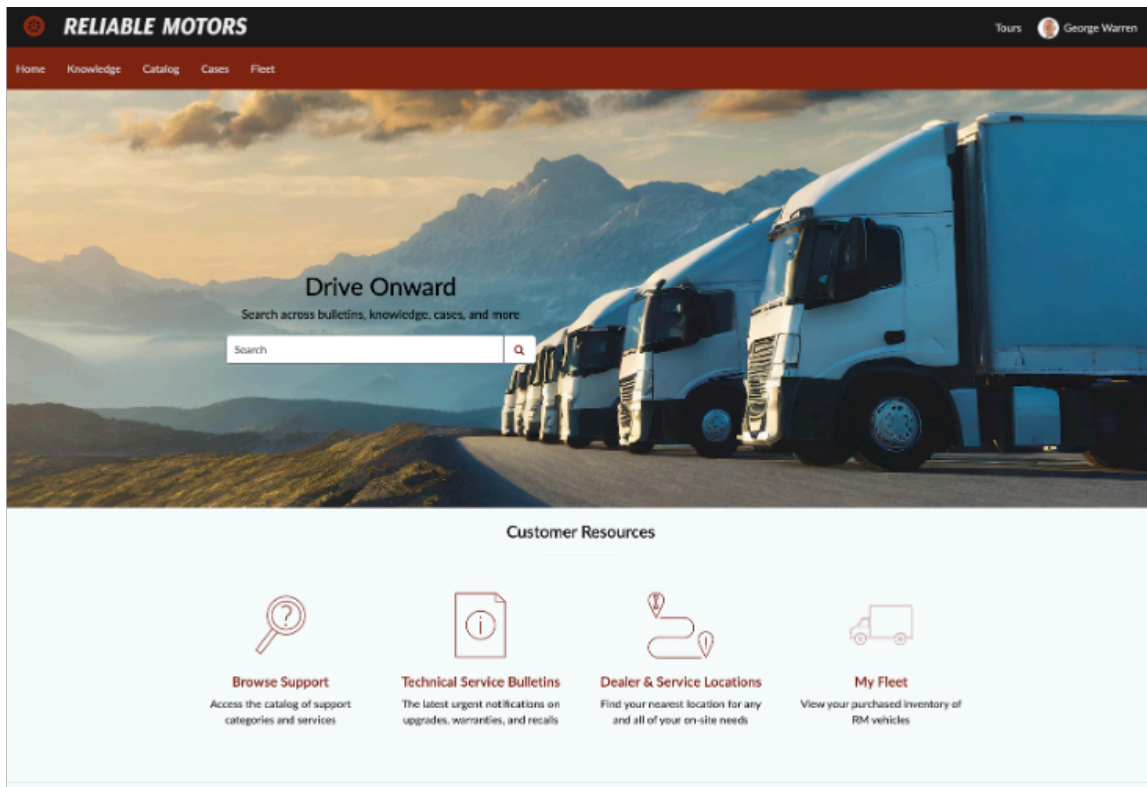
- Prioritize and accelerate issue resolution for the most important eligible customer orders.
- Automatically identify discrepancies and improve agent productivity with guided recommendations.
- Collaborate with internal teams to resolve issues faster.

## Manufacturing with Product and Service Issues Management

Integrate with other systems, make data available to the agent at the point of service, and communicate back and forth with customers, internal teams, and stakeholders seamlessly with configurable case types, playbooks, issues management workflows, and agent workspaces. Identify all impacted install base and communicate solutions and issue resolutions.

## Manufacturing Commercial Operations Channel Support Operations

Use the Service Bridge application with Manufacturing Commercial Operations for providers to create and publish catalogs of services, receive, and fulfill requests generated from consumers, and establish integrations with consumer instances.



