



Xanadu Sales Customer Relationship Management

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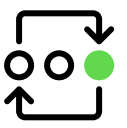


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Table of Contents

| | |
|---|----------|
| Sales Customer Relationship Management..... | 4 |
| Exploring Sales Customer Relationship Management..... | 4 |
| Product Catalog Management..... | 7 |
| Pricing Management..... | 9 |
| Product configurator..... | 13 |
| Lead Management..... | 14 |
| Opportunity Management..... | 15 |
| Quote Management..... | 17 |
| Sales Agreement Management..... | 21 |
| Order Management..... | 21 |
| Lead-to-Cash Process Management..... | 45 |
| Customer Engagement Sequences..... | 47 |
| Business Portal..... | 49 |
| Configuring Sales Customer Relationship Management applications..... | 50 |
| Install and configure Lead Management..... | 51 |
| Install and configure Opportunity Management..... | 53 |
| Install and configure Quote Management..... | 57 |
| Configure Sales Agreement Management..... | 60 |
| Configuring product offerings and catalogs..... | 62 |
| Configuring product pricing..... | 96 |
| Configuring agent tools in Sales Customer Relationship Management..... | 129 |
| Setting up the product configurator..... | 133 |
| Assign user roles in Sales Customer Relationship Management applications..... | 137 |
| Configuring the Business Portal..... | 142 |
| Configuring Lead-to-Cash Process Management..... | 146 |
| Configuring Customer Engagement Sequences..... | 155 |
| Using Sales Customer Relationship Management applications..... | 158 |
| Using Lead Management..... | 160 |
| Using Opportunity Management..... | 170 |
| Using Quote Management..... | 187 |
| Using Sales Agreement Management..... | 203 |
| Using Order Management..... | 204 |
| Using Lead-to-Cash Process Management..... | 239 |
| Using Customer Engagement Sequences..... | 247 |
| Using Business Portal..... | 249 |
| Extending Order Management with ServiceNow applications and integrations..... | 252 |
| Order Management for providers with Service Exchange..... | 252 |
| Order Management integration with Field Service Management..... | 267 |
| Order Management integration with Strategic Portfolio Management..... | 270 |

Sales Customer Relationship Management

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

| | | |
|--|---|---|
| <p>Explore</p>  <p>Learn how you can use the Sales and Order Management applications.</p> | <p>Configure</p>  <p>Plan and configure your Sales and Order Management implementation.</p> | <p>Integrate</p>  <p>Extend capabilities in Sales and Order Management by integrating with other applications.</p> |
| <p>Use</p>  <p>Use the Sales and Order Management applications as an agent.</p> | <p>Reference</p>  <p>Get details about components such as fields, tables, and properties.</p> | |

Exploring Sales Customer Relationship Management

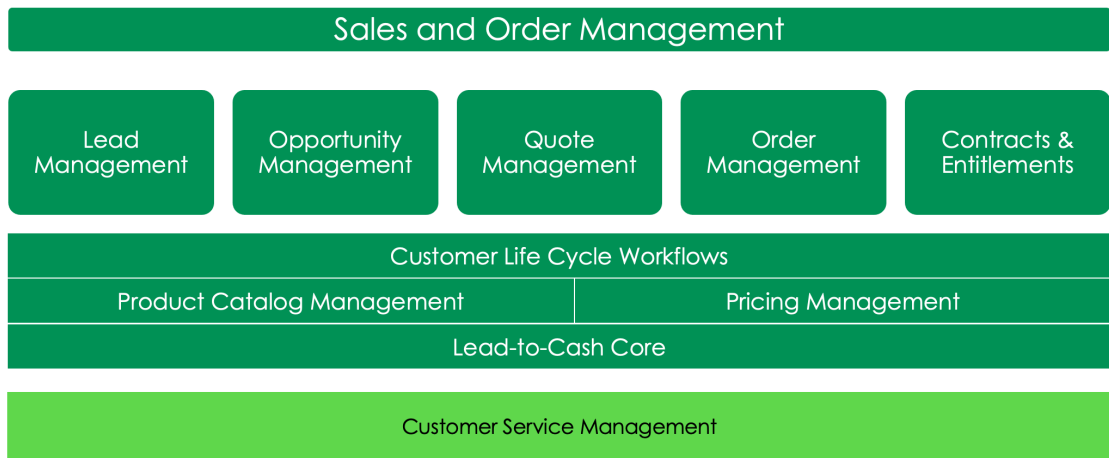
Whether you're starting or expanding a Sales Customer Relationship Management (Sales CRM) implementation, learn more about its available applications and workflows for pre-sales engagement, order capture and fulfillment, and post-sales activities in your organization.

Overview of Sales and Order Management

The Sales Customer Relationship Management applications enable you to manage the product sales life cycle in your organization, including pre-sales leads and opportunities, sales quote generation, order capture, order fulfillment, and post-sales order changes and contract renewals.

To support the product sales life cycle, Sales Customer Relationship Management provides the following features and applications.

Sales Customer Relationship Management applications and key features




Benefits

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

Benefits of Sales Customer Relationship Management applications

| Benefits | Application or key feature | Persona |
|--|--|--|
| Create and manage product catalogs for commercial and technical product offerings. Commercial catalogs can be used by your agents to create opportunities, quotes, and orders. | Product Catalog Management | Product catalog administrator or manager |
| Set the pricing for your products through price lists, contextual price controls, and if needed, pricing from external systems. | Pricing Management | Pricing administrator |
| Create and manage leads for potential customers and product sales. | Lead Management | Sales agent and account executive |
| Create pre-sales opportunities that identify and track potential sales based on customer needs. | Opportunity Management | Sales agent and account executive |
| Create and manage sales quotes, which are formal offers for products or services that agents propose to customers. | Quote Management | Sales agent |

Benefits of Sales Customer Relationship Management applications (continued)

| Benefits | Application or key feature | Persona |
|--|--|--|
| Quickly configure and price opportunities, quotes, and complex product offers. | Product configurator user interface | Sales and order agent, admin to set up |
| Create and manage binding agreements between your sales organization and buyers, with specified items, quantities, prices, terms, and effective periods. | Sales Agreement Management | Sales and order agent |
| Capture and fulfill product and service orders to create a seamless ordering experience for your customers. | Order Management | Order agent, fulfillment agent, agent manager, and fulfillment manager |
| Create and manage contracts and entitlements as part of post-sales support. | Post Sales Support  | Agent |
| Empower sales teams by providing a consolidated view of all critical sales data and activities. | Lead-to-Cash Process Management | Sales managers |
| Create a series of automated and manual activities that can be set up to engage with leads and customers at every stage of their relationship with your business through various channels. | Customer Engagement Sequences | Sales agents |
| Provide self-service capabilities to your B2B customers such as the ability to browse product catalog, place orders, or request changes to the orders. | Customer self-service for Sales Customer Relationship Management | Customers |
| Create the workflows for your organization and configure the metadata for your various Sales Customer Relationship Management entities. | Sales and Order Management workflows (lead-to-cash core)  | Agent, admin to configure |
| Support change management and commercial workflows (move, add, change, and disconnect) for sold products. | Customer Life Cycle Management Workflows  | Agent |

Request apps on the 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](#).

Product Catalog Management

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

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

- **Product catalog user interface:** Launch from anywhere in opportunity, quote, and order capture workflows, enabling agents to browse and find products quickly with a full catalog search function.
- **Catalog category hierarchy:** Use hierarchical structures of catalogs and categories to organize products and services logically.
- **Version control:** Track changes made to product information over time, helping with transparency and auditability.
- **Product offer eligibility:** Filter your product catalogs, product offering categories, or product offerings so that agents sell customers only the products for which they're eligible.

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

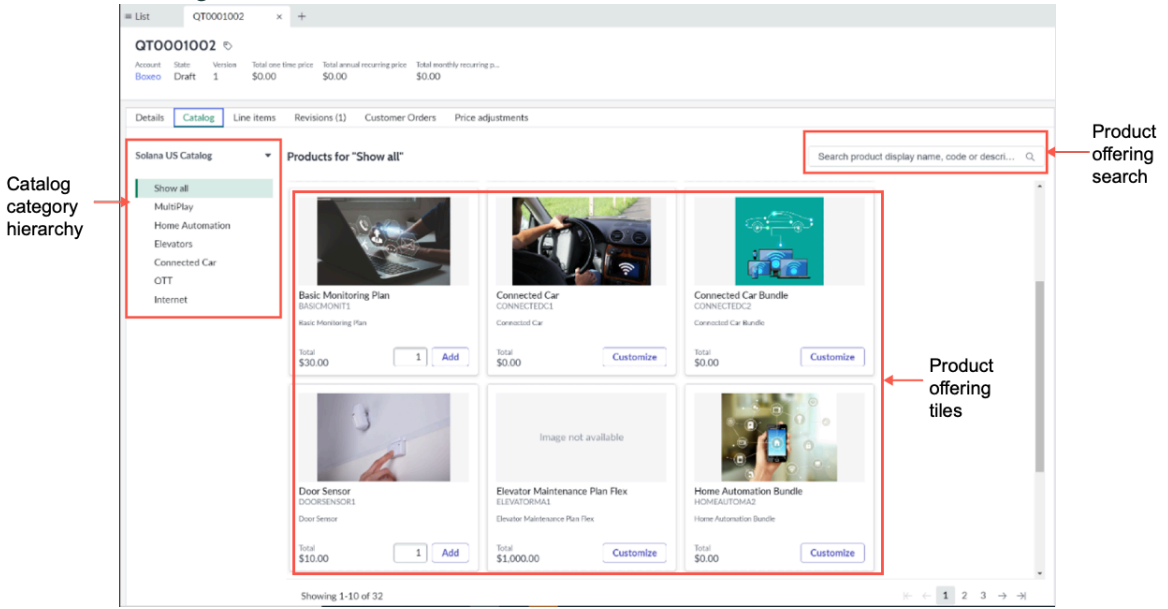
To learn more about setting up product offering catalogs, see [Configuring product offerings and catalogs](#).

Product catalog UI

The product offering catalog enables agents to do the following:

- Browse and search product offerings by using keywords, descriptions, and industry codes.
- Review product offers that are organized by catalog category hierarchy, which streamlines catalog navigation.

Product catalog user interface



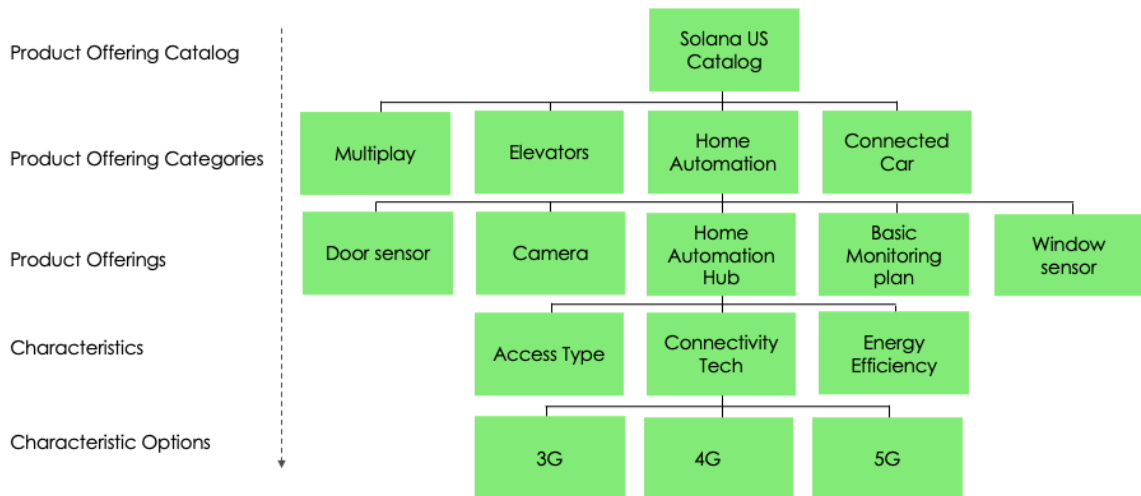
You can also enable location-based transactions, which provides a location filter in the catalog interface. This filter enables agents to add product lines to opportunities, quotes, and orders by location. To learn more, see [Configuring location-based product transactions](#).

Product offering catalogs and categories

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

- Product Offering Catalog: Hierarchical product offering structures of categories and product offerings.
- Product Offering Categories: Categories are a logical grouping of product offerings.
- Product Offerings: Physical goods or non-tangible services that are configurable.
- Characteristic and Characteristic options: Product options that are created based on customer preferences.

Example catalog hierarchy with categories and product offerings



Product offer bundling

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

Product offer eligibility

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

Pricing Management

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

The Pricing Management application is the foundation of any Sales Customer Relationship Management solution, enabling your organization to set, manage, and optimize pricing strategies that maximize profitability while meeting customer expectations. Pricing Management provides various features to implement pricing in your organization.

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

Pricing plans

A pricing plan is a sequence of steps that control how pricing adjustments and calculations, such as the list price and discounts, are applied to price lines. You can have multiple pricing plans for your organization, but only one active plan for each domain.

Pricing Management provides a default pricing plan with predefined steps. You can use the default pricing plan, or you can customize the default plan by copying it and adding steps or changing certain steps as needed. To learn more about customizing a pricing plan, see [Configurable pricing plans](#).

Price lists

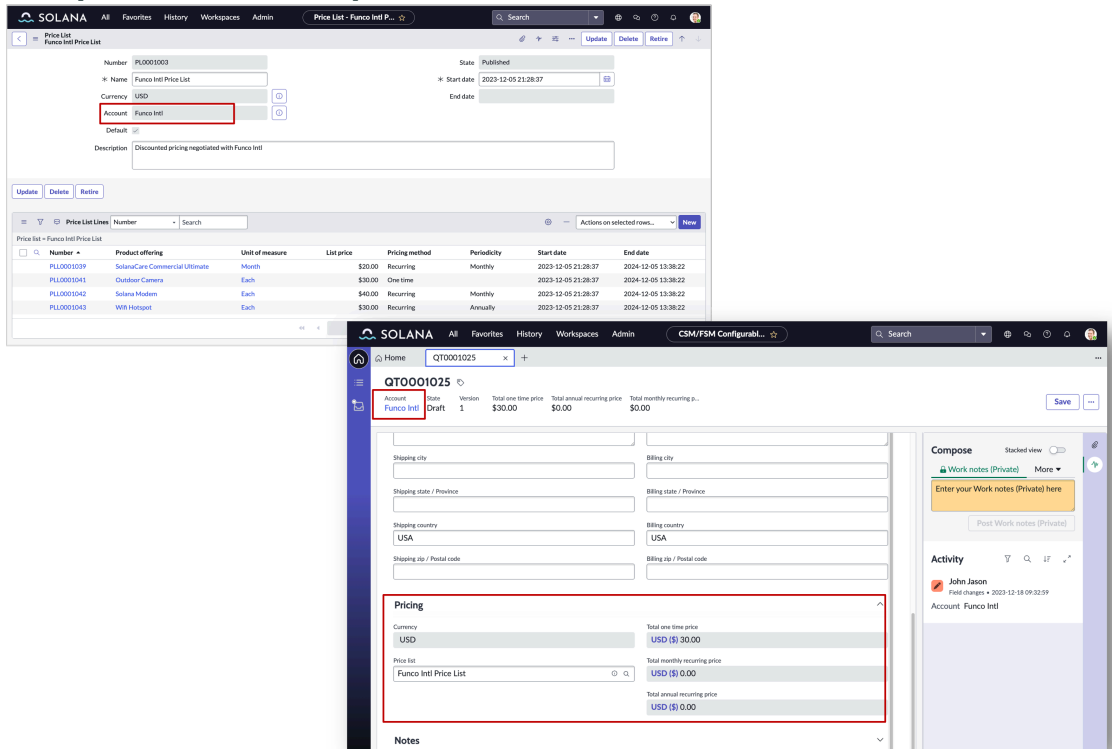
Price lists define the prices for products and services offered by your organization. Your agents use price lists to find product pricing quickly when creating quotes and capturing orders. Your pricing admins or managers create price lists and add price list lines that define the list price for each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

Support for multiple price lists

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

You can set an account-based price list as the default, which is then used by your agents when they create quotes or orders for that particular customer.

Example of account-based price list



Pricing methods

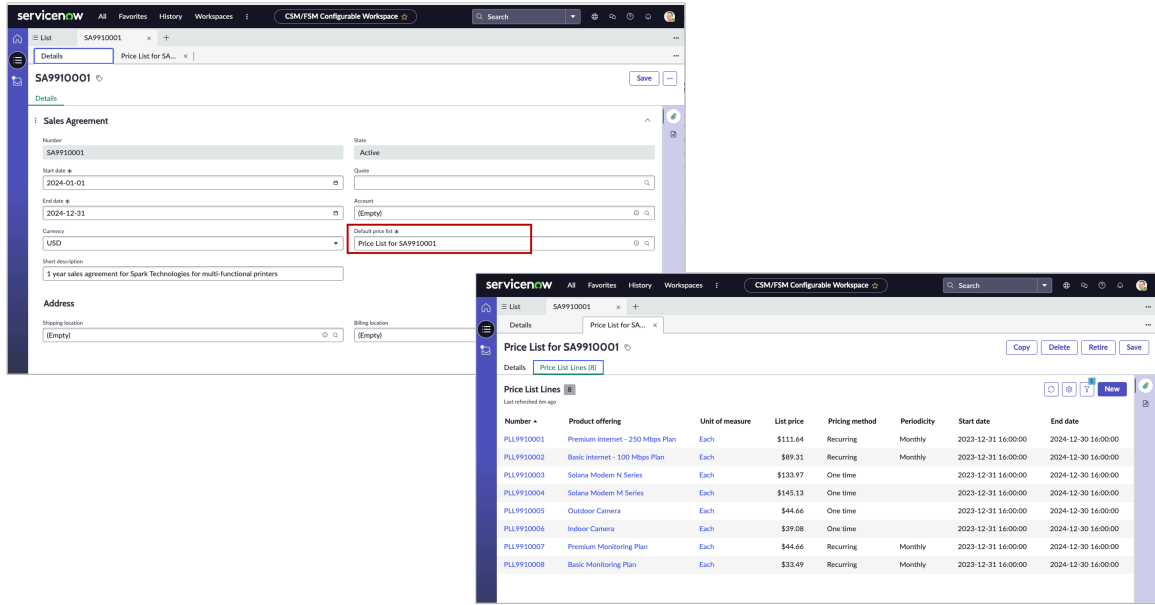
The pricing method is either a one-time fee or a recurring pricing fee with monthly and annual frequencies. The pricing method is set in product offerings and is displayed in price list lines.

For details on setting up and managing price list features, see [Configuring product pricing](#).

Sales Agreement price lists

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

Example of sales agreement price list

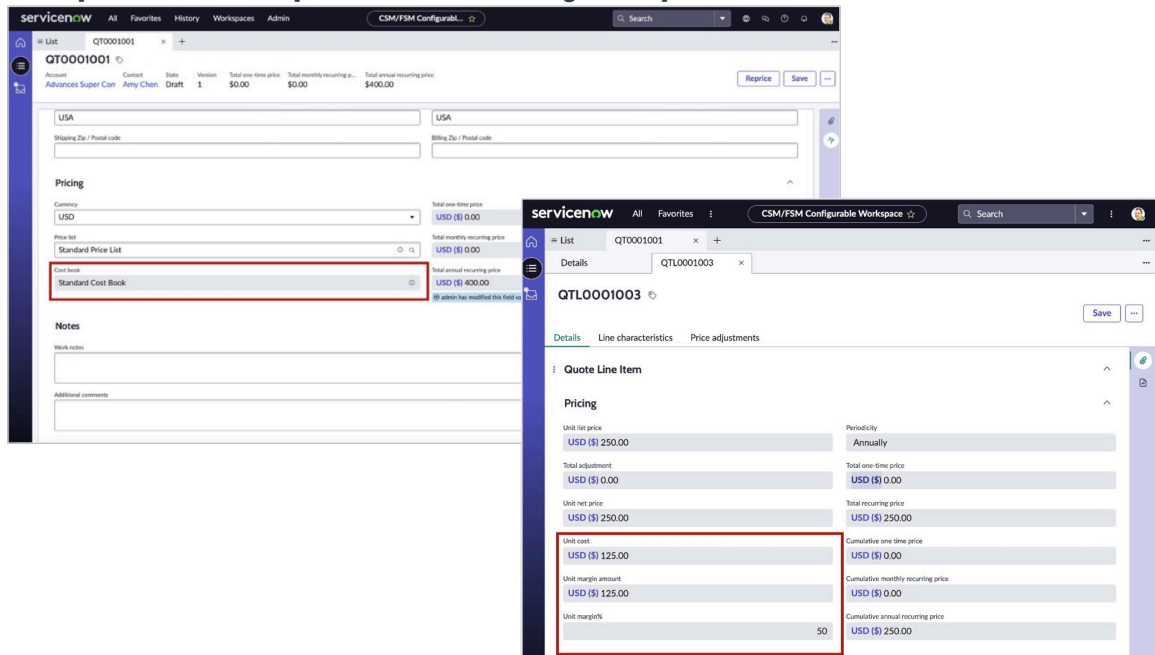


When a quote is created for a sales agreement workflow, the sales agreement price list created is also used for orders generated from the sale agreement. The price list lines that are created maintain the offer hierarchy (parent offer and any child offers) captured in the quote and sales agreement. The price list lines have a reference to the parent product offer and the root product offer, for tracing the offer hierarchy. In addition, the unit net price in a sales agreement line is used as the list price in the associated price list line. The effectivity dates for price list lines are based on the start and end dates of the corresponding sales agreement line item.

Cost books

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

Example cost book in quote details and margins in quote line



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

Price adjustments

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

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

Pricing matrices

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

- **Price List Defaulting:** Select the default price list to be used, such as the standard price list or an account-specific price list. For more information on configuring this price list matrix, see [Control the default price list on transaction header or header line](#).
- **Cost Book Defaulting:** Select the default cost book to be used, for example the standard cost book or an account-specific cost book. To learn more about configuring this matrix, see [Control the default cost book on transaction header or header line](#).
- **Standard Price Adjustment:** Apply an adjustment based on context variables that represent non-product attributes, such as shipping location or account. Pricing Management provides certain system-defined, non-product context variables that you can use in this matrix, but you can also create your own custom variables, for example, market segment. Your pricing administrator can work with your administrator to develop custom context variables that can be used in pricing matrices. For details on configuring these adjustments, see [Create a non-product attribute pricing adjustment](#). For more information on configuring custom context variables, see [Create a custom context variable](#) and [Map a custom context variable to a transaction entity](#).
- **Configuration Component Price Adjustment:** Adjust the price of a product when it's sold as part of a product bundle. For details, see [Create pricing adjustments for bundled products](#).

Matrix validations

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

Revenue metrics for subscription pricing

In the Opportunity and Quote Management applications, certain subscription-related revenue amounts are automatically calculated when your agents add products to opportunities and quotes. Agents and sales managers can use this information to forecast subscription revenue and track sales performance. For details on these metrics, see [Subscription revenue metrics](#).

Pricing extensions

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

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

To learn more, see [Use extension points in Pricing Management](#).

Product configurator

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

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

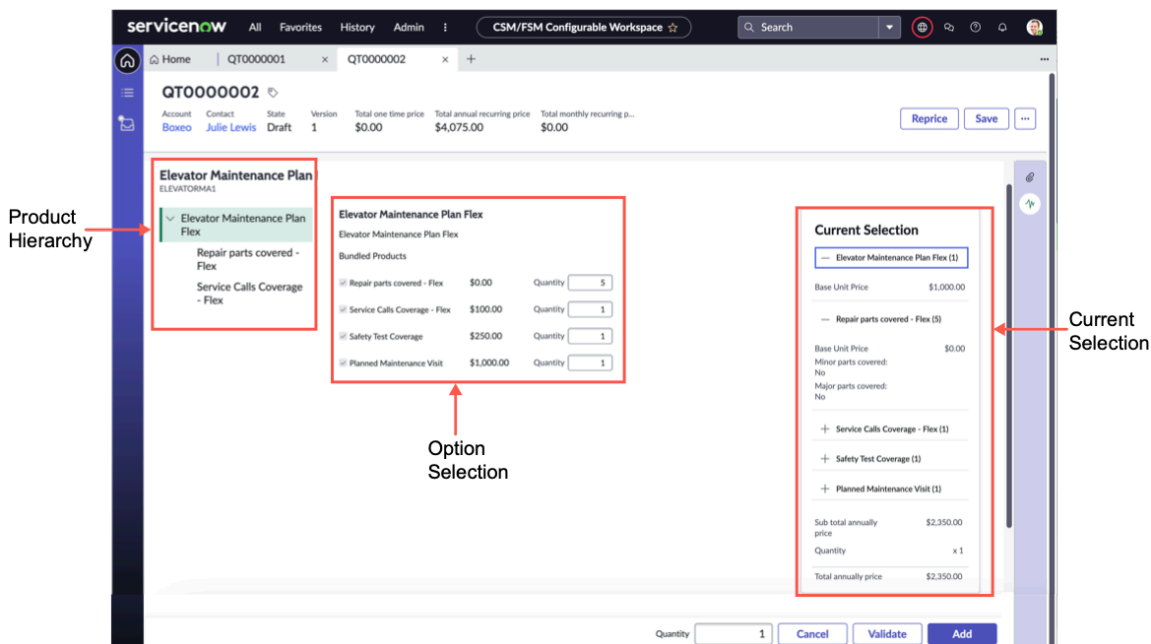
The interface consists of three main sections:

- **Product hierarchy:** Lists the parent and child product relationships for configurable products. Product hierarchies are configured using relationships and relationship groups. These hierarchies help agents navigate the product at different nodes or levels within a nested bundle. To learn more about how to configure this section of the product configurator, see [Create product offering relationships](#).
- **Option selection:** Displays the product options or product characteristic options that can be selected. Characteristics and characteristic options are configured as you build your product offerings and appear in the product configurator. As your agents use the interface, visual indicators, alert messages, and contextual information about their entries are also displayed to help agents complete the order. For more information on configuring these options, see [Create product characteristics and characteristic options](#).

- **Current selection:** Shows the pricing for the options that you select, which are calculated automatically and displayed. Pricing for selected options is shown and grouped as bundles as applicable. Also shown are the subtotals and total based on the recurring and one-time pricing methods. See [Configuring product pricing](#) for more information.

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

Product configurator interface



Lead Management

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

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

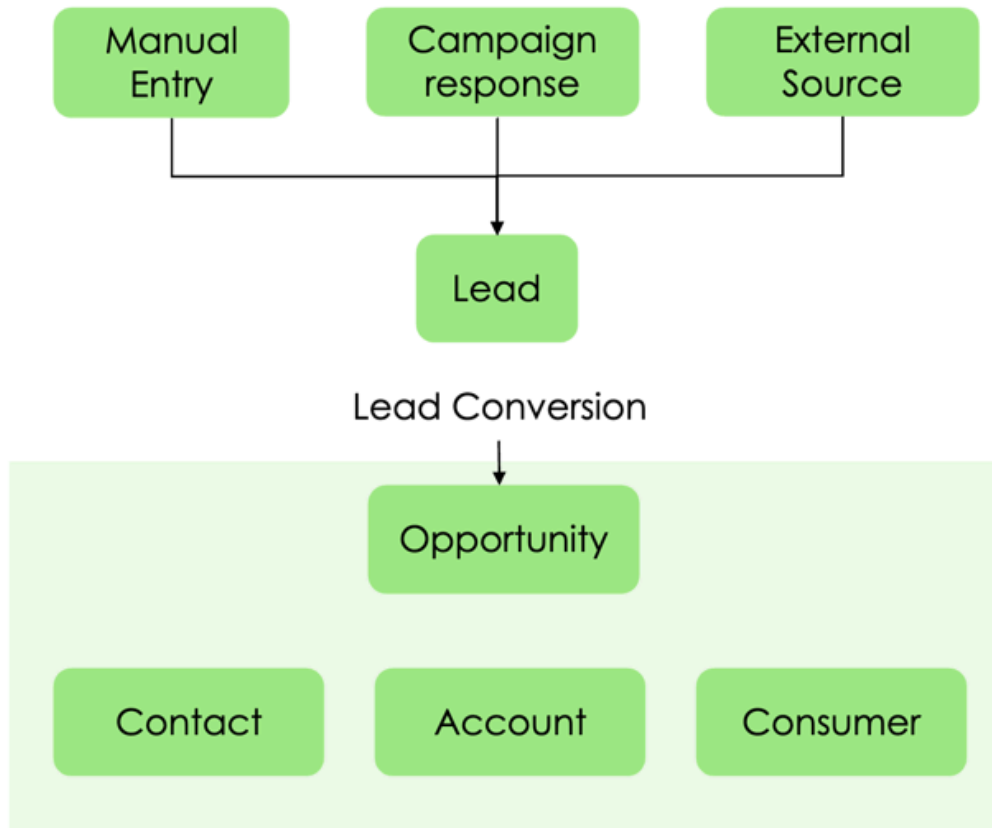
The processes include:

- **Lead scoring:** Prioritizing leads based on predefined criteria for more focused attention.
- **Lead qualification:** Determining if a lead meets certain criteria to be considered a sales-qualified lead.
- **Lead assignment:** Assigning leads to the correct sales development representative to follow up.
- **Lead nurturing:** Engaging with leads until they become sales-ready.
- **Lead segmentation:** Categorizing leads based on industry, behavior, or other parameters for targeted marketing.

As sales agents move through the lead workflow and recognize interest from customers in buying products, it becomes essential to qualify or convert the lead. This process includes linking the

lead to specific accounts and establishing lead qualification, which ultimately generates product orders.

Lead workflow in Sales Customer Relationship Management



What to do next

To learn about setting up Lead Management, see [Install and configure Lead Management](#).

Opportunity Management

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

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

Opportunity workflow in Sales Customer Relationship Management



Opportunity Management interface

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

Opportunity Management tabs

| Tab | Description |
|---------------------------------|--|
| Details tab | Add basic information for the opportunity. |
| Catalog tab | Search for and add product offerings to your opportunity. |
| Needs tab | Lists the need templates that provide product recommendations for the opportunity. |
| Line Items tab | Add different line items to an opportunity. |
| Competitors tab | Record competitors information. |
| Tasks tab | Create opportunity tasks. |
| Emails tab | Create emails to send to the required stakeholders. |
| Quotes tab | Create quotes directly from opportunities. |

Integrating pricing in Opportunity Management

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

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

Pricing in Opportunity Management provides the following benefits:

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

To learn more about pricing, see [Pricing Management](#).

What to do next

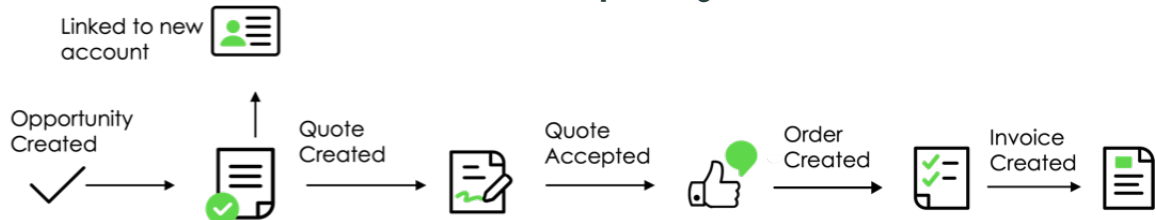
To learn about setting up Opportunity Management, see [Install and configure Opportunity Management](#).

Quote Management

Quote Management is an application used to create and manage product quotes. Quote Management can be a separate application or part of the Sales Customer Relationship Management (SOM) application.

A quote is a formal offer for products and services, proposed at specific prices and related payment terms, which is sent to a prospective customer or consumer. In the context of Sales Customer Relationship Management, quotes can be created from the Opportunity Management application or quotes can be created separately, depending on your configuration.

Quote workflow in Sales Customer Relationship Management



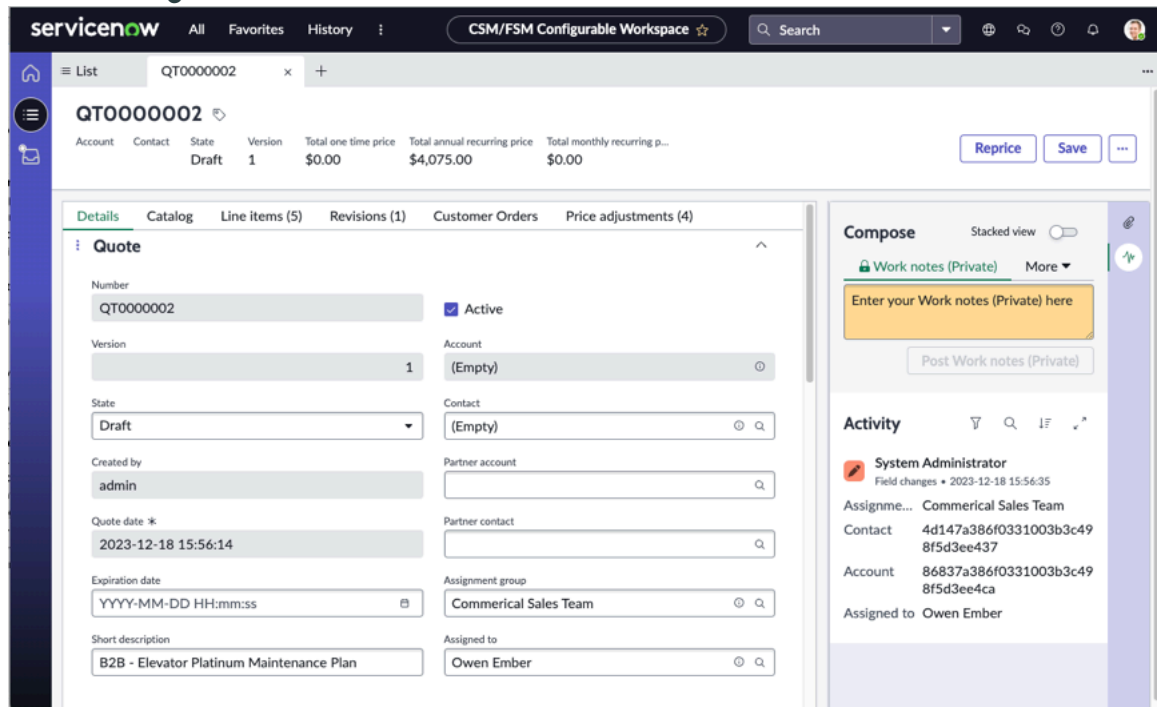
Quote Management interface

The Quote Management application is integrated with the product offering catalog and product configurator to help sales agents build quotes easily and conveniently. The Quote Management interface contains the following tabs:

Quote Management tabs

| Tab | Description |
|--|--|
| Details tab | Add basic information for the quote. |
| Catalog tab | Search for and add products to your quote using the product configurator. Pricing is also managed through the product offering catalogs. |
| Line Items tab | Add different line items to a quote. In each quote line item, you can update product characteristics and add pricing adjustments. |
| Revisions tab | Create multiple versions of a quote. |
| Customer Orders tab | Turn your quote into a customer order. |
| Pricing Adjustment tab | View and update pricing adjustments. |

Quote Management Details tab



Quote Management integration with product offering catalogs

Quote Management is integrated with the product catalog and pricing to make adding products to your quote easier and convenient. Agents use the catalog to browse product offerings and the product configurator to add options and pricing to your products. Then they simply add them to the quote. Pricing adjustments that are fetched based on pricing matrices rules are automatically added and presented in the quote.

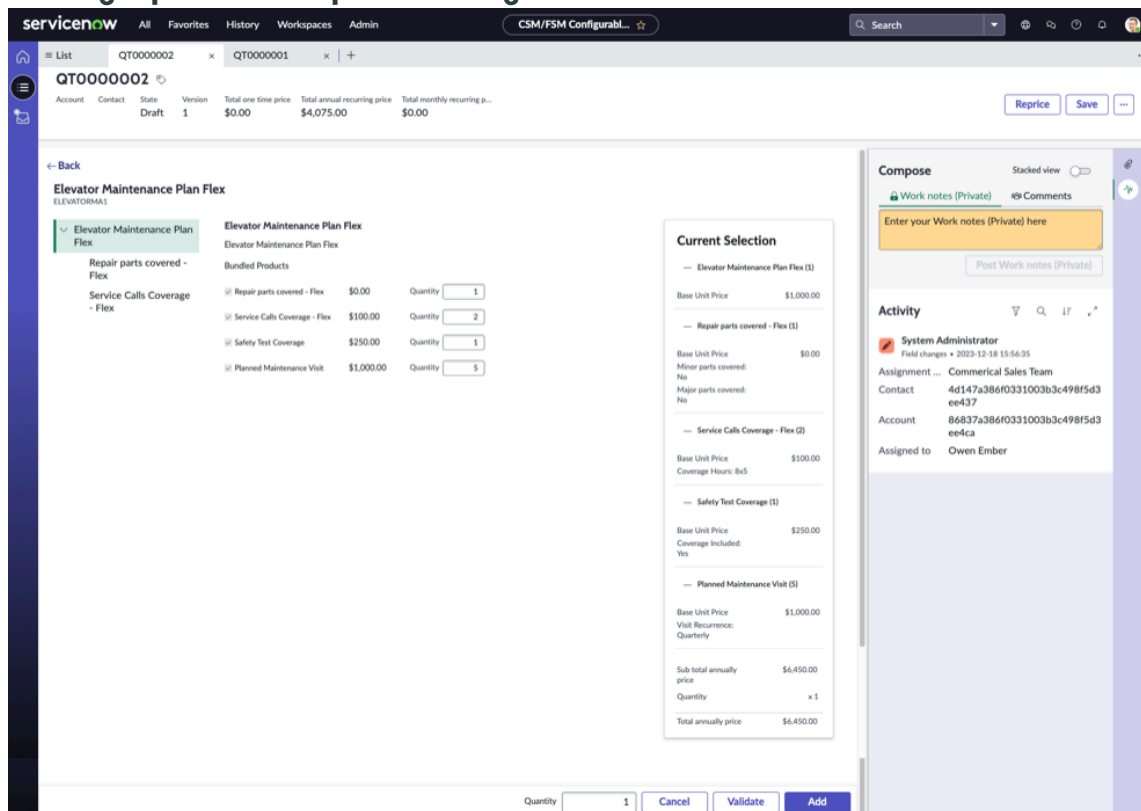
Product configurator

The product configurator lets your agents configure products in the following ways:

- Browse and add configurable product offerings from the catalog to create quote lines.
- Select product options and view product relationships.

The product configurator uses Sales Customer Relationship Management primitives to create and update quote lines and characteristics.

Building a quote with the product configurator



Configure and create quote line items

From the product catalog, browse and add product offers to create quote lines and characteristics.

With the product configurator, characteristics options and relationships can be changed and updated in the Catalog tab for Quote Management. The product configurator uses Quote Management primitives to create and update quote lines and characteristics.

Add pricing adjustments to quotes

Quote Management integrates with the pricing engine to get the list price and price adjustments for the product offers in your quote.

Auto-pricing adjustments are fetched from the pricing engine. Manual pricing adjustments are added by the agent.

Pricing adjustments include markups, markdowns, and price overrides. Total Adjustments are applied to each line item with the cumulative total from each line rolled up to total.

Quote Management lets sales agents add the following types of manual pricing adjustments:

- Markup amount - add a markup amount to a product.
- Markdown amount - add a markdown amount to a product.
- Markup % - add a markup percentage to a product.
- Markdown % - add a markdown percentage to a product.
- Price override - override a price and set a new price.

Adding cost books in Quote Management

A cost book contains the unit costs for product offerings. Cost books provide your agents with the following benefits:

- **Profit margin calculation:** Ability to calculate the profit margin by subtracting the cost price from the quoted selling price, helping your sales team verify that their pricing strategy aligns with desired profit margins,
- **Discount management:** Apply discounts to quotes based on cost prices to incentivize bulk purchases or long-term commitments for flexible pricing strategies while maintaining profitability and competitive incentives to your customers.
- **Negotiation support:** Use cost prices as a reference during negotiations with your customers or suppliers. It provides a transparent basis for discussions, helping you build trust and facilitating fair and mutually beneficial agreements.

To learn more about cost books and their configuration, see [Pricing Management](#), [Create and publish a cost book](#), [Create a cost book line](#), and [Install and configure Quote Management](#).

Creating PDF documents in Quote Management

Once your quote is completed, you can send it to customers for review and signing by creating a pdf and emailing it. The pdf can be configured with logos and also connected to services like Docusign. This allows you to communicate and confirm quote offerings.

View line items as a hierarchical list

Sales Agent view quote line items as a hierarchical list, which helps organize quote with many line items.

What to do next

To learn about setting up Quote Management, see [Install and configure Quote Management](#).

Quote Management integration with Contract Management Pro


The Quote Management integration with Contract Management Pro is known as Contract Management for Sales and Order Management (com.sn_som_cim).

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

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

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

A contract generation process consists of the following steps:

- A sales ops specialist creates a contract type and document template, defines signatory rules, and completes configurations for the contract generation process. To learn more, see [Set up Contracts Core](#) .
- A sales agent then initiates the contract creation process through the Initiate contract UI action by filling the required details, such as Type of paper, Contract type, Signature type, and Start and End dates.

- **Initiate Contract** UI action is visible only when a quote is in Completed state.
- After you submit the contract creation form, it creates a contract request record.
- The new contract request triggers the workflow to generate the legal sales contract. To learn more, see [Initiate a contract request](#).
- When the contract workflow is complete, the state of the contract request is changed to Closed complete.

What to do next

To learn more, see [Integrate with Contract Management Pro](#).

Sales Agreement Management

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

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

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

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

Sales agreement workflow: Quote-to-sales agreement

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

Sales agreement line items

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

Sales agreement price list

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

Order Management

Learn more about available features in the Order Management application so that you can create a seamless ordering experience for your enterprise customers.

Request apps on the 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](#).

Overview of Order Management

With the Order Management application, you get an order management system that is configurable, extendable, and data driven. The Order Management application delivers workflows that enable your agents to capture and fulfill your customer orders. If you have a Telecommunications Service Management (TSM) subscription, you can use workflows that help you manage communications products and services.

Benefits

- Catalog-driven, cloud-based order fulfillment with a unified technical and base product catalog.
- Decomposition and orchestration workflows that are easy to configure and modify according to your business needs.
- Integrated order fulfillment and service assurance process on a single cloud-native platform.
- If you're using the Order Management for Telecommunications, Media, and Technology application, the TM Forum-based data model provides interoperability with any external Configure Price Quote (CPQ) application, and other systems.

Features

Order capture and enrichment

Order Management provides different ways to capture product and service orders.

- Direct order capture - Your agents and order managers can enter product or service orders using the CSM Configurable Workspace.
- If you're using the Order Management for Telecommunications, Media, and Technology application and have a Telecommunications Service Management subscription, you can use the following features:
 - Product and Service Order Open APIs - Use the ServiceNow implementation of the TMF Open APIs to capture product and service orders from third-party systems.
 - Now Service Exchange integrations - Use the Service Exchange applications to receive and fulfill product or service requests directly between your instance and the instances of your customers, without configuring and maintaining custom integrations. Service Exchange supports the verification, enrichment, decomposition, and fulfillment of these customer orders. For detailed benefits of the Service Exchange applications, see [Exploring Service Exchange](#).

After an order is captured, your order agents can add other required order details, such as delivery location or pricing as part of order enrichment.

Order decomposition

After a fulfillment manager reviews and approves a product or service order, Order Management breaks down the order into the required product, service, and resource orders for each order line item. This breakdown is based on the specification relationships set in the product catalog and any decomposition rules that you created. If some of the information isn't available when order

decomposition starts, Order Management can stagger the decomposition to create certain orders using the current information.

Order fulfillment

Your fulfillment agents and managers complete the series of tasks needed to fulfill an order, based on an orchestration plan that defines the order tasks for fulfillment. You can use different tools to handle issues during fulfillment:

- Inflight change order management - Handle customer order changes.
- Fallout Management - Identify and resolve order processing errors.
- Jeopardy Management - Alert fulfillment managers when the assigned time for an order task is in jeopardy.

Order Management data model

The Order Management data model provides a framework that enables you to capture, manage, orchestrate, and fulfill customer orders and external service orders for products and services.

Order life cycle

In Order Management, a customer order moves through the various stages of an order's life cycle.

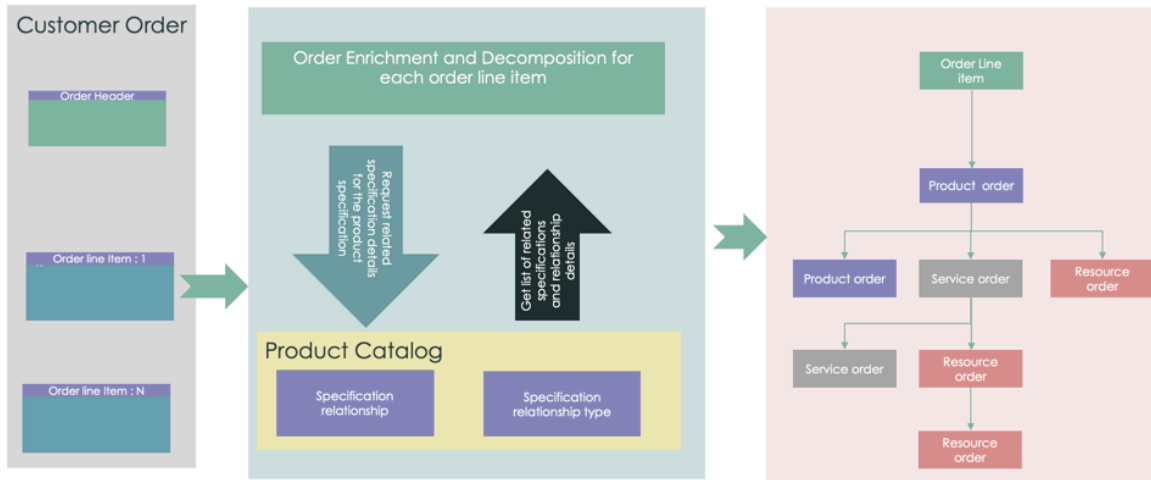
Order life cycle

| Stage | Description |
|----------------|---|
| Customer order | Main order entity that is captured and created for managing the end-to-end life cycle of a customer request for products or services. |
| Enrichment | Additional information that is required for the order decomposition and for the fulfillment process. Attributes and elements can be added to orders that are required for downstream applications, such as billing or activation. |
| Decomposition | Order that is split into multiple suborders for fulfillment. |
| Orchestration | Order fulfillment coordination that uses a fulfillment flow. |

Order enrichment and decomposition process

A customer order can have one or more order line items. The enrichment and decomposition process creates the required product, service, and resource order for each order line item, using the specification relationship information in the Product Catalog. The following diagram is an example of how a customer order can be enriched and decomposed.

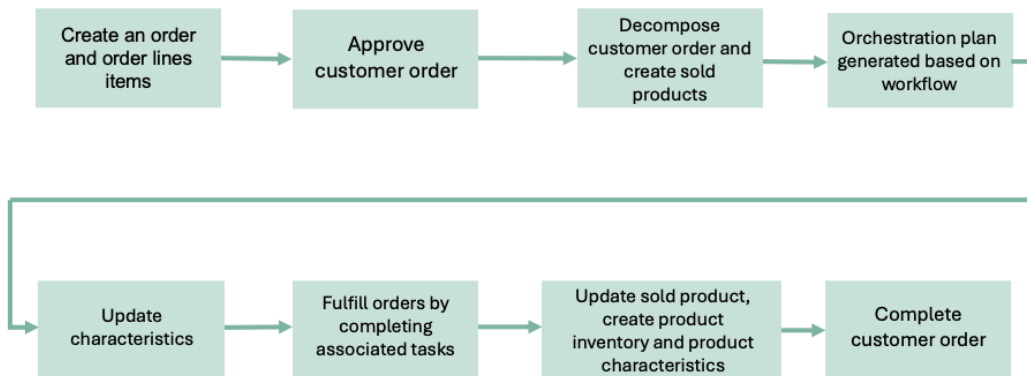
Order enrichment and decomposition process



The fulfillment plan uses decision tables to match the flow for a product order. The assigned flow then triggers the required order fulfillment tasks.

The following diagram shows how the fulfillment process works for a telecommunications product order.

Order fulfillment workflow example



Action types for customer and service orders

Learn how you can take various types of actions for your customer orders. Action actions include move, add, change, disconnect, suspension, resume, or no-change of services.

By using an order action type, you can define the type of actions that you want to do with an order. The following table lists the order action types.

Order action types

| Order action type | Description |
|---------------------------------|---|
| Add | <p>Add a customer order that isn't associated with an existing order from the same customer. This customer order results in new order management and fulfillment activities.</p> <p>For example, you place a new order for a home internet service.</p> |
| Change | <p>Change an existing order, which changes a previously ordered or fulfilled product or service. This order action type includes the following scenarios:</p> <ul style="list-style-type: none"> • Addition of a child product specification that the customer didn't previously order. • Deletion of an optional child product specification that the customer already has. <p>For example, you upgrade the download speed of your home internet from 100 Mbps to 1000 Mbps.</p> |
| Disconnect (delete for TMF API) | <p>Disconnect an existing customer service order. For example, you can disconnect your home internet service.</p> <p>i Note: When a mandatory product is deleted, all the products are deleted.</p> |
| Suspend | <p>Product or service order to temporarily inactivate the product inventory of its order line items.</p> <p>i Note: To learn more, see Using suspend and resume actions.</p> |
| Resume | <p>Product or service order to reactivate the product inventory of its order line items that were previously suspended.</p> <p>i Note: To learn more, see Using suspend and resume actions.</p> |
| No change | <p>Order line items with No change action are included in the order for informational purpose only. For example, a parent order line item with No change action can have a child order line item with Change or Suspend action.</p> |

Using suspend and resume actions

You can use suspend and resume actions to temporarily suspend or inactivate your product and service inventories. That way, you can capture a customer's suspend request and resume the products and services later.

Overview

As a Communications Service Provider (CSP), you can temporarily suspend or inactivate your product and service inventories. The suspend and resume requests are managed as orders with

the changes in the inventory of the product and service orders during the order decomposition and fulfillment process. An order suspension and resume action can occur immediately or at a future date.

With suspend and resume actions, a CSP can do the following tasks:

- Ingest and fulfill the suspend product and service orders.
- Ingest and fulfill the resume product and service orders for suspended inventories.
- Support future-dated suspend and resume orders by using a scheduler.
- Manage the product inventory state for suspend and resume scenarios.

How the Suspend and Resume actions work

The process for the suspend and resume actions is as follows:

1. A customer order of type Suspend or Resume is received in the order management system. After reviewing the order details, a fulfillment manager approves the customer order.
2. When a customer order is approved, a new Product Inventory Operations [sn_prd_invt_product_inventory_operations] table is created as a related list in the order line items form. In case of scheduled scenario, as part of fulfillment process the state of the product inventory operations record marks to Scheduled state for order line items.
3. A pre-configured scheduler tracks the Product Inventory Operations table to check for any future scheduled date of the customer order:
 - If your customer order contains order line items with a future date (a date value for the `committedDueDate` field on the order line items form), the suspend or resume action starts on the scheduled date.
 - If your customer order doesn't include any date for the suspend or resume action, it starts immediately at the time of closure of the orders.
4. At the time of order closure, the following changes occur:
 - For a scheduled scenario, the scheduler picks up the record with a Scheduled state from the Product Inventory Operations table on the scheduled date and marks the record state to Completed. And the inventory state of the order line item is updated to Suspended for the suspend action and to Active for the resume action in the product inventory table.
 - For an immediate scenario, the state of the record in the Product Inventory Operations table is updated to Completed. And the inventory state of the order line item is updated to Suspended for the suspend action and to Active for the resume action in the product inventory table.
5. The inventory state in the Product Inventory Operations table is updated to Canceled in the following two scenarios:
 - During the inflight changes or due to the cancellation of any order line items.
 - The dates for both the suspend and resume operations are scheduled, but the date for the resume operation is before the date of the suspend operation.

Additional validations and scenarios

When the order line items for the suspend or resume actions are combined with the change or disconnect actions in a single order and the inventory state of any order line item is in a pending state, the order approval fails. The reason is due to the approval validation for the change or disconnect order.

- i Note:** During the order approval for suspend or resume or no change actions, the product inventory should not be in the Installation Pending state.

In the order creation process for the suspend or resume actions, the `committedDueDate` field value on the order line item form can be a past date, present date, or a future date. If it's a past or present date, the inventory state should be set as Active for the suspend action and set as Suspended for the resume action.

If the `committedDueDate` field value of the customer order line items is invalid (the date field value exceeds the calendar date) for the suspend or resume action, it's then considered as an immediate action.

In the suspend or resume type of customer orders, the parent order has precedence over a child order. If the parent order is scheduled for an immediate suspend or resume action, but the child order is scheduled for any future date, the entire inventory hierarchy is considered for the immediate action.

If the top order line item for suspend or resume action is scheduled for a future date, the entire inventory hierarchy is then considered for the suspend or resume action. Child order line items are considered for suspend or resume action when they're combined with a change or a no-change action.

For an inflight change of the suspend or resume type order, only Cancellation is supported. If an order line item or the entire order gets canceled, the Product inventory Operations record is marked as Canceled during the order fulfillment process. The state change doesn't occur for the Product inventory record.

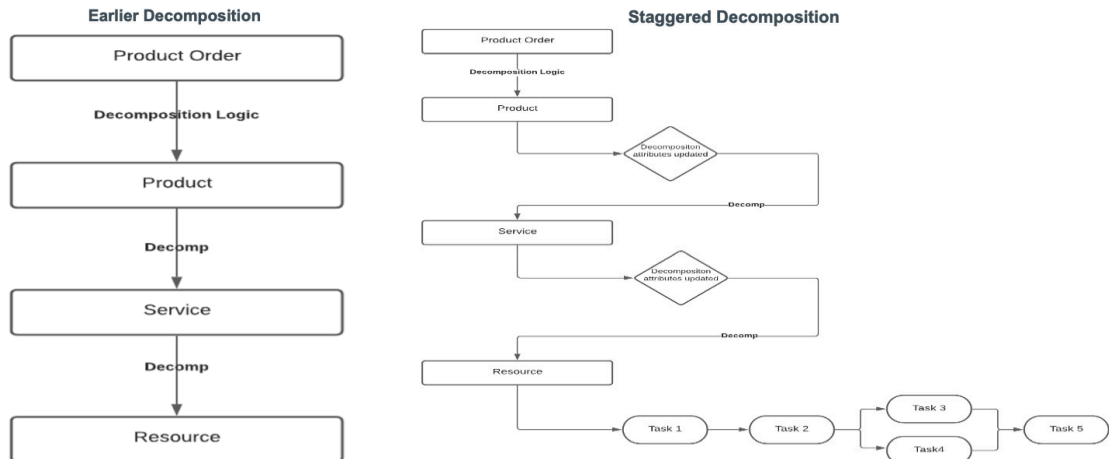
In the order creation process for the suspend or resume action, you can use the external inventory ID in the payload instead of the system-generated ID for the inventory.

Staggered decomposition

Learn how you can stagger the decomposition for your customer orders. You can decompose your customer orders in multiple iterations by using the available information at the domain level, rather than decomposing an entire customer order at one time after it is approved for fulfillment.

The following diagram shows how the staggered decomposition process works. You can start the decomposition process with the information that you already have for your order and order line items. The decomposition process skips the domain orders (product or service or resource orders) that you don't have the required information for at this time. When you add this information later, the decomposition process triggers and completes the processing for the remaining domain orders.

Staggered decomposition processing



Contrast to earlier decomposition processing

Before staggered decomposition was available, order decomposition processing started immediately after a customer order was approved for fulfillment. Order decomposition was based on the specification relationships and decomposition rules that were defined in the product catalog.

If the decomposition rule depended on any characteristic value that was not available at the time of order decomposition, the order processing skipped the decomposition of orders. However, in staggered decomposition, with the initial decomposition, the decomposition automatically triggers again for the skipped orders when the dependent characteristic value is available. The characteristic value can be set by your order fulfillment users or by the attribute propagation rules.

How staggered decomposition works

To support order decomposition in a staggered manner, you can use this method to retrigger the decomposition process for the skipped domain orders when the characteristic values are assigned in the corresponding decomposition rules.

When you approve an order, the order decomposition process starts. The decomposition process creates domain orders by using the information that is available from the order, order line items, and catalog definition. It also evaluates the decomposition rules to create the target domain orders. If the decomposition feature fails to evaluate the decomposition rules due to the unavailability of characteristic values, the decomposition is stopped for those domain orders.

When the characteristic values are available either from a user's action or from an attribute propagation rule, the decomposition process is retriggered. The process then creates the required domain orders and completes the order decomposition. If you again update the characteristic value after the order decomposition is complete, it does not trigger the decomposition for the domain order.

Order quantity support

Learn how you can support and fulfill your customer orders for multiple instances of a product or service. You can create multiple domain orders that equal the order quantity for each instance of the product or service. This way, you can efficiently decompose and manage the fulfillment of your customer orders.

Overview

An instance of a product or service refers to an ordered item with a unique set of order characteristic values, such as the speed and memory size. A customer might order the same top-level product or service for different locations, but each might differ in their order characteristics. For example, if a customer orders a router for one of their locations, it might have a memory size selection that varies from the same router model that was ordered for another location. Order Management supports this order quantity processing for the following scenarios:

Support for the order line item quantity that is provided by the customer when they order an item

If your customer places an order with more than one instance, the Quantity field on the order line item captures the number of instances of your customer order line items. The order decomposition process then creates the same number of product or service orders and manages the fulfillment process for each order independently.

Support for the catalog-driven characteristic quantity

In this scenario, the decomposition process decomposes a product or service order into the required number of domain orders. These domain orders are based on the quantity mapping that you define in the product catalog between the source and target specifications that are used in a product offering. The quantity mapping in the specification relationship triggers the decomposition process to create the required number of domain orders for the fulfillment process.

Support for the characteristic based quantity

In this scenario, you accept and support your customer order that has the information for order characteristics value which impacts the quantity of the domain orders. So, the order decomposition process refers to following information to create the required number of domain orders.

- Specification relationship with quantity characteristic
- Characteristic mapping

Order capture process in Order Management

You can capture, manage, and fulfill the orders from your customers by using APIs, Service Exchange, or direct order capture with the Order Management application.

The following scenarios represent typical situations in which you capture orders for processing in the ServiceNow AI Platform.

Scenario 1: Using APIs for order capture and upload

Your current order capture systems can be integrated with ServiceNow instances by using TMF622-based APIs. With this integration, your order capture system can submit requests for products or services, which can then be fulfilled in your ServiceNow instance.

Note: To learn more about the ServiceNow - supplied API that is based on the TMF622 Product Ordering API REST Specification, see [Standardized Product Order OpenAPI](#).

This diagram shows how the TMF622-based API operates within the telecommunications order capture and upload process.

API-based workflow scenario for Order Management



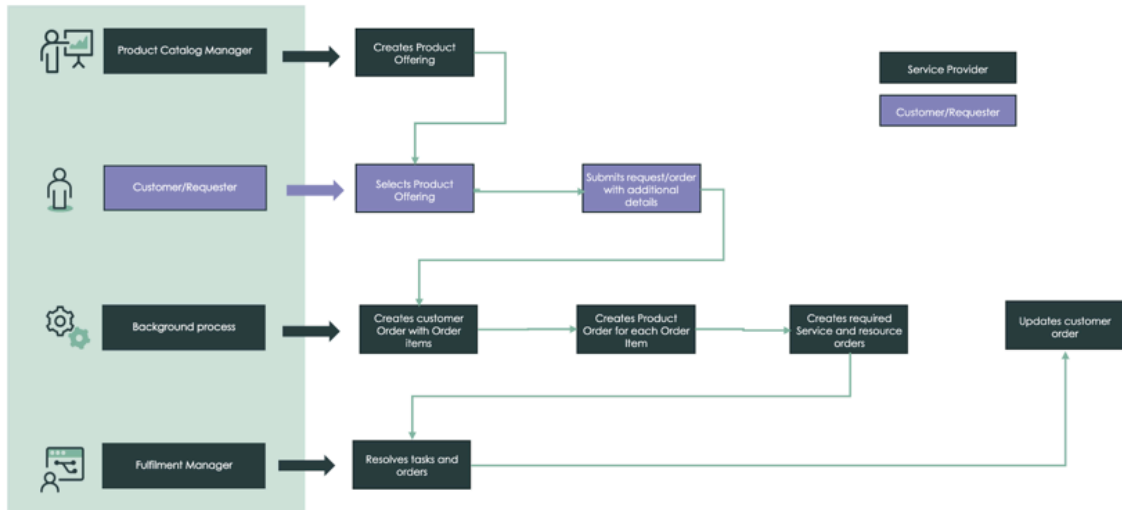
Scenario 2: Using Service Exchange for order capture and upload

Your ServiceNow instances can be integrated with the instances of your customers by using Service Exchange. With this integration, you can create and publish product offerings to your customer's instances. Enterprise customers can then submit requests for products or services, which you can then fulfill.

Note: For detailed benefits on using the Service Exchange applications, see [Learn about Service Exchange](#).

This diagram shows how Service Exchange operates within the telecommunications order capture and upload process.

Service Bridge workflow scenario for Order Management



Enriching an order in Order Management

As an order agent, capture all the required information for an order before the order approval stage so that there won't be any delay or fallout in the order fulfillment due to missing or incorrect information.

Overview

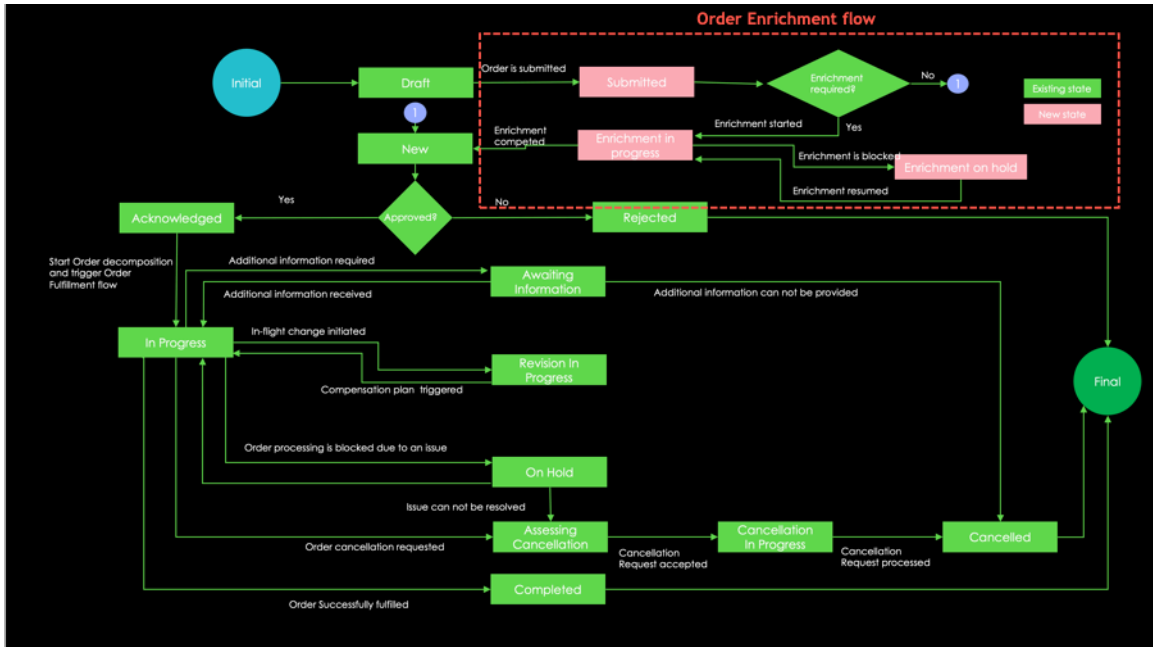
An order enrichment process is a set of tasks to capture additional order details by the order agent from your customer.

In the current enhanced order capture process, the agent first captures the basic order details to make the order entry in the Order Management system. Before approving the order, the order agent connects with the customer to get all the required order details according to the customer's business needs.

How the order enrichment process works

It isn't required to enrich all the orders. If it is a complex product or service order, the agent decides to enrich the order.

Order Enrichment flow



An order agent creates an order in Order Management by capturing the basic order details and the order **State** field is set to Draft. When the order agent submits the order, the system checks for each order line item whether it requires enrichment or not according to the defined Order Enrichment Flow Policy in the decision table.

Decision table for Order enrichment process

Order Enrichment Flow Policy

Inputs

| Label | Type | Reference | Mandatory |
|-----------------|-----------|--|--------------------------|
| Order line item | Reference | Order Line Item (sn_ind_tmt_orm_order_line_item) | <input type="checkbox"/> |

Decision table

| Conditions | Results | | | | | | | | | | | | |
|--|--|-------------------------------------|------|--|--|---------------------|------------------------|----------------------------|-----------------------------------|------------------|--|-------------------------------------|----------------|
| <table border="1"> <thead> <tr> <th>Category</th> <th>Offering</th> <th>Flow</th> </tr> </thead> <tbody> <tr> <td>Order line item (Order Line Item + Specification + Category)</td> <td>Order line item (Order Line Item + Product offering)</td> <td>Flow (sys_hub_flow)</td> </tr> <tr> <td>SD-WAN Service Package</td> <td>Premium SD-WAN Offering v3</td> <td>SD-WAN Service Package Enrichment</td> </tr> <tr> <td>Managed Firewall</td> <td></td> <td>Managed Firewall Service Enrichment</td> </tr> </tbody> </table> | Category | Offering | Flow | Order line item (Order Line Item + Specification + Category) | Order line item (Order Line Item + Product offering) | Flow (sys_hub_flow) | SD-WAN Service Package | Premium SD-WAN Offering v3 | SD-WAN Service Package Enrichment | Managed Firewall | | Managed Firewall Service Enrichment | Default result |
| Category | Offering | Flow | | | | | | | | | | | |
| Order line item (Order Line Item + Specification + Category) | Order line item (Order Line Item + Product offering) | Flow (sys_hub_flow) | | | | | | | | | | | |
| SD-WAN Service Package | Premium SD-WAN Offering v3 | SD-WAN Service Package Enrichment | | | | | | | | | | | |
| Managed Firewall | | Managed Firewall Service Enrichment | | | | | | | | | | | |

If any order line item is applicable for the enrichment process, the state of the order including its line items changes to Enrichment in progress and the Order Enrichment Flow Policy is triggered. The flow creates order enrichment tasks for those order line items. If the line item is not eligible for enrichment, the line item state changes to New.

The order agent reviews and closes each task after providing the required additional details for order decomposition. When the order enrichment is completed, the state of the order line items changes to New from Enrichment in Progress and the order state also changes to New.

The order agent can now approve or reject the order.

Managing service orders

Use service orders for the activation of new services or for the post-sales requests for the services that were activated for and delivered to customers at earlier dates.

Service orders contain the details of an Add, Change, or Disconnect operation that your enterprise performs for a service that you render for a customer. Service providers capture them from an external third-party Customer Order Management system through the Service Order Open API, or you enter them directly into the ServiceNow AI Platform®.

Fallout Management data model


Manage and fix the processing issues that occur during the fulfillment of a customer or service order. With Fallout Management, you can identify the order processing exceptions and create a fallout record to investigate and resolve the underlying processing issue. Fallout Management enables a customer or service order to continue until it's completed.

The Fallout Management data model extends the Task table. The following table lists the attributes that apply to order fallout processing.

Order fallout table attributes

| Field | Description |
|-------------|--|
| Number | Unique system-assigned fallout number, starting with a prefix of FO, up to seven digits in length. |
| Assigned to | Identifier for the assigned person responsible for acting on the fallout record. |
| Created by | Identifier for the fallout administrator who created the fallout record. |
| Created on | Timestamp that includes the date and time that the fallout record was created. |
| State | <p>Indicator of the current processing state for the fallout record. Unless otherwise indicated, the fallout manager or agent manually assigns the appropriate state to the fallout record, depending on where it currently resides in the processing cycle.</p> <p>Open Fallout record that is new and not currently assigned to a person to work on.</p> <p>In Progress Fallout record that is assigned and currently being worked on.</p> <p>On Hold Fallout record that is on hold. No further fallout processing can take place until you release the hold.</p> <p>Awaiting Information Fallout record that is on hold and waiting for more information before processing can proceed.</p> <p>Resolved</p> |

Order fallout table attributes (continued)

| Field | Description |
|------------------------|---|
| | <p>Fallout issue that has a resolution but you have not formally closed it.</p> <p>Closed Completed</p> <p>Fallout record that is complete and closed.</p> <p>Canceled</p> <p>Fallout record that the fulfillment manager canceled. No further fulfillment processing can take place.</p> |
| <p>Originated from</p> | <p>Identifier of the originating order task record that the fallout record is associated with.</p> |
| <p>Activity</p> | <p>Listing of the processing activities and changes in the field values that have taken place for the fallout record. To expand, collapse, or filter by activity stream:</p> <ul style="list-style-type: none"> • Click the activity stream filter icon (🔍) to filter by additional comments, attachments, or state. • Click the more options icon (⋮), and then select the appropriate one:  |
| <p>Attachments</p> | <p>File attachments for the fallout record. Click Browse to add the file as an attachment.</p> |

Related topics

[Managing order fallout](#)

[Create automated and manual fallout records](#)

[Flow Designer](#) 

[Flows](#) 

[Create a flow](#) 

Inflight change order management in Order Management

By using inflight change order management, you can determine how to manage changes for customer orders that are still being fulfilled. By managing inflight changes, your organization can reduce operational costs and deliver a better customer experience.

You can use an inflight change to modify a customer order that is still in fulfillment. You define a point of no return (PONR) after which the order can't accept any change. After an inflight change is received and approved, order management dynamically assesses the impact of the requested change and automatically generates a plan to orchestrate the order correctly. With Order Management, your organization can manage the inflight changes more easily, reduce operational costs, and deliver a better customer experience.

To learn more about how to change or cancel an inflight order request, see [Managing inflight order changes and cancellation requests](#).

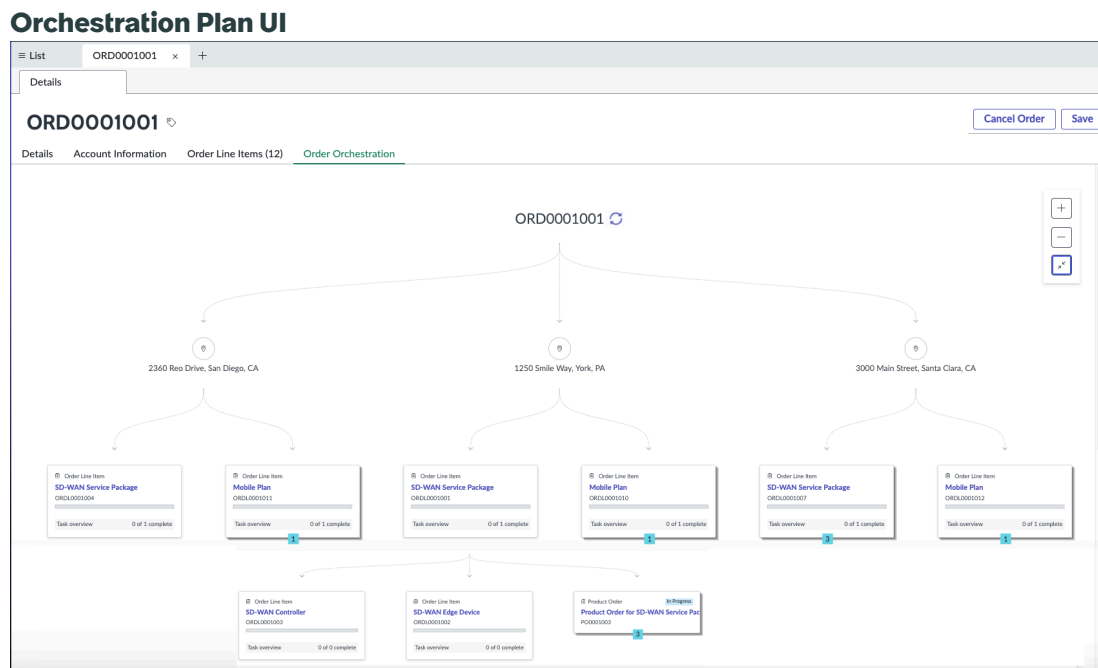
Orchestration plans for order fulfillment

By using the Orchestration Plan user interface (UI), you can make sure that you do all the tasks that are required to fulfill your customer (product) orders. You can also view the complete order hierarchy, the status of the associated decomposed orders, the order line items, and the order tasks.

Using the Orchestration Plan UI

As an order fulfillment manager or agent, you use the Orchestration Plan UI to track all related domain orders and order tasks for an order, order line item, or domain order. You can also use the UI to review and resolve any issues for related order tasks and domain orders.

The following example shows the Orchestration Plan UI:



Use the Orchestration Plan UI to see:

- A pictorial representation that shows the hierarchy of all order line items, domain orders, and order tasks for an order, order line item, or a domain order.
- The dependencies between the domain orders and order tasks.
- The current state of the associated order line items, domain orders, and order tasks within the hierarchy.

By using the Orchestration Plan UI, you can perform the following actions:

1. View a hierarchical visual representation of all order line items, domain orders, and order tasks for the selected order.
2. Open a node in the hierarchy and view the additional details.
3. Determine the current state of the associated order line items, domain orders, and order tasks.
4. Identify any order delays or fallouts in the order fulfillment process, and resolve them on time.

Fulfilling multi-site orders

The Orchestration Plan UI is especially helpful when you fulfill customer orders that involve multiple products that are fulfilled at multiple locations. For example, a customer orders the SD-WAN Service Package for their San Jose, San Diego, Denver, and Dallas locations. That means that there's a minimum of three order line items for each of the four locations:

- One line item for the SD-WAN Service Package
- One line item for the SD-WAN Controller product
- One line item for the SD-WAN Edge product

If the same customer also orders an optional SD-WAN Security product for each location, there would be an extra four order line items. That is, there's one order line item for each of the four locations (San Jose, San Diego, Denver, and Dallas).

To initiate the fulfillment process for a multi-site order, the Order Management application decomposes the order into multiple domain orders for fulfillment. The domain orders are the product, service, and resource orders that are generated during decomposition. Each decomposed order has a corresponding fulfillment flow with several order tasks. To fulfill an order by the delivery dates that you promise to your customer, you must complete all the related domain orders and resolve all the related order tasks on time.