With Channel Support Operations for Manufacturing Commercial Operations, you can:

- Automate after-sales support processes (e.g., product & service issues, warranty claims, recalls)
- Resolve poor quality, non-conformance and warranty issues
- Provide tech support agents with a 360° view of customers, products, entitlements, and channels
- Increase deflection with tailored self-service portal and workspaces
- Improve OEM-channel collaboration with proactive communications and automated channel workflows (e.g., vehicle handover, service delivery)

### Register a Product Complaint

Log a product-related complaint to RM customer support.

Please provide the following details to help us provide you assistance as quickly as possible.

Submit

---

**Account Details**

\*Account  \*Contact

---

**Vehicle/Component Details**

\*Vehicle Model  Impacted Component(s)

\*Inspected Vehicle VIN

---

**Complaint Details**

\*Complaint Details

Date of Issue  \*Was anyone injured?

Select your Preferred Service Location

[Add attachments](#)

## Configuring Manufacturing Commercial Operations

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

Configuring Manufacturing Commercial Operations involves several main tasks:

- Installing and setting up the Manufacturing Commercial Operations application.
- Installing and configuring Customer Service Management (CSM).
- Installing and setting up Sales Customer Relationship Management applications, such as Lead Management, Opportunity Management, Quote Management, and Sales Agreement Management.
- Installing and setting up Service Exchange for Providers and Consumers.








### Installing and configuring Manufacturing Commercial Operations applications

As a user with the admin role, complete the following main configuration tasks to set up your Manufacturing Commercial Operations applications.

#### MCO configuration tasks

Configuration task	Description
<a href="#">Install and configure Customer Service Management</a>	Install the Customer Service Management application from the ServiceNow Store store. This application enables your agents and account executives to gain visibility into the customer systems and tools they need to deliver proactive services to customers.
<a href="#">Install and configure Lead Management</a>	Install the Lead Management application from the ServiceNow Store. This application

**MCO configuration tasks (continued)**

Configuration task	Description
	enables manufacturers to create leads and provide pre-sales product recommendations based on customer needs, as well as assign user roles and configure related features such as needs analysis.
<a href="#">Install and configure Opportunity Management</a> 	Install the Opportunity Management application from the ServiceNow Store store. This application enables your sales agents and account executives to create and manage opportunities that identify and track potential sales based on identified customer needs.
<a href="#">Install and configure Quote Management</a> 	Install the Quote Management application from the ServiceNow Store store. It enables your sales agents to generate sales quotes for products or services that a customer wants to buy.
<a href="#">Install and configure Order Management</a> 	Install the Order Management application from the ServiceNow Store. This application enables your agents to capture, manage, and fulfill orders from enterprise customers.  <b> Note:</b> If you have a Telecommunications Service Management subscription, install the Order Management for Telecommunications, Media, and Technology application from the store. This application includes the Order Management application and also the ServiceNow implementations of the TMF APIs for telecommunications products.
<a href="#">Install and configure Sales Agreement Management</a> 	Install the Sales Agreement Management application from the ServiceNow Store store to create sales agreements between a buyer and a seller for future transactions.
<a href="#">Install and configure Service Model Foundation</a> 	Install the Service Model Foundation application from the ServiceNow Store store. This framework enables you create structured and flexible data models that represent your business needs.
<a href="#">Install and configure Install Base Management</a> 	Install the Install Base Management application from the ServiceNow Store store. This application enables you to capture a customer’s use or purchase of a product with the Manufacturing Commercial Operations application.

**MCO configuration tasks (continued)**

Configuration task	Description
Install and configure Service Exchange for Providers	See <a href="#">Install Service Exchange for Providers</a> .
Install and configure Service Exchange for Consumers	See <a href="#">Install Service Exchange for Consumers</a> .

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

## Installing and configuring Sales Customer Relationship Management for Manufacturing

Set up the Sales Customer Relationship Management (Sales CRM) applications for Manufacturing Commercial Operations to optimize the lead-to-cash cycle and allow your agents can work on various stages of the manufacturing sales life cycle, such as sales opportunities, quotes, order capture and fulfillment, contracts, and entitlements.






### Installing and configuring Sales CRM applications

As a user with the admin role, complete the following main configuration tasks to set up your Sales CRM applications for Manufacturing Commercial Operations.

**SOM configuration tasks**

Configuration task	Description
<a href="#">Install and configure Lead Management</a> .	Install the Lead Management application from the ServiceNow Store. This application enables manufacturers to create leads and provide pre-sales product recommendations based on customer needs, as well as assign user roles and configure related features such as needs analysis.
<a href="#">Install and configure Opportunity Management</a> .	Install the Opportunity Management application from the ServiceNow Store store. This application enables your sales agents and account executives to create and manage opportunities that identify and track potential sales based on identified customer needs.
<a href="#">Install and configure Quote Management</a> .	Install the Quote Management application from the ServiceNow Store store. It enables your sales agents to generate sales quotes for products or services that a customer wants to buy.

### SOM configuration tasks (continued)

Configuration task	Description
Install and configure the Order Management application	Install the Order Management application from the ServiceNow Store. This application enables your agents to capture, manage, and fulfill orders from enterprise customers.
<a href="#">Configure Sales Agreement Management</a> 	Install the Sales Agreement Management application from the ServiceNow Store to create sales agreements between a buyer and a seller for future transactions.
<a href="#">Configuring product offerings and catalogs</a> 	Create product offerings and the associated product catalogs that can be used by Sales and Order Management agents for pre-sales activities, order capture, and post-sales engagement.
<a href="#">Configuring product pricing with Pricing Management application</a> 	Use the Pricing Management application to create the price lists and price list lines, define pricing adjustments, and manage other features that control pricing for product offerings. Product pricing is used by your sales and order agents when creating opportunities, quotes, and sales orders in Sales and Order Management.
<a href="#">Setting up the product configurator</a> 	Control the product options displayed in the interface by using the Open State Management API framework.
<a href="#">Assign user roles in Sales Customer Relationship Management applications</a> 	Review and assign roles to users of the SOM applications that you install.

## Installing and configuring Service Exchange for Providers

To set up and configure the Service Exchange for Providers application for Manufacturing Commercial Operations, follow these steps.

**Note:** Service Exchange 2.x.x that is being released with the Xanadu release does not support migration of the Service Exchange (Legacy) versions. If you are using a Service Bridge (Legacy) version, before you upgrade to the Xanadu release, you must follow instructions in the [Service Bridge for Providers \(Legacy\) - Migration Utility \(KB1499823\)](#)  to migrate your configuration data.

### Pre-installation checks

**Check the glide.servlet.uri property:** Ensure that the `glide.servlet.uri` property in the Glide instance is set to the correct instance URL. An issue can occur when an instance is cloned from production, but still refers to the production URL for the `glide.servlet.uri` property.

## Setting up Service Bridge for Providers

Task	Link
Install the Service Exchange for Providers application.	See <a href="#">Install Service Exchange for Providers</a> .
Upgrade from version 1.x.x of Service Exchange for Providers if required.	See <a href="#">Upgrade Guide - Service Bridge for Providers and Consumers application (v2.x.x release - KB1700387)</a> .
Migrate from Service Exchange legacy version if required.	See <a href="#">Migrate from Service Exchange (legacy)</a> .  <b>Note:</b> This feature is supported only for Service Exchange 1.x.x versions.
Set up a new provider record.	See <a href="#">Set up a Service Exchange provider record</a> .
Assign Service Exchange roles for providers.	See <a href="#">User roles for providers</a> .
Create catalog personas.	See <a href="#">Create catalog personas</a> .
Create remote choice definitions.	See <a href="#">Create remote choice definitions in Service Exchange for Providers</a> .
Create remote catalog items.	See <a href="#">Create remote catalogs in Service Exchange for providers</a> .
Create remote task definitions.	See <a href="#">Create remote task definitions in Service Exchange for Providers</a> .
Create transforms.	See <a href="#">Create a transform in Service Exchange</a> .
Update Authorized Users settings.	See <a href="#">Update settings for Authorized Users</a> .