Note: To learn about the Order Management data model and order decomposition, see:

- [Order Management data model](#)
-

Related topics

[Managing order fallout](#)

Jeopardy Management

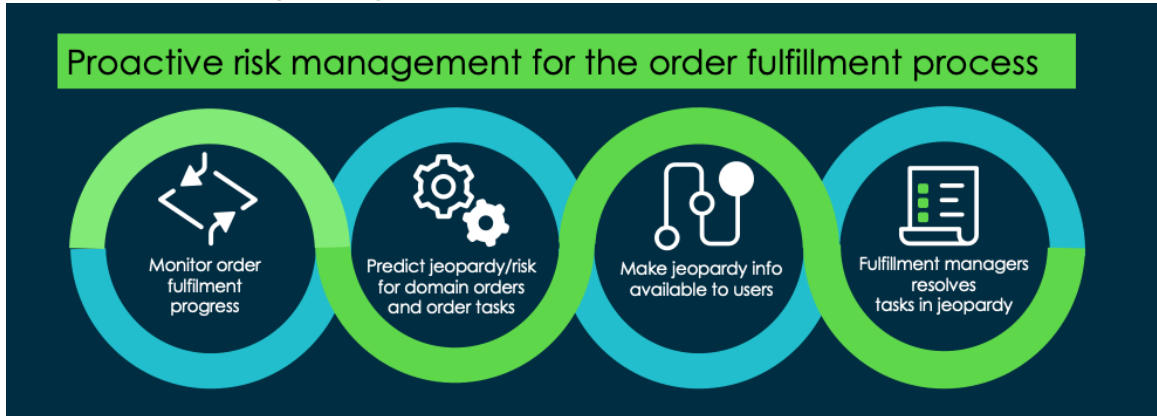
Jeopardy Management is a risk assessment tool that monitors fulfillment tasks, assesses the risk level, and alerts fulfillment managers when the assigned task time is in jeopardy.

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

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

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

Overview of Jeopardy Management



How Jeopardy Management works

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

Jeopardy Management components

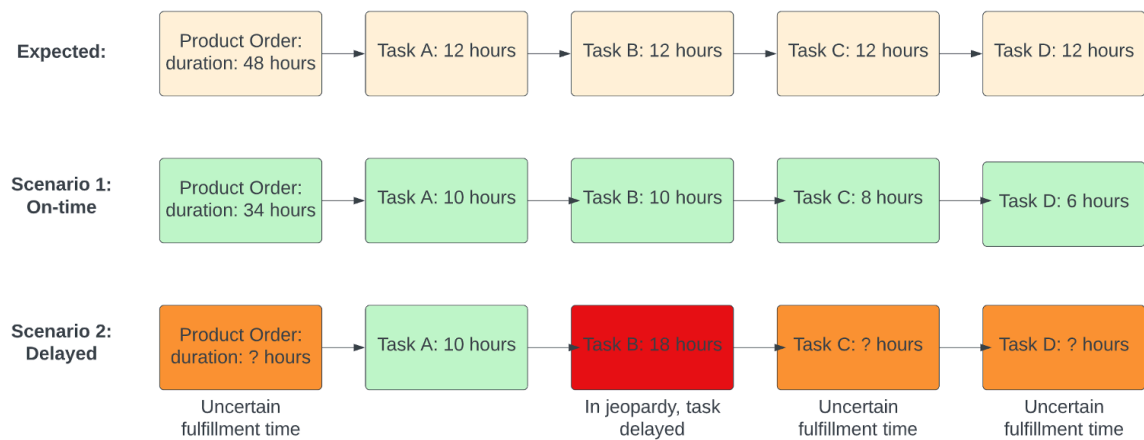
| Define subflows & decision tables | Monitor order fulfillment progress | Predict jeopardy /risk | Share jeopardy info | Resolve tasks in jeopardy |
|--|--|---|---|---|
| <ul style="list-style-type: none"> Define subflows that create order tasks upfront and define task relationships Configure jeopardy policy decision tables | <ul style="list-style-type: none"> Define and launch SLA for order tasks Monitor fulfillment progress and closure of domain orders and order tasks | <ul style="list-style-type: none"> Leverage planned task date fields and date roll up logic to produce timelines for order task fulfillment progression Monitor the progress of each order task and produce jeopardy information Rollup jeopardy date changes for all order entities | <ul style="list-style-type: none"> Use the order forms, list and orchestration UI forms to show jeopardy details for orders, domain orders and order tasks in order to prioritize tasks to take action | <ul style="list-style-type: none"> Based on jeopardy condition, customer can implement notifications or other logic as required based on jeopardy level flag on each entity jeopardy |

Jeopardy Management alert levels

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

The following image shows several Jeopardy Management configuration examples.

Jeopardy Management scenarios



The Jeopardy Management scenarios image compares some scenarios for tasks at certain risk levels: expected, on-time, and delayed. Jeopardy Management assesses all the tasks in a workflow and adjusts the risk level for tasks that occur later in the workflow.

What to do next

Use the following links to learn more about how to configure and use Jeopardy Management.

- [Monitoring Jeopardy Management](#)

Jeopardy Management setup overview

Learn about how to set up and configure Jeopardy Management for Order Management for Telecommunications.

During design time, fulfillment managers must complete the following Jeopardy Management configuration and setup steps:

- **Define Fulfillment Subflows:** Creates an Orchestration plan for each specification. Fulfillment managers can use demo data flow actions to ensure that order task relationships are created.
- **Define Service Level Agreements (SLA) Definitions:** SLA definitions track how much time each order task takes to complete.
- **Build Decision Tables:** Build decision tables that contain information including order task duration, jeopardy level assignment, and jeopardy enablement.

Define Fulfillment Subflows

To use Jeopardy Management, fulfillment managers must either reconfigure existing fulfillment subflows or create subflows for each specification.

- **Order tasks are created up front:** Subflows that are configured for jeopardy management create order tasks up front and in a Draft state.
- **Use Create Order Planned Task flow action:** In Decision Builder, use the Create New Order tasks.
- **Create task relationships:** After all the order tasks are created, fulfillment managers create order task relationships.
- **Define fulfillment progress:** After all order tasks and task relationships are created, define the fulfillment progress.

Create SLA Definitions

SLA definitions and SLA Processing flows are linked to tasks in a fulfillment plan and track and report on the time jeopardy-enabled tasks take to complete. See [for more information](#).

- SLA Definitions: Set start condition, pause condition, cancel condition, and reset conditions according to use case.
- SLA Durations: Durations are specified so that tracking can be achieved when task SLA is created.
- SLA Processing flow should be defined: Customer can use demo data flows, which trigger jeopardy level calculation for order tasks at 50%, 75%, 100% task SLA progression.

Link Jeopardy Management to Product and Service Specifications using Decision Builder

Decision tables are used to link and configure Jeopardy Management to product and service specifications in Order Management for Telecommunications.

- Order Line Item Jeopardy Level Calculation: Returns Jeopardy Level for order line item based on delayed percentage of tasks.
- Order Task Jeopardy Level Calculation: Sets a task's jeopardy level based on percentage task completion.
- Order Task Duration Assignment Policy: Defines the order duration and task SLA definition.
- Order Jeopardy Enablement Policy: Defines if a specification has jeopardy enabled.

Jeopardy Management use cases

Jeopardy Management use cases help you explore and understand how Jeopardy Management works in different scenarios in Order Management for Telecommunications.

Design-time use cases

Design-time use cases explain some of the scenarios around configuring and setting up Jeopardy Management for Order Management for Telecommunications.

Use case: Configure business logic and workflows

System admins want to configure and define fulfillment subflows with Jeopardy Management actions and logic.

Define jeopardy logic using Workflow Studio to links product specifications and a fulfillment workflow.

- Create planned order tasks in Draft state.
- Set task relationships.
- Create placeholder for domain orders.
- Create relationships for order tasks in a domain order.
- Set order task state.
- Configure jeopardy decision tables.

Run-time use cases

Run-time use cases explain some of the scenarios around running and monitoring Jeopardy Management for Order Management for Telecommunications.

Use Case: Support predictive jeopardy that monitors customer orders

Fulfillment agents and managers use jeopardy management workflows to monitor the potential risk of an order missing a customer due date.

- Calculate planned task completion dates and estimated dates.
- Monitor order tasks against service level agreements (SLA)s.
- Trigger SLA thresholds for order task and order line items.
- Update jeopardy levels as needed in the order entry forms.
- Roll up planned dates for order tasks that complete.

Use Case: Support staggered order decomposition and *Jeopardy Management*

Fulfillment managers and agents expect that when a staggered order decomposition occurs, each occurrence of a staggered order line item causes the Jeopardy Management workflow logic to restart.

- Completed decomposed order line items, the Jeopardy Management workflow restarts when additional planned tasks are added.
- New planned tasks get a task SLA assigned, which is benchmarked for all tasks repeated, and includes the date roll ups.

Use Case: Support inflight orders and *Jeopardy Management*

Fulfillment managers and agent want Jeopardy Management to pause orders. When the order revision is approved, the jeopardy monitoring restarts.

- Revision in progress and all tasks are on hold: jeopardy monitoring halts.
- Order revisions approved: task states go from on hold to their previous state and upcoming tasks move to a scheduled state.
- Jeopardy logic recalculates dates: planned dates and estimated or expected dates.
- Dates are benchmarked.
- Date roll up logic run and reflects the new start and end dates for planned and estimated dates.

Jeopardy Management roles and personas

Learn more about how the roles and personas in Order Management may change by adopting Jeopardy Management.

Roles in Jeopardy Management

The following table lists the roles and personas in Order Management when Jeopardy Management is enabled.

Personas and roles in Jeopardy Management

| Persona | Responsibilities | Role |
|----------------------|--|-------|
| System administrator | <ul style="list-style-type: none"> • Configures fulfillment flows for Jeopardy Management. • Configures all jeopardy-related decision table rule sets that define jeopardy fulfillment policies. | admin |

Personas and roles in Jeopardy Management (continued)

| Persona | Responsibilities | Role |
|---------------------------|---|---|
| | <ul style="list-style-type: none"> • Configures service level agreements (SLA) definitions for tasks. • Reviews and updates existing workflows and adds jeopardy actions when updates are required. • Reviews and updates jeopardy decision tables. | |
| Order fulfillment manager | <ul style="list-style-type: none"> • Reviews order jeopardy data for order impacts. • Assigns task jeopardy priorities to appropriate skilled agent for resolution. • Tracks and monitors timely fulfillment of customer order using jeopardy information. • Proactively mitigates jeopardy risks. • Escalates order jeopardy-related issues as needed. | sn_ind_tmt_orm.order_fulfilment_manager |
| Order fulfillment agent | <ul style="list-style-type: none"> • Tracks, monitors, and reviews order task progressions for jeopardy data and proactively acts on potential jeopardy-related issues. • Escalates jeopardy issues as appropriate to fulfillment managers. | sn_ind_tmt_orm.order_fulfilment_agent |
| Service order manager | <ul style="list-style-type: none"> • Reviews service order jeopardy data for potential service order impacts. • Assigns task jeopardy priorities to appropriate skilled agent for resolution. • Tracks and monitors timely fulfillment of customer orders by leveraging jeopardy information. • Proactively mitigates jeopardy risks. • Escalates jeopardy-related issues as needed. | sn_ind_tmt_orm.service_order_manager |
| Service order agent | <ul style="list-style-type: none"> • Tracks, monitors, and reviews order task progressions for jeopardy data. • Escalates order jeopardy impacts to the fulfillment manager. | sn_ind_tmt_orm.service_order_agent |

Defining a horizontal relationship

By using a compatibility rule, you can define the horizontal relationships between your product, service, and resource specifications.

Overview of horizontal relationships

When you create a product catalog, you can create a vertical relationship, which is the relationship between your parent and child entities. Your product catalog manager can also enable a horizontal relationship, which is a relationship between product to product, product to service, or product to resource, by defining compatibility rules in the product catalog.

Using a horizontal relationship

The compatibility rules include the horizontal relationships between your product, service, and resource specifications. Your customers can now place orders for enterprise products where a product can depend on another product in the same or different product offering, like a sibling or a peer.

Let's look at an example of a horizontal relationship. The relationship between the Voice over Internet Protocol (VoIP) and an internet service is a good example. VoIP requires an active internet connection but VoIP and an internet service are defined in a different product hierarchy. With a horizontal relationship, you can define a relationship between VoIP and an internet service in the product catalog to support the order creation process for VoIP and to fulfill the order.

Asynchronous order processing for large customer and consumer orders

If you're an administrator for a communications service provider (CSP), you can support a high volume of enterprise, multi-site customer orders and consumer orders by using asynchronous order processing in the ServiceNow® Order Management application.

Overview

CSPs support both enterprise customers and consumers. Usually, the orders from enterprise customers are large multi-site orders and the orders from consumers are high volume.

If you have a Telecommunications Service Management subscription, you can use the Product Order Open API to receive an order in the ServiceNow® Order Management application. Order processing goes through three stages:

- Order validation
- Order ingestion
- Order creation

How synchronous order processing works

With synchronous order processing, an order is received in the Order Management application through the API. Then, the order records are simultaneously created in a customer order table after the order validation.

As an administrator, you can activate or deactivate the order validation for synchronous order processing by setting the `create_product_order_validation_sync` and `create_service_order_validation_sync` system properties to True (Default) or False in the ServiceNow AI Platform. Synchronous order processing takes longer than asynchronous order processing when it comes to creating a large number of customer order records.

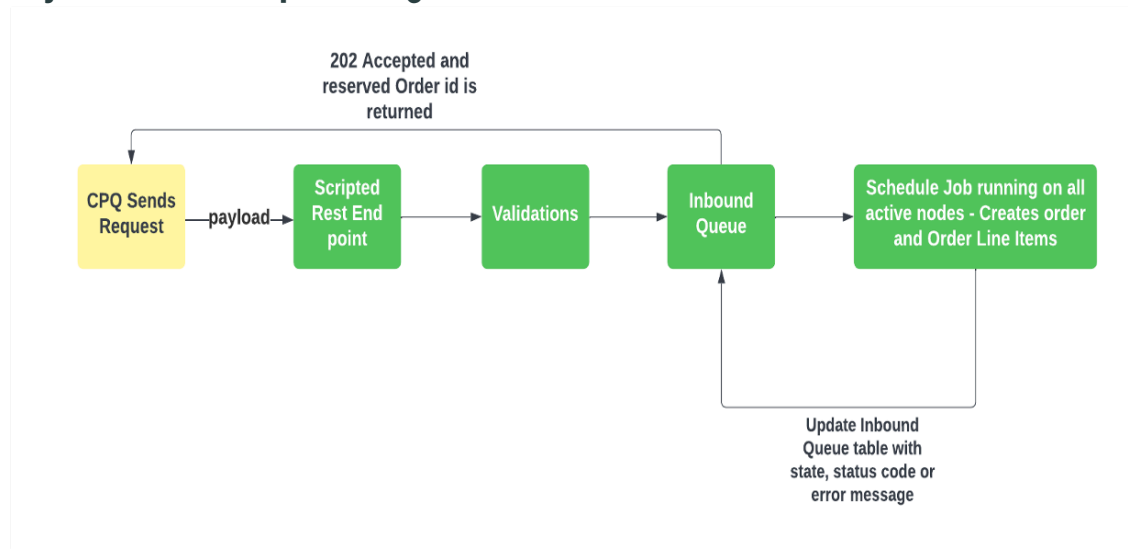
How asynchronous order processing works

In asynchronous order processing, a high volume of orders or a large number of order payloads are received through the Product Order Open API (Scripted Rest End Point) in the Order Management application from the external Configure, Price, and Quote (CPQ) systems. The order details are first validated and are then inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. If there are any validation errors, an error message is returned in the response.

This validation is managed by the `create_product_order_validation_async` system property for product orders and the `create_service_order_validation_async` system property for service orders. These properties control the validation in the asynchronous processing of orders before the orders are inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. The default value is set to True.

When the order details are successfully validated, a scheduled job runs to pick up the records from the Inbound Queue [sn_tmt_core_inbound_queue] table and then creates entries in the customer order table as shown in the following diagram.

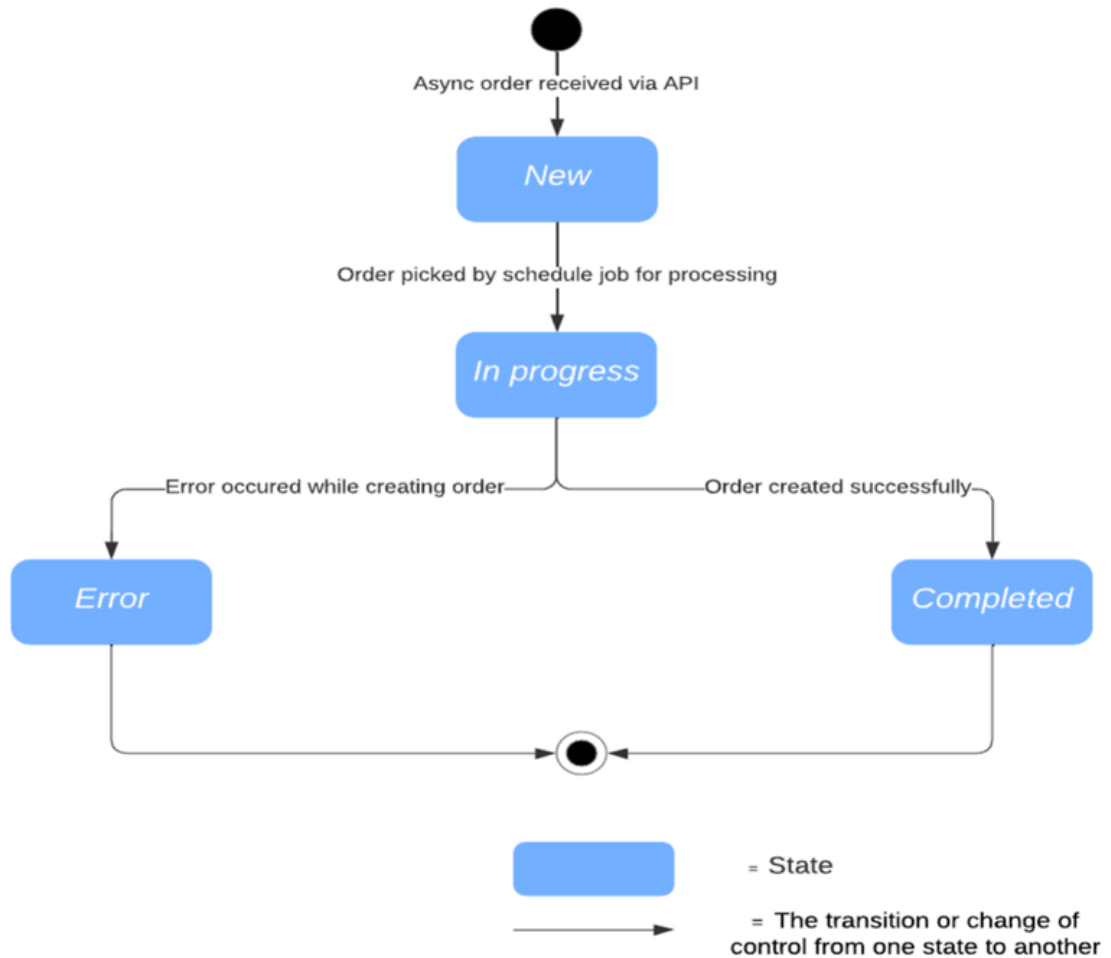
Asynchronous order processing workflow



The asynchronous order processing follows these steps:

1. You must activate the Product Order Open API. The new parameter mode enables the API to process the orders synchronously or asynchronously. For more information about the API, see [Product Order Open API](#).
2. After you receive a high volume of orders or a large number of the order payloads through the Product Order Open API in the async mode, the order details are first validated. The order details include the product offering, order line items, order specifications, order line items characteristics, and the specification relationship of order line items.
3. After the validation of the order details is complete, an entry for each order with a unique record ID is created in the Inbound Queue [sn_tmt_core_inbound_queue] table. The following diagram shows how the inbound queue state model works.

Inbound Queue State Model



4. When all the orders are captured in the Inbound Queue [sn_tmt_core_inbound_queue] table, a scheduled job runs to create the customer orders for the records in the New state.

Managing the orders for a 5G sliced network

By using the Order Management application, a communication service provider (CSP) can define the 5G services in the catalog and manage the creation and fulfillment of these orders for a sliced network.

Overview

Network slicing refers to a method of partitioning a physical network into multiple, separate networks. These separate networks are called slices.

By slicing a 5G network, a CSP can do the following tasks:

- Create and manage the slice templates with the required slice attributes in their product catalog.
- Support slice specifications by using the slice templates to define the slice services.

- Support the ingestion of slice orders from external systems through the existing product order API.
- Decompose the slice orders and trigger the fulfillment workflows for the decomposed orders.
- Trigger the southbound slice orders with southbound attributes toward southbound systems, such as Network Slice Management Function (NSMF), by using the service order open API.

How a slicing order is managed

A product catalog administrator creates templates in the product catalog by defining the template characteristics and template characteristic options. When the product catalog administrator is finished creating the templates, they publish it to the product catalog. With this process, the product catalog administrator can create templates for the various types of slices with the slice attributes and attribute values for the 5G network services.

Next, the product catalog administrator maps the slice templates with the various specification categories. The product catalog administrator does the mapping by using the Template Selection Policy decision table in the Decision Builder. The mapped templates are automatically filled in the service specification form when a user selects a specification category. For a description of the Service specifications form fields, see [Product catalog forms in Order Management for Telecommunications and Media](#).

Note:

- If a specification category is mapped with multiple templates, the latest published template is considered to be in the service specification.
- If a specification category is not mapped with any templates, the default category-template mapping is considered to be in the service specification.

The product catalog manager then uses the templates to define the new specifications for the 5G services.

After the 5G service specifications are created, they can be used in the slice order creation and fulfillment process. The 5G slice ordering process follows the existing order approval, decomposition, and fulfillment process in the Order Management application.

External product inventory ID

You can use a product inventory ID from external Configure, Price, and Quote (CPQ) systems in the Order Management application to complete the order fulfillment flow for various actions on the product and service orders.

Overview

If you're using the Order Management application, you can use the enhanced TM Forum's Open APIs to create, change, disconnect, suspend, and resume product and service orders. After the order capture and fulfillment process, the system-generated IDs are created against the product inventory records to manage any future requests on the inventory for different order action types.

Using an external ID

With the support of an external inventory ID, you can do the following tasks:

- Capture the external product inventory ID in the Order Management system through the Product and Service Order APIs.
- Store the external inventory ID in a new table for new orders and associate them with the product inventory records that were created after the order fulfillment. Also, update the ID

in the external product inventory table for any inflight revisions during the order fulfillment process.

- Allow external CPQ or southbound systems to use the external inventory ID to submit, change, disconnect, suspend, and resume orders on the product inventory in the order management system.

Note: You can also map the external product inventory ID with the product inventory record by using the Product Inventory Open API. For more information, see [Product Inventory Open API](#).

Lead-to-Cash Process Management

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

Lead-to-Cash Process Management overview

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

Lead-to-Cash Process Management users

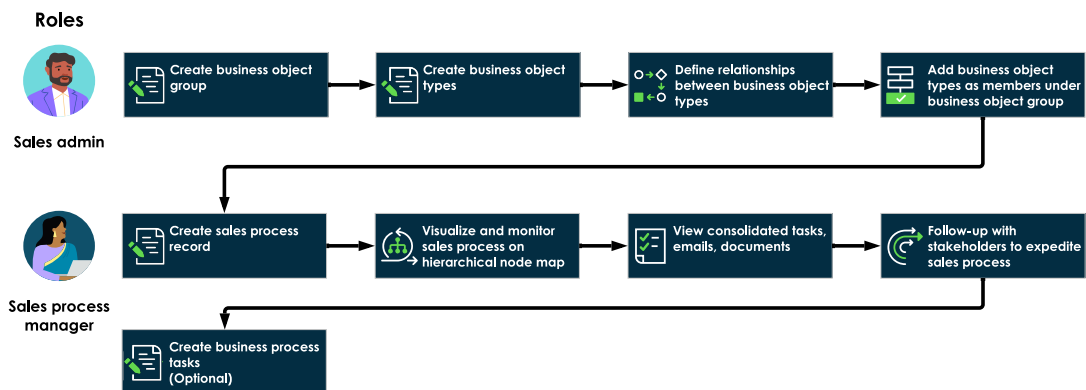
Users

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

Lead-to-Cash Process Management workflow

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

Lead-to-Cash Process Management workflow



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

Lead-to-Cash Process Management benefits

Lead-to-Cash Process Management benefits

| Benefit | Feature | Users |
|---|---|-----------------------|
| Create a hierarchical relationship between sales entities using built-in or custom business objects that mirror your organization's structure and strategic goals. | Create business objects and set up relationships between the entities | Sales admin |
| Customize the number of levels and tile content on the node map, enhancing clarity and control so that the sales process managers can focus on relevant data and navigate through complex sales processes effectively. | Customize the sales process dashboard | Sales admin |
| Select parent entities (such as Opportunity, Quote, or Order) and child entities (such as Quote lines or Order lines) to create a customized view of the sales life cycle that reflects the structure and needs of each account. This capability helps you track only relevant records, reducing noise and improving focus. | Create account-specific sales process records | Sales process manager |
| Gain end-to-end visibility of the defined sales process through a consolidated view that provides a real-time snapshot of opportunities, quotes, orders, and related entities. The ability to see an entity's details eliminates the need to toggle between systems. | Consolidated view and nodal hierarchy for monitoring a sales process | Sales process manager |
| Adjust which entities are actively tracked by linking and delinking records or changing how records are linked to focus on relevant sales activities. | Link and delink records | Sales process manager |
| Streamline communication, task management, and documentation, which accelerates | View consolidated emails and tasks, | Sales process manager |

Lead-to-Cash Process Management benefits (continued)

| Benefit | Feature | Users |
|--|--|-------|
| decision-making and improves cross-functional alignment and collaboration without having to leave the workspace. | create checklists and attachments, and use integrated chat | |

What to explore next

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

- [Configuring Lead-to-Cash Process Management](#)
- [Using Lead-to-Cash Process Management](#)
-

Customer Engagement Sequences

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

Customer Engagement Sequences overview

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

Customer Engagement Sequences users

Users

| User | Description |
|--|---|
| Sequence admin, sequence writer (For example, Sales admin, Sales Development Manager (SDR)) | Creates multi-step sequences using Workflow Studio and defines triggers (start conditions), activities (for example, call attempts), and exit conditions. |
| Sequence task owner (For example, Sales representative, customer success manager, telesales representative) | Views sequence tasks that are assigned to them and executes targeted outreach strategies, often using a combination of emails, phone calls, and social media, to engage prospects and move them through the initial stages of the sales funnel using the predefined sequence steps. |

Customer Engagement Sequences workflow

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

Creating and using Customer Engagement Sequences

1. As a sequence admin, create a customer engagement sequence such as a lead-nurturing sequence from the CSM Configurable Workspace.
2. Define the sequence parameters:
 - Trigger conditions (for example, when a new lead is created)
 - Sequence steps (for example, call, follow-up, email)
 - Step frequency (for example, wait three days between steps)
 - Exit conditions (for example, lead conversion or disqualification)
3. Test and activate the sequence.
4. Every record that meets the trigger condition is added to the sequence, and a sequence task associated with the record is created. For example, when a new lead record is created in the system, the sequence is run, and it generates a sequence task.
5. As a sequence task owner, view the assigned sequence task and complete the series of predefined activities that are part of it. For example:
 - Day 1: Call the prospect
 - Day 4: Make a follow-up call and use a questionnaire to gather more information
6. The sequence task moves to closed state when all sequence steps have been completed or the predefined exit condition is met.

Customer Engagement Sequences benefits

Customer Engagement Sequences benefits


| Benefit | Feature | Users |
|---|---|--|
| <ul style="list-style-type: none"> • Configure sequences using Workflow Studio to reduce dependency on developers. • Provide a structured, multi-step plan to sales representatives for each prospect so they know exactly when to call, email, or send a social media message. • Personalize outreach by inserting a prospect’s name, company, and other details. • Ensure consistent messaging and effective objection handling by providing teams with clearly defined steps that dynamically adapt to customer responses. | <p>No-code interface to build customer engagement sequences</p> | <p>Sequence admin, sequence writer</p> |
| <ul style="list-style-type: none"> • Boost productivity by minimizing repetitive tasks so sales representatives can focus on high-value activities. • Reduce the chance of missing a follow-up, ensure consistency in outreach, and minimize manual effort by following predefined steps. | <p>Predefined activities that align with business goals and outreach strategy</p> | <p>Sequence task owner</p> |

Customer Engagement Sequences benefits (continued)

| Benefit | Feature | Users |
|--|---------|-------|
| <ul style="list-style-type: none"> Accelerate onboarding by enabling new sales representatives to adopt proven outreach strategies from existing sequences. | | |

What to explore next

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

- [Configuring Customer Engagement Sequences](#)
- [Using Customer Engagement Sequences](#)
- [Exploring Workflow Studio](#) 

Customer self-service for Sales Customer Relationship Management

Support your business-to-business customers by enabling self-service capabilities through the Business Portal to create and manage orders and submit order issues and requests.

Business Portal overview

The Business Portal is a self-service web portal that supports your business-to-business (B2B) customers by providing integrated access to knowledge articles, community forums, service catalogs, and chatbots. It's based on Customer Service Management (CSM) and built using configurable widgets.

B2B customers can perform the following order management tasks using the Business Portal:

- Browse products and create orders.
- Create and view cases for their orders.
- View order and order case details, such as the order status.
- View and track the list of product inventories associated with your account.
- Manage products or services using service catalogs.

Key benefits

- Make order management features that your sales agents use available directly to your B2B customers
- Reduce customer dependency on customer service agents for routine order inquiries and for raising order issues such as quantity or address disputes
- Improve issue resolution time and customer satisfaction
- Preserve items and configurations added to the cart
- Add order instructions while placing an order

- Download cart summary in PDF format for stakeholder review
- Review terms and conditions, specify shipping and billing addresses before placing an order

Business Portal users

Users

| User | Description |
|-----------|--|
| Admin | Manages and administers the Business Portal, installs new plugins to enable new features. |
| Customers | B2B customers browse products catalog, order products, create, order cases to request changes to orders and order line items, view order case details. |

What to explore next

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

- Getting started with the Business Portal:
- (All features and capabilities)
- [Configuring the Business Portal](#)
- [Customer self-service using the Business Portal](#)
-

Configuring Sales Customer Relationship Management applications

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

Configuring the Sales Customer Relationship Management applications includes several basic tasks:

- Installing the Sales CRM applications that you want to use from the ServiceNow® Store.
- Assigning roles to your users of the SOM applications that you install.

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.

SOM configuration tasks

| Configuration task | Description |
|--|--|
| Install and configure the Opportunity Management application | 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. |

SOM configuration tasks (continued)

| Configuration task | Description |
|--|--|
| Install and configure Quote Management | Install the Quote Management application from the ServiceNow Store. It enables your sales agents to generate sales quotes for products or services that a customer wants to buy. |
| Install and configure the Order Management application | <p>Install the Order Management application from the ServiceNow Store. This application enables your agents to capture, manage, and fulfill orders from enterprise customers.</p> <p>Note: 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.</p> |
| Configuring the Business Portal | Admins can configure the Business Portal (sn_b2b_portal) so that customer can browse products and create orders in Sales Customer Relationship Management. |
| Configuring Lead-to-Cash Process Management | Admins can install the Lead-to-Cash Process Management application and Business object writers set up business object groups and relationships so that sales process managers can create and monitor sales process records. |
| Configuring Customer Engagement Sequences | Install and configure Customer Engagement Sequences so that the sales representatives can receive predefined sequence steps for interacting with prospects and customers. |
| Assign user roles in Sales and Order Management | Review and assign roles to users of the SOM applications that you install. |

Install and configure Lead Management

Install the Lead Management application, which enables sales agents and sales development representatives to create leads and provide pre-sales product recommendations based on customer needs. You then assign the user roles and configure related features, such as needs analysis and kanban view used in Lead Management.

Admins and users with various roles, such as application admins and sales operation specialists, complete the following configuration tasks to set up Lead Management.

Configuration tasks for Lead Management

| Task | Description | Role |
|--|--|-----------------------|
| Install Lead Management | Install Lead Management from the ServiceNow® Store. | Admin |
| Assign user roles in Sales Customer Relationship Management applications | Assign the user roles for Lead Management, Product Catalog Management, and Pricing Management. | Admin |
| Configuring product offerings and catalogs | Create the product offerings and catalogs, unless they've been previously defined. | Product catalog admin |
| Configure needs analysis | Create the needs templates for questionnaires that sales agents complete to get product recommendations for leads. | Product catalog admin |

Install Lead Management

If you have the admin role, you can install the Lead Management application. The application includes the demo data and installations that are related ServiceNow® Store applications and plugins.

Before you begin

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

Depending on your entitlements, you may have to install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The following items are installed with Lead Management:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see [Find components installed with an application](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Lead Management application (sn_lead_mgmt) using the filter criteria and search bar.

You can search for the application by its name or ID. If you can't find the application, request it from the ServiceNow Store.

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 box, review the application dependencies.

Dependent plugins and applications appear if they’re installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Lead Management.

4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|--|---|
| If demo data is available and you want to install it | <p>a. Select the Load Demo Data option.</p> <p>b. Select Install.</p> <div style="border: 1px solid #ccc; background-color: #e0f2f1; padding: 5px; margin-top: 10px;"> <p>Important: If you don't load the demo data during installation, it's unavailable to load later.</p> </div> |
| If the Load Demo Data option isn't available but you want demo data | <p>Load the demo data after installing Lead Management.</p> <p>a. Install Lead Management.</p> <p>b. Navigate to the All and in the Filter, type <code>v_plugin.list</code>.</p> <p>c. In the System Plugin list, search for Lead Management data model (sn_l2c_lead_mgmt_data_model) plugin.</p> <p>d. In the System Plugin Lead Management data model window, under Related Links, select Install Demo Data Only.</p> |

Install and configure Opportunity Management

Install the Opportunity Management application, which enables sales agents and account executives to get pre-sales product recommendations based on customer needs. You then assign the user roles and configure related features, such as needs analysis, used in Opportunity Management.

Admins and users with various roles, such as application admins and sales operation specialists, complete the following configuration tasks to set up Opportunity Management.

Configuration tasks for Opportunity Management

| Task | Description | Role |
|---|---|-------|
| Install Opportunity Management | Install Opportunity Management from the ServiceNow® Store. | Admin |
| Assign user roles in Sales and Order Management | Assign the user roles for Opportunity Management, Product Catalog | Admin |

Configuration tasks for Opportunity Management (continued)

| Task | Description | Role |
|--|---|---------------------------------|
| | Management, and Pricing Management. | |
| Configuring product offerings and catalogs | Create the product offerings and catalogs, unless they've been previously defined. | Product catalog admin |
| Configuring product pricing | Define the price lists , pricing strategies, and other pricing features that you want to use, unless they've been previously defined. | Pricing admin |
| Configure needs analysis | Create the needs templates for questionnaires that sales agents complete to get product recommendations for sales opportunities. | Product catalog admin |
| Configure location-based transactions Configure location-based transactions | Activate the system property for location-based transactions and set up the rule entity and product eligibility decision rules. | Admin and product catalog admin |
| Create opportunity stages | Create sales cycle stages for an opportunity. | Sales operation specialist |
| Create a sales cycle for an opportunity | Create a sales cycle type for an opportunity. | Sales operation specialist |
| Associate a sales cycle with the opportunity stage | Link one or multiple opportunity stages with a sales cycle. | Sales operation specialist |

Install Opportunity Management

If you have the admin role, you can install the Opportunity Management application. The application includes the demo data and installations that are related ServiceNow® Store applications and plugins.

Before you begin

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

Depending on your entitlements, you may have to install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The following items are installed with [Opportunity Management](#):

- Plugins
- Store applications

- Roles
- Tables

For more information on viewing components that are installed with an application, see [Find components installed with an application](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the **Opportunity Management** application (sn_opty_mgmt) using the filter criteria and search bar.

You can search for the application by its name or ID. If you can't find the application, 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 box, review the application dependencies.

Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install **Opportunity Management**.

4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|--|---|
| If demo data is available and you want to install it | <ol style="list-style-type: none"> a. Select the Load Demo Data option. b. Select Install. <div style="background-color: #e0f2f1; padding: 5px; border: 1px solid #ccc;"> <p>Important: If you don't load the demo data during installation, it's unavailable to load later.</p> </div> |
| If the Load Demo Data option isn't available but you want demo data | <p>Load the demo data after installing Opportunity Management.</p> <ol style="list-style-type: none"> a. Install Opportunity Management. b. Navigate to the All and in the Filter, type <code>v_plugin.list</code>. c. In the System Plugin list, search for Opportunity Management data model (sn_l2c_opportunity_mgmt_data_model) plugin. d. In the System Plugin Opportunity Management data model window, under Related Links, select Install Demo Data Only. |

Create opportunity stages

Create sales cycle stages for an opportunity.

Before you begin

Role required: sales_ops_specialist

Procedure

1. Navigate to **All > Opportunity Management > Opportunity Stages.**
2. Select **New** to create an opportunity stage or select an existing opportunity stage to make changes.
3. Fill in the fields in the Opportunity Stage form.

Opportunity Stage form

| Field | Description |
|--------|---|
| Name | Name of the opportunity stage. For example, Qualify or Develop or Propose or Negotiate. |
| Order | Number of orders that is in the opportunity stage. |
| Type | Type of the opportunity stages. For example, Open or Closed. |
| Active | When the option is selected, the opportunity stage is active. |

4. Select **Submit.**
The sales cycle stage has now been created for the opportunity.

Create a sales cycle for an opportunity

Create a sales cycle type for an opportunity.

Before you begin

Role required: sales_ops_specialist

Procedure

1. Navigate to **All > Opportunity Management > Sales Cycle Types.**
2. Select **New** to start a new sales cycle type or select an existing sales cycle type to make changes.
3. Fill in the fields in the Sales Cycle Type form.

Sales Cycle Type form

| Fields | Descriptions |
|-------------------|---|
| Code | Type of sales cycle. For example, NEW RENEW or NEWCUST or UPSELL. |
| Short Description | More information about the new opportunity sales cycle. |
| Active | When the checkbox is selected, the sales cycle is active. |

4. Select **Submit.**
The sales cycle type has been created for the opportunity.

What to do next

Add sales cycle stages to your opportunity. To learn more, see [Create opportunity stages](#).

Associate a sales cycle with the opportunity stage

Link one or multiple opportunity stages with a sales cycle.

Before you begin

Role required: sales_ops_specialist

Procedure

1. Navigate to **All > Opportunity Management > Sales Cycle Types**.
2. Select an existing sales cycle type to make changes.
3. On the **Sales Cycle Stages** related list, select **Edit**.
4. Select and move one or multiple opportunity stages from Collection on the left to the Sales Cycle Stages List on the right.
5. Select **Save**.
The sales cycle and opportunity stages have been associated.

Install and configure Quote Management

Learn how to set up Quote Management so that your sales agents can create and manage customer quotes.

Admins and Quote Management administrators complete the following configuration tasks to set up Quote Management.

Configuration tasks for Quote Management

| Task | Description | Role |
|--|--|-------|
| Install Quote Management | <p>Install Quote Management from the ServiceNow® Store Store. It provides these key features for your agents:</p> <ul style="list-style-type: none"> • Build quotes with products and pricing, then present them to customers. • Use the product configurator to select simple and configurable product offerings. • Add pricing adjustments to products. • Convert quotes to product orders once customers have approved. | Admin |
| Assign user roles in Sales and Order Management applications | Set the roles for Quote Management users and your product catalog and pricing administrators. | Admin |

Configuration tasks for Quote Management (continued)

| Task | Description | Role |
|--|---|------------------------|
| Configuring product offerings and catalogs | Create the product offerings and catalogs, unless they've been previously defined. | Product catalog admin |
| Configuring product pricing | Define the price lists, pricing strategies, and other pricing features that you want to use, unless they've been previously defined. <ul style="list-style-type: none"> • Set the price lists and pricing strategies that control how pricing is applied to quotes. • If you're using cost books, create the cost books that define the unit costs for product offerings. | Pricing admin |
| Activate cost books and cost margins | Use the <code>sn_quote_mgmt_core.enable_cost_margin_calculation</code> system property to activate the cost book and cost margin features in Quote Management. These features enable sales agents to view product unit costs and cost margins when creating sales quotes. | Quote Management admin |
| Activate location-based transactions | Use the <code>sn_sales_common.enable_location_based_transactions</code> system property to activate location-based transactions in Quote Management. | Admin |

Install Quote Management

If you have the admin role, you can install the Quote Management application. The application includes the demo data and installations that are related ServiceNow® Store applications and plugins.

Before you begin

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

Depending on your entitlements, you may have to install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The following items are installed with Quote Management:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see [Find components installed with an application](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Quote Management application (sn_quote_mgmt) using the filter criteria and search bar.

You can search for the application by its name or ID. If you can't find the application, request it from the ServiceNow Store.

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 box, review the application dependencies.

Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Quote Management.

4. If you want to install demo data, do one of the following depending on your entitlements.

| Demo data install task | Description |
|---|--|
| <p>If demo data is available and you want to install it</p> | <p>a. Select the Load Demo Data option.</p> <p>b. Select Install.</p> <div style="background-color: #e1f5fe; padding: 5px; border: 1px solid #cfe2f3;"> <p>Important: If you don't load the demo data during installation, it's unavailable to load later.</p> </div> |
| <p>If the Load Demo Data option isn't available but you want demo data</p> | <p>Load the demo data after installing Quote Management.</p> <p>a. Install Quote Management.</p> <p>b. Navigate to the All and in the Filter, type <code>v_plugin.list</code>.</p> <p>c. In the System Plugin list, search for Quote Management data model (sn_l2c_quote_mgmt_data_model) plugin.</p> <p>d. In the System Plugin Quote Management data model window, under Related Links, select Install Demo Data Only.</p> |

Integrate with Contract Management Pro

With the integration of Quote Management and Contract Management Pro, sales agents can initiate contract requests while finalizing a deal and formalizing agreements between you and your customers.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Definition > Plugins**.
2. Search for Contract Management for Sales and Order Management (Quote Management with Contract Management Pro) plugin (com.sn_som_clm).

i Note: To activate this plugin, there's a dependency on the Contracts core plugin (com.sn_cm_core). Verify that it's installed to use the contract creation workflow from a quote.

3. Select **Activate**.
4. Complete the initial configuration steps to set up this integration.
For more information on setting up Contract Management Pro, see [Configure Contract Management Pro](#).

What to do next

To learn more, see [Set up Contracts Core](#) and [Initiate a contract request](#).

Configure Sales Agreement Management

Use the Sales Agreement Management application to create sales agreements between a buyer and a seller for future transactions.

Activate Sales Agreement Management

As an admin, you can activate the following plugins to enable users to create and manage sales agreements. For more information, see [Activate a plugin](#).

Sales Agreement Management plugins

| Plugin | Description | Dependency |
|--|---|--|
| Sales Agreement Data Model [com.sn_sales_agmt_core] | This plugin provides foundational objects to manage sales agreements. | <ul style="list-style-type: none"> • Product Catalog Management Core[com.sn_prd_pm] • Price Management [com.sn_csm_pricing] |
| Sales Agreement Management [com.sn_sales_agmt_wf] | This plugin provides workflow to create and manage sales agreements. | <ul style="list-style-type: none"> • Sales Agreement Data Model [com.sn_sales_agmt_core] • Lead to Cash Core [com.sn_l2c_core] |

Sales Agreement Management plugins (continued)

| Plugin | Description | Dependency |
|--------|-------------|--|
| | | <ul style="list-style-type: none"> Quote Management Application [com.sn_l2c_quote_mgmt] <p>Note: You need to install the Quote Management Application plugin separately.</p> |

For more information on the installed roles and tables, see [Components installed with Sales Agreement Management](#). To view sales agreements from an account, you must manually configure the sales agreement related list on the Account form.

Request apps from the ServiceNow Store

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

Components installed with Sales Agreement Management

Several types of components are installed with activation of the Sales Agreement Management plugins, including tables and user roles.

Roles installed

Sales Agreement roles details

| Role | Description | Contains roles |
|---|---|--|
| sn_sales_agmt_core.sales_agreement_viewer | This role enables users to perform read operations on sales agreements, sales agreement lines, and related data such as characteristics, price lists, and other tables. | <ul style="list-style-type: none"> sn_prd_pm.product_catalog_viewer (contains sn_prd_pm.characteristics_viewer) sn_quote_mgmt_core.quote_viewer (contains sn_csm_pricing.pricelist_viewer) |

Sales Agreement roles details (continued)

| Role | Description | Contains roles |
|---|--|---|
| sn_sales_agmt_core.sales_agreement_writer | This role enables users to perform, create, read, and update operations on sales agreements and sales agreement lines. | sn_sales_agmt_core.sales_agreement_viewer |

Tables installed

Sales Agreement Management tables

| Table | Description |
|---|---|
| sn_sales_agmt_core_sales_agreement | Stores all the sales agreements. |
| sn_sales_agmt_core_sales_agreement_line | Stores the lines of a sales agreement indicating the products and services agreed for sale. |
| sn_sales_agmt_core_line_characteristic | Stores the attributes of products and services to be sold. |
| sn_sales_agmt_core_line_adjustment | Stores the adjustments applied during negotiation. |

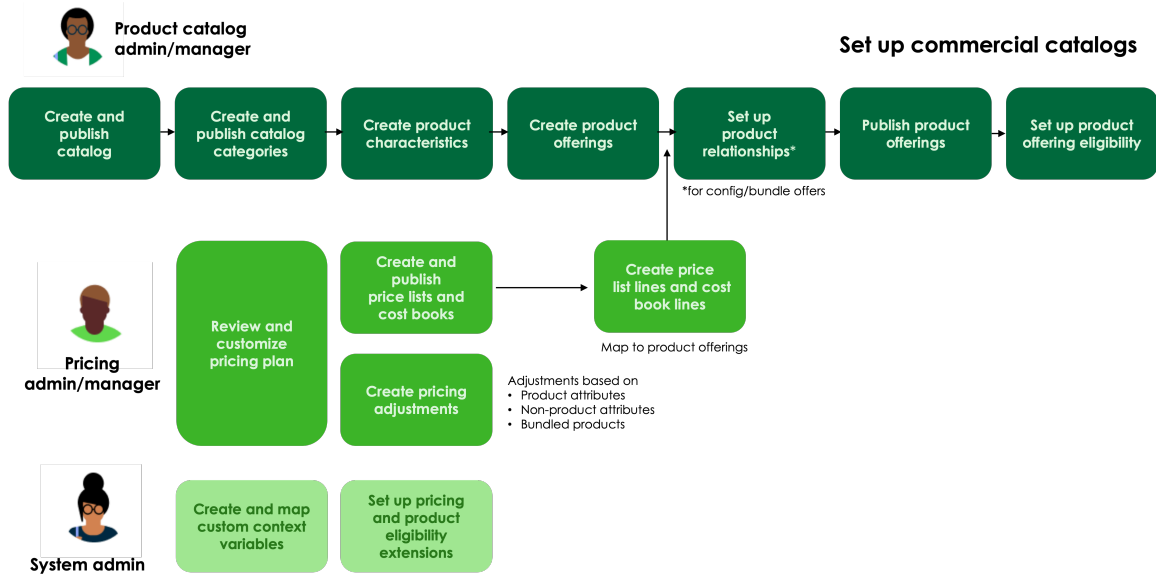
Configuring product offerings and catalogs

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

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

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

Product catalog and pricing configuration workflow



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

Overview of product offering and catalog configuration

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

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

Product offering and catalog management configuration tasks

| Configuration task | Description |
|---|--|
| Create a product offering catalog | Create a catalog, which is the top-level entity in the catalog hierarchy. Catalogs can have categories, and categories can have subcategories or product offers. |
| Create a product offering category | Define a product offering category used to organize similar product offerings in a catalog. Catalog categories make it easier for agents to browse and navigate product offerings when creating opportunities, quotes, and orders. |
| Create product characteristics and characteristic options | Define the specific attributes, properties, and options that distinguish a product offering, influencing its configuration and pricing. |
| Create product offerings | Configure and add product offerings to catalogs and categories. Once published, product offerings are available to Sales Customer Relationship Management agents as they create opportunities, quotes, and orders. |
| Add product visuals | Add images and thumbnails to your product offerings to help agents as they build opportunities, quotes, and orders. |
| Create product offering relationships | Create product relationships to bundle products and services together to streamline the order process. Product offering relationships drive the order capture experience by letting |

Product offering and catalog management configuration tasks (continued)

| Configuration task | Description |
|--|---|
| | you group multiple product offerings into bundles. Bundles also let you offer special bundle pricing. |
| Control cascading quantity values in child product offerings | Control how the quantities for child line items in a product offering for a quote or order are calculated by using the <i>sn_prd_pm.enable_cascade_quantity</i> system property. |
| Add related contracts to product offerings | Add related contracts to your product offerings in the Sales Customer Relationship Management application. |
| Add a unit of measure to a product offering | Add a unit of measure (UOM) to a product offering in Sales Customer Relationship Management. |
| Create a product offering version | Create a product version to add updates to a published product offering. |
| Create product offering relationship groups | Combine bundles of product offerings into related groups in Sales Customer Relationship Management. |
| Configure needs analysis | Create needs templates, which are questionnaires from product selection guides that your agents use to determine what product offers can be added to opportunities. |
| Export and import product catalog entities | Export and import product catalog entities between ServiceNow instances. For example, you can promote catalog entities from a non-production instance to a production instance. |
| View product offering hierarchy and associated specification hierarchy | View the complete hierarchy of a product offering and any associated specifications (product, service, and resource). Use these views to verify that all entities have been defined and associated correctly. |
| Configure product offer eligibility | Filter the product catalog, product categories, and product offerings dynamically, to display only eligible product offerings for a customer in the product catalog. |


Create a product offering catalog

Catalogs are top level entities in the catalog hierarchy. Catalogs have categories and categories can have sub-categories or product offers.

Before you begin

Role required: *sn_prd_pm_product_catalog_admin* and *sn_prd_pm_product_catalog_manager*

Procedure

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

Product Offering Catalog form

| Field | Description |
|-----------------|--|
| Number | System-generated number that identifies the product catalog. |
| Name | Name of the catalog. |
| Thumbnail image | Thumbnail image of your catalog. Select Attach Image to upload your image. |
| Image | Image of your catalog. Select Attach image to upload your image. |
| Default | Option that indicates this catalog is the default catalog displayed to your agents. Agents can switch from one default catalog to another. |
| Description | A brief description of your product catalog, for example. |
| State | State of the catalog. The supported lifecycle states are Draft, Published, Retired, and Archived. |
| Start date | Date and time that the catalog is available for Sales Customer Relationship Management applications. Select the Calendar icon to choose the start date and time, then select OK . |
| End date | Date and time that the catalog is no longer available for use in Sales Customer Relationship Management. Select the Calendar icon to choose the end date and time, then select OK . |
| Code | Product code for the catalog. The system automatically generates a code based on the catalog Name entered, but you can change the value to any desired alphanumeric string. |

4. Select Save and then Publish.

The product offering catalog is in the Draft state.

5. Select Publish.

The catalog state changes to Published. The Categories tab opens for creating a product offering category.

What to do next

Create product offering categories.

Create a product offering category

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

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

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

Product Offering Category form

| Field | Description |
|-----------------|---|
| Number | A unique system-defined number that identifies the product category. |
| Name | Name of the category. |
| Leaf | Option indicating there are no subcategories for this category. Selecting Leaf means the category can have product offers but not subcategories. If Leaf isn't selected, the category can only have subcategories but not product offers. |
| Thumbnail image | Thumbnail image for the product offering category. Select Attach Image to upload your image. |
| Image | Image of the product offering category. Select Attach Image to upload your image. |
| Description | A brief description of the category. |
| State | State of the category: <ul style="list-style-type: none"> ○ Draft: Initial state of the category, before it's published. ○ Published: The product category has been published to the catalog. After a category is published, you can update it. You can delete, retire, or archive it if there are no associated product offerings. ○ Retired: Category has been retired and is no longer active. The category can't be updated. ○ Archived: Category has been archived and is no longer available for use. ○ Copied to Catalog: The product category has been copied. |

| Field | Description |
|------------|---|
| Start date | Date and time that the category is available in the catalog. Select the Calendar icon to choose the start date and time, then select OK . |
| End date | Date and time that the category is no longer used in the catalog. Select the Calendar icon to choose the end date and time, then select OK . |
| Code | Product code for the category. The system automatically generates a code based on the category Name entered, but you can change the value to any desired alphanumeric string. |

5. Select **Save**.
6. Associate the category to a catalog.
 - a. In the Catalogs tab, select **New**.
 - b. In the Catalog Category form, select the published Catalog to which this category belongs and select **Save**.
7. In the Details tab for the category, select **Publish**.
The category state changes to Published and is added to the selected catalog.
8. If needed, define the parent category and subcategories for the category using the Parent categories and Child categories tabs.

What to do next

[Create product offerings.](#)

Activate the display of product catalog visuals

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

Before you begin

Role required: admin

About this task

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

Procedure

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

Control cascading quantity values in child product offerings

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

Before you begin

Role required: admin

About this task

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

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

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

Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the `sn_prd_pm.enable_cascade_quantity` system property.
3. Set the property value for the cascading quantity feature in the **Value** field.
 - Enter `true` to activate this property.
 - Enter `false` to suppress this property if it's currently enabled.
4. Select **Update**.

If you enabled this property, quantity values are cascaded to the child lines for product offers. If you suppressed this property, quantity values are not cascaded to the child lines for product offers.


Create product offerings

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

Before you begin

Role required: `sn_prd_pm_product_catalog_admin` and `sn_prd_pm_product_catalog_manager`



Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Offerings > Product Offerings** and select **New**.

Note: You can also create a product offering from the product specification.
3. In the Details tab, fill in the fields.

Product Offering form

| Field | Description |
|--|--|
| Number | System-assigned number for the product offering. |
| Name | Alternative name for the product offering to help differentiate it from similar product names. |
| Display Name | Name of the product offering that is added. |
| Offering Type | Type of product offer. Select one of the following: <ul style="list-style-type: none"> Product: A product entity that an agent can add to an order using the CSM Configurable Workspace. Entitlement: An entity such as a warranty or subscription that can be added to an order by an agent. |
| Offering sub-type | Type of entitlement: <ul style="list-style-type: none"> Warranty Extended warranty License Subscription |
| Product specification | Functional view of a product offering that drives order fulfillment. |
| Product model | Name of the product model. |
| Create contract | Option indicating to agents that entitlement contracts can be added to the product order. If selected, service contracts are created after order fulfillment. Used when entitlements are managed as contracts. |
| Sellable | Option indicating that the product offering can be sold as a standalone item. If selected, the product offering can be sold as a standalone item. If not selected, the product offering can be sold as part of bundle but not as a standalone item. |
| Pricing method | Pricing method for the product: <ul style="list-style-type: none"> One-time: A single fee for the product. Recurring: A fee that occurs at scheduled intervals. You can set the periodicity for a recurring fee. |
| Periodicity | Recurring pricing: Monthly or annually. |
| Copy child specification characteristics | Option that when selected copies all child specification characteristics in a specification hierarchy. For example, if the product offer has an associated product specification, selecting this option indicates that the characteristics are inherited from the child specifications in addition to the parent specification. <p>Displays when a product specification for a composite product is entered and the product offering is saved.</p> |

| Field | Description |
|---------------------------|---|
| Description | Short description of the product offering. The description helps the order agent understand the product when placing an order. |
| Offering Catalog | Catalog that contains the product offering. |
| Start Date | Date and time that the product offering is available for Sales Customer Relationship Management applications. Select the Calendar icon () to choose the start date and time, then select OK . |
| End Date | Date and time that the product offering is deleted from Sales Customer Relationship Management applications. Select the Calendar icon () to choose the end date and time, then select OK . |
| State | State of the product offering. States include In Draft, Published, Retired, and Archived. You can update product offerings In Draft state. |
| Distribution channel | Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels. If you're using the Service Exchange Order Management for Providers application, enter Service Exchange. |
| Owner | Person responsible for the product offering. |
| Monthly recurring charges | Charges that recur every month. Monthly recurring charges are supported for backward compatibility. Use price lists to define prices. |
| Non recurring charges | Charges that are applied once. Supported for backward compatibility. Use price lists to define prices. |
| Code | System-generated alphanumeric number based on the product name. Although system generated, you can edit the code to represent a SKU or any other industry specific product codes. |
| Version | Version number that is assigned to this product offering version. |
| Initial version | Name of the initial version of the product offering. |
| Previous version | Several versions of a product offering can exist. This field lets you view previous versions. |
| Contract term | Length of the contract: <ul style="list-style-type: none"> ○ 12 months ○ 24 months ○ 36 months ○ 48 months ○ 60 months |

4. Select Save and then select Publish.

What to do next

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

Create product characteristics and characteristic options

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


Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

Use this procedure to build product characteristics and characteristic options, which you add to product offerings. For example, If the product offering is a bike, characteristics might include bike size and color, and the characteristic options are the option choices, such as the various bike sizes and colors available. The options appear in the product configurator as agents are creating orders or building quotes.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Characteristics > Characteristics**.
3. Select **New**.
4. In the form, fill in the fields.

Create New Characteristic

| Field | Description |
|-------------|--|
| Name | Name of the product characteristic. |
| Code | System-generated alphanumeric number based on the product characteristic name. Although system generated, you can edit the code to represent a SKU or any other industry specific product codes. |
| Description | Brief description of the characteristic, for example DSL speed. |
| Input type | List of input options that identify the functionality for the characteristic. Depending on the input type, additional options become available: <ul style="list-style-type: none"> ○ Address: Input for the entry of an address ○ Attachment: Input for the attachment of an external document. ○ CheckBox: Option that you select or clear. |

| Field | Description |
|-------|--|
| | <ul style="list-style-type: none"> ○ Choice: Options that you choose for the characteristic. If you select Choice, you can define options for the characteristic in the Characteristic Options tab. ○ Date/time: Input for the entry of a date and time of day. ○ Duration: Input for the entry of a duration of time. ○ Email: Input for the entry of an email address. ○ Label: Input for the selection that enables the production of a label. ○ Single Line Text: Input for the free-form entry of a single line of text. ○ Yes/No: Input that requires the selection of a Yes/No response. |

5. Select Save.

Depending on the **Input type** you selected, you may need to complete additional steps if the new characteristic has more options.

6. If the new characteristic has more options, complete the following steps:

a. In the Characteristic Options tab, select **New**.

b. Enter the Option for the characteristic and select **Save**.

The option is added to the characteristic. Repeat this step to add as many options as needed. Later, when you are configuring product offerings, you can add the characteristics and options.

What to do next

- [Add product visuals](#)
- [Add product catalog categories](#)
- [Create product offering relationships](#)
- [Add related contracts to product offerings](#)
- [Add a unit of measure to a product offering](#)
- [Create a product offering version](#)
- [Create product offering relationship groups](#)
- If you're creating telecommunications products, create the product, service, and resource specification categories and associate them with model categories.

Add characteristic and characteristic options to a product offering

Add characteristic and characteristic options to an existing product offering using the **Product Offering Characteristic** tab in Sales Customer Relationship Management.


Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

There are a number of ways to create characteristic and characteristic options. The following procedure lets you add characteristics to product offerings that already exist but have not been published.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Offerings > Product Offerings** and select the product offering that you're working with.
3. In the **Product Offering Characteristics** tab, select **New**.
4. In the form, fill in the fields.

Product Offering Characteristic form

| Field | Description |
|-------------------------|--|
| Characteristic | Product offering characteristic. Select an existing characteristic. Select New to create a characteristic. |
| Characteristic option | Characteristic option for the product offering. Select an existing characteristic option or select New to create options. |
| Characteristic type | Option that lets you select a characteristic type. |
| Product offering | Name of the product offering. |
| Order | Numerical order for the options. Options designated with the number 1 appear first in the order. |
| Mandatory | Option indicating that the characteristic option is required to complete the order. |
| Default | Option indicating this characteristic option is the default choice. |
| Customer input required | Option indicating that consumer input is required for the product option. |

5. Select **Save**.
The product offering characteristic is added to the product offering. Select the characteristic in the **Product Offering Characteristics** tab to make further changes.

Add product visuals

Add visuals to your product offering in Sales Customer Relationship Management that let agents easily see what the product looks like.


Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

Add images to your product offerings so that order agents see the products they're placing into orders and quotes.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Offerings > Product Offerings** and select the product offering that you're working with.
3. Select the **Product Visuals** tab.
4. Select **New**.
5. On the form, fill in the fields.

Product Visuals

| Field | Description |
|------------------|--|
| Name | Name for the visual. |
| Product offering | Name of the product. |
| Active | Option indicating that a thumbnail image is used to depict the product. |
| Thumbnail image | Thumbnail visual of your product offering. Select Attach Image to upload the thumbnail image. |
| Primary | Option indicating that the thumbnail visual is the primary visual. |
| Image | Visual of your product offering. Select Attach Image to upload the image. |

6. Select **Save**.

Note: You must turn on the display of product visuals in product catalogs. For more information, see [Activate the display of product catalog visuals](#).

What to do next

- [Create product characteristics and characteristic options](#)
- [Add product catalog categories](#)
- [Create product offering relationships](#)
- [Add related contracts to product offerings](#)
- [Add a unit of measure to a product offering](#)
- [Create a product offering version](#)
- [Create product offering relationship groups](#)

Add product catalog categories

Use the Product Offering Categories tab to organize your products in groups in Sales Customer Relationship Management.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task


Product catalog categories help organize products into groups, which makes it easier for order agents to find products while creating orders or building quotes. Catalog categories are

associated with a catalog. For more information about catalogs, see [Create a product offering catalog](#).

Product offering catalog categories must be published before products can be added.

This procedure explains the Product Offering Category tab. To set up categories before adding products, see [Create a product offering category](#).

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Offerings > Product Offerings** and select the product offering you are working with.
3. Select the **Product Offering Categories** tab.
4. Select **New**.
5. On the form, fill in the fields.

| Field | Description |
|------------------|--|
| Category | Select an existing published category. |
| Product offering | Name of the product offering you are working with. |

6. Select **Save**.
7. Review the category information and select **Publish**.
The category is published and available to add product offerings too or create child categories.

What to do next

- [Create product characteristics and characteristic options](#)
- [Add product visuals](#)
- [Add related contracts to product offerings](#)
- [Add a unit of measure to a product offering](#)
- [Create a product offering version](#)
- [Create product offering relationship groups](#)

Create product offering relationships

Create product relationships to bundle products and services together to make ordering more convenient. Product offering relationships drive the order capture experience by letting you group multiple product offerings into bundles. Bundles can also be added to other bundles in relationship groups.


Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

Create product offering relationships that bundle products together. A bundled product offering can be ordered as a group and can't be changed.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Offerings > Product Offerings** and select the product offering you're working with.
3. Select the **Product Offering Relationships** tab.
4. Select **New**.
5. On the form, fill in the fields.

Product Offering Relationship form

| Field | Description |
|-------------------------------------|---|
| Display name | Name of the product relationship displayed in the interface. |
| Source product offering | System-generated reference to the source product offering. |
| Target product offering | The offering that is bundled with the source product offering. |
| Relationship type | Option that identifies how the products are related: <ul style="list-style-type: none"> ○ None - Indicates that the bundled products have no relationship. ○ Implicit - Indicates the products grouped in a bundle have an implicit relationship. |
| Product offering relationship group | Reference to offer relationship groups used to logically group similar product offers. |
| Unit of measurement | Unit of measure for the bundled products. Select a unit of measure, for example Box or Case. |
| Default | Option indicating that the product offering relationship is the default. |
| Mandatory | Option indicating that the product offering relationship is mandatory. |
| Default quantity | Option indicating the default quantity of product relationships. |
| Max quantity | Option indicating the maximum quantity of products in the bundle. |
| Min quantity | Option indicating the minimum quantity of products in the bundle. These flags mean different things depending on whether each relationship is or is not part of a relationship group. |

6. Select **Save**.
The relationship is created. Select the relationship on the **Product Offering Relationships** tab to make further changes.

What to do next

- [Create product characteristics and characteristic options](#)
- [Add product visuals](#)
- [Add product catalog categories](#)
- [Add related contracts to product offerings](#)

- [Add a unit of measure to a product offering](#)
- [Create a product offering version](#)
- [Create product offering relationship groups](#)


Add related contracts to product offerings

Add related contracts to your product offerings in the Sales Customer Relationship Management application.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Offerings > Product Offerings** and select the product offering that you’re working with.
3. Select the **Related Contracts** tab.
4. Select **New**.
5. On the form, fill in the fields.

Contract Product Offering

| Field | Description |
|------------------|--|
| Contracts | Contract to add to the product offering. Select the contract from the list of contracts. |
| Product offering | System-generated entry reflecting the product offering you’re working with. |

6. Select **Save**.
The contract appears in the product offering under the **Related Contracts** tab. You can select the contract record to make further changes to the contract details.

What to do next

- [Create product characteristics and characteristic options](#)
- [Add product visuals](#)
- [Add product catalog categories](#)
- [Create product offering relationships](#)
- [Create a product offering version](#)
- [Create product offering relationship groups](#)


Add a unit of measure to a product offering

Add a unit of measure (UOM) to a product offering in Sales Customer Relationship Management.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Offerings > Product Offerings** and select the product offering that you're working with from the list.
3. Select the **Units of Measures** tab.
4. Select **New**.
5. On the form, fill in the fields.

Unit of Measure form

| Field | Description |
|------------------|---|
| Product offering | Name of the selected product offering. |
| Unit of measure | Option for selecting an existing unit of measure or select New to add a new unit of measure. |
| Default | Option indicating the selected UOM is the default. |
| Active | Option indicated the selected UOM is active. |

6. Select **Save**.

What to do next

- [Create product characteristics and characteristic options](#)
- [Add product visuals](#)
- [Add product catalog categories](#)
- [Create product offering relationships](#)
- [Add related contracts to product offerings](#)
- [Create a product offering version](#)
- [Create product offering relationship groups](#)

Create a product offering version

Create a version of a product offering when updates are needed to a published offering in Sales Customer Relationship Management.


Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

After a product offering is published, changes can't be made. To add changes to a published product offering, create a new version.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Offerings > Product Offerings** and select the product offering that you're working with from the list.
3. In the **Versions** tab, select **Create New Version**.
The next version of the product offering is displayed.

4. In the **Details** tab, make and save any changes, and then publish the offering.

Version history is maintained. Each version has its own life-cycle status.

What to do next

- Create product characteristics and characteristic options
- Add product visuals
- Add product catalog categories
- Create product offering relationships
- Add related contracts to product offerings
- Create product offering relationship groups

Create product offering relationship groups

Use relationship groups to organize child offer options or relationships into logical groups and set up cardinality rules at the group level in Sales Customer Relationship Management. Groups of product offerings then appear on the product configurator.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

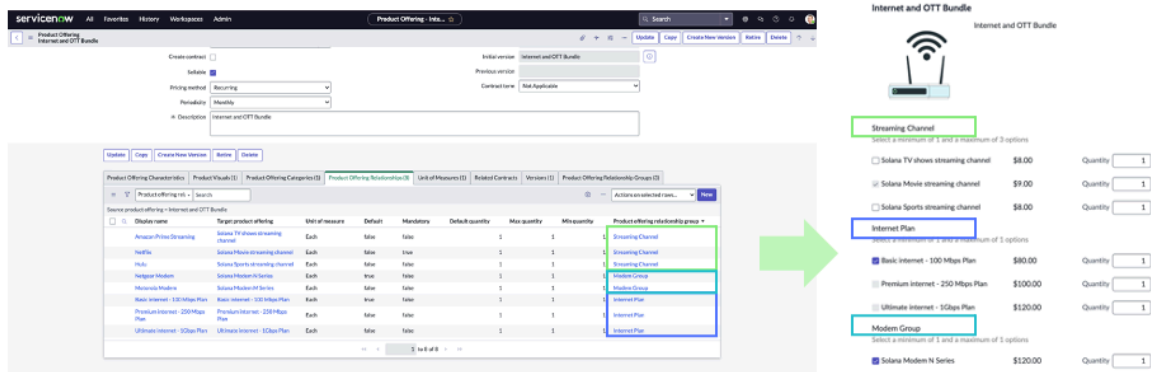
About this task

Create product offering relationship groups to organize product bundles into groups in the product configurator.


For example, an internet and OTT Bundle Product Offering is configured to have three product offering relationship groups: modem group, internet group, and the plan streaming channel group.

Bundled product offerings can be other bundles or individual product offerings.

Assign child product offerings in a bundle to the product offering relationship group, which presents the options in logical groups on the product configurator to the agent. The following example shows how product offering groups appear in the product configurator.



Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Offerings > Product Offerings** and select the product offering you're working with.
3. Select the **Product Offering Relationship Groups** tab.
4. Select **New**.

5. On the form, fill in the fields.

Product Offering Relationship Group form

| Field | Description |
|------------------|--|
| Name | Name of the relationship group. |
| Description | A description of the relationship group. |
| Product offering | Reference to the current product offering in context. |
| Order | Order in which the relationship group is displayed in the product configurator. |
| Max options | Maximum number of options that can be selected within the relationship group during configuration. |
| Min options | Minimum number of options that must be selected within the relationship group. |

6. Select **Save**.

The relationship group is created as part of the product offering.

What to do next

- [Create product characteristics and characteristic options](#)
- [Add product visuals](#)
- [Add product catalog categories](#)
- [Create product offering relationships](#)
- [Add related contracts to product offerings](#)
- [Add a unit of measure to a product offering](#)
- [Create a product offering version](#)

Product offer bundling with product specifications

Product Catalog Management supports the bundling of product offers that have associated product specifications or specification hierarchies at any level of the bundle.

Supported product offer bundles

As a product catalog admin or manager, you can create a bundle offer for the following product offer combinations:

- A top-level offer with several offers in multiple levels, but no product specification reference at any level.
- A top-level offer with several offers in multiple levels that can have a product specification reference at any level.
- A top-level offer with two or three levels of nesting, where the leaf-level product offer references a specification hierarchy.

When offer bundles that have a specification reference at different levels are added to a quote or an order, the appropriate transaction lines are generated with specification references and product offer references. If fulfillment is done in ServiceNow Order Management, the applicable domain orders are generated and records for sold products and product inventory are created or updated.

Characteristics inherited from product specifications

When you [create a product offering](#) and reference a product specification hierarchy, you can select an option called **Copy child specification characteristics**. When you select this option, the product offer inherits all the characteristics from the specification or specification hierarchy. For example, if a product offer has an associated product specification, the characteristics are inherited from the child specifications in addition to the parent specification. The attributes from parent specification are always inherited by the product offer.

You can also do the following when you create a bundle product offering:

- Add other characteristics to the offering, such as attributes for order enrichment, aside from characteristics inherited from the specification.
- Delete product offering characteristics that were inherited from the specification.

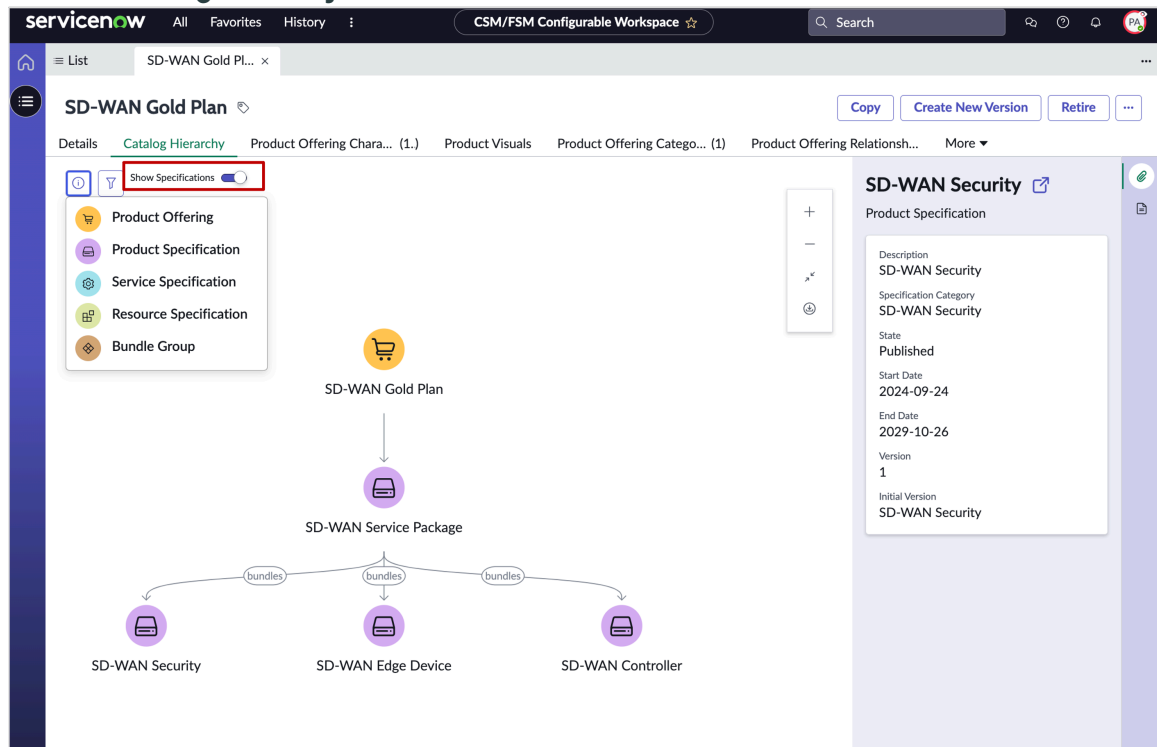
To learn more about product offerings, see [Create product offerings](#).

Product catalog hierarchy visualization

As a product catalog admin or manager, you can view the complete hierarchy of a product offering and any associated specifications (product, service, and resource). Use these views to verify that all entities have been defined and associated correctly.

For product offerings that have associated specifications, you can toggle the hierarchical view of the product offering to show its specification hierarchy. The hierarchical specification view shows the services that enable the product to be realized and the resources that are required to deliver those services. This view helps you visualize different aspects of a product offering, to validate the product and determine that the supporting services and resources are designed as needed. The hierarchy also highlights any relationships between specifications.

Product catalog hierarchy views



To view the product catalog hierarchy in the CSM Configurable Workspace, in the List view navigate to **Offerings > Product Offerings**. Select a product offering, then select the Catalog

Hierarchy tab. Use the **Show specification** toggle to switch between the product offering and specification hierarchical views.

The toggle legend identifies the product offering and specification icons displayed in the visualization. Similar to the selection of specification nodes, when you select any product offer node, the side panel displays the high-level details of the product offer. You can use the filter to select a node and display the hierarchy under the node rather than the whole tree.

Configuring product offer eligibility

You can filter the product catalog, offering categories, and product offerings dynamically, to display only the appropriate catalog, categories, and offerings for which a customer is eligible. Your agents see this filtered product information when they're creating opportunities, quotes, and orders.

Product offer eligibility overview

As a product catalog admin or manager, you create the business rules that filter the product catalogs, offering categories, and product offerings to display only the eligible products for customers when agents are creating quotes or orders. Filtering the products helps agents sell the correct products to customers. The filters are based on decision rules that you set in the following product eligibility matrices:

- **Product Offering Catalog Eligibility:** Define the eligibility rules to be applied to product offering catalogs. For example, you can use this matrix to filter sales catalogs based on customer location, such as country, state, or city.
- **Product Offering Category Eligibility:** Define the eligibility rules to be applied to product offering categories.
- **Product Offering Eligibility:** Define the eligibility rules to be applied to product offerings.

These matrices are frameworks for setting the conditions and the context variables that control the catalogs, product categories, and product offerings displayed. You can use system-defined context variables provided with Product Catalog Management and Pricing Management, or you can work with your admin to develop your own custom context variables, such as marketing segment or sales channel, to be used in the eligibility matrices.