## Install Service Bridge for Providers in Manufacturing Commercial Operations

If you have an admin role, you can install the Service Exchange for Providers (sn\_sb\_pro) application for use with Manufacturing Commercial Operations. The application includes the demo data and installations that are related to ServiceNow® Store applications and plugins.

### Before you begin

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

Role required: admin

### About this task

The following plugins are automatically installed with the Service Exchange for Providers application in Manufacturing Commercial Operations:

- sn\_req\_criteria
- sn\_sb
- sn\_sb\_rps

- sn\_transport
- com.glide.hub.process.sync
- com.snc.ihub\_spoke\_util\_pack

Apart from these, several components including roles, business rules, tables, and flows are also installed. For more information about the components that are installed with this application, see [Components installed with Service Exchange for Providers](#).

### Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Service Exchange for Providers application (sn\_sb\_pro) by 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 [ServiceNow Store version history release notes](#).

3. In the application installation dialog, review the application dependencies.

This listing indicates, for each dependent plugin and application if it's being installed, is already installed, or must be installed. If any plugins or applications must be installed, you must install them before you can install Service Exchange for Providers.

4. If demo data is available and you want to install it, click **Load demo data**.  
Demo data contains the sample records that describe the application features for common use cases. Load demo data when you first install the application on a development or test instance. If you don't load the demo data during installation, it's unavailable to load later.
5. Select **Install**.

## Installing and configuring Service Exchange for Consumers

As a consumer, follow these steps to set up the Service Exchange for Consumers application for Manufacturing Commercial Operations.

### Pre-installation checks

**Check the glide.servlet.uri property:** Ensure that the `glide.servlet.uri` property in the Glide instance is set to the correct instance URL. An issue can occur when an instance is cloned from production, but still refers to the production URL for the `glide.servlet.uri` property.

### Setting up Service Bridge for Consumers

Task	Link
Install the Service Exchange for Consumers application.	See <a href="#">Install Service Exchange for Consumers</a> .
Upgrade from version 1.x.x of Service Exchange for Consumers if required.	See <a href="#">Upgrade Guide - Service Bridge for Providers and Consumers application (v2.x.x release - KB1700387)</a> .
Add Service Exchange roles for consumers.	See <a href="#">Personas for consumers</a> .

## Setting up Service Bridge for Consumers (continued)

Task	Link
Register with a provider.	See <a href="#">Registering with a provider</a> .
Activate entitlements.	See <a href="#">Activate entitlements in Service Exchange</a> .
Configure consumer pre-flows.	See <a href="#">Service Exchange consumer pre-flows</a> .
Add authorized users.	See <a href="#">Add an authorized user</a> .
Create transforms.	See <a href="#">Create a transform in Service Exchange</a> .
Create remote tasks to sync data.	See <a href="#">Create remote tasks to sync data</a> .
Configure settings.	See <a href="#">Configure settings on the consumer instance</a> .

## Install Service Exchange for Consumers in Manufacturing Commercial Operations

If you have an admin role, you can install the Service Exchange for Consumers application for use with Manufacturing Commercial Operations. The application includes demo data and installations that are related to ServiceNow® Store applications and plugins.

### Before you begin

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

Role required: admin

### About this task

The following plugins are installed in with the Service Exchange for Consumers application in Manufacturing Commercial Operations:

- sn\_sb
- sn\_sb\_rps
- sn\_transport
- com.glide.hub.process.sync
- com.snc.ihub\_spoke\_util\_pack

Apart from these, several components including roles, business rules, tables, and flows are also installed. For more information about the components that are installed with this application, see [Install Service Exchange for Consumers in Manufacturing Commercial Operations](#).

### Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Service Exchange for Consumers application by 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 [ServiceNow Store version history release notes](#).

**3.** If demo data is available and you want to install it, click **Load demo data**.

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

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

**4.** Select **Install**.

## Integrating Manufacturing Commercial Operations

Extend the capabilities of Manufacturing Commercial Operations and connect with other departments to assist with case resolution by integrating with other applications.

Manufacturing Commercial Operations provides integrations with the following applications:

### [Field Service Management](#)

Integrating the Manufacturing Commercial Operations application with the Field Service Management application enables you to create and view all field service work orders and appointments related to your case, depending on the business needs.

### [Strategic Portfolio Management](#)

Provide project oversight of complex, long-running orders and order tasks in Order Management, and manage them in Strategic Portfolio Management.

## Using Manufacturing Commercial Operations

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

Using Service Exchange with Manufacturing Commercial Operations, Manufacturers can connect within the company across multiple divisions, with B2B customers, with suppliers, with channel partners, or with third party logistics partners (3PLs).

### Using Service Exchange for Providers

As a manufacturer using Service Exchange for Providers in Manufacturing Commercial Operations, learn how to use Service Bridge to submit requests from the service catalog, and track order fulfillment from your ServiceNow® instances.

### Using Service Exchange for Consumers

As a manufacturer using Service Exchange for Consumers in Manufacturing Commercial Operations, learn how your consumers can use Manufacturing Commercial Operations with Service Bridge to submit requests from the service catalog, all from your ServiceNow® instance.

## Using Sales Customer Relationship Management for Manufacturing Commercial Operations

The Order Management application for Manufacturing Commercial Operations creates a seamless ordering experience for your manufacturing customers.



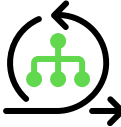
Use Sales Customer Relationship Management as the system of action and relay order status via the customer service portal. Orders can be captured and fulfilled in any system and synced back to the Sales Customer Relationship Management order table.

### Sales Customer Relationship Management workflow



## Manufacturing Commercial Operations reference

Reference topics provide additional information about Manufacturing Commercial Operations.

<p><b>Customer Service Management reference</b></p>  <p>Reference topics provide additional information about the Customer Service Management for Manufacturing Commercial Operations application.</p>	<p><b>Order Management Reference</b></p>  <p>Reference topics provide additional information about the Order Management for Manufacturing Commercial Operations application.</p>	<p><b>Service Bridge reference</b></p>  <p>Reference topics provide additional information about the Service Bridge for Manufacturing Commercial Operations data model and configurations.</p>
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## Customer Service Management for Manufacturing Commercial Operations reference

Reference topics provide additional information about the Customer Service Management for Manufacturing Commercial Operations application.

For more reference information about Customer Service Management, see [Customer Service Management reference](#).

## Components installed with Customer Service Management for Manufacturing Commercial Operations

Several types of components are installed with CSM workspaces for Manufacturing Commercial Operations.

For information on the components installed with Customer Service Management for Manufacturing Commercial Operations, see [Components installed with Customer Service Management](#).

## Order Management for Manufacturing Commercial Operations reference

Reference topics provide additional information about the Order Management for Manufacturing Commercial Operations application.

## Components installed with Order Management for Manufacturing Foundation

Several types of components are installed when you activate the Order Management application in Manufacturing Commercial Operations, including tables, properties, and user roles.