Configuration tasks

Complete the following tasks to set up product eligibility matrices.

Product eligibility configuration tasks

| Task | Description | Role |
|--|--|----------------------------------|
| Create a custom context variable (if needed) | Review system-defined and existing custom context variables. If needed, add a new context variable, then map the customer variable to a transaction entity . | Admin |
| Create a rule entity filter | Define the eligibility filters for a product entity. | Product catalog admin or manager |
| Define product eligibility rules in a product eligibility matrix | Define the eligibility rules in the decision table of a product eligibility matrix. | Product catalog admin or manager |

Create a rule entity filter


Create a rule filter for the product entity to be used in a product eligibility matrix. The rule filter defines how the rule is applied, for example to a product catalog, category, or offering.

Before you begin

Determine the entity to which the filter applies, for example a particular product catalog, category, or a product offering.

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Context Rule Management > Rule Entity Filter**.
3. Select **New**.
On the form, fill in the fields.

Rule Entity Filter

| Field | Description |
|--|--|
| Filter Name | Name of the filter, for example Ineligible offers for CA . |
| Entity | Product entity for the rule: <ul style="list-style-type: none"> ○ Product catalog ○ Product offering category ○ Product offering |
| Filter type | Type of filter to be applied: <ul style="list-style-type: none"> ○ Static: Use a particular list to filter the product entity. ○ Dynamic: Set the conditions to filter the entity. |
| Code | System-generated alphanumeric number based on the filter name. |
| Product <catalogs, categories, or offerings> | The product catalog, category, or offering to be filtered, based on the Entity selected. This field appears only when Static is selected as the Filter type . |
| Condition | Condition to be used to filter the entity. Use the Set conditions builder to specify the conditions. For example, if you want to identify a specific product offering to be filtered, you could build a filter with the Display name field that contains the name of the product offering, such as Quadplay Home Tech. This field appears only when Dynamic is selected as the Filter type . |

4. Select **Save**.

The rule filter can now be used in a product eligibility matrix.

Define product eligibility rules in a product eligibility matrix

Define product eligibility rules by using the Product Offering Catalog Eligibility, Product Offering Category Eligibility, or Product Offering Eligibility Matrix.

Before you begin

Create the rule entity filters and define any new custom context variables needed to define the eligibility rules.

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task


When you define eligibility rules, consider the two modes for determining eligibility:

- **Ineligible:** Determine all the catalogs, categories, and product offers that are considered ineligible by default, then set your eligibility rules as needed.
- **Eligible:** Determine all the catalogs, categories, and product offers that are considered eligible by default, then set your ineligibility rules as needed.

Use the **Default result** field in the decision table for the product eligibility matrix to control the default mode.

The November 2024 release provides Version 2 of the product eligibility matrices, which now support eligibility rules based on transaction line attributes. You can also use service location context variables to set product eligibility rules for service locations: Service City, Service State, Service Country, and Service Zip.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Context Rule Management > Rule Matrices**.
3. Select the product eligibility matrix for the rule to be defined.
 - To set the eligibility rules for a product catalog, select the Product Catalog Eligibility Matrix.
 - To set the eligibility rules for a product category, select the Product Category Eligibility Matrix.
 - To set the eligibility rules for a product offering, select the Product Offering Eligibility Matrix.
4. Select **Edit Rule**.

The Decision Table for the selected eligibility matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions that control the eligibility.
5. In the decision table, set the rule to control the eligibility.
 - a. In the **Default result** field of the Condition section, review the eligibility mode being used and update it if needed.
 - b. Select **Add new decision row**.
 - c. In the row, select the column for the input (context variable) to be applied, such as the Billing State or Account.
 - d. In the **Active** column, set the value to true.

- e. In the Results section, under the **Eligibility Rules** column, select the eligibility state to be applied, for example Ineligible or Eligible.
- f. Under the **Rule Entity Filter** column, select the filter to be applied.

6. Select Save.

Review the **Validation Status** and **Validation Messages** columns to see if you're missing mandatory inputs, outputs or other information. If so, enter the appropriate information and select **Save**.

The filtered product entity (product catalog, category, or offering) is displayed or hidden to sales and order agents, depending on the filter.

Use extension points in product eligibility

Use extension points to call custom scripts from external sources that control product eligibility logic used in the Sales Customer Relationship Management (SOM) applications.

To access the available extension points, navigate to **All > Scripted Extension Points** and in the Extension Points list, select the desired extension point to view it.

Product eligibility extension points

| Extension point | Description |
|---|---|
| <code>sn_prd_pm.EligibilityRulesExtensionPoint</code> | Extension point for defining eligibility methods for product catalogs, categories, and offerings. |

Exporting and importing product catalog entities

As a product catalog admin, you can both export and import product catalog entities between ServiceNow instances. For example, you can promote catalog entities from a non-production instance to a production instance. Each process involves a separate set of steps.

Overview

You choose the product catalog entities to be exported. However, after you export your product catalog entities, certain base entities must be imported first to your target instance, such as characteristics, characteristic options, template, and Unit of Measure (UOM), since they're referenced by product offerings, product specifications, and service specifications. For this reason, import certain product catalog entities to your target instance in the following order:

1. Import the exported base entities.
2. Import the product offering catalog if you're exporting product offerings.
3. Import product offerings and product specifications.

Export and import process

Follow these steps to export and import product catalog entities.

Export and import product catalog steps

| Step | Description |
|---|--|
| Export product catalog entities | Export product catalog entities from one instance to another. The entities are exported as JSON and are downloaded to your local download directory. |

Export and import product catalog steps (continued)

| Step | Description |
|---|---|
| View export job status | Check the state of the export job. |
| Import product catalog entities | Import product entities exported as JSON files to another instance. |
| View import job status | Check the state of the import job. |

Note: Your system administrator must [add the Code field values to your main product catalog entities](#) on your source and target instances if they weren't added after upgrading to the Washington DC release.

Add Code field values to catalog entities after upgrading

Add the **Code** field values for the main product catalog entities. The system uses this field to determine whether the **Code** field values for an export catalog entity are to be inserted or updated in the target instance.

Before you begin

Role required: admin

About this task

In the Washington DC release, the **Code** field was added for the main product catalog entities. If the **Code** field values for these catalog entities are empty after upgrading to the Washington DC release, run both a fix script and an on-demand scheduled job to add the **Code** field values for the main product catalog entities.

The fix script adds the **Code** field values for characteristic options. The scheduled job adds the **Code** field values for product offerings, product offering catalog, and product, service, and resource specifications.

Procedure

1. On the source instance, navigate to **All > System Definition > Fix Scripts**.
2. Select the **Populate Code Field** and select **Run Fix Script**.
The system runs the script, which adds the **Code** field value to characteristic options.
3. Navigate to **All > System Definition > Scheduled Jobs**.
4. Select the *Schedule job to populate code field on master entities* job.
5. Verify that the **Run** field is set to On Demand and select **Execute now**.
The system runs the job, which adds the **Code** field value for product offerings, product offering catalog, product offering categories, and product, service, and resource specifications.
6. Select the *Schedule Job with upgrade script to populate code* job.
7. Verify that the **Run** field is set to On Demand and select **Execute now**.
The system runs the job, which adds the **Code** field value to the Product Catalog Management Core.
8. Repeat Steps 1 through 7 on the target instance.

Result

Your product catalog admin can export product catalog entities from the source instance and import them to the target instance.

Export product catalog entities

Export product catalog entities as a JSON file and save the file to your local download directory so that it can be imported to another ServiceNow instance.

Before you begin


After upgrading to the Xanadu release, check with your administrator that the **Code** field values are available for the main product catalog entities in your source and target instances. For more information, see [Add Code field values to catalog entities after upgrading](#).

Role required: product_catalog_admin

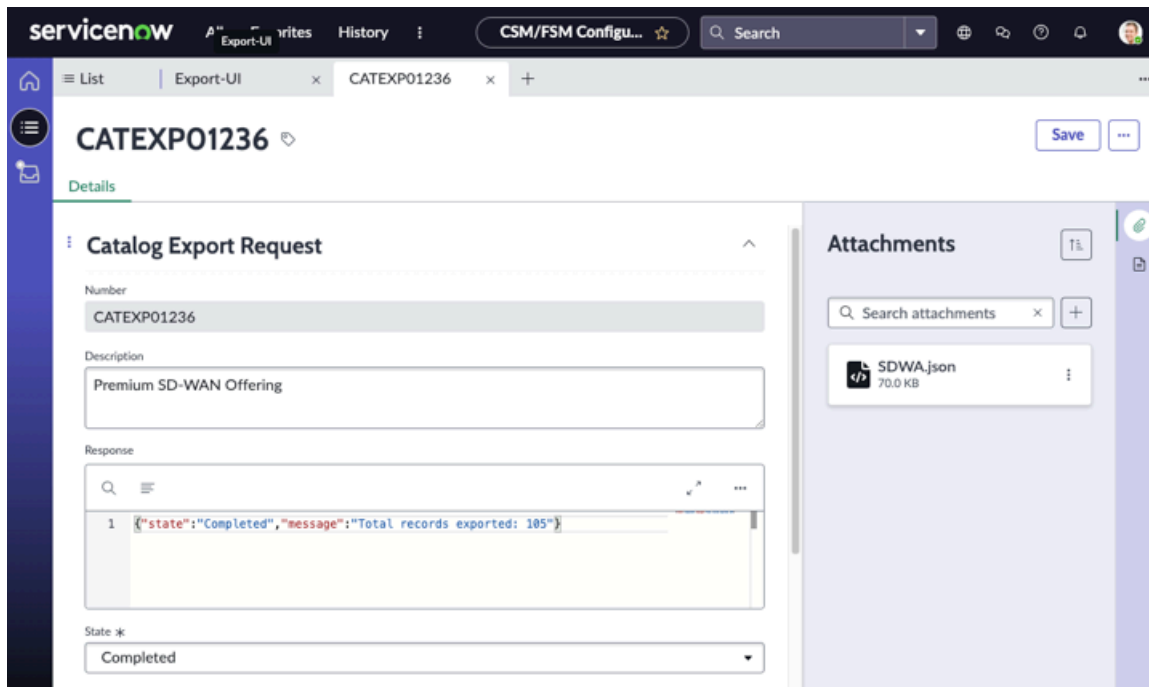
About this task

You can export catalog entities in any sequence, but they must be imported to a target instance in a certain order. You import base entities (characteristics and characteristic options, template, and unit of measure) first, followed by the product catalog, product offerings, and product specifications.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Export > Export Entities**.
The Export Entities list shows the previous export jobs.
3. Start an export job by selecting **Export Hierarchy**.
The **Catalog Export** form opens in the **Export-UI** tab.
4. In **Entity Type**, select the product catalog entity to be exported from your source instance.
The product catalog entities are: Product Offering, Product Specification, Service Specification, Product Offering Catalog, Characteristic, Unit of Measure, and Template.
5. Select the items that you want to export and select **Export**.
6. Give the export job a file name and description, then select **Submit**.
The export process begins and a message displays the catalog export ID.
7. Find and view the exported JSON file by refreshing the **Export Entities** list and selecting the export job.

The exported file appears in the **Attachments** pane.



8. Select the attachment to download the exported file.
The file is downloaded as a JSON file and saved to your local download directory.

What to do next

- [Import product catalog entities](#)
- [View export job status](#)

View export job status

Check the status of an export job for product catalog or pricing entities to see if it's in progress or completed.

Before you begin

Role required: product_catalog_admin for catalog entities, sn_csm_pricing_pricelist_administrator for pricing entities

Procedure

1. In the **CSM Configurable Workspace**, select the **List**  view.
2. Navigate to **Export > Export Catalog**.
The **Export Catalog** list shows the status of export jobs.
3. In the **State** column for the export job, view the status.

What to do next

If the export job is complete, [import the product catalog entities](#) or [import the pricing entities](#) to your target instance.


Import product catalog entities

Import product catalog entities by using the ServiceNow Platform import function.

Before you begin

Role required: product_catalog_admin

Procedure

1. Go to the target instance where you want to import the data.
 2. Navigate to **All > Product Catalog Management > Catalog Import > Import**.
The Catalog Import Data Source window opens.
 3. If the following message appears, select the link to change the application scope to Product Catalog Management.
-
4. Attach the JSON file by selecting the **Attachments** () icon.
 5. Select **Choose file** and select the file you want to import.
 - Note:** When you're importing files to a target instance, import the files in a certain order, based on the type of entity:
 - a. Import the exported base entities first, for example characteristics, characteristic options, template, and Unit of Measure (UOM).
 - b. Import the product offering catalog if you're exporting product offerings.
 - c. Import product offerings, product specifications, and service specifications.
 6. When the file is uploaded, close the Attachments window.
 7. Under Related Links, select **Load All Records**.
The data from the imported file loads, and a Progress window opens showing the imported job.
 8. Select **Run Robust Transform**, then select the **Transform** button.
 9. In the Progress window under the Next Steps section, select the imported file name to view the results.
The imported data is loaded into the correct tables.
 10. Navigate to the Entity list view of the entity that you imported to check the imported data.

What to do next

- [View export job status](#)
- [View import job status](#)

View import job status

Check the status of an import job for product catalog or pricing entities.

Before you begin

Role required: product_catalog_admin for catalog entities and sn_csm_pricing_pricelist_administrator for pricing entities

Procedure

1. Navigate to the product catalog or pricing module.
 - To check product catalog entities, navigate to **All > Product Catalog Management > Catalog Import**.
 - To check pricing entities, navigate to **All > Pricing > Import**.
2. Select the links under **Related Links** to view import job status:

- Import sets - View the import sets for this data set.
- Loaded Data - View the newly imported data for catalog entities in the Catalog Import Data Source table [sn_prd_pm_catalog_import_data_source] or for pricing entities in the Pricing Import Data Source [sn_csm_pricing_import_data_source] or sn_csm_ctxrul_mgt_import_data_source staging tables.
- Run Robust Transform - Transforms a loaded import set using a robust transform.
- Import Log - Opens the import log.

Caching in Product Catalog Management

The Product Catalog Management application uses caching to improve user interface performance when agents access product catalogs and product offerings through the product configurator.

Overview

The product offering catalog and configurable product offerings have hierarchical structures that require frequent database retrieval when they're used. To improve performance, these hierarchical structures are cached when you publish these features.

As a product catalog admin or manager, when you make the following changes to a published product offering or product offering catalog, you must update the associated cache so that you can immediately see the changes just made:

- **Unit of Measure (UOM)** in product offerings – Although product offerings cannot be changed after you publish them, you can change the default **Unit of Measure**. After updating the UOM, you must update the product offering cache.
- **Product offering catalog changes** – If you change the hierarchies for catalog to category or category to sub-category hierarchies, you must update the product offering catalog cache.

For details on regenerating these caches, see [Update a cache in Product Catalog Management](#).

Update a cache in Product Catalog Management

Regenerate the cache associated with product offerings or product offering catalogs after changing the **Unit of Measure** in a product offering or category-related hierarchies in a product offering catalog.

Before you begin

Role required: sn_prd_pm.product-catalog_admin, sn_prd_pm.product-catalog_manager, or admin

Procedure

1. Navigate to the record that you updated.

| Feature change | Navigate to |
|--|---|
| <p>Unit of Measure (UOM) for a product offering</p> | <p>a. Navigate to All > Product Catalog Management > Product Offering.</p> <p>b. Select the product offering record that you just updated.</p> |

| Feature change | Navigate to |
|--|---|
| <p>Product offering catalog changes</p> <ul style="list-style-type: none"> ○ Catalog to category ○ Category to sub-category | <p>a. Navigate to All > Product Catalog Management > Product Offering Catalogs.</p> <p>b. Select the product offering catalog record that you just updated.</p> |

2. Right-click the **Additional actions** menu in the record header and select **Regenerate Configuration JSON**.
 The system immediately updates the associated cache for the product offering or product offering catalog. You can then view the changes that you made to the **Unit of Measure** in a product offering or the product offering catalog.

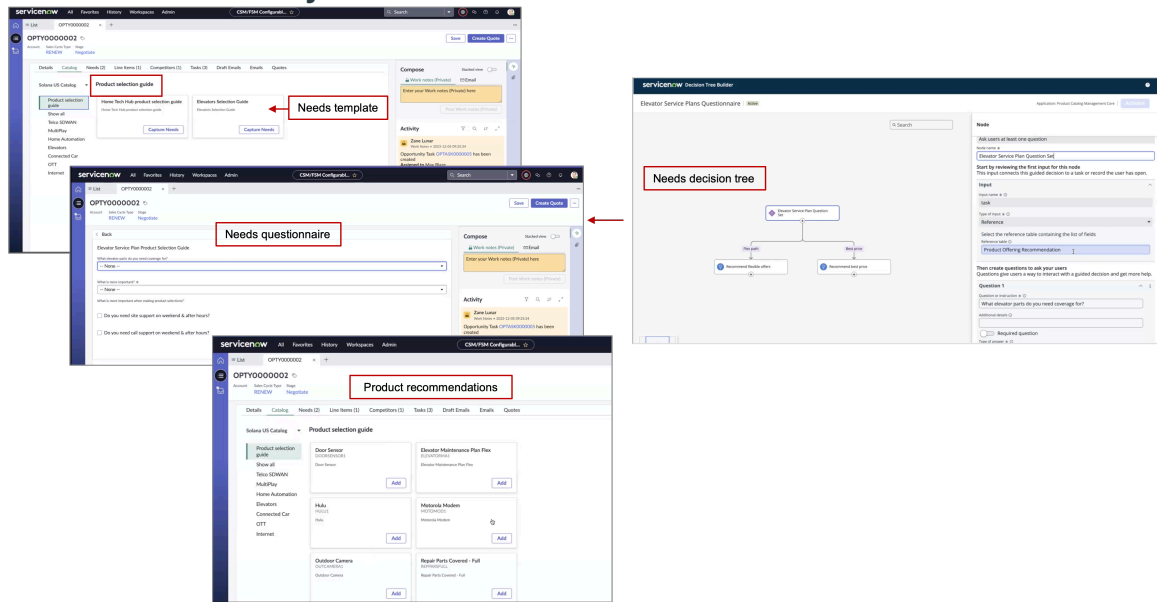
Configuring needs analysis

As a product catalog administrator, you can create needs templates, which are questionnaires that agents use to find product offers to add to a lead or opportunity. Questionnaires function as product selection guides. When agents complete a questionnaire based on customer input, they get product recommendations that they can add to a lead or opportunity.

Overview of needs analysis

When agents create a lead in the Lead Management application or an opportunity in the Opportunity Management application, a product selection guide is displayed in the product catalog. The product selection guide lists the needs templates that agents can choose to get product offer recommendations.

Elements of needs analysis



Needs template

Product selection guides associated with the product catalog display one or more needs templates. Each needs template is a questionnaire that has a set of guided questions that agents answer to get product recommendations for a customer. Each template is associated with a needs decision tree.

Needs decision tree

A multi-step, guided decision process that presents a series of questions to the agent. The decision tree defines the question nodes, expected answers,

connection points, decision logic, and guidance for decision paths in the questionnaire. You use Decision Tree Builder to create and build the decision tree.

Product recommendations

The product offerings suggested for an opportunity, based on the results of the needs questionnaire.

Working with decision trees

You configure decision trees by adding nodes, defining paths, and attaching guidances in Decision Tree Builder. This tool is a canvas for diagramming the basic elements in a decision tree, such as the question nodes and decision paths.

Before creating decision trees for needs templates, review how decision trees work:

- [Decision trees in Guided decision](#) - Learn the basic elements of a decision tree, such as node types, linking inputs in nodes, and decision tree paths.
- [Example configuration of a decision tree](#) - Review an example decision tree, including preparations for creating a decision tree, to understand the end-to-end configuration of a decision tree.
- [Answer types for questions](#) - Learn about the various types of answers to questions, such as Choice, Date, or Integers.

Setting up needs analysis

Follow these steps to configure needs analysis:

1. [Create a product recommendation.](#)
2. [Create a decision tree for a needs template.](#)
3. [Build a needs decision tree.](#)
4. [Create a needs template and set the catalog relationship.](#)

Create a product recommendation

Set the product offering to be used as a product recommendation for a needs template.

Before you begin

Product offerings must be defined and published before they can be set as a product recommendation.

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm.product-catalog_admin, admin

Procedure

1. Navigate to **All > Product Catalog Management > Needs > Product Offering Recommendations.**
2. Select **New.**
On the form, fill in the fields:

Product Offering Recommendation New record form

| Field | Description |
|-------|---|
| Name | Name of the recommended offering displayed to the agent. For example: |

| Field | Description |
|------------------|---|
| | Recommend Flex or Recommend Quad Play service bundle. |
| Description | Brief description of the recommendation. For example: Recommending flex offers based on customer needs. |
| Product Offering | Product offerings to be recommended. |

3. Select **Submit.**

The selected product offerings are available as product offering recommendations and can be selected as guidance nodes in a needs decision tree.

What to do next

[Create a decision tree for a needs template.](#)

Create a decision tree for a needs template

Create a decision tree that defines the questions that agents answer to determine customer needs and get product recommendations.

Before you begin

Before creating decision trees, review the following information:

- [Decision trees in Guided decision](#) - Become familiar with the basic elements of a decision tree and how they work, such as node types, linking inputs in nodes, and decision tree paths.
- [Example configuration of a decision tree](#) - Walk through an example decision tree, including preparations for creating a decision tree, to understand the end-to-end configuration of a decision tree.
- [Answer types for questions](#) - Learn about the various types of answers, such as Choice, Date, or Integers.

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm.product-catalog_admin

Procedure

1. Navigate to **All > Product Catalog Management > Needs > Decision Trees.**

2. Select **New.**

On the form, fill in the fields.

Decision Tree form

| Field | Description |
|--------------|---|
| Name | Name of the decision tree. |
| Action Label | Label of the decision tree displayed on the needs template card in the product selection guide. |
| Description | Brief description of the decision tree displayed on the needs template card in the product selection guide. |
| Title | Name of the decision tree on the needs template card in the product selection guide. |

| Field | Description |
|-----------------------|--|
| Show a dismiss button | Option that shows or hides the Dismiss button that cancels the flow of a decision tree during opportunity creation. This field is enabled by default. |

3. Select **Submit**

A decision tree is created with the name specified in the **Name** field.

What to do next

[Build a needs decision tree](#) using Decision Tree Builder.

Build a needs decision tree

Define the decision tree question nodes, decision paths, and guidance for each decision path using Decision Tree Builder.


Before you begin

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm.product-catalog_admin

About this task

As you build your decision tree, for example after adding a decision node or a path, you save and close the decision tree record. To continue working on the tree, navigate to the Decision Trees list, select the decision tree record, and open it in Decision Tree Builder, as described in steps 1 through 3 of this procedure.

Procedure

1. Navigate to **All > Product Catalog Management > Needs > Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, define the start node:
 - a. Select **New node**
 - b. In the **Node name** field, enter a name for the start node.
 - c. In the **Reference table** field, select the Product Offering Recommendation table.
 - d. Enter the question for the agent to answer.
You can make the question mandatory by selecting the **Required question** field and enter more details in the **Additional details** field.
 - e. Select the type of answer for your question.
For a description of the answer types, see [Answer types for questions](#) .
 - f. **Optional:** Add more questions.
 - g. Select **Save and close**.
5. Continue building your decision tree in Decision Tree Builder.

| Option | Steps |
|---|---|
| <p>Determine the next node displayed in a deci </p> | Configure a path to set the conditions for when the next question is displayed in a decision tree. |
| <p>Add a follow-up set of questions or instruc </p> | Configure a question node to add follow-up questions or instructions. An answer to these questions either leads to a guidance or a further set of questions. |
| <p>Provide actions to agents in a decision </p> | Configure a guidance node so agents can view the product recommendation after completing the questionnaire. |
| <p></p> | <p>When your decision tree is complete, select Activate in Decision Tree Builder, which validates your tree. If there are no errors, select Activate now in the confirmation message dialog box.</p> <p>The decision tree status changes to active.</p> |

What to do next

Create a needs template and set the catalog relationship.

Create a needs template and set the catalog relationship

Define a needs template for a decision tree and associate the template with the product catalog to which it belongs.

Before you begin

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm.product-catalog_admin

Procedure

1. Navigate to **All > Product Catalog Management > Needs > Needs template**.
2. Select **New**.
On the form, fill in the fields.

Needs Template

| Field | Description |
|---------------|---|
| Number | Unique system-assigned number that identifies the needs template. |
| Name | Name of the needs template, for example Home Tech Product Selection Guide. |
| Decision tree | Name of the decision tree that has the questionnaire to determine customer product needs. |
| Description | Brief description of the needs template. |
| Start date | Date and time that the needs template becomes effective and is listed in the product selection catalog. |

| Field | Description |
|----------|---|
| End date | Date and time that the needs template is no longer effective and not listed in the product selection catalog. |
| State | Stage of the needs template: <ul style="list-style-type: none"> ○ Draft: Initial state of the needs template. The template hasn't been published yet. ○ Published: Template has been published. After a template is published, you can update or delete it. |

3. Select **Submit.**

The needs template is displayed in the Needs Template list.

4. In the Needs Templates list, select the needs template record to set the catalog relationship. The Needs Template Relationships section opens.

a. Select **New**, which opens the Needs Template Relationship form.

b. In the **Catalog** field, select the published Product Offering Catalog to which this needs template belongs.

c. Select **Submit.**

The selected catalog name is listed under the **Catalog** field in the Needs Template Relationships section.

5. In the Needs Template record, select **Publish to make it available in the product selection guide.**

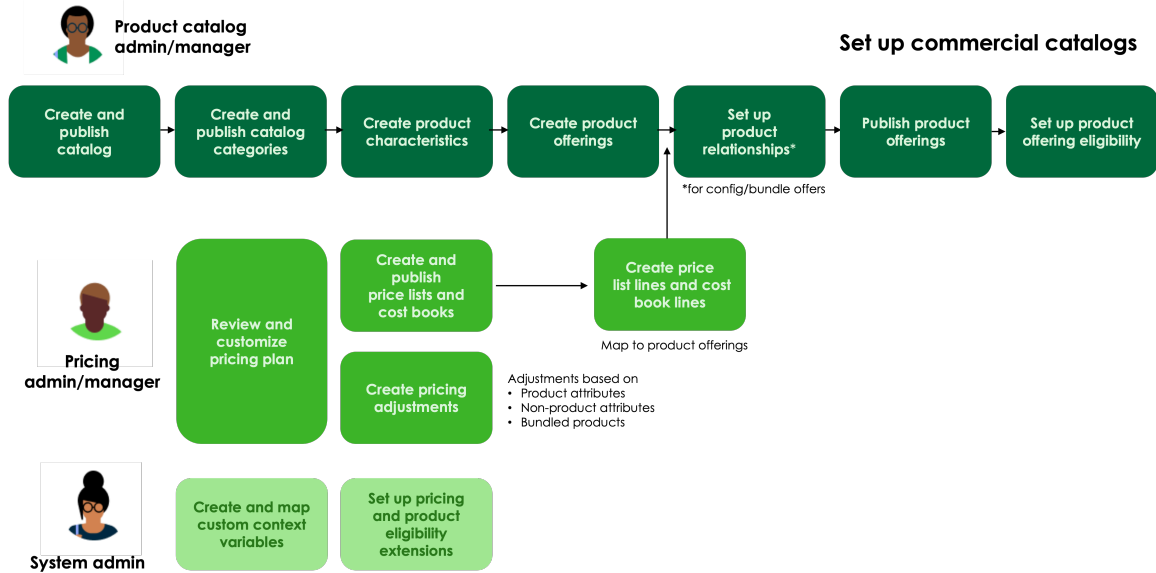
Configuring product pricing

Use the Pricing Management application to create the price lists and price list lines, define pricing adjustments, and manage other features that control pricing for product offerings. Product pricing is used by your sales and order agents when creating opportunities, quotes, and sales orders in Sales Customer Relationship Management.

Pricing configuration overview

As a pricing administrator or pricing manager, you complete various configuration tasks and work with your product catalog administrator to set up the pricing for products and services sold by your organization. The following example workflow shows the pricing configuration tasks and how they fit within [product catalog and product offering configuration](#). You can also work with your administrator to extend certain pricing features, such as setting up pricing extension points to access pricing information from external sources.

Product catalog and pricing configuration workflow



Starting with the May 2024 release of Sales Customer Relationship Management applications, you can use the CSM Configurable Workspace to configure product pricing.

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

Configuration tasks for Pricing Management

| Configuration task | Description |
|---|---|
| Configurable pricing plans | Customize the default pricing plan provided with Pricing Management. You can add, change, or delete the sequence of steps in which pricing calculations and adjustments are run to determine product offering prices. |
| Create and publish a price list | Define a price list that identifies basic pricing features, such as the currency used or the customer account to which the price list applies. |
| Create a price list line | Add line items to a price list. A price list line identifies the list price for a product offering. |
| Copy a price list | Duplicate a published price list and its associated price list lines, attribute adjustments, and decision tables. |
| Control the default price list on transaction header or header line | Specify the conditions that control when a default price list is used for an opportunity, quote, or order by using the Price List Defaulting Matrix. |
| Create and publish a product attribute-based pricing adjustment | Define pricing adjustments based on certain product characteristics. |
| Create and publish a cost book | Create a cost book that identifies the currency of the unit costs defined for a set of product offerings. |
| Create a cost book line | Add line items to a cost book. A cost book line defines the unit cost for a product offering. This feature is used in Quote Management, which uses |

Configuration tasks for Pricing Management (continued)

| Configuration task | Description |
|--|--|
| | unit costs to provide cost margins for products in sales quotes. |
| Copy a cost book | Duplicate a cost book and its cost book lines. |
| Control the default cost book on transaction header or header line | Set the default cost book displayed to your sales agents on the transaction header or header line for a Sales Customer Relationship Management application by using the Cost Book Defaulting Matrix. |
| Create a non-product attribute pricing adjustment | Define pricing adjustments for products based on non-product characteristics such as shipping zip code, location, sales channel, or account segment by using the Standard Price Adjustment Matrix. |
| Create pricing adjustments for bundled products | Define the pricing adjustments for child product offerings in a bundled product by using the Configuration Component Price Adjustment Matrix. |
| Create a matrix version | Create a version of a published price matrix when you need to update the matrix, for example to add or delete a context variable used in the price matrix. |
| Set properties to control pricing processing | Manage the processing of pricing features, such as how certain pricing calculations are made. |
| Create a custom context variable | Create a custom variable that represents an attribute that can be used in a pricing matrix, for example to create a non-product attribute adjustment. |
| Map a custom context variable to a transaction entity | Associate a custom pricing context variable to a particular transaction entity type in Sales Customer Relationship Management. |
| Use extension points in Pricing Management | Apply pricing extension points to use pricing information from external sources or extend the pricing engine logic on how list prices or adjustments are calculated. |
| Export and import pricing entities | Export and import pricing entities between ServiceNow instances. For example, you can promote pricing entities such as price lists from a non-production instance to a production instance. |

Configurable pricing plans

Pricing Management provides a default pricing plan that defines the sequence of steps in which pricing calculations and adjustments are applied to determine final product prices.

How the pricing plan works

The default pricing plan is an active, published plan that is automatically implemented with the November 2024 release. You can use the default plan, or you can copy the default plan and

customize it by adding or changing the pricing steps to tailor it for your organization. You can have only one active pricing plan per domain.

Note: If you upgraded to the November 2024 release, there is no change in pricing calculations or pricing logic with the pricing plan. If you don't change anything with the pricing plan, the pricing calculations occur exactly as before the upgrade.

Default Pricing Plan steps

| Number | Name | Sequence | Action | Price point | Calculation type | Rule matrix | Extension Point | Description | Code |
|------------|---|----------|-----------------------------------|-------------|----------------------|--|-----------------------------------|---|----------------|
| PP50000001 | Initialize Pricing Context | 10 | Initialize Pricing Engine context | | | (empty) | (empty) | This step initializes the pricing engine context object and sets the necessary parameters | PRCCONTEXT |
| PP50000002 | Fetch Cost | 20 | Fetch Cost | | | (empty) | CostExtensionPoint | Fetches the Cost defined in the Cost Book or defined via the Extension Point | FETCHCOST |
| PP50000003 | Fetch Price List Price | 30 | Fetch List Price | List Price | | (empty) | ListPriceExtensionPoint | Fetches the List Price defined in the Price List or defined via the Extension Point | FETCHLISTPRICE |
| PP50000004 | Apply Attribute Adjustments | 40 | Apply Attribute Adjustments | List Price | | (empty) | AttributeAdjustmentExtensionPoint | Applies attribute adjustment | ATTRADI |
| PP50000005 | Apply configuration component adjustments | 50 | Apply Matrix Adjustments | Net Price | Previous Price Point | Configuration Component Price Adjustment Matrix v1 | (empty) | Apply configuration component adjustments | CONFIGCOMP |
| PP50000006 | Apply contextual adjustments | 60 | Apply Matrix Adjustments | Net Price | Previous Price Point | Standard Price Adjustment Matrix v1 | (empty) | Applies contextual adjustment | STDADJ |
| PP50000007 | Custom adjustments | 70 | Apply Custom Adjustments | Net Price | Previous Price Point | (empty) | PricingAdjustmentExtensionPoint | Other Adjustments | CUSTOMADJ |

The default plan consists of basic pricing steps in which certain actions are run to calculate product offering prices.

Pricing steps

| Step | Action |
|--|---|
| Initialize Pricing Context | Starts the pricing engine context. The system gathers basic data required for subsequent calculation steps. For example, the system resolves context variable values, initializes the pricing cache, and performs basic validation of request payloads. |
| Fetch Cost | Get costs from a cost book , if your organization is using cost books in Quote Management. |
| Fetch Price List Price | Get the list price for all requested products based on the price list , unit of measurement, and data provided to the pricing API. |
| Apply Attribute Adjustments | Apply attribute adjustments based on product characteristics selected. |
| Apply configuration component adjustment | Apply adjustments as defined in the Configuration Component Price Adjustment Matrix for child product offerings that are bundled under a parent product offering. |
| Apply contextual adjustments | Apply adjustments as defined in the Standard Price Adjustment Matrix for product offerings based on non-product characteristics, such as billing state or shipping zip code. |
| Custom adjustments | Apply custom adjustments if implemented using the PricingAdjustmentExtensionPoint to fetch adjustments from another system or for adjustments that can't be supported via a pricing matrix. |

For the configuration component adjustments, contextual adjustments, and custom adjustments, the **Price point** and **Calculation type** values in a step determine how multiple pricing adjustments are calculated:

- **Price point:** The price for a product or service that is calculated after the step is run, either the List Price or Net Price.
- **Calculation type:** Method for evaluating the impact of the adjustment at each step. The adjustment is applied to either the Previous Price Point or the Rolling Price.
 - When the Calculation Type is Previous Price Point and the price point is Net Price, the previous price point is List Price. The adjustment is applied to the List Price.
 - When the Calculation Type is Rolling, the adjustment calculated is based on the output of the previous step.

Example pricing plan calculations

The following example shows how multiple pricing adjustments in a pricing plan are calculated and applied to a door sensor product. The door sensor is part of the Home Automation bundled product, which is being sold to Boxeo, a customer in California. The price of the door sensor is based on the price list for Boxeo.

Pricing plan calculations for a product

| Pricing Plan Step | Data Input | Data Output | Adjustment (Previous price point*) | Adjustment (Rolling) |
|---|--|--------------|------------------------------------|--|
| Initialize pricing engine | - | - | - | - |
| Fetch list price | \$18 (Boxeo Price List) | \$18 | - | - |
| Apply attribute adjustments | \$2 (Door sensor doesn't have any characteristic options) | \$20 | - | - |
| Apply configuration component adjustments | 20% markdown (Discount as part of a bundle) | \$16 | \$4 (Applied on list price) | \$4 (Applied on output of previous step) |
| Apply contextual adjustments | 10% markdown (Customer located in CA) | \$14/\$14.40 | \$2 (Applied on list price) | \$1.60 (Applied on output of previous step) |
| Final price after discount | | | \$14 | \$14.40 |

* Applied on List Price, which is the Previous Price Point

Customizing a pricing plan

The default pricing plan is fixed, to preserve the default pricing logic. You can copy the default plan, and add or change steps as needed for your organization. When you finish your changes, you publish the copy so that it becomes the active plan. If needed, you can revert to the default plan at any time by publishing the default plan.

As a pricing admin or manager, follow these steps to define a custom pricing plan:

- **Create a configurable pricing plan** (copy the default plan).
- **Add or change a pricing plan step.** In your configurable pricing plan, you can add one or more pricing steps for pricing adjustments, including any conditions for running the step. You can also change the sequence of the adjustment steps, if needed.
- **Delete a pricing plan step.**

As you add or change pricing steps, the system validates your entries, such as the sequence number, price point, and calculation type. When you finish adding or changing steps, publish the configurable pricing plan to make it active. The former active plan is retired.


Create a configurable pricing plan

Create a configurable pricing plan by copying the default pricing plan provided in Pricing Management.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Plans**.
3. Select the default pricing plan and select **Copy**.
The copy of the default pricing plan opens in a new tab in the Draft state.
4. Provide the pricing plan details:
 - a. Enter the **Name** of the pricing plan.
 - b. If you want price adjustments to be applied after price overrides, select the **Apply adjustments after price override** option.
If you select this option, after the system applies a price override, any remaining pricing steps are run. If you don't select this option, any pricing steps scheduled after the price override is applied are not run.
 - c. Enter a new **Description** for the custom pricing plan.
5. Select **Save**.
The configurable pricing plan is created with the **Name** that you provided.

What to do next

[Add or change a pricing plan step.](#)

Add or change a pricing plan step

Add a pricing plan step to a configurable pricing plan that applies either a pricing matrix or a custom adjustment using the pricing extension point. You can also change certain items in an existing step, such as the sequence or type of matrix used, as well as specify conditions for running the step.