## Plugins Installed with Sales Customer Relationship Management for Manufacturing Foundation

### Plugins Installed

Plug-In IDs	Store App Names
sn_ga_exp	Guided Decisions Experience
sn_prd_pm	Product Catalog Management Core
sn_csm_pricing	Price Management
sn_ind_tmt_orm	Order Management
sn_om_tmt	Order Management for Telecom, Media and Tech
sn_l2c_core	Lead to Cash Core
sn_opty_mgmt_core	Opportunity Management Data Model
sn_opty_mgmt	Opportunity Management Application
sn_quote_mgmt_core	Quote Management Data Model
sn_quote_mgmt	Quote Management Application
sn_sales_agmt_core	Sales Agreement Data Model
sn_sales_agmt_wf	Sales Agreement Management
sn_prd_config_ui	Product Configurator
sn_l2c_cust_flows	Customer Life Cycle Management Workflows
sn_csm_price_mtrx	Pricing Matrix Management
sn_pss_core	Customer Contracts and Entitlements
sn_contract_ent_wf	Contracts and Entitlements Workflows

**Plugins Installed (continued)**

Plug-In IDs	Store App Names
sn_ent_verify	Entitlements Verification
sn_lead_mgmt_core	Lead Management Data Model
sn_lead_mgmt	Lead Management Applications

**Service Bridge for Manufacturing Commercial Operations reference**

Reference topics provide additional information about the Service Bridge for Manufacturing Commercial Operations data model and configurations.

For more reference information about Service Bridge, see [Service Exchange reference](#).

**Components installed with Manufacturing Commercial Operations with Service Exchange**

Several types of components are installed when you activate the Service Exchange application in Manufacturing Commercial Operations, including tables and user roles.

**Plugins Installed with Service Bridge for Manufacturing Foundation**

**Plugins Installed**

Plug-In IDs	Store App Names
Sn_sb	Service Bridge Base
Sn_sb_pro	Service Bridge for Providers
Sn_sb_con	Service Bridge for Consumers
Sn_sb_rps	Service Bridge Remote Process Sync Transport
Sn_sb_om_provider	Service Bridge Order Management for Providers

**Components installed with Service Exchange for Providers in Manufacturing Commercial Operations**

Several types of components are installed when you activate the Service Exchange for Providers application in Manufacturing Commercial Operations, including tables and user roles.

**Roles installed**

The following roles are installed with the Service Exchange for Providers application.

**Roles installed with the Service Exchange for Providers application**

Role title [name]	Description	Contains roles
Service Bridge requester [sn_sb.requestor]	<ul style="list-style-type: none"> <li>Enables members of the customer IT staff to request and monitor services from</li> </ul>	N/A

**Roles installed with the Service Exchange for Providers application (continued)**

Role title [name]	Description	Contains roles
	<p>the provider from their service catalog.</p> <p><b>Note:</b> Any member of the customer's staff who needs access to the provider's remote record producers requires this role.</p> <ul style="list-style-type: none"> <li>Provides access to the remote record producers and provider tasks.</li> </ul>	
Service Bridge read [sn_sb.read]	<ul style="list-style-type: none"> <li>Enables the provider's customer service agents to read the contents of the provider task record.</li> <li>Provides read-only access to the Service Exchange application.</li> </ul>	N/A
Service Bridge admin [sn_sb.admin]	<ul style="list-style-type: none"> <li>Typically assigned to an administrator for the Service Exchange applications on both the customer and the provider side.</li> <li>Provides read access to all Service Exchange tables</li> </ul>	<ul style="list-style-type: none"> <li>sn_sb.requestor</li> <li>sn_sb.remote_task_creator</li> <li>sn_sb.read</li> <li>flow_designer</li> <li>sn_customerservice.case_viewer</li> <li>sn_customerservice.customer_data_viewer</li> <li>catalog</li> </ul>

**Tables Installed**

The following tables are installed with the Service Exchange for Providers application.

**Tables installed with the Service Exchange for Providers application**

Table	Description
Authorized Users [sn_sb_pro_authorized_user]	Contains the authorized user records.
Consumer Connection [sn_sb_pro_consumer_connection]	Consumer connection record for provider, extends the base connection table.
Entitlement [sn_sb_pro_entitlement]	Provider entitlements associating records to entitled consumers, extends base entitlement table.