Before you begin

[Create a configurable pricing plan.](#)

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager


About this task

You can add or change a pricing plan step only when the configurable pricing plan is in the Draft state.

Note: The following steps in all pricing plans are fixed and can't be changed:

- Initialize Pricing Context
- Fetch Cost
- Fetch Price List Price
- Apply Attribute Adjustments

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Plans**.
3. Select the configurable pricing plan to which steps are being added or changed.
4. In the pricing plan, select the Pricing Plan Steps tab.
 - To add a step, select **New**.
 - To change a step, select the step number to be updated. If you need to delete a pricing adjustment step, see [Delete a pricing plan step](#).
5. Fill in or change certain fields in the form.

Pricing Plan Step

| Field | Description |
|------------------|---|
| Number | System assigned number for the pricing plan step. |
| Name | Name of the step to be added. |
| Description | Brief description of the step. |
| Price point | <p>Selling price for a product or service. Select one of the following:</p> <ul style="list-style-type: none"> ○ List Price: Standard selling price to be applied before any pricing adjustments. ○ Net Price: Final price to customer after predefined or negotiated adjustments have been subtracted. |
| Calculation type | <p>Option for evaluating the result of the adjustment at each step. Select one of the following:</p> <ul style="list-style-type: none"> ○ Previous price point: When the Price Point is Net Price, the previous price point is List Price. The adjustment is applied to the List Price. ○ Rolling: When multiple adjustments exist, apply the subsequent adjustment to the price resulting from the previous adjustment to calculate the final net price. |
| Sequence | <p>Number value indicating the order in which the step is to be applied.</p> <p>For example, if you're adding a step between two existing steps with sequence numbers</p> |

| Field | Description |
|-----------------|---|
| | 40 and 50 respectively, you could enter the sequence number 45 for the step. |
| Code | System-generated alphanumeric number based on the pricing plan step name. |
| Action | Option indicating the type of pricing adjustment to be run in the step. Select one of the following: <ul style="list-style-type: none"> ○ Apply Matrix Adjustments: Run a pricing matrix. ○ Apply Custom Adjustments: Run a custom pricing adjustment using the PricingAdjustmentsExtensionPoint. |
| Rule matrix | Option that displays if you selected the Apply Matrix Adjustments action. Select the pricing matrix to be applied: <ul style="list-style-type: none"> ○ Configuration Component Price Adjustment Matrix: Use this matrix to set the price adjustments for child product offerings that are bundled under a parent product offering. ○ Standard Price Adjustment Matrix: Use this matrix to set a pricing adjustment for a product offering based on non-product characteristics, such as billing state or shipping zip code. <p>You can select the rule matrix link in the step to define the matrix.</p> |
| Pricing plan | Name of the configurable pricing plan. |
| Extension point | Option that displays the PricingAdjustmentsExtensionPoint if you selected the Apply Custom Adjustments action. |

6. Specify certain conditions for running the step, if applicable.

Note: Any conditions that aren't met, are ignored.

| Type of condition | Description |
|-------------------------|--|
| Header condition | Use the condition builder to add or change conditions that control when the step is run, based on the transaction header (for example the header for an opportunity, quote, or order). Specify the condition fields to be used, for example a context variable for transaction headers, product characteristics, or other objects such as account or product offering. |

| Type of condition | Description |
|------------------------------|--|
| <p>Line condition</p> | <p>Use the condition filter to add or change conditions that control when the step is run, based on the transaction line (for example an opportunity, quote, or order line). Specify the condition fields to be use, such as a context variable for transaction lines, product characteristics, or other objects, such as account or product offering.</p> |

7. Select **Save**.

8. To continue adding or changing steps, repeat steps 4 through 7.
If you need to remove a step, see [Delete a pricing plan step](#).

9. When you're finished adding or changing steps, select **Publish**.
The configurable plan becomes the active pricing plan, and the former active plan is retired.


Delete a pricing plan step

Remove a pricing step from a configurable pricing plan when the plan is in the Draft state.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Plans**.
3. Select the configurable pricing plan to be changed.
4. In the pricing plan, select the Pricing Plan Steps tab and then select the step number to be deleted.
5. In the More actions menu, select **Delete**, and confirm that you want to delete the step.
The step is removed from the pricing plan.

Create and publish a price list

Create a price list that defines the pricing for products and services in Sales Customer Relationship Management.


Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

You can create various types of price lists for your organization, such as price lists that are based on a standard currency or price lists that are based on a particular customer account. The first price list that you create for a specified currency is automatically set as the default price list. When you're creating a default price list, the start date must be either the current date or a date earlier than the current date. If you don't want the price list as the default, deselect the **Default** option.



Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Price Lists**.

3. Select **New**.

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

Create New Price List

| Field | Description |
|-----------------|--|
| Number | Unique system-assigned number that identifies the price list. |
| Name | Name of the price list. |
| Code | System-generated alphanumeric number based on the price list name. Although the code is system-generated, you can edit it to represent any industry-specific product code. |
| Currency | Currency of the price list, for example USD for US dollars. |
| Account | Optional. Account of the customer to which this price list applies. |
| Default | Option for setting this price list as the default price list with the specified Currency or for the specified Account. |
| Sales agreement | If you're using the Sales Agreement Management application and a sales agreement was created by an agent, the unique system-assigned number that identifies the sales agreement associated with this price list. |
| Description | Description of the price list. |
| State | <p>Stage of the price list:</p> <ul style="list-style-type: none"> ○ Draft: Initial state of the price list. Information is still being added to the price list and hasn't been published to the catalog yet. ○ Published: Price list has been published to the catalog. After a price list is published, you can update, delete, retire, or archive it. ○ Retired: Price list has been retired and is no longer active. The price list and its price list lines cannot be updated. ○ Archived: Price list has been archived and is no longer available for use. <p>Note: A default price list cannot be deleted, retired, or archived.</p> |
| Start Date | <p>Starting date and time that the price list is effective. Select the Calendar icon  to choose the start date and time, then select OK.</p> <p>Note: If this is a default price list, the start date must be either the current date or a date that is earlier than the current date.</p> |
| End Date | <p>Ending date and time of the price list. Select the Calendar icon  to choose the end date and time, then select OK. After the end date, the price list is no longer active.</p> <p>Note: If this is a default price list, the end date is ignored.</p> |

5. Select Save.

The price list is in the Draft state.

6. Select Publish.

The price list state changes to Published. The Price List Lines tab opens for creating a price list line.

What to do next

[Create a price list line](#) for the price list.


Create a price list line

Create a price list line and associate it to a product offering.



Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Price Lists** and select the price list to which you're adding the price list line.
3. In the Price List Lines tab, select **New**.
4. On the form, fill in the fields.

Price List Line

| Field | Description |
|------------------|---|
| Number | Unique system-assigned number for the price list line. |
| Price List | Name of the price list. |
| Product Offering | Product to which this price list is associated. |
| Unit of Measure | Unit of measure for the product. |
| List price | Price set for the product offering, which is the full price that a product or service is sold for, without any discounts or promotions applied. |
| Start Date | Starting date and time that the price list line is effective. Select the Calendar icon () to choose the start date and time, then select OK . |
| End Date | Ending date and time that the price list line is no longer effective. After this time, the price list line is no longer active. Select the Calendar icon () to choose the end date and time, then select OK . |
| Pricing Method | Type of pricing selected when the product offering was created: <ul style="list-style-type: none"> ○ Recurring: Payment fee that occurs over certain intervals. ○ Non Recurring: one-time payment fee. |
| Periodicity | Frequency of recurring pricing: <ul style="list-style-type: none"> ○ Monthly ○ Annually |

5. Select Save.


Copy a price list

Duplicate a published price list and its associated price list lines, attribute adjustments, and decision tables. You can copy a price list, update the pricing in the copied price list if needed, then publish it.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Price Lists**.
3. Select the published price list to be copied and select **Copy**.
The state changes to Copy in Progress and a message indicates that the copy is starting. You can't edit the price list, price list lines, any attribute adjustments, and related decision tables during the copy process. Each price list line and the other related pricing features are copied asynchronously. During the copy process, you can refresh the page to see the items copied. When the copy process completes, the following occurs:
 - The copied price list is available in the Draft state and opens in a new tab.
 - Any errors that occurred during the copy process, for example a price list line didn't get copied, are displayed in a message in the copied price list.
4. Select **Save**.
When the price list copy is in the Draft state, you can add or change price list lines or delete the price list. When you finish updating the copied price list, you can publish it so that it's available for use.

Control the default price list on transaction header or header line

Define the default price list displayed to your sales and order agents on the transaction header or header line by using the Price List Defaulting Matrix.

Before you begin


Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

For base systems, the default price list used is based on the transaction header. The transaction header displays information about an entity, such as a quote or order. For example, if a sales agreement is populated on the transaction header, the sales agreement price list is used as the default. If a customer account is populated on a transaction header and a valid account-based price list exists, the header defaults to the account-based price list. If no account-based price list exists, the default currency-based price list is used.

You can change the default price list selection logic by using the Price List Defaulting Matrix.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Matrices**.
3. In the Pricing Matrices list, select Price List Defaulting Matrix.
4. Select **Edit Rule**.
The Decision Table for the Price List Defaulting Matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions to display the default price list in the header.

5. In the decision table, set the rule for displaying the default price list:
 - a. In the **Header Price List Type** column in the Results section, select the **Edit** icon to add the price lists that can be applied, for example an account-based price list or a currency-based price list.
 - b. In the Condition section, select **Add new decision row**.
 - c. In the row, select the column for the input to be applied, such as **Account** and select the condition to make it active.
 - d. In the Results section, select the **Header Price List Type** column and select the price list to be applied, for example an account-based price list or a currency-based price list.
6. Select **Save**.
 Review the **Validation Status** and **Validation Message** columns to see if you're missing mandatory inputs or outputs or required information. If so, enter the appropriate information and select **Save**.
 The default price list is available to sales or order agents when working on the transaction header for opportunities, quotes, or orders or when working on the transaction line, for example a quote line or order line.

Create and publish a cost book

Create a cost book that defines the unit costs for products and services in Sales Customer Relationship Management.

Before you begin


Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

You can create cost books that define the unit costs for a set of products and a specified currency. However, only one cost book per given currency is allowed.



You can create multiple cost books for a given currency, but the first cost book that you create for a particular currency is automatically set as the default cost book. If you don't want the first cost book as the default, deselect the **Default** option. When you're creating a default cost book, the start date must be either the current date or a date earlier than the current date.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Prices > Cost Books**.
3. In the Prices - Cost Books list, select **New**.
4. In the Details tab, fill in the fields.

Create New Cost Book

| Field | Description |
|--------|--|
| Number | Unique system-assigned number that identifies the cost book. |
| Name | Name of the cost book, for example Standard Cost Book. |
| Code | System-generated alphanumeric number based on the cost book name. Although the code is system-generated, |

| Field | Description |
|-------------|--|
| | you can edit it to represent an industry-specific code. |
| Currency | Currency of the cost book, for example USD for US dollars. |
| Default | Option for setting this cost book as the default cost book with the specified Currency . |
| Description | Brief description of the cost book. |
| State | <p>Stage of the cost book:</p> <ul style="list-style-type: none"> ○ Draft: Initial state of the cost book. Information is still being added to the cost book and hasn't been published to the catalog yet. ○ Published: Cost book has been published to the catalog. After a cost book is published, you can update, delete, retire, or archive it. ○ Retired: Cost book has been retired and is no longer active. The cost book and its cost book lines can't be updated. ○ Archived: Cost book has been archived and is no longer available for use. <p>Note: A default cost book can't be deleted, retired, or archived.</p> |
| Start date | <p>Starting date and time that the cost book is effective. Select the Calendar icon () to choose the start date and time, then select OK.</p> <p>Note: If this date is for a default cost book, the start date must be either the current date or a date that is earlier than the current date.</p> |
| End date | <p>Ending date and time of the cost book. After the ending time, the cost book is no longer active. Select the Calendar () icon to choose the end date and time, then select OK.</p> <p>Note: If this date is for a default cost book, the end date is ignored.</p> |

5. Select Save.

The cost book is in the Draft state.

Note: You can continue by defining cost book lines when the cost book is in Draft state. However, you must publish the cost book to apply the cost book and its cost book lines.

6. Select Publish.

The state changes to Published. The Cost Book Lines tab opens for creating a cost book list line.

What to do next

[Create a cost book line.](#)


Create a cost book line

Create a cost book line that defines the unit cost for a product offering.


Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

Procedure

1. In the CSM Configurable Workspace, access the cost book to which you're adding a cost book line.
 - a. Select the **List**  view.
 - b. Navigate to **Prices > Cost Books** and select the cost book.
2. In the Cost Book Lines tab, select **New**.
3. In the Create New Cost Book Line tab, fill in the form.

Cost Book Line

| Field | Description |
|------------------|--|
| Number | Unique system-assigned number for the cost book line. |
| Cost Book | Name of the cost book to which this line is added. |
| Code | System-generated alphanumeric number based on the cost book name and the line item to be created. Although the code is system-generated, you can edit it to represent any industry-specific code. |
| Product offering | Product to which this cost book line is associated. |
| Unit of measure | Unit of measure for the product. |
| Cost | Unit cost of the product, which is the cost incurred to produce or procure the product. |
| Start date | Starting date and time that the cost book is effective. Select the Calendar icon () to |

| Field | Description |
|----------------|---|
| | choose the start date and time, then select OK . |
| End date | Ending date and time of the cost book. After the ending time, the cost book is no longer active. Select the Calendar icon (📅) to choose the end date and time, then select OK . |
| Pricing method | Type of pricing selected when the product offering was created: <ul style="list-style-type: none"> ○ Recurring: Payment fee that occurs over certain intervals. ○ Non Recurring: one-time payment fee. <p>i Note: The Pricing Method is auto-populated when the product offering is selected.</p> |
| Periodicity | Frequency of recurring pricing: <ul style="list-style-type: none"> ○ Monthly ○ Annually <p>i Note: The Periodicity is auto-populated when the product offering is selected.</p> |

4. Select Save.


Copy a cost book

Duplicate a cost book and its cost book lines.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Cost Books**.
3. Select the published cost book to be copied and select **Copy**.
 The state changes to Copy in Progress and a message indicates that the copy is starting. Each cost book line is copied asynchronously, but you can refresh the page to see the cost book lines copied. When the copy process completes, the following occurs:
 - The copied cost book is available in the Draft state and opens in a new tab.
 - Any errors that occurred during the copy process, for example a cost book line doesn't get copied, are displayed in a message in the copied cost book list.

4. Select **Save**.

When the cost book is in the Draft state, you can add cost book lines or delete the cost book. When you finish any changes to the copied cost book, you can publish it so that it's available for use and retire the former cost book.

Control the default cost book on transaction header or header line

Set the default cost book displayed to your sales agents on the transaction header or header line for a Sales Customer Relationship Management application by using the Cost Book Defaulting Matrix.


Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

The transaction header is a record that contains general information about an entity, such as a cost book. A transaction line record contains specific information about a specific item, such as a cost book line for a certain product.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Matrices**.
3. In the Pricing Matrices list, select **Cost Book Defaulting Matrix**.
4. Select **Edit Rule**.
The Decision Table for the Cost Book Defaulting Matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions to display the default cost book in the header.
5. In the decision table, set the rule for displaying the default cost book:
 - a. In the **Header Cost Book Type** column in the Results section, select the **Edit** icon to add the cost book that can be applied.
 - b. In the Condition section, select **Add new decision row**.
 - c. In the row, select the column for the input to be applied, such as **Currency** and set the condition to make it active.
 - d. In the Results section, select the **Header Price List Type** column and select the cost book to be applied, for example a specific currency-based cost book.
6. Select **Save**.
Review the **Validation Status** and **Validation Message** columns to see if you're missing mandatory inputs or outputs or required information. If so, enter the appropriate information and select **Save**.
The default cost book is displayed in the transaction header or header line for the application.


Create and publish a product attribute-based pricing adjustment

Create a pricing adjustment for a product offering based on its product characteristics, such as the product size or color. A pricing adjustment can be a markup or markdown percentage, amount, or a pricing override.



Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

In this task, you specify the product characteristics to which the pricing adjustment applies. Then you use a decision table to set the attribute adjustment rule, which defines the conditions for applying the pricing adjustment. For more information on using decision tables, see [Using decision tables](#) .

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Attribute Adjustments**.
3. In the Pricing - Attribute Adjustments list, select **New**.
4. On the Attribute Adjustment form, specify the product characteristics used to determine the adjustment:
 - a. Enter the **Name** of the attribute adjustment rule, for example, Make and Model selection.
 - b. If you want to change the system-assigned **Code** based on the attribute adjustment name, enter a different alphanumeric value.
 - c. If you want the adjustment to apply to all price lists, select **Apply to all Price Lists**.
 - d. Select the **Product offering** to which this adjustment applies.
 - e. If this attribute adjustment applies to a specific price list line and not all price lists, select the **Price list line**.
 - f. Select the **Start Date** that this attribute adjustment begins.
 - g. Select the **End Date** that this attribute adjustment ends, if applicable.
 - h. Unlock the **Product Characteristics** field and select the product characteristics to be used to differentiate the product price.
 - i. Select **Save**.
5. In the Attribute Adjustment, select **Create Rule**.
The Decision Table for the adjustment opens in Workflow Studio and displays the inputs, which are the product characteristics that you selected, and the decision table that contains the columns for setting the attribute adjustment rule conditions.
6. Set the attribute pricing rule:
 - a. In the Conditions section, select **Add new decision row**.
 - b. In the row, select an attribute column and select the appropriate value.
For example, if a product has attribute columns labeled **Make** and **Model**, select each column and then select the appropriate value.
 - c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.
 - d. In the **Adjustment Value** column, enter the adjustment amount.
 - e. Select **Save**.
The adjustments are made to the price lists or the price list line, depending on the options selected in step 3.
7. **Optional:** Test your decision table.
For more information on testing your decision table before publishing it, see [Test a decision table in Workflow Studio](#) .

8. In the **Details** tab for the attribute adjustment, select **Publish**.

The pricing attribute adjustment is available to agents when they create an opportunity, quote, or an order.

Create a non-product attribute pricing adjustment

Create a pricing adjustment for a product offering based on non-product characteristics, such as billing state or shipping zip code. You use the Standard Price Adjustment Matrix to define the pricing adjustment.

Before you begin


Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

Non-product attributes are represented as context variables, which identify non-product characteristics, such as billing state or shipping zip code. Pricing Management provides a set of default context variables for non-product attributes. You can view the list of context variables for non-product attributes in the **Context variables** field in the Standard Price Adjustment Rule Matrix. You can also review a list of system-defined context variables in the Context Variables [sn_csm_ctxrul_mgt_context_variable] table.

However, if you have a non-product attribute that is not available as a default context variable, such as sales channel, your system administrator can [create a custom context variable](#) for that attribute. You can then use the custom context variable as an input in the decision table for the Standard Price Adjustment Matrix.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Matrices**.
3. In the Pricing Matrices list, select Standard Price Adjustment Matrix.
4. If you want to remove any of the context variables in the Content variables section In the Rule Matrix Standard Price Adjustment Matrix record, delete the pills that represent context variables for non-product attributes.
5. If you have a large number of rows in the decision table and you want to optimize rule matrix performance, in **Query optimization variables**, select one or more context variables that the system uses to filter the pricing decision table rows that are evaluated.
6. Select the option in **Rule selection criteria** that indicates whether single or multiple rules are applied in the Standard Adjustment Matrix.
If multiple rules match and the option is marked true, all applicable pricing rules are applied when evaluating adjustments for product offers. If the option isn't selected, the first rule based on priority is applied for adjustment calculation.
7. Select **Edit Rule**.
The Decision Table for the Standard Price Adjustment Matrix opens in Workflow Studio and displays the inputs, which are the default non-product characteristics available, and the decision table section that contains the columns for setting the non-product attribute adjustment rule conditions.
8. If you have a custom context variable to add as an input, select **+Add** and add the custom variable **Label**, **Type**, **Reference** (if applicable), **Mandatory** indicator, and **Add condition column**, which adds the variable to the Conditions section.
9. In the decision table, set the pricing rule for the non-product attribute:

- a. In the Conditions section, select **Add new decision row**.
- b. In the row, select the columns for the non-product attributes to be applied, such as **Shipping State** and **Account**, and select the appropriate values.
- c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example **Markdown %** or **Markdown amount**.
- d. In the **Adjustment Value** column, enter the adjustment amount.
- e. In the **Adjustment Description** column, enter a brief description of the adjustment, for example, **Adjustment for state location**.
- f. Select **Save**.
The adjustments are available to sales or order agents when working on quotes or orders.

Create pricing adjustments for bundled products

Define price adjustments for a product when it is sold as part of a product bundle. You use the Configuration Component Price Adjustment Matrix to set the price adjustments for child product offerings that are bundled under a parent product offering.


Before you begin

Role required: `sn_csm_pricing_pricelist_administrator`, `sn_csm_pricing_pricelist_manager`

About this task

A pricing adjustment can be a markup or markdown percentage, amount, or a pricing override of the standalone product list price.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Matrices**.
3. In the Pricing Matrices list, select Configuration Component Price Adjustment Matrix.
4. Select **Edit Rule**.
The Decision Table for the Configuration Component Price Adjustment Matrix opens in Workflow Studio and displays the inputs, which include the parent product offering and its child product offerings that comprise the bundle, and the decision table section that contains the columns for setting the conditions and the pricing adjustments to be applied to the child product offerings in the bundle.
5. In the decision table set the pricing rule for the child product offerings in the bundle:
 - a. In the Conditions section, select **Add new decision row**.
 - b. In the row, select the columns for the product offerings to be applied and select the appropriate values.
 - c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example **Markdown %** or **Markdown amount**.
 - d. In the **Adjustment Value** column, enter the adjustment amount.

e. In the **Adjustment Description** column, enter a brief description of the adjustment. This description is copied to the adjustment record linked to the quote or order line when the product offer is added to the quote or order. Consider creating a description that is formatted with a unique ID followed by a text description. You can use the unique ID to audit the adjustment generated when the quote or order is being configured, and the agent can use the description to understand the reason for the adjustment.

f. Select **Save**.

The adjustments are available to sales or order agents when working on quotes or orders.

Set properties to control pricing processing

Activate or deactivate system properties that control how pricing features are processed in Sales Customer Relationship Management applications.

Before you begin

Role required: admin

About this task

You can control the following pricing features using pricing system properties:

- Logging of pricing engine requests for debugging.
- Method for applying multiple pricing adjustments defined in various pricing matrices.
- Parallel processing of a large set of pricing engine requests, typically 100 transaction lines or more, to optimize performance. You can also set the threshold, which is the number of transaction lines that triggers parallel processing.

Procedure

1. Navigate to **All > Pricing > Administration > Properties**.
2. Set the following properties:

Customization properties for pricing

| Property | Description |
|--|--|
| Logging Pricing Requests (sn_csm_pricing.log_pricingengine_request) | Control the logging of pricing engine requests for debugging. Select Yes to activate logging or No to turn off the pricing request log. |
| Method used to stack multiple adjustments defined in matrices (sn_csm_pricing.matrix_multiple_adjustments_handling) | Control how multiple pricing adjustments from different pricing matrices are applied. Select one of the following: <ul style="list-style-type: none"> ○ Starting List Price: Calculate adjustments based on the list price of the product. ○ Running Total: Calculate current adjustment by applying the adjustment calculations on the previous adjusted value. |
| Pricing Engine Parallel Execution | Set properties that optimize the processing time for pricing transactions. |

| Property | Description |
|--|---|
| <ul style="list-style-type: none"> ○ Enable the pricing engine to perform parallel processing of transaction lines when a transaction threshold is met. (sn_csm_pricing.enable_pricing_engine_parallel_execution) ○ Set the number of transactions that must be met before the pricing engine can run parallel processing. (sn_csm_pricing.pricing_engine_parallelism_lines_threshold) | <ul style="list-style-type: none"> ○ The parallel execution property is set to Yes by default. Select No to turn off parallel execution and process the transaction lines serially. If you select No, the system ignores the threshold value. ○ The default threshold value is 100. You can enter a different number that represents the minimum number of transaction lines that must be met before the pricing engine can perform parallel processing using multiple threads. <p>Note: Parallel processing isn't performed by the pricing engine for calls to the product configurator pricing integrations, even if the number of transaction lines meets the parallelism threshold.</p> |

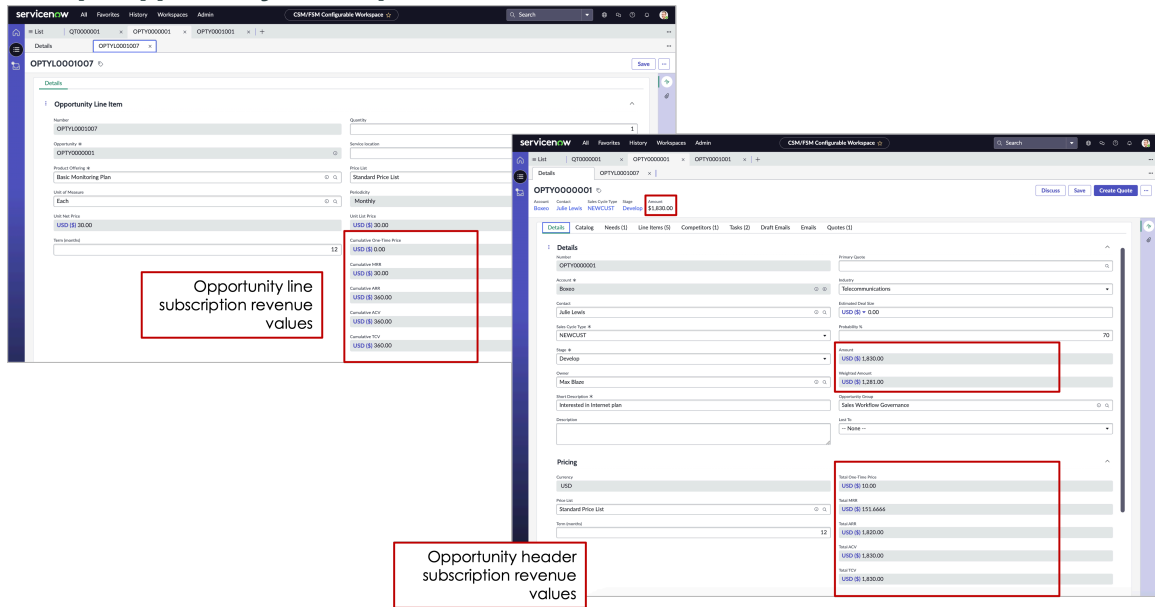
3. Select **Save**.

Subscription revenue metrics

Subscription pricing is a pricing model where customers pay a recurring fee for products or services, usually at regular intervals such as monthly or annually. In Sales Customer Relationship Management, various subscription revenue amounts are calculated automatically for opportunities and quotes.

Subscription revenue amounts are metrics that help sales agents and sales managers track and analyze the revenue impact of sales deals. Sales agents and managers can view these system-calculated revenue amounts in the pricing details for opportunities and quotes, both at the header and line levels. These revenue amounts, such as monthly recurring revenue (MRR) or annual recurring revenue (ARR), are useful for monitoring sales performance, forecasting subscription revenue, and providing relevant subscription amounts when agents engage with customers.

Example opportunity subscription revenue details



Subscription pricing metrics

In subscription pricing, common metrics for assessing subscription-based revenue include the following values and items:

Monthly Recurring Revenue (MRR)

The total revenue generated from recurring subscriptions or contracts on a monthly basis. It helps sales agents and managers assess the stability and growth of subscription-based revenue streams.

Annual Recurring Revenue (ARR)

The annual revenue generated from recurring subscriptions or contracts. It provides insights into the predictable revenue stream that can be expected from existing customers over a year.

Annual Contract Value (ACV)

The total value of a contract on an annual basis. It highlights the annual revenue impact of a deal and facilitates comparison with other contracts or revenue streams.

Total Contract Value (TCV)

The total value of a contract over its entire duration, including recurring and one-time charges. It provides visibility into the overall value of a deal and its impact on the organization's financial performance.

Term

The duration or period of a subscription or contract, in months, such as 10 months or 24 months. In Opportunity Management, agents can enter a Term value before adding line items. In Quote Management, when agents enter a Term value and the subscription start date, the system uses the term value and start date to auto-calculate the subscription end date. If an agent changes the subscription end date, the system recalculates the Term value.

For products with monthly periodicity, the per-day price (pro-rate multiplier) is based on the Unit list price/number of days in the month. For a product with annual periodicity, the per-day price (prp-rate multiplier) that is multiplied against the decimal fields is the Unit price/365 days or 366 days if the year is a leap year.

How subscription pricing revenues are calculated

Product offers for products and services contain basic pricing information, such as list price and pricing method (either one-time or recurring periodicity). When agents add product lines to opportunities and quotes, the system uses basic pricing information and product line details to auto-calculate the various revenue subscription values. These values are calculate and displayed in both the header pricing details and line pricing details.

For example, when an agent adds an opportunity line, the system calculates the Cumulative Monthly Recurring Revenue (MRR) amount using the unit net price and quantity of the product. The system then sums up the cumulative revenue to the parent line in the opportunity and displays the cumulative MRR in the pricing details of the opportunity header.

When agents use the configuration UI to add customizable products to quotes, the configurator interface displays the calculated subtotal values such as the Cumulative Monthly Recurring price for the root product offer of the line item.

The following tables describe the subscription pricing revenue amounts for opportunities and quotes and how they're calculated.

Opportunity line subscription revenue metrics

| Opportunity line subscription metric | Description | Calculation |
|--------------------------------------|---|---|
| Unit net price | Price of a single unit. | Unit list price i Note: Unit Net Price = Unit list price only when the opportunity is not in sync with the quote. |
| Cumulative one-time price | One-time price of the opportunity line and any child lines. | Unit net price * Quantity |
| Cumulative MRR | Cumulative monthly recurring revenue of the opportunity line and any child lines. Not calculated for one-time products. | <ul style="list-style-type: none"> If the periodicity is monthly: Cumulative MRR = Unit net price * Quantity If the periodicity is annual: Cumulative MRR = (Unit net price/12 months) * Quantity |
| Cumulative ARR | Cumulative annual recurring revenue of the opportunity line and any child lines. Not calculated for one-time products. | Cumulative MRR * 12 months |
| Cumulative ACV | Cumulative annual contract value of the opportunity and any child lines. | Cumulative One-time price + Cumulative ARR |
| Cumulative TCV | Cumulative total contract value of the opportunity and any child lines. | Cumulative One-time price + (Cumulative MRR * Term months) |

Opportunity header subscription revenue metrics

| Opportunity header subscription metric | Description | Calculation |
|--|--|---|
| Amount | The total contract value. | Total contract value if there are opportunity line items. If no line items exist, this amount is copied from the Estimated Deal Size. |
| Weighted amount | Value that represents the potential size of a deal. | Amount * Probability |
| Total One-Time Price | Sum of all the cumulative one-time prices of the opportunity line items. | Cumulative one-time price of the top-level parent |
| Total MRR | Total monthly recurring revenue. | Sum of the Cumulative MRR values of the top-level parent. |
| Total ARR | Total annual recurring revenue. | Sum of the Cumulative ARR of the top-level parent. |
| Total ACV | Total annual contract value. | Sum of the Cumulative ACV of the top-level parent. |
| Total TCV | Total contract value. | Sum of the Cumulative TCV of the top-level parent. |

Quote line subscription revenues

| Quote line subscription metric | Calculation |
|--------------------------------|--|
| Monthly recurring price | <ul style="list-style-type: none"> • If periodicity is monthly: Monthly recurring price = Unit net price * Quantity • If periodicity is annual: Monthly recurring price = (Unit net price/12) * Quantity |
| Annual recurring price | Monthly recurring price * 12 months |
| Cumulative net price | Unit List Price - Total adjustment |
| Cumulative one time price | One-time price for the line item + (if parent line item) One-time price for all child line items |
| One-time price | One-time price for the line item. |

Quote header subscription pricing

| Quote header subscription metric | Calculation |
|----------------------------------|--|
| Term | The duration in months for subscription or contract. If an opportunity exists, the value comes from the opportunity. Otherwise, the default term is 12 months. |
| Total one-time price | Sum of all parent lines. |

Quote header subscription pricing (continued)

| Quote header subscription metric | Calculation |
|----------------------------------|---|
| Total monthly recurring price | Sum of the Cumulative monthly recurring price of all root parent lines. |
| Total annual recurring price | Sum of the Cumulative annual recurring price of all root parent lines. |
| Total amount | Sum of the Cumulative net price of root parent lines. |

To learn more about the revenue metrics in opportunity details, see [Add and view the details of an opportunity](#) and [Add line items to an opportunity](#).

To learn more about the revenue metrics in quote details, see [Add details to a quote](#).

Configuring matrix validation rules

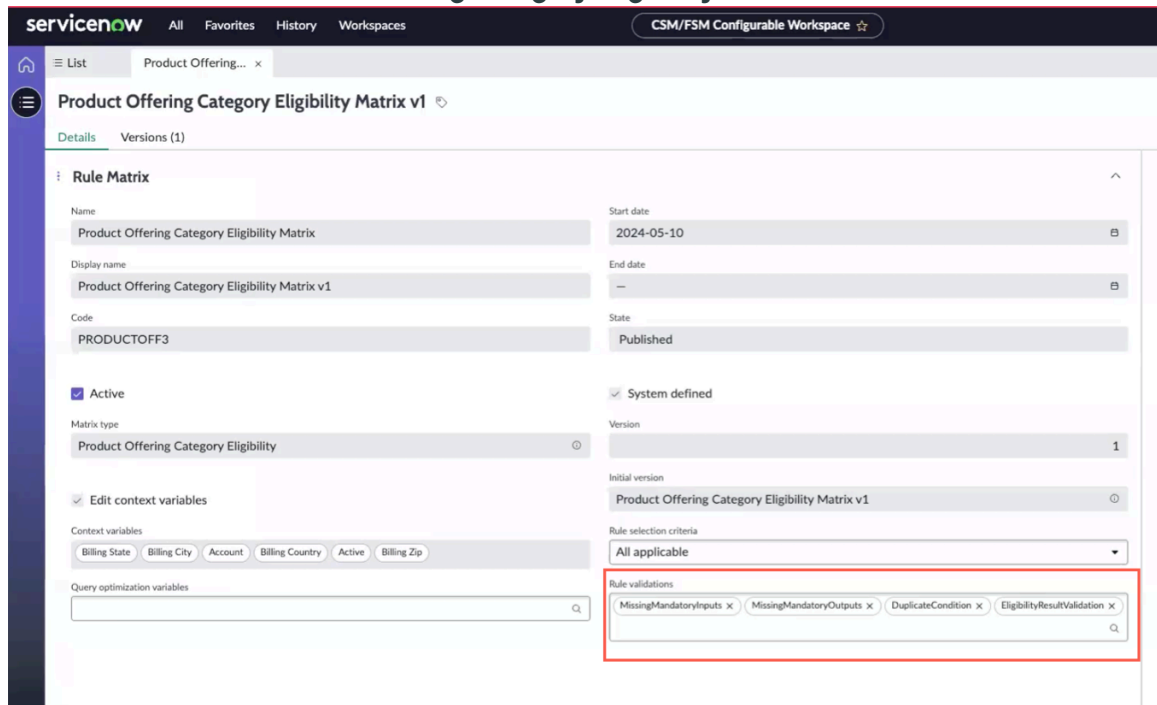
As a product catalog admin or pricing admin, you can manage the system-defined matrix validation rules that automatically check the mandatory rule inputs or outputs in matrix decision tables. You can also define your own custom validations.

The product eligibility and pricing matrices included with the Product and Pricing Rules application have system-defined matrix validation rules, which are identified in the Details tab for each matrix. Each validation rule has a validation definition, which is a script that identifies the context variables to be validated in the matrix decision table and the corresponding error or warning messages to be displayed. The validations are run when you save your matrix decision row changes. The **Validation Status** field indicates whether the change is valid. If the change is not valid, error or warning messages are displayed in the **Validation Message** columns of the decision table.

Some system-defined validation rules are applicable to all decision tables, while others apply to only certain types of matrices:

- DuplicateCondition: Checks for duplicate conditions in decision rules.
- MissingMandatoryInputs: Checks for missing required inputs.
- MissingMandatoryOutputs: Checks for missing required outputs.
- EligibilityResultValidation: Checks the product eligibility results.
- MandatoryCostBookForTypeExistingCostBook: Checks the cost book type.
- MandatoryPriceListForTypeExistingPriceList: Checks the price list type.
- ProductOfferCharsWithoutProdOffer: Checks for product offer characteristics without product offering.

Rule validations in Product Offering Category Eligibility Matrix



From the Details tab for a matrix, you can also run rule validations for the entire matrix by selecting the **More actions** icon and selecting **Validate rule**.


Update validation settings in a matrix

Change the rule validation checks for a matrix. These checks run automatically when you save changes made to the matrix decision table.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Context Rule Management > Rule Matrices**.
3. Select the matrix to update.
4. In the **Rule validations** field, change the rule validation.
 - To add a validation rule, select the Search icon and select the rule validation.
 - To delete a validation, select the X in the validation pill.
5. Select **Save**.


Create a custom validation definition

Provide a script that validates a context rule input or output in the decision table for a pricing or product eligibility matrix.

Before you begin

Role required: admin

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Context Rule Management > Validation Definitions**.
3. Select **New**.
4. In the **Script** field, enter the custom script that defines the error check, warning messages, and error messages for the validation.
5. If the decision condition won't be active by default, select **Inactivate decision condition**.
6. Enter the **Name** of the validation definition.
7. Select **Save**.
8. Associate the custom definition to a rule matrix.
 - a. Navigate to **Context Rule Management > Matrix Validations**.
 - b. Select **New**.
 - c. In the **Matrix type** field, select the rule matrix to which this custom validation definition applies.
9. Select **Save**.

Create a matrix version

Create a version of a published price or product eligibility matrix when you need to update the matrix, for example to add or delete a context variable used in a price matrix.


Before you begin


Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

You can create a version of a published pricing matrix (Standard Price Adjustment Matrix, Price List Defaulting Matrix, Cost Book Defaulting Matrix, or Configuration Component Price Adjustment Matrix) and also a product eligibility matrix (Product Catalog, Product Category, or Product Offering Eligibility Matrix). When you create a matrix version, the new version becomes the active version. After creating the version, you update the decision table for the matrix, then save and publish the matrix.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Matrices**.
3. In the Pricing Matrices list, select the matrix to be updated.
4. In the Details tab for the matrix, select **Create new version**.
The following changes occur:
 - The new version of the matrix opens in another tab.
 - In the former matrix, the **State** changes from Published to Retired and the System **System defined** value changes to false.
5. Change the matrix as needed.
For example, if you're updating context variables used in the Standard Price Adjustment Matrix, you can add or delete context variables in the **Context variables** section of the matrix.
6. Select **Save**.
7. Update the decision table for the matrix by selecting **Create rule**.

Add the decision rows in the decision table for the matrix. You can use the decision table export feature to edit the decision table for the previous matrix version in Excel, update the Excel file, then import the updated Excel table to populate the decision table for the new version. For details, see [Manage decision tables in Excel](#). 

8. Select **Save and then **Publish**.**

You can refresh the list of matrices to see the new matrix version.

Create a custom context variable

Create custom context variables to represent product or non-product characteristics that can be used by pricing admins to apply control different pricing features, such as pricing adjustments, or product catalog admins to set product offering eligibility rules.

Before you begin

Before creating a custom variable, review the context variables available in the Context Variables [sn_csm_ctxrul_mgt_context_variable] table to verify whether you need a new one. This table identifies the system-defined variables provided with Product Catalog Management and Pricing Management and also any custom variables that have been created.

For example, the system-defined context variables provided for non-product attributes include: Account, Shipping Country, Shipping City, Shipping State, Shipping Zip, Billing Country, Billing City, Billing State, Billing Zip, and Transaction Date.


Role required: admin

About this task


As an administrator, you can create custom context variables for items such as non-product characteristics, that your pricing and product catalog administrators can use in rule matrices to control pricing features or product offering eligibility. For example, your pricing administrator might want to define pricing adjustments based on sales segment, but sales segment isn't a system-defined context variable.

You create the variable name and define the variable type, so that the variable can be used in a decision rule for a rule matrix. After you create the variable, you must also [map the context variable to the transaction entity](#), such as quote or order, from which the system retrieves the context.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Context Rule Management > Context Variables**.
3. In the Context Variables list, select **New**.
4. On the form, fill in the fields.

Context Variable form

| Field | Description |
|-------|---|
| Type | Context variable type. Choose the type of field for the variable. For example, the choice list field type lets your user select from a pre-defined list of choices. For more information on the different field types, see Field types  . |

| Field | Description |
|--------------|---|
| Label | Name of the context variable, for example, sales segment. |
| Column name | ID of the context variable for which the context variable type is created. The system assigns this name automatically based on the Label name entered, for example sales_segment. |
| Code | System-generated alphanumeric number based on the label name. |
| Context type | Option that indicates from where the context is retrieved. Select one of the following: <ul style="list-style-type: none"> ○ Transaction Header: Context is fetched from the header record for a transaction, such as an opportunity, quote, or sales order. ○ Transaction Line: Context is fetched from the line record for an opportunity, quote, or sales order transaction. |
| Application | Name of the application scope. The default scope is Global. |
| Active | Option that indicates the context variable is available for use in rule matrices. |

5. Select **Save.**

The tab (related list) for the **Type** that you selected in Step 4 and the **Variable Mapping** tab are displayed.

6. Depending on the **Type you selected, create the values for the type, then select **Save**.**

For example, in Step 4, if you selected the Choice type, select **New** in the **Choices** tab and define the choices.


What to do next

[Map the custom context variable to a transaction entity.](#)

Map a custom context variable to a transaction entity

Associate a custom pricing context variable to a particular transaction entity type in Sales Customer Relationship Management.

Before you begin

Verify that you're in the appropriate application scope for the transaction type. For example, if you're mapping a context variable for orders, the application scope is Order Management. Use the Globe  icon in the navigation bar to change the application scope.

Role required: admin

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.

2. Navigate to **Context Rule Management > Variable Mappings**.

3. Select **New**.

4. In the form, fill in the fields.

Lead to Cash Entity Attribute form

| Field | Description |
|--------|---|
| Entity | The Sales Customer Relationship Management entity for which the variable will be used. Select the entity, for example Opportunity or Order. |
| Table | Name of the application table for the transaction. |
| Field | Field from the application table that is related to the custom context variable. Select the field. |
| Key | Custom context variable. Select the variable from the list of pricing context variables. |

5. Select **Save**.

Result

The custom context variable is available for use in pricing and product eligibility matrices.

Use extension points in Pricing Management

Use extension points to call custom scripts from external sources that control pricing logic used in the Pricing Management feature of the Sales Customer Relationship Management (SOM) applications.

To access the available extension points, navigate to **All > Scripted Extension Points** and in the Extension Points list, select the desired extension point to view it.

Pricing Management extension points

| Extension point | Description |
|--|---|
| <code>sn_csm_pricing.DefaultCostBookExtensionPoint</code> | Customize the logic for determining the default cost book used by the calling application, such as Quote Management. This extension point changes the default cost book logic for both the header and line of the calling application. |
| <code>sn_csm_pricing.DefaultPriceListExtensionPoint</code> | Customize the default price list logic used by the calling Sales CRM applications such as Quote Management or Order Management. This extension point changes the default logic for both the header and line of the calling application. |

Pricing Management extension points (continued)

| Extension point | Description |
|--|--|
| | <p>Note: If you want to create additional context variables, use the Price List defaulting matrix to manage the price list default at the header level. Use this extension point only for use cases that can't use the Price List defaulting matrix. In this case, the request contains values for all the context variables, in addition to the default context variables.</p> |
| <p><i>sn_csm_pricing.ListPriceExtensionPoint</i></p> | <p>Customize the logic for determining a base list price. Enables you to extend the pricing engine logic and not rely on a price list and price list line to fetch the base list price.</p> |
| <p><i>sn_csm_pricing.AttributeAdjustment</i></p> | <p>Customize the logic that determines the attribute adjustments for a product offering. You can extend the pricing engine logic without using the Attribute Adjustment table to fetch the adjustment values.</p> |
| <p><i>sn_csm_pricing.PricingAdjustment</i></p> | <p>Customize the logic that determines price adjustments for a product offering. Enables administrators (partner implementers) to extend the pricing engine logic by not relying on the Standard and Component Configuration Rule matrix to fetch the adjustment values.</p> |

Exporting and importing pricing entities

As a pricing admin, you can both export and import pricing entities between ServiceNow instances. For example, you can promote pricing entities such as price lists from a non-production instance to a production instance. Each process involves a separate set of steps.

You choose the pricing entities, such as price lists, to be exported. Before you export your pricing entities to a target instance, be sure that your product catalog admin has first imported the product catalog base entities, product offering catalog, and product offerings to your target instance. Your pricing entities are associated with product offerings and catalogs, so the offering and catalog information must exist before you import pricing entities. For more information on the product entities that must be imported to your target instance, see [Exporting and importing product catalog entities](#).

Export and import process for pricing entities

Follow these steps to export and import pricing entities.

Export and import steps for pricing entities

| Step | Description |
|---|--|
| Export pricing entities | Export pricing entities from one instance to another. The entities are exported as JSON and are downloaded to your local download directory. |
| View export job status | Check the state of the export job. |
| Import pricing entities | Import pricing entities exported as JSON files to another instance. |
| View import job status | Check the state of the import job. |


Export pricing entities

Export pricing entities as a JSON file and save the file to your local download directory so that it can be imported to another ServiceNow instance.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Export > Export Entities**.
The Export Entities list shows the previous export jobs.
3. Start an export job by selecting **Export Hierarchy**.
The **Export Entities** form opens in the **Export-UI** tab.
4. In **Entity Type**, select the pricing entity to be exported from your source instance.
The pricing entities include: Rule Matrix, Price List, Price List Line, Attribute Adjustment, Cost Book, and Cost Book Line.
5. Select the items that you want to export and then select **Export**.

Note: Entities such as rule matrices may have specific versions. Be sure to select a specific version of the entity to be exported and import that version to the target instance.

6. Give the export job a file name and description and select **Submit**.
The export process begins and a message displays the catalog export ID.
7. Find and view the exported JSON file by refreshing the **Export Entities** list and selecting the export job.

The exported file appears in the **Attachments** pane.

8. Select the attachment to download the exported file.
The file is downloaded as a JSON file and saved to your local download directory.

What to do next

[Import pricing entities.](#)

Import pricing entities


Import pricing entities to a target instance by using the ServiceNow Platform import function.

Before you begin

Before you start, check your target instance and verify that certain required entities have been imported. For example, the product offerings and product offering catalogs associated with your pricing entities must have been previously imported to your target instance. Similarly, if you're importing price list lines or cost book lines, the price list or cost book for those lines must have been previously imported to your target instance.

Role required: sn_csm_pricing_pricelist_administrator

Procedure

1. Go to the target instance where you want to import the pricing data.
2. Start the import process.
 - To import pricing entities, navigate to **All > Pricing > Export/Import > Import**.
 - To import context rules, navigate to **All > Context Rule Management > Import**. The record for the import data source opens.
3. Attach the JSON file by selecting the **Attachments** () icon in the header bar. The Import Data Source pop-up opens.
4. Select **Choose file** and select the JSON file you want to import.
5. When the file is uploaded, close the Attachments pop-up.
6. Under Related Links, select **Load All Records**. The data from the imported file loads, and a Progress bar opens showing the imported job. The imported data is loaded into the import set temporary table sn_csm_pricing_import_data_source or sn_csm_ctxrul_mgt_import_data_source if you're importing context rules.
7. In the Next steps section, select **Run Robust Transform**, then select **Transform**. The progress bar shows the transform status. When the transform is complete, the imported data is loaded into the appropriate pricing tables.
8. In the Next steps section, select the import set link to view the resulting import set. The imported data is available in the appropriate tables.
9. In the Import Set record, open the **Import Log** tab to check for any errors and verify that the transform completed successfully.

What to do next

Certain imported pricing entities, such as price lists or cost books, are in the draft state in the target instance. To make the imported price list or cost book active in the instance, publish them.

Configuring agent tools in Sales Customer Relationship Management

The applications in Sales Customer Relationship Management share common features and tools for agents, such as the Product Configurator.

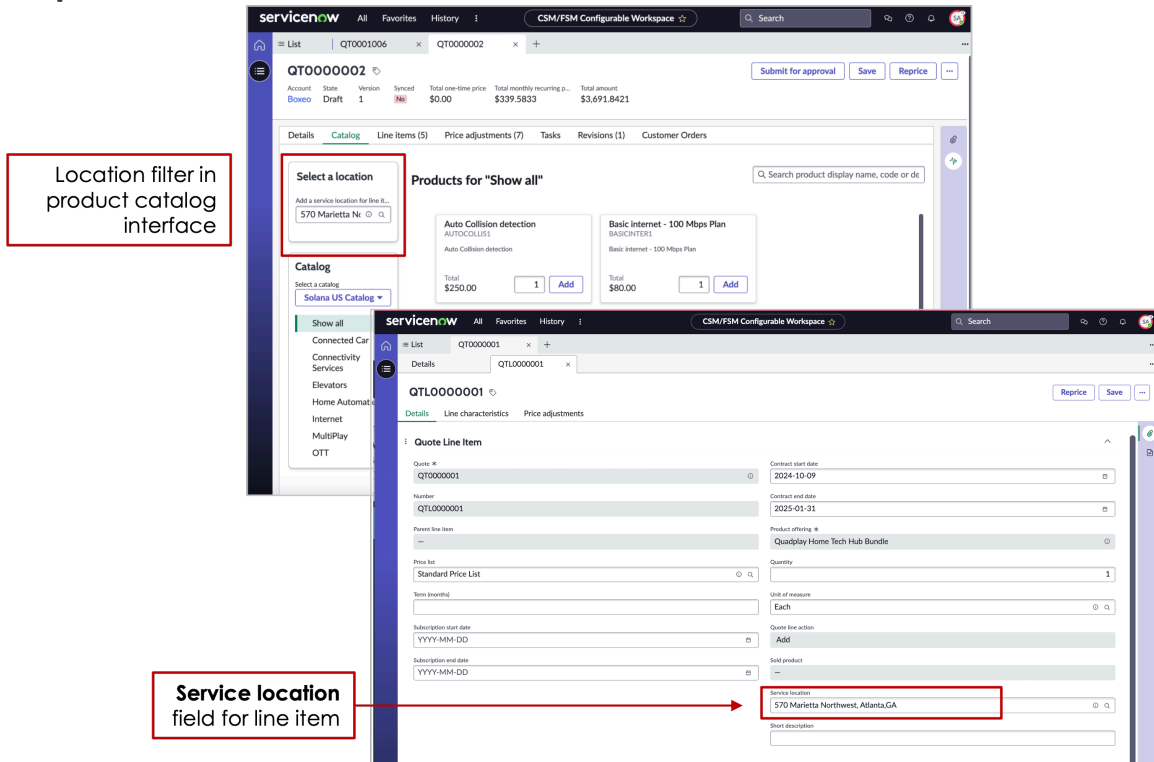
This section describes common features that you can configure for your agents, such as location-based transactions.

Configuring location-based product transactions

In Sales Customer Relationship Management, agents can create opportunities, quotes, and orders tailored to customer location. These transactions are called location-based product transactions.

When the product offerings and services available to customers vary based on location, your agents can use a location filter in the product catalog UI to select a service location and view only the products and services appropriate for that location. Agents can then add the appropriate products to an opportunity, quote, or order. Agents can also copy products and services from one location to another within the same transaction, which eliminates the need to create another opportunity, quote, or order for each location.

Location filter in the product catalog UI and service location in the line item view for quotes



How location-based transactions work

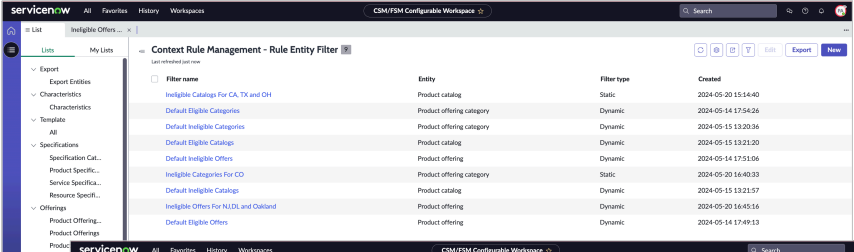
Admin and product catalog admin configuration

Admins activate location-based transactions by enabling the *sn_sales_common.enable_location_based_transactions* system property.

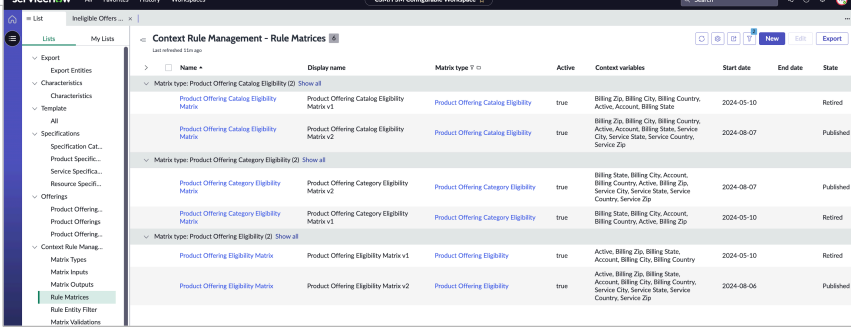
Product catalog admins use the product eligibility rule entity filters to identify eligible and ineligible product entities (catalogs, categories, and product offerings). They also set up decision rules in product eligibility matrices, to specify the context variables, such as billing state or the service location variables (introduced in the November 2024 release), for controlling the display of eligible catalogs, categories, or product offerings.

Rule entity filters and product eligibility rule matrices

Rule entity filters for product eligibility



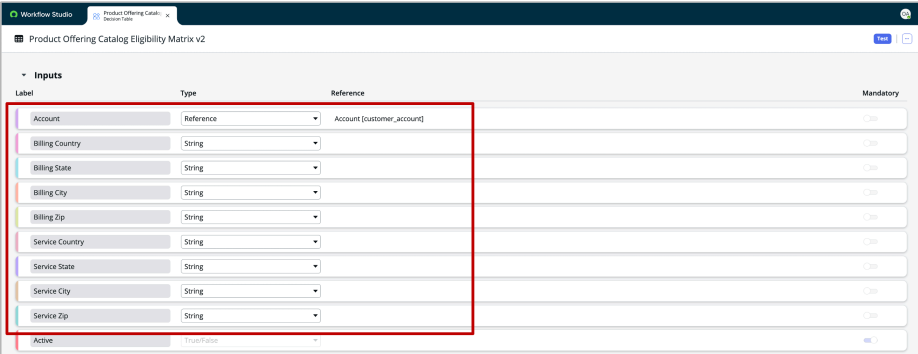
Product eligibility matrices (v2 provides service location context variables)



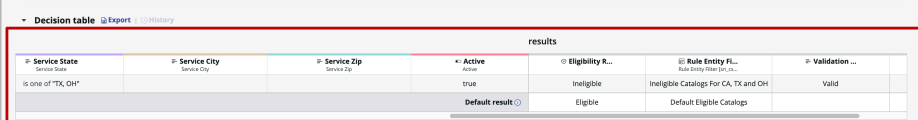
In the following example of the Product Offering Catalog Eligibility matrix, a rule entity filter for ineligible catalogs and the context variable, service state, are used to filter the product catalog displayed.

Example product offering catalog eligibility matrix

Context variables for product eligibility



Decision rule for product entity

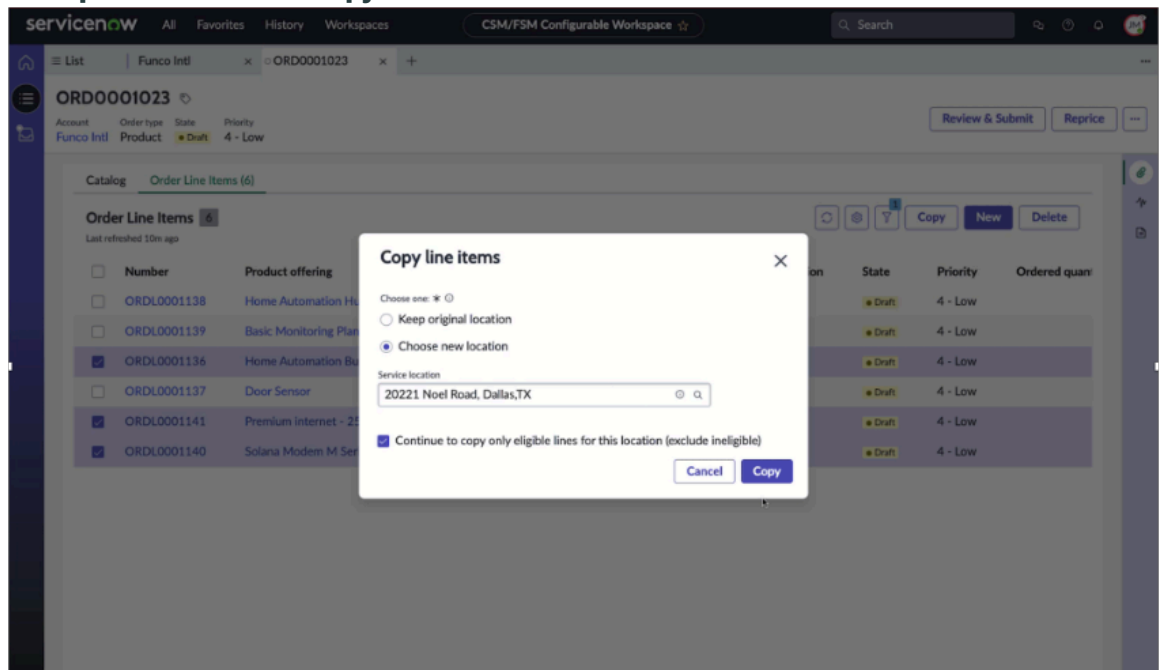


Agent experience for location-based transactions

When agents specify a service location, the product catalog UI displays the eligible catalog, categories, or offerings for that location, depending on the product eligibility entities configured. When they select a simple or fixed product, the line item is created automatically for the specified location. If they select a configurable product, they use the product configurator to customize the product options. A line item is created automatically when they save the product configuration.

Your agents can then copy line items to another location in the same transaction (opportunity, quote, or order). They can indicate that only eligible line items can be copied to the specified location.

Example order line item copy



For details on how agents add products to an opportunity, quote, or order by location, see the following:

- Use location filter to add opportunity line items.
- Copy opportunity line items to a location.
- Filter catalogs by location in a quote.
- Copy locations for quote line items.
- Filter product catalog by location.
- Update product locations at the order line level.

Setting up location-based transactions

Admins and product catalog admins complete the following configuration tasks to set up location-based transactions.

Location-based transaction configuration tasks

| Step | Description | Role |
|--------------------------------------|--|-----------------------|
| Activate location-based transactions | Enable the <code>sn_sales_common.enable_location_based_transactions</code> system property. | Admin |
| Create rule entity filters | Define the rule entity filters that make catalogs, categories, and product offerings either eligible or ineligible for display. | Product catalog admin |
| Define product eligibility rules | Set the product eligibility rules by selecting the context variables, such as the service location context variables, that control the display of product catalog, category, or offerings. | Product catalog admin |

Activate location-based transactions

Turn on location-based transactions for opportunities, quotes, and orders by using the `sn_sales_common.enable_location_based_transactions` system property.

Before you begin

Role required: admin

About this task

The `sn_sales_common.enable_location_based_transactions` system property enables your agents to select a customer location and view only the eligible products for that customer location when adding product lines to an opportunity, quote, or order. This feature also enables agents to copy line items to another location within the same transaction (opportunity, quote, or order).

Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the `sn_sales_common.enable_location_based_transactions` system property.
3. In the **Value** field, enter `true`.
4. Select **Update**.
The location filter is displayed in the product catalog interface. Agents can use the filter to select a location when adding product lines to an opportunity, quote, or order. The catalog displays the eligible product offerings for the location. After adding products from the catalog, agents can then copy selected products (line items) to another location within the same transaction, without having to create another opportunity, quote, or order for a different customer location.

What to do next

Define the [product eligibility rule filters](#) and [matrices](#) that control the product offerings displayed by location.

Setting up the product configurator

Control the product options displayed in the product configurator interface by using the Open State Management API framework.

Configuration overview

As an admin, you can manage the configuration states and configurator nodes displayed in the product configurator by using the Open State Management API framework and open state management extension points.

Open state management

The open state model is a programmatic framework in the Configuration State Model API, which lets you program variations in product options that appear in the product configurator in Sales Customer Relationship Management. The API framework provides certain states and helper API methods for controlling how nodes in the product configurator user interface are displayed.

As developers, you can use [extension points for open state management](#) to set the view-only or editable states on any configurator node, based on events that occur at loading or when product selections change. You can also optionally script information messages along with changing the state of the node. These messages display contextually in the Product Configurator user interface. Various helper API methods are available for reading and setting states on any node, eliminating the need for extensive JSON scripting.

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

Use cases for configuration state management

The following table shows different ways that you can control the product options displayed in the product configurator.

Configuration state model use case examples

| Product configurator use case | Example |
|--|---|
| Hide certain options for a customer | A product attribute selection isn't displayed for customers in California due to state safety regulations. |
| Set certain default options for a customer | For upgrades, only the Ultimate plan is displayed for existing customers who have a premium plan. |
| Allow only certain options to be selected based on other attribute options | For certain products such as laptops, display all sizes 13", 15", and 17", but display only 15" and 17" laptops if only the touchscreen feature is required. |
| Allow quantity to be set for products | Some products might have different default quantity values. Allow agents to configure the quantity as long as the value is within the bounds of a minimum quantity and maximum quantity allowed for that product. |
| Allow only certain characteristic selections to be made | Certain product selections require a particular characteristic value to be chosen. For example, upon selection of the Ultimate Internet Plan, the connectivity speed that can be chosen is 5G. |

You can manage the display of options in the product configurator by using the Configuration State Model API Framework.

Node states

Nodes in the product configurator display product relationship groups, child products, and characteristic options. Nodes can have the following states:

Visible - Yes (make node visible) or No (make node invisible)

Configurations that are visible or not visible to the agent in the product configurator. Options might not be visible if they're incompatible with other selections made by the agent. For example, for a particular car wheel size, incompatible tire options are not visible.

Editable - Yes (show node and make it selectable) or No (show node but make it unselectable)

Configurations that are editable or not editable by the agent in the product configurator. Agents can personalize certain aspects of the product while maintaining constraints that are necessary for the product. For example, for a specific car model, only compatible exterior colors are editable.

Quantity - Visible (Yes/No), Editable (Yes/No)

Configurations that set quantity on a product, enforce rules related to quantity, and show informational and error messages related to quantity at the appropriate node.

Checked - Yes (show node selections) or No (make node selections invisible)

Configurations that show the configuration options for selection based on the context.

Value - Visible (Yes/No), Editable (Yes/No)

Configurations that set a value for a characteristic, enforce rules related to the characteristic, and show informational or error messages related at the appropriate node.

i Note: Agents can choose to set messages at a node level to provide justification for a state change.

Events

Manage node states using the Configuration State Model API Framework. Activate these states by using the following two events in the Events Framework of the Configuration State Model:

- On Load - The state (visibility, editability) of each node is initially set to Yes (true). The open state is invoked on loading.
- On Change - This function is called whenever there's a change in a node's value in the product configurator user interface. However, this state isn't invoked when quantity changes occur in the product configurator. These states can be set programmatically in one of the following ways: on-load, during selections, or just before the instance is synchronized back to the transaction

Helper API methods

You can use the following helper API methods to read and set states on any node.

Apply states

Set the visible and editable states for product relationship groups, product characteristics, and product characteristic options using Getter and Setter methods to read and change the state of the configuration model.

Getter methods

Obtain node paths along with the states on any configuration node:

- *getAllNodes()*: Returns JSON with node path (reference to code) and its respective relative path with all the states.
- *getNode(nodePath)*: Returns javascript object of the node for the specified node path if it exists.
- *getNodeDetails(nodePath)*: Return all the states for the specified node path if it exists.

Setter methods

- Set the visible and editable states for product relationship groups, product characteristics, and product characteristic options.
 - *setVisible*: True/False at all levels
 - *setVisible(True/False)*
 - *setEditable*: True/False at all levels
 - *setEditable(True)*
 - Implementation example:

```
var newHandler = configInstance.getNode(nodePath);
newHandler.setVisible(true, "This is a sample
message for setVisible");
newHandler.setEditable(false, "This is a sample
message for setEditable");
```

- Set the quantity for offers and specifications. The nodePath determines the product, and the value is the quantity to be set.

- `setQuantity(value);`
- Implementation example:

```
var newHandler = configInstance.getNode(nodePath);
newHandler.setQuantity(value, "This is a sample
message for setQuantity");
```

- Set the configuration options to see what is being selected.

- `setChecked (value); True/False`
- Implementation example:

```
var nodePath =
"QUADPLAYH01/OPTIONALPRODUCTS/CONNECTEDC2/CONNECTED
C1/VIN"
var newHandler = configInstance.getNode(nodePath);
var newHandler.setChecked(true, "This is a sample
message for setChecked")
```

- Set the value for a characteristic node where the input type is a single line of text.

- `setValue(value);`
- Implementation example:

```
var nodePath =
"QUADPLAYH01/OPTIONALPRODUCTS/CONNECTEDC2/CONNECTED
C1/VIN"
var newHandler = configInstance.getNode(nodePath);
newHandler.setValue("9TKN332", "This is a sample
message for
setValue");
```

Getter context variable methods

Retrieve context variables inside the product configurator user interface.

- `getHeaderContextVariables()`: Returns a list of all the header context variables.
- `getHeaderContextVariableValue(contextVariable)`: Returns a value and the display value of a specific context variable in the header.
- `getLineContextVariables()`: Returns a list of all the line context variables.
- `getLineContextVariableValue(nodePath, contextVariable)`: Returns the value of a specific context variable in the line.

Use extension points for open state management

Control the options displayed in the product configurator by using extension points in Open state management.

You can use extension points to call custom scripts for managing the product configurator.

As an admin, access the available open state management extension points, by navigating to **All** > **Scripted Extension Points** and in the Extension Points list, select the appropriate extension point to view it.

State management extension points

| Extension points | Description |
|-------------------------|---|
| ConfigInstanceAPIImpl | Fetches open state execution for config instances during change and on load commands. |
| OpenStateValidation | Returns open state execution on config instances during change and on load. |
| SetOpenStateResponse | Updates the open state config instance to a config instance. |
| OpenStateModelExtension | Method used to return to the updated config instance. Customers can customize the process method. |

Assign user roles in Sales Customer Relationship Management applications



The Sales Customer Relationship Management applications use roles to control access to features and capabilities. Roles also determine access to information for data security, identify users, and define the work that users perform in your organization.

Overview of roles

Roles define the functions available to users of the Sales Customer Relationship Management applications, including:

- Product Catalog Management
- Pricing Management
- Lead Management
- Opportunity Management
- Quote Management
- Sales Agreement Management
- Order Management

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

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

Lead Management roles

The roles in the following table apply to Lead Management.

| Role | Description |
|--|---|
| Lead Agent [sn_customerservice.csm_workspace_user] | Identifies, nurtures, and converts leads into opportunities. Creates, reads, updates, and deletes leads. Has access to CSM Workspace. |
| Sales Agent [sn_sales_common.sales_manager] | Role that has access to CSM and lead entities. |
| Sales Operations Specialist [sn_sales_common.sales_ops_specialist] | Enhances efficiency and accuracy in sales operations. Read access to lead entities. Configures sales processes in an organization. |
| Lead Viewer [sn_prd_pm.product_catalog_viewer] [sn_csm_ctxrul_mgt.context_variable_viewer] [sn_csm_ctxrul_mgt.rule_matrix_viewer] | Granular role that has access to view product catalog entities such as product offerings. |
| Lead Writer | Read access to all lead tables such as header and line items. |

Opportunity Management roles

The roles in the following table apply to Opportunity Management. To learn more about these roles, see [Opportunity Management](#).

| Role | Description |
|---|--|
| Sales Agent [sn_sales_common.sales_agent] | Identifies, nurtures, and converts opportunities into successful sales. Creates, reads, and updates opportunities. |
| Sales Manager [sn_sales_common.sales_manager] | Reviews open opportunities and assigns them to sales agents. Creates, reads, and updates opportunities. |
| Sales Operations Specialist [sn_sales_common.sales_ops_specialist] | Enhances efficiency and accuracy in sales operations. Configures sales processes in an organization. |
| sn_opty_mgmt_core.opportunity_setup_viewer | Granular role that has access to sale cycle and stages. |
| sn_opty_mgmt_core.opportunity_setup_writer | Granular role that has access to sales cycle and stages. |
| sn_opty_mgmt_core.opportunity_viewer | Read access to all opportunity tables such as header and line items. |
| sn_opty_mgmt_core.opportunity_writer | Read access to all opportunity tables such as header and line items. |

Quote Management roles

The roles in the following table apply to Quote Management.

| Role | Description |
|---|---|
| Sales Agent [sn_sales_common.sales_agent] | Identifies, nurtures, and converts quotes into successful sales. |
| Sales Manager [sn_sales_common.sales_manager] | Assigns quotes to sales agents or sales teams. |
| Sales Operation Specialist [sn_sales_common.sales_ops_specialist] | Enhances efficiency and accuracy in sales operations. Configures sales processes in sales operations. |

Sales Agreement Management roles

| Role | Description |
|--|--|
| Sales Agent, Sales Manager, Data Viewer sn_sales_agmt_core.sales_agreement_viewer | Read operations on sales agreements, sales agreement lines, and related data such as characteristics, price lists, and other tables. |
| Sales Agent, Sales Manager sn_sales_agmt_core.sales_agreement_writer | Create, read, and update operations on sales agreements and sales agreement lines. |

Product Catalog Management roles

The roles in the following table apply to Product Catalog Management.

| Role | Description |
|---|--|
| Product Catalog Manager [sn_prd_pm.product-catalog_manager] | Create, read, update, and delete product, service, and resource specifications. |
| Product Catalog Admin [sn_prd_pm.product-catalog_admin] | Create, read, update, and delete product, service, resource specifications, characteristics, and characteristic options. Can also export and import catalog entities and set up any catalog-related system properties. |
| Product Catalog Viewer [sn_prd_pm.product-catalog_viewer] | Read access to product, service, resource specifications, characteristics, and characteristic options. |

Pricing Management roles

The roles in the following table apply to Pricing Management.

| Role | Description |
|---|--|
| Price List Admin [sn_csm_pricing.pricelist_administrator] | Create, update, and read pricing entities. Can also export and import pricing entities, set up or edit pricing-related system properties, and view transaction logs. |

| Role | Description |
|---|---|
| Price List Manager [sn_csm_pricing.pricelist_manager] | Create, update, and read pricing entities. |
| Price List Writer [sn_csm_pricing.pricelist_writer] | Granular role that has read, write, and delete access to pricing entities. To delete a pricing entity such as a price list or cost book, the pricing entity must be in Draft state. |
| Sales Agreement Price List Writer [sales_agreement_pricelist_writer] | Granular role that has read and create access to pricing entities. Create access is granted only through back-end workflows. Write access only for Sales Agreement price lists. Inherited within Sales Agreement Writer role. |
| Price List Viewer [sn_csm_pricing.pricelist_viewer] | Granular role that has read access to pricing entities such as price lists, price list lines, cost books, and cost book lines. |

Order Management roles

Order Management uses the roles in the following tables to control and manage access to the application features for Order Management, Service Order Management, and Fallout Management.

Order Management roles

| Role | Description |
|---|--|
| Order Fulfillment Manager [sn_ind_tmt_orm.order_fulfillment_manager] | View and edit access to product orders, product order tasks, service orders, and resource orders. Fulfillment managers with this role can view, but not edit, order fallout records. The Order Fulfillment Manager receives orders, reviews order line items, checks that orders are ready for fulfillment, and then approves them. |
| Order Fulfillment Agent [sn_ind_tmt_orm.order-fulfillment_agent] | View access to product orders, product order tasks, service orders, and resource orders. Agents with this role can also view, but not edit, order fallout records, but they can edit some fields on the product order tasks. After the Order Fulfillment Manager approves an order, the agent performs these fulfillment tasks. This role also includes the Order Viewer [order_view] role. |
| Order Approver [order_approver] | View access to customer orders and product catalog data. Users with this role can approve customer orders but can't create, update, or delete an order like an Order Fulfillment Manager or Order Fulfillment Agent would |

Order Management roles (continued)

| Role | Description |
|--|--|
| | do. This role also includes the Order Viewer [order_view] role. |
| Order Viewer [order_viewer] | <p>View access to customer orders, product orders, product order tasks, service orders, and resource orders.</p> <p>You should also grant an order viewer with the sn_prd_pm.product_catalog_viewer role to access the product catalog data.</p> <p>Note: The order approver and order viewer roles are included in the Order Management Business Stakeholder role, which has a fee associated with it. Don't assign these roles to users without confirming that your organization has the appropriate entitlement. To learn more, see Activate Business Stakeholder</p> |
| Fulfillment Viewer [sn_ind_tmt_orm.fulfillment_viewer] | Granular role that has read access to fulfillment tables: order tasks, domain orders, product orders, resource orders, and service orders. |
| Fulfillment Writer [sn_ind_tmt_orm.fulfillment_writer] | Granular role that has read and write access to fulfillment tables: order tasks, domain orders, product orders, resource orders, and service orders. This role includes the Fulfillment Viewer [sn_ind_tmt_orm.fulfillment_viewer] role. |

Service Order Management roles

| Role | Description |
|--|--|
| Service Order Manager [sn_ind_tmt_orm.service_order_manager] | <p>View and edit service order requests, service orders, resource orders, and related fulfillment tasks. A manager with this role can also view, but not edit, order fallout records.</p> <p>The Service Order Manager can review external service order requests, review service order line items, checks that service orders are ready for fulfillment, and then approve them.</p> |
| Service Order Agent [sn_ind_tmt_orm.service_order_agent] | View access to service order requests, service orders, resource orders, and related fulfillment tasks. Service Order Agents can edit some fields on the service order tasks. After the Service Order Fulfillment Manager approves a service order, the agent performs these |

Service Order Management roles (continued)

| Role | Description |
|------|--|
| | tasks. This role also includes the Order Viewer [order_view] role. |

Fallout Management roles

| Role | Description |
|--|---|
| Fallout Manager [sn_fallout_mgmt.fallout_manager] | Create, view, assign, and edit fallout records. Managers with this role can also view order tasks and domain orders. |
| Fallout Agent [sn_fallout_mgmt.fallout_agent] | View fallout records. Agents with this role can also update the state of fallout records and create work notes on them. |

Configuring the Business Portal

Admins can configure the Business Portal (sn_b2b_portal) so that customer can browse products and create orders in Sales Customer Relationship Management.