**Tables installed with the Service Exchange for Providers application (continued)**

Table	Description
Inbound Field [sn_sb_pro_inbound_field]	Manages provider side inbound field mappings for remote task definitions.
Outbound Field [sn_sb_pro_outbound_field]	Manages provider side outbound field mappings for remote task definitions.
Personas [sn_sb_pro_persona]	Manages personas for Service Exchange.
Provider [sn_sb_pro_provider]	Provider association record to tie provider side records together.
Provider Task [sn_sb_pro_provider_task]	Provider tasks on provider side, created by consumers through remote record producers.
Registration [sn_sb_pro_registration]	Service Exchange registration records.
Remote Choice Definition [sn_sb_pro_remote_choice_definition]	Remote choice definitions for remote record producer.
Consumer Criteria [sn_sb_pro_remote_record_producer_consumer_criteria]	Consumer criteria records attributed to remote record producers, controls which consumers are entitled to a given remote record producer.
Remote service [sn_sb_pro_remote_service]	Remote service record.
Remote Task [sn_sb_pro_remote_task]	Remote tasks for managing data transfer between parent tasks on synced instances.
Remote Task Definition [sn_sb_pro_remote_task_def]	Remote task definition, controls creation and processing of remote tasks.
Consumer Criteria [sn_sb_pro_remote_task_def_consumer_criteria]	Consumer criteria records attributed to remote task definitions, controls which consumers are entitled to a given remote task definition.
Remote Task Variable [sn_sb_pro_remote_task_variable]	Glide variables associated with a remote task, allows displaying incoming synced data
Service Bridge Settings [sn_sb_pro_service_bridge_settings]	Settings record for provider, manages various Service Exchange settings alignment between provider and consumer.
Transform [sn_sb_pro_transform]	Provider side transform records.

**Components installed with Service Exchange for Consumers**

Several types of components are installed with activation of the Service Exchange for Consumers application in Manufacturing Commercial Operations, including tables and user roles.

**Note:** The Application Files [sys\_metadata] 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](#).

## Roles installed

The following roles are installed with the Service Exchange for Consumers application.

### Roles installed with the Service Exchange Consumers application

Role title [name]	Description	Contains roles
Service Bridge admin [sn_sb.admin]	<ul style="list-style-type: none"> <li>Typically assigned to an administrator for the Service Exchange applications on both the customer and the provider side.</li> <li>Provides read access to all Service Exchange tables</li> </ul>	<ul style="list-style-type: none"> <li>sn_sb.read</li> <li>sn_sb.requestor</li> <li>sn_sb.remote_task_creator</li> <li>flow_designer</li> <li>catalog</li> </ul>
Service Bridge read [sn_sb.read]	Provides read-only access to provider tasks	N/A
Service Bridge requester [sn_sb.requestor]	Provides access to remote record producers and provider tasks	N/A

## Tables installed

The following tables are installed with the Service Exchange for Consumers application.

### Tables installed with the Service Exchange for Consumers application

Table	Description
Authorized user [sn_sb_con_authorized_user]	Authorized users.
Connection [sn_sb_con_consumer]	Consumer side connection record.
Entitlement [sn_sb_con_entitlement]	Consumer side table extending entitlements.
Inbound Field [sn_sb_con_inbound_field]	Consumer side inbound fields for Remote Task Definitions.
Outbound Field [sn_sb_con_outbound_field]	Consumer side outbound fields for Remote Task Definitions.
Personas	Consumer side persona records.