Configuration overview

1. Install the following plugins in the given order using the Application Manager to set up the Business Portal:
 - a. Order Management Portal: sn_ord_mgmt_portal
 - b. Product Catalog Management Portal: sn_prd_pm_portal
 - c. Customer Service Portal: sn_csm_portal
 - d. Business Portal: sn_b2b_portal
 - e. UI Components for Customer Portals: sn_ciwf_ui_cmpnt
 - f. Sales Cart plugin: sn_sales_cart

2. Enable the Business Portal

Enable the Business Portal (sn_b2b_portal) so customers can browse products and create orders.

Enable the Business Portal

Admins can enable the Business Portal (sn_b2b_portal) so customers can browse products and create orders.

Before you begin

Role required: admin

About this task

To set up the Business Portal and Sales Customer Relationship Management self-service enhancements, first install the Business Portal plugins, which are available in the app store.

See [Configuring the Business Portal](#) for more information.

Procedure

1. In the CSM Configurable Workspace, select **All > Portals**.
2. Select **Business Portals**.
3. Clear the **Inactive** box.
4. Select **Save**.
The Business Portal is enabled.

Post-upgrade order migration for the Business Portal

Migrate draft proxy order carts to the new sales cart to avoid having your customers lose products they added to their carts on the Business Portal

Before you begin

Ensure that the Sales Cart application has been installed. For more information, see [Install Sales Cart](#).

Role required: admin

About this task

- Note:** If you have used the Business Portal and are upgrading to the Zurich release, you must run the *Migrate proxy orders to sales cart* scheduled job after installing the Sales Cart application. This job migrates the draft proxy order carts to the new sales cart and prevents your customers from losing products added to their carts on the Business Portal.

The *Migrate proxy orders to sales cart* scheduled job performs the following actions:

- Migrates items from customers' existing cart to the new sales cart
- Creates cart-related records in the Sales Cart tables
- Updates the value of the `sn_sales_cart.show_cart_migration_msg` property to false

Until you run the this job, the following message is displayed to your customers on the Business Portal:

```
A system update cleared your cart. Please contact your administrator for help.
```

Procedure

1. Select **All > System Definition > Scheduled Jobs**.
2. On the Scheduled Jobs page, enter `Migrate proxy orders to sales cart` in the search field.
3. Select the job.
4. On the Scheduled Script Execution page, select **Execute Now**.

Install Sales Cart

You can install the Sales Cart plugin (`sn_sales_cart`) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).
- Review the [Sales Cart](#) listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with the Sales Cart plugin (sn_sales_cart):

- Roles
- Scheduled jobs
- Tables

For more information, see .

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.

2. Find the Sales Cart plugin (sn_sales_cart) using the filter criteria and search bar.

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

A list of the versions available to you are displayed.

3. Select a version from the list and select **Install**.

In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.

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

6. Select **Install**.

What to do next

A sample logo is applied to the sales cart PDF by default. To customize and add your logo, see [Add a logo to the sales cart PDF](#).

Add a logo to the sales cart PDF

Customize and embed your company logo in sales cart summary PDFs to ensure consistent branding and alignment with corporate identity standards.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Definition > Tables**.
2. In the **Name** search field, enter `db_image` table and select the Images table.
3. On the Tables details page, select **Show List** from the Related Links section.
4. In the **Name** search field, enter `sn_sales_cart.sales_cart_download_logo.png` and select the record.
5. If a message appears about the application scope, select **here** to be able to edit the record.
6. Update the logo by selecting **Update** next to the Image field.
 - a. Select **Update** next to the **Image** field.
 - b. Select the **Choose File** button and select the image file on your computer that you want to use.
 - c. Select **OK**.
7. On the Images page, verify that your logo file uploaded successfully.

Note: You might have to change the application scope again.

8. Select **Update**.

Modifying the data retention and table cleanup policy for the Sales Cart application

A default data retention and table cleanup policy automatically deletes records from the Sales Cart application based on predefined conditions. You can modify these conditions to match your organization's policies.

By default, records in the complete state are deleted from the Sales Cart [sn_sales_cart] table if they meet either of the following conditions:

- Records older than six months
- Records that haven't been updated for more than six months

Modify the data retention and table cleanup frequency depending on your expected load and volume. For more information, see [Modify data retention policy for ATF test results](#).

Related topics

[Table cleanup](#)

[Autoflush form](#)

Modify terms and conditions for the sales cart

Add order checkout terms and conditions in the CartTermsAndCo document template block for your Business Portal.

Before you begin

Role required: admin

About this task

The CartTermsAndCo document template block in the Sales Cart Demo Template and Sales Cart Terms and Conditions Default document templates is used for displaying terms and conditions in the cart summary PDF and while checking out respectively.

Procedure

1. Navigate to **All > Document Templates > Document Template Blocks**.
2. Select **CartTermsAndCo**.
3. Select the record from the Document Template Block Contents related list.
4. If a message appears about the application scope, select **here** to be able to edit the record.
5. Add your terms and conditions in the Body section.
6. Select **Update**.

Related topics

[Document Templates](#) 

[Create block content in Document Templates](#) 

Configuring Lead-to-Cash Process Management

Plan and configure your implementation of Lead-to-Cash Process Management.

Configuration overview

1. Review the dependencies for installing and using Lead-to-Cash Process Management.
 - For sales process managers to be able to create and monitor sales process records through the CSM Configurable Workspace Customer Service Management (CSM) must be installed.
 - To be able to monitor opportunities, quotes, or orders in the sales process, you must have Opportunity Management, Quote Management, Order Management installed.
 - Business Object Core (sn_bo_core) is automatically installed as a dependency when you install the Lead-to-Cash Process Management application (app-l2c-cockpit).

2. Install Lead-to-Cash Process Management

You can install the Lead-to-Cash Process Management application (app-l2c-cockpit) if you have the admin role. The application installs related ServiceNow[®] Store applications and plugins if they aren't already installed. Install Lead-to-Cash Process Management on each of your environments.

3. Assign roles to Lead-to-Cash Process Management users

Assign roles to your users so that they can access features, capabilities, and data in the Lead-to-Cash Process Management application.

4. Set up business objects for sales process records

Create business object group and business object types. Define relationships between the business object types, and add them as members under the business object group. This enables the sales process managers to create sales process records using these entities.

5. Customizing the sales process dashboard

Define the number of levels and tile content on the node map, and determine how tasks are consolidated on the Tasks tab, to enhance clarity and control so sales process managers can focus on relevant data and navigate through complex sales processes effectively.

6. Modifying data retention and table cleanup policy for Lead-to-Cash Process Management

Access and modify the default data retention and table cleanup policy to modify it to suit your needs.

7. Setting conditions for enabling email access in Lead-to-Cash Process Management

Sales process managers can compose emails directly from the dashboard for sales entity records that are monitored within a sales process record.

Install Lead-to-Cash Process Management

You can install the Lead-to-Cash Process Management application (app-l2c-cockpit) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).
- Review the [Lead-to-Cash Process Management](#) application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Lead-to-Cash Process Management:

- Roles
- Tables
- Properties

For more information, see [and](#) .

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Lead-to-Cash Process Management application (app-l2c-cockpit) using the filter criteria and search bar.

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

A list of the versions available to you is displayed.

3. Select a version from the list and select **Install**.

In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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

6. Select Install.

Result

The Lead-to-Cash Process Management application is installed on your instance. The Business Object Core application is auto-installed as a dependency. For more information, see .

The O2C Objects business object group also becomes available. It contains entities involved in the opportunity-to-cash process, such as opportunity, quote, and order. You can use this group provided you have Opportunity Management, Quote Management, and Order Management apps installed on your ServiceNow instance.

What to do next

Assign roles to Lead-to-Cash Process Management users so that they can access features and perform tasks using this app. For more information, see [Assign roles to Lead-to-Cash Process Management users.](#)

Assign roles to Lead-to-Cash Process Management users

Assign roles to your users so that they can access features, capabilities, and data in the Lead-to-Cash Process Management application.

Before you begin

Before you can assign roles to your users and groups, make sure you have created and configured required users and groups.

Role required: admin

About this task

The following table lists the roles business object writers and sales process managers need to access the tables necessary to perform their respective tasks.

Required roles for specific job functions

| User persona | Job function | Role required | Tables accessed |
|------------------------|---|---|---|
| Business object writer | Creates business object groups and defines relationships between the business object types. | Business object writer [sn_bo_core.business_object_writer] | <ul style="list-style-type: none"> Business Object Type [sn_bo_core_obj_type] Business Object Relationship [sn_bo_core_obj_rel] Business Object Group [sn_bo_core_obj_group] |

Required roles for specific job functions (continued)

| User persona | Job function | Role required | Tables accessed |
|-----------------------|---|---|---|
| | | | <ul style="list-style-type: none"> • Business Object Group Members [sn_bo_core_obj_group_members] |
| Sales process manager | Creates sales process records, monitors tasks and activities on the hierarchical node map, links and delinks nodes. | Sales process manager [sn_l2c_cockpit.sales_process_manager] | <ul style="list-style-type: none"> • Sales Process Record [sn_l2c_cockpit_sales_process_record] • Business Process Record [sn_bo_core_process_record] • Business Process Resource [sn_bo_core_process_resource] • Business Process Task [sn_bo_core_process_task] |

You can assign roles to users and groups using either guided setup or through the following user administration features:

- [Assign a role to a user](#)
- [Assign a role to a group](#)

Related topics

- [Creating users](#)
- [Creating groups](#)

Set up business objects for sales process records

Create the business objects necessary for sales process managers to create sales process records using these entities.

Before you begin

Role required: Business object writer [sn_bo_core.business_object_writer]

About this task

https://player.vimeo.com/video/1102610152?h=669291cfe1&badge=0&autoplay=0&player_id=0&app_id=58479

Procedure

1. Create business object groups.

- a. Navigate to **All > Business Object Core > Business Object Group**.
- b. Select **New**.
- c. On the form, fill in the fields.

Business Object Group form

| Field | Description |
|-------------|---|
| Name | Name for the business object group. |
| Applies to | Workflow or process for which you're creating the business object group. This value should be Sales Process Record [sn_l2c_cockpit_sales_process_record]. |
| Description | A brief description of the business object group. |

2. Create business object types to add as members in the business object group.

- a. Navigate to **All > Business Object Core > Business Object Types**.
- b. Select **New**.
- c. On the form, fill in the fields.

Business Object Type form

| Field | Description |
|------------|---|
| Name | Name for the business object type. For example, Opportunity. |
| Table name | Table associated with the business object. For example, if the business object type is Opportunity, you would enter the Opportunity [sn_pty_mgmt_core_opportunity] table. |

- d. Select **Submit**.

3. Define relationships between the object types.

Relationships define how two object types are related by the source and destination columns on the respective tables and govern the hierarchy of the records displayed on the node map. For example, if you add Opportunity Line and Quote as child entities for the business object type Opportunity, on the node map you would see the related Opportunity Line and Quote records under an Opportunity node.

You can add more than one child entity under a parent business object type. Ensure that you avoid circular relationships.

- a. Select the business object type you created.
- b. On the Business Object Type page under the Business Object Relationships related list, select **New**.
- c. On the form, fill in the fields.

Business Object Relationship form

| Field | Description |
|------------------------|--|
| Source | The parent business object type for which you are creating the relationships. |
| Destination | The child business object type that is related to the parent. |
| Source table name | Table name of the parent business object type. |
| Destination table name | Table name of the child business object type. |
| Source field | (Optional) The column on the source table used for establishing the relationship. |
| Destination field | (Optional) The column on the destination table used for establishing the relationship. |

- d. Select **Submit**.
- 4.** Add business object types as members of business object group.
- a. Navigate to **All > Business Object Core > Business Object Group**.
 - b. Under the Business Object Group Members related list, select **New**.
 - c. Select the business object type you want to add using the Lookup list icon (🔍).
 - d. Select **Submit**.

Result

Business object group and business object types are available in Business process and Business entity lists respectively in the Create new sales process record form in the CSM Configurable Workspace.

Customizing the sales process dashboard

Customizing the number of levels and tile content on the node map enhances clarity and control so sales process managers can focus on relevant data and navigate more easily through complex sales processes.

Customize hierarchical node map levels for Lead-to-Cash Process Management

Customize the number of node levels to display in the Lead-to-Cash Process Management hierarchical node map visualization.

Before you begin

Role required: admin

About this task

By default, the Lead-to-Cash Process Management hierarchical node map shows three node levels. Although there is no upper limit on the number of node levels you can display, the node map can display a maximum of 250 nodes at a time.

Procedure

1. Select **All** and in the navigation filter, enter `sys_properties.list`.
2. In the **Name** column, search for `sn_l2c_cockpit.node_default_levels` and select it.
3. If a message appears about the application scope, select **here** to be able to edit the record."
4. In the **Value** field, specify an integer for the number of node levels you want to display on the hierarchical node map.
5. Select **Update**.

Customize details displayed on node map tiles using a decision table

Customize the details displayed on the node map tiles in the Lead-to-Cash Process Management using Decision Tables.


Before you begin

Role required: admin

About this task

You can add more columns to display additional lines. However, this would require you to make code changes in the UI Builder.

Procedure

1. Navigate to **All > System Definition > Decision Tables**.
2. In the **Name** field of the system properties table, search for and select the Business object type configuration decision table.
You are redirected to the decision table in Workflow Studio.
3. Change the values in the **Field 1** and **Field 2** columns depending on the information you want to display in the node map tile.
4. **Optional:** Change the icon for the tile.
 - a. Access the [Icon Gallery](#)  to obtain the icon name corresponding to the icon you want to use.
 - b. Enter the icon name in the **Node Icon** field.
5. **Optional:** Add decision rows for any additional business entities you created.
6. **Optional:** Verify the changes by selecting **Test**.
7. Select **Save**.

Customize Tasks tab views using EVAM

Customize the sales entities from which the tasks are displayed, icon and fields that are displayed on each task tile, and create custom options to filter and view consolidated tasks on the sales process dashboard in Lead-to-Cash Process Management using Entity View Action Mapping (EVAM).

Before you begin

Role required: admin or evam_admin

About this task

Note: Use SPR task EVAM definition for customizing Tasks tab views. Custom EVAM definitions are not supported.

Procedure

1. Log in to your ServiceNow instance.
2. Select the Globe icon (🌐) and set the application scope to Lead-to-Cash Process Management.
3. Navigate to **All > Entity View Action Mapper (EVAM) > EVAM Definitions**.
4. In the **Name** column, search for and select SPR task.
5. **Optional:** In the **EVAM Datasource M2Ms** tab, add or remove a data source.
 - Create and Link: Define a new data source and then link this data source to your EVAM definition. For more information, see [Define a datasource](#).
 - Note:** When specifying a condition to define how the data is filtered from the selected table, select the operator as **is not empty** for the business entity you're adding. For example, **[Quote][is not empty]**.
 - Link Existing: Add a predefined data source to your EVAM definition.
 - Unlink Selected: Unlink a data source you don't want to see on the Tasks tab in the sales process dashboard.
6. Select **Submit**.
7. In the **EVAM View Config Bundle M2Ms** tab, add or remove a configuration bundle.
 - Create and Link: Define a new configuration bundle and then link this bundle to your EVAM definition. For more information, see [Defining an EVAM configuration bundle](#) and [Defining an EVAM view template](#).
 - Link Existing: Add a predefined configuration bundle to your EVAM definition.
 - Unlink Selected: Remove the view config bundle for entities you don't want to display.
8. **Optional:** Add more data filter options on the Tasks tab of the sales process dashboard.
 - a. In the EVAM Data Filters related list, select **New**.
 - b. On the form, fill in the fields.

EVAM Data Filters form

| Field | Description |
|--------|---|
| Label | Label name of the EVAM data filter. |
| Active | Option to activate the EVAM data filter. |
| Order | Priority for the EVAM view configuration. Lower numbers indicate a higher priority. |

| Field | Description |
|-----------------|--|
| Application | Application scope of the EVAM view configuration. |
| EVAM Definition | Associate an EVAM definition with the data filter. |

9. Select **Submit**.

Related topics

[Create an EVAM definition](#) 


Modifying data retention and table cleanup policy for Lead-to-Cash Process Management

Modify the default data retention and table cleanup policy for Lead-to-Cash Process Management to match your organizations requirements.

By default, records are deleted from the Business Process Record [sn_bo_core_process_record] and Sales Process Record [sn_l2c_cockpit_sales_process_record] tables and child records in the Business Process Task [sn_bo_core_process_task] and Business Process Resource [sn_bo_core_process_resource] tables if they meet either of the following conditions:

- In an inactive state and not updated in the past six months
- In an active state but not updated in the past year

You can modify the data retention and table cleanup policy depending on your expected load and volume.

To find out how to modify the data retention and table cleanup frequency for Lead-to-Cash Process Management, see [Modify data retention policy for ATF test results](#) .

Related topics


[Table cleanup](#) 

[Autoflush form](#) 

Setting conditions for enabling email access in Lead-to-Cash Process Management

Sales process managers must be granted access to compose emails for the sales entity records that are monitored within a sales process record.

Sales process managers can compose and send emails related to a sales process record by default. Enable sales process managers to compose emails for the related sales entities by setting the value of the *email_client* dictionary attribute to *true* and using either of the following methods:

- Grant the sales process manager write access to the child entity. For more information, see [Enable the email client for a table](#) .
- Set the value of the *glide.email_client.check_write_access* system property to *false* to override checking whether the user has write access to the child entity.

Note: The *glide.email_client.check_write_access* system property isn't supported on Xanadu and Yokohama Glide versions. If you're using these Glide versions, then you must grant your users write access to the child entity.

Related topics[Email client](#) [View and send emails in Lead-to-Cash Process Management](#)

Configuring Customer Engagement Sequences

Plan and configure your implementation of Customer Engagement Sequences.

Configuration overview

1. Install Customer Engagement Sequences

You can install the Customer Engagement Sequences application (com.sn_crm_sequence) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed. Install Customer Engagement Sequences on the ServiceNow instances in all of your environments:



2. Create a customer engagement sequence

Create a customer engagement sequence from the CSM Configurable Workspace. Specify trigger and exit conditions, and add activities to create a guided experience for your sales representatives to engage with their prospects and customers.

Install Customer Engagement Sequences

You can install the Customer Engagement Sequences application (com.sn_crm_sequence) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#) .
- Review the [Customer Engagement Sequences](#)  application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Customer Engagement Sequences:

- Roles
- Tables

For more information, see .

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Customer Engagement Sequences application (com.sn_crm_sequence) using the filter criteria and search bar.

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

A list of the versions available to you are displayed.

3. Select a version from the list and select **Install.**

In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

5. Select **Install.**

Create a customer engagement sequence

Create a customer engagement sequence to guide your sales representatives through engaging with their prospects and customers.

Before you begin


Role required: `playbook.admin` or `pd_author`

About this task

Setting up a sequence is based on playbooks and requires you to be familiar with using Workflow Studio and Playbook Experience.


i Important: Setup and Tear Down are predefined stages in the Customer Engagement Sequences playbook. Do not remove these stages or add more activities in it. Avoid making any other changes to the Start Sequence and End Sequence activities.

Procedure

- 1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.**
- 2. Select the List icon (☰).**
- 3. Navigate to **Sequences** > **All Sequences**.**
- 4. Select **Create New Sequence**.**
- 5. On the Create new Sequence window, specify a name and optionally a description for your sequence and select **Create**.**
You're redirected to Workflow Studio and a playbook of the type sequence is created with the following predefined stages:
 - Setup
 - Configure sequence activities
 - Tear Down
- 6. Define trigger conditions that initiate a sequence.**
 - a. Select the Edit icon  above the Start pill.**
 - b. On the **Schedule** tab of the Playbook properties form, indicate whether you are using an existing trigger, which includes the trigger type and the conditions that set up the sequences, or defining a new one.**
 - To use an existing trigger, select **Choose an existing trigger** and then proceed to step 7.
 - To define a new trigger, select **Define your own conditions for when your process runs**.


- c.** In the drop-down list for the **Define your own conditions for when your process runs** choice, select the trigger type for the new trigger.
The available trigger types are:
- Record Create
 - Record Update
 - Record Create or Update
- d.** In the **Table** field, select the table whose record operations you want to use to trigger your playbook.
For example, you might want the sequence to trigger when a record is created or updated in the Lead [sn_lead_mgmt_core_lead] table.
- e.** In the **Condition to run** field, add conditions that must be met to trigger your playbook.

Example


For example, to trigger the sequence when a new record is created in the Lead [sn_lead_mgmt_core_lead] table, you would set the condition **[Stage][is][New]**.
For more information, see [Condition builder](#) .

- f.** Select the frequency for your trigger from **Run my trigger** drop-down list.
The available options are:
- Once
 - For each unique change
 - Only if not currently running
 - For every update
- g. Optional:** Trigger your playbook for tables that extend your selected table by selecting the **Run this trigger on extended table** check box.
- h. Optional:** Provide users with the ability to rewind the playbook from the beginning by selecting the **Details** tab and selecting the **Allow this playbook to be restarted during runtime** check box.
- i.** Select **Save and close**.


- 7. Optional:** Change the priority with which a sequence task is created in the Start Sequence activity of the Setup stage.
When the trigger condition is met, this activity creates a sequence task with a state of Work in progress and a priority of Moderate by default.


 **Note:** Do not remove this stage or add more activities to this stage. Avoid making any other changes to the Start Sequence activity.

- 8.** In the sequence diagram, configure sequence steps in the Configure sequence activities stage.

Use this stage to configure activities you want to make available to the sales representative as guided sequence steps during runtime. For more information, see [Add and configure an activity in a playbook](#) .

You can add any number of activities to this stage in your sequence.

9. **Optional:** Exit early from the sequence by selecting the **Customer Engagement Sequences > Update Sequence Task** activity from the activity picker.
For more information on adding an activity, see [Add and configure an activity in a playbook](#) .
10. Review the configuration in the Tear Down stage.
This predefined stage updates the sequence task record when the sales representative completes all the sequence steps in their sequence task. By default, the system updates the state of the sequence task record as complete (indicated by State = 3) in the Customer Engagement Sequence Task [sn_crm_sequence_task] table.

Note: Do not remove this stage or add more activities to this stage. Avoid making any other changes to the End Sequence activity.
11. Verify the sequence by selecting **Test**.
12. Select **Activate** to publish the sequence.
13. **Optional:** View the sequence in the CSM/FSM Workspace by selecting the List icon  and navigating to **Sequences > All Sequences**.

What to do next

View sequence tasks and execute sequence steps. See [Using Customer Engagement Sequences](#).

Related topics

[Stages and activities](#) 

[Triggers](#) 

[Table extension and classes](#) 

[Restart](#) 

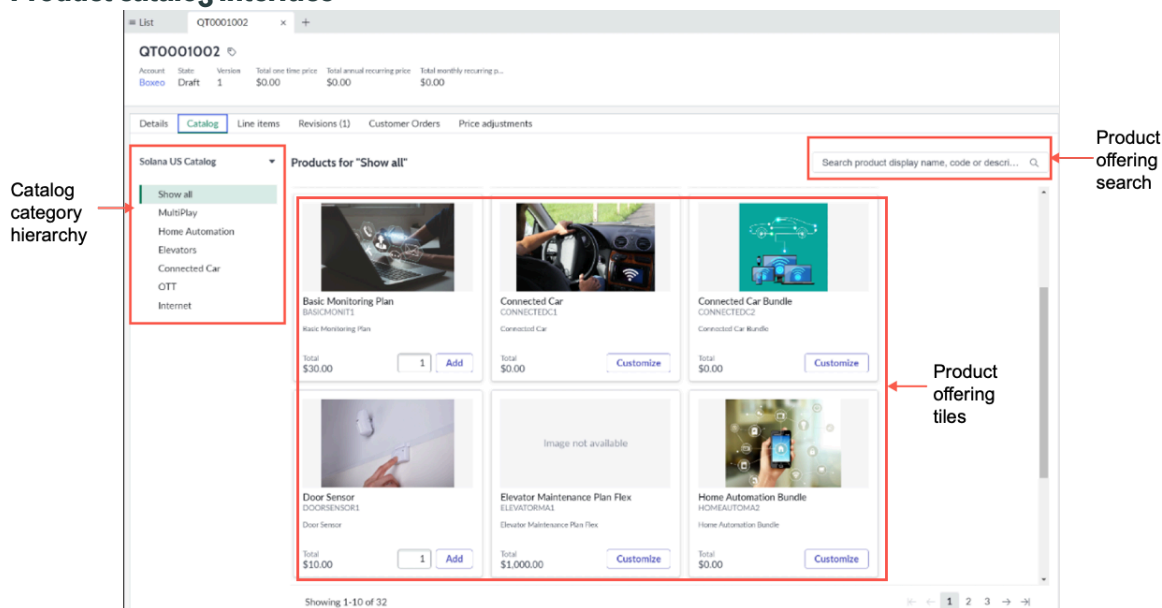
Using Sales Customer Relationship Management applications

As agents and managers, you use the CSM Configurable Workspace to complete various tasks when using the Sales Customer Relationship Management applications. From the workspace you can access product catalogs to see the product offerings available in your organization. You also use the product configurator to create quotes and orders, manage sold products and product inventory, and work on MACD orders.

Using product catalogs

When you start an opportunity, quote, or order, a **Catalog** tab (related list) opens, which provides a visual display of the product offerings available in a catalog.

Product catalog interface



The catalog view has the following features for selecting products:

- **Location filter:** If location-based transactions have been enabled by your admin, the location filter displays a list of customer locations applicable to your opportunity, quote, or order. When you select a location, the product catalog is filtered and shows only the product tiles applicable for the selected location.
- **Catalog navigation tree:** Catalog and a list of its categories used to organize product offerings. Selecting a category filters the display and shows only the product tiles for that category.
- **Search bar:** Option for finding product offerings by product name, code, or description. The search feature displays the product tiles that match the name, code, or search string entered.
- **Product tiles:** Cards that depict each product, which can have a product image, brief description, and an option to add or customize the product offer. The **Add** option displays when the product is a simple (fixed) product offering. The **Customize** option displays for configurable product offerings that can be tailored for a customer. Selecting **Customize** opens the product configurator for configuring the product offering.

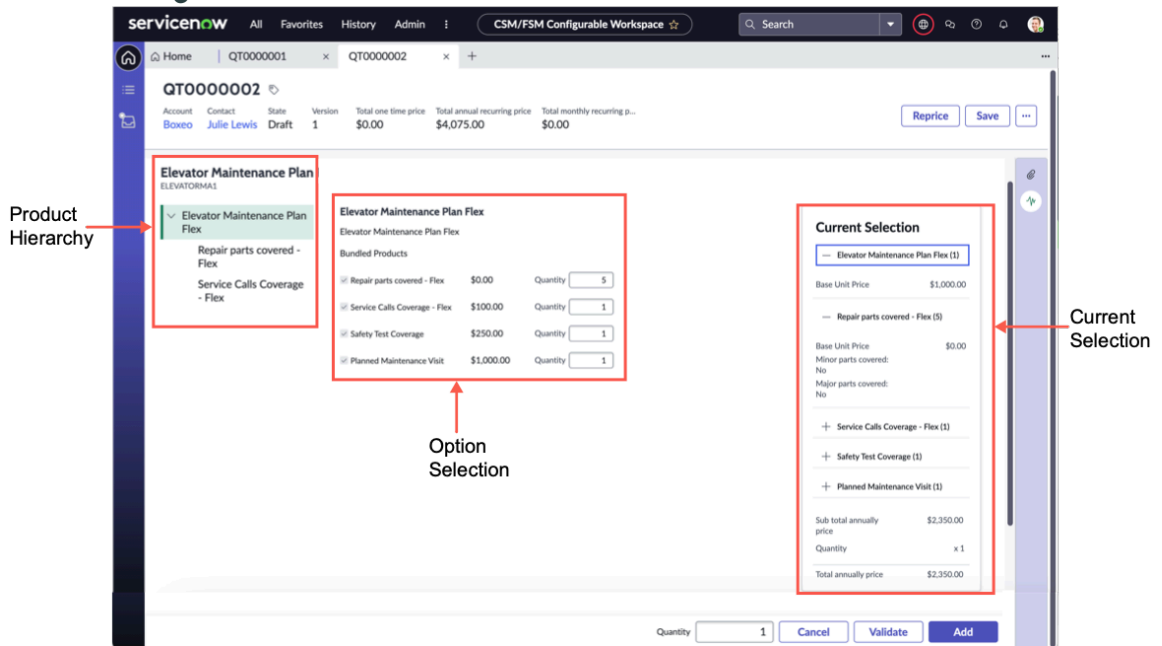
Using the product configurator

The product configurator is an interface for customizing configurable product offers. It displays the product options available and automatically calculates product pricing as you select options.

The interface consists of three main sections:

- **Product hierarchy:** Lists the parent and child product relationships for configurable products.
- **Option selection:** Displays the product options that can be selected, for example product characteristics such as color or model.
- **Current Selection:** Shows the pricing for the options that you select. The pricing is calculated automatically and displayed dynamically as you select product options.

Product configurator



Using Lead Management

Use the Lead Management to create your lead.

Lead Management interface

The Lead Management interface contains the following tabs:

Lead Management tabs

| Tab | Description |
|----------------------------------|---|
| Details tab | Add basic information for your lead. |
| Catalog tab | Search for and add product offerings to your lead. |
| Needs tab | Lists the need templates that provide product recommendations for a lead. |
| Tasks tab | Create lead tasks. |
| Appointments tab | Create appointments for your lead. |
| Line items tab | Add different line items to a lead. |
| Emails tab | Create emails to communicate with the required stakeholders. |


Create a lead

Create a lead in the Lead Management application by entering the details, such as customer name, sales stage, lead type, score, and source.

Before you begin


Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Leads > All** and select **New**.
3. On the form, fill in the fields.

Create new lead

| Field | Description |
|----------------|------------------------------------|
| First Name | First name of the lead. |
| Last Name | Last name of the lead. |
| Email | Email address of the lead. |
| Mobile Phone | Mobile number of the lead. |
| Business Phone | Business phone number of the lead. |
| Title | Title of the lead. |
| Company | Company name of the lead. |
| Stage | Stage of the lead. |
| Lead Source | Source of the lead. |

4. Select **Create Lead**.
A message confirms that the lead was created. To continue working on the lead, select the link in the message.
5. Select **Refresh**  to see the new lead in the list.

What to do next

Start adding more information to your lead. To learn more, see [View the details of a lead](#).


Update a lead

Edit or update a lead in Lead Management.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Leads > All** and select an existing lead that is in New or Contacted or Nurturing stage.
 - On the **Leads- All** page, select **Edit** to make changes to lead information and select **Update**.
 - Open the lead record, make the changes and select **Save**.

What to do next

To learn more, see [Using Lead Management](#).



Assign a lead

Assign a lead to a sales agent in Lead Management.

Before you begin

Role required: sales_agent or sales_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Leads > All** and select an existing lead that you're working with.
 - o On the **Leads- All** page, select **Assign to**.
 - o Open the lead record, select three-dot menu  at the top-right corner on the lead header and select **Assign to**.
To [Create a lead](#), select **New**.

Note:

Immediately after you create the lead, a message confirms that the lead was created. To continue working on the lead, select the link in the message.

3. On the **Assign leads to** dialogue box, select **Owner** and choose a sales agent.
You can select the box if you want to reassign all the tasks from the selected leads to this sales agent.
4. Select **Assign**.

What to do next

To learn more, see [Using Lead Management](#).


View the details of a lead

Use the Details tab to add more information about your lead.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Leads > All** and select the lead that you're working with.
3. Fill in additional information on the Details tab.

Details tab for lead

| Field | Description |
|------------|---|
| Number | System-generated number of your lead record. |
| Lead Group | Group to which your lead belongs. |
| Owner | The user persona who owns this lead. |
| Industry | The industry to which the lead belongs. |
| Website | Website of the business customer for your lead. |
| Phone | Mobile or business phone number. |

| Field | Description |
|----------------------|---|
| Stage | Stage of your lead, such as New or Contacted or Nurturing or Qualified or Disqualified. |
| Lead Type | Type of lead, such as New Business or Existing Business. |
| Lead Source | Originator of the lead. |
| Account | Account name for the lead. |
| Lead Score | Score for the lead. |
| Contact | Contact details of your lead. |
| Lead Rating | Ratings for the lead, such as, Cold, Warm, Hot, and Super Hot. |
| Address | Address of the lead account. |
| Customer Preferences | Preferences that are given by the lead account, such as: Do Not Call, Do Not Share, and Do Not Email. |
| System Information | System information, such as time of the lead creation and the user who has created the lead. |
| Notes | Work notes for the lead. |

To learn more, see [Create a lead](#).

4. Select Save.

What to do next

[Add products to a lead.](#)

Add products to a lead

Use the Catalog tab in the Lead Management to add products to your lead.


Before you begin

Role required: sales_agent

About this task

You can use the Catalog tab to search for and select product offerings from catalogs and add them to your lead.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. In the **Leads - All** list, select the lead that you're working with.
3. Select **Catalog**.
4. Use the following table to learn about the functionality of the **Catalog** tab.

Catalog tab

| Element | Description |
|---------------------------|--|
| Product catalog hierarchy | This option selects the product catalog. |

| Element | Description |
|--------------|--|
| Add button | The Add button adds the product to the quote. The Add button appears for simple products that don't have any selectable options. |
| Search field | Use the search field to search for a product in the product catalog hierarchy selected. |

5. Select Add.

The product offering is added to the quote as a **Line Item**.

What to do next

[Add line items to a lead.](#)

Get product recommendations for your lead using needs analysis

Choose a needs template from the product selection guide in the product catalog to get product recommendations for sales leads.

Before you begin

Role required: sales_agent

About this task

A needs template is a questionnaire that you complete to get product recommendations based on input or requirements that you receive from a customer. The product selection guide lists the needs templates available for a particular catalog.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.

2. Navigate to **Lead > All**.

- To work on an existing lead, select the lead.
- To [Create a lead](#), select **New**.

Immediately after you create the lead, a message confirms that the lead was created. To continue working on the lead, select the link in the message.

The product catalog displays in the Catalog tab of the lead.

3. In the Catalog tab, select **Product selection guide** in the catalog hierarchy.


The needs template cards for the guide are displayed.

4. In the needs template card that best matches what your customer wants, select **Capture Needs**.

The questionnaire for the selected template opens.

5. Answer the series of questions.

6. After replying to the last question, review or select the recommendations:

- To review your responses, select the **Edit**  icon. You can change your responses if needed.
- To view product recommendations, choose **Select Recommendations**. The Catalog tab displays the recommended products.

7. Choose a recommendation by selecting **Add** in the tile for the product that best matches your customer needs.
The selected product is added to the lead. The Needs tab displays the needs template that you selected. You can review the needs template and if needed, change your answers, which might result in different product recommendations.


Add line items to a lead

Create a new product line item for your lead by entering the details, such as product offering and quantity.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to **List** view  and select **Leads - All**.
2. From the **Leads List** window, select the lead you want to work with and select the **Line Items** tab.
3. Select **New** to start a new lead line item or select an existing lead line item to make changes.
4. Fill in the fields in the Opportunity Line Item form.

Lead Line Item form

| Field | Description |
|------------------|---|
| Number | System-generated number of the lead line item. |
| Quantity | Quantity of the lead line item. |
| Product Offering | Product offering bundle for the lead line item. |
| Unit of Measure | Measuring unit of the lead line item. |
| Work Notes | Additional information related to the lead line item. |

5. Select **Save**.
The Lead Line Item is added to the main lead.

What to do next

Add a task to your lead. To learn more, see [Add lead tasks](#).


Add lead tasks

Create lead tasks to follow-up calls, emails, or meetings with your to progress on the lead.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to **List** view  and select **Leads - All**.
2. From the **Leads List** window, select the lead you want to work with.

- On the **Leads- All** page, select **Create task**.
- Open the lead record, select the **Tasks** tab and select **New** to start a new lead task or select an existing lead task to make changes.
To [Create a lead](#), select **New**.

Note:

Immediately after you create the lead, a message confirms that the lead was created. To continue working on the lead, select the link in the message.

3. Fill in the fields in the **Create task for lead form.**

Create task for lead

| Field | Description |
|-------------------|---|
| Short description | Description about the lead task. |
| State | State of the lead task. |
| Due date | Date by which the lead task has to complete. |
| Assigned to | Name of the sales agent to whom this lead task is assigned. |

4. Select **Create Task.**

This task is added to the lead.

What to do next

You can create appointments in your lead tasks. To learn more, see [Create appointments](#).

Create appointments for lead tasks

Create appointments with your stakeholders to conduct business discussions for your lead.


Before you begin

Role required: sales_agent

About this task

You can create appointments only after creating a lead task. To create a lead task, see [Add lead tasks](#).

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Lead > All**.
3. Select the lead task you want to work with and select the **Appointments** tab.
4. Select **New** to start a new appointment or select an existing appointment to make changes.
5. Fill in the fields in the Create New Appointment form.

Create New Appointment form

| Fields | Descriptions |
|--------|---------------------------|
| From | Email id of the sender. |
| To | Email id of the receiver. |

| Fields | Descriptions |
|----------------|--|
| Activity state | State of the appointment. |
| Start time | Start time of your appointment. |
| End time | End time of your appointment. |
| Reminder | Time interval for a reminder. |
| Subject | Subject information of your appointment. |
| Location | Location of your appointment. |
| Message | Additional information for your appointment. |

6. Select **Save** to save the appointment and send it later or select **Send activity** to send it now.


Compose emails

Create an email to communicate the product information to your customer as per the business requirements.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Leads > All** and select a lead that you want to work with.
3. Select the **Emails** tab.
4. Select **Compose Email** to start a new email or select an existing email to view details.
5. Fill in the details in the Email draft form.

Lead Email Draft form

| Fields | Descriptions |
|---------------|-----------------------------|
| From | Email id of the sender. |
| To | Email id of the receiver. |
| Subject | Subject of your email. |
| Email message | Body details of your email. |

i Note: You can create your own email templates