**Tables installed with the Service Exchange for Consumers application (continued)**

Table	Description
[sn_sb_con_persona]	
Provider Connection [sn_sb_con_provider_connection]	Provider Connection record linking consumer to provider instance, extending base connection table.
Provider Task [sn_sb_con_provider_task]	Consumer side provider task records, extends Provider Task base table.
Remote Choice Cache [sn_sb_con_remote_choice_cache]	Consumer side cache for remote choice queries.
Remote Record Producer [sn_sb_con_remote_record_producer]	Consumer side Remote Record Producer records.
Remote Task [sn_sb_con_remote_task]	Consumer side remote task records, extends remote task base table.
Remote Task Definition [sn_sb_con_remote_task_def]	Consumer side Remote Task Definition records.
Remote Task Variable [sn_sb_con_remote_task_variable]	Remote Task associated variable table extending glide vars.
Service Bridge Settings [sn_sb_con_service_bridge_settings]	Consumer side Service Exchange setting records, extends settings base table.
Remote Choice [sn_sb_con_st_remote_choice]	Consumer side remote choice records.
Transform [sn_sb_con_transform]	Consumer side transform records, extends transform base table.

**Manufacturing Commercial Operations Use Cases**

In this example, the Manufacturing Commercial Operations application helps the fictitious Zenod manufacturing company (the OEM) use Service Exchange to manage their partnerships with Boxeo, a transportation company who uses their printers and services for shipping goods globally, and Office Mart, a channel retailer that sells many office brands and commercial tech supplies to retailers and consumers (e.g., computers, monitors, printers, shipping supplies, etc.).

**Example scenario: Key personas and how they benefit**

Zenod, a manufacturing company that manufactures and sells scanners, printers, and other multifunctional office systems, offers a shipping services package to its enterprise customers. A

customer, Boxeo, has partnered with them to use Zenod printers, shipping supplies, and services for shipping goods globally.

The key personas (manufacturer and customer) can complete the following tasks in their respective Service Exchange instances:

**The manufacturer (Zenod) can:**

- Publish a product or service catalog using remote catalog item and remote task definition
- Receive requests in the agent workspace in real time
- Relay resolutions to customers and any channel partners on the watchlist

**The customer (Boxeo) can:**

- Request for repairs and tech support directly with Zenod using remote catalog
- Synchronize using remote task
- View outages and service issues
- View products they have purchased
- Request services related to the products they have purchased

The scenario plays out in the following manner:

1. Zenod publishes their product or service catalog using remote catalog item and remote task definition.
2. Boxeo's production printer goes down, and they raise a request for a repair and for tech support directly with Zenod using remote catalog.
3. While Boxeo's production printer is down, Boxeo's L1 is working on the incident, and needs to be able to relay that information and what they've done so far to Zenod. Boxeo's L1 and Zenod can synchronize workflows using remote task.
4. Zenod's tech support receives the request in their agent workspace in real time, meeting Boxeo where they are, and proceeds with the resolution.

**Example Manufacturing Commercial Operations and Service Exchange use cases**

Zenod manufactures scanners, printers, and other multifunctional office systems, and sells them both B2B and to end consumers through wholesalers, SMBs, and retails channels. OfficeMart is a channel retailer that sells many office brands and commercial tech supplies to end consumers (e.g., office furniture, computers, monitors, printers, shipping supplies, etc). Here is an example of how Zenod might use Manufacturing Commercial Operations with Service Exchange to communicate with their channel retailer, OfficeMart, and vice versa.

**Manufacturer (OEM) to Channel**

1. Zenod creates a case that informs the channel retailer about a recall on a product, and sets the channel and accounts to "Alert".
2. Office Mart receives a provider task on their instance, which appears in the portal as a task to be completed.
3. Office Mart follows the pre-defined workflows for tasks surrounding the recall, such as how to notify customers that have purchased or licensed the product about the recall.

**Channel to Manufacturer (OEM)**

1. OfficeMart publishes a product or service catalog.
2. An OfficeMart buyer makes a change request for their current order using the service catalog (a remote catalog published by Zenod) on their employee portal. They describe what they want to change and submit it to OfficeMart through their service catalog, where the system automatically creates a case task in their consumer instance that is synchronized to Zenod's Service Exchange for providers instance.
3. The task is converted into a case. The Zenod order management agent receives the case directly in the agent workspace, and works to resolve it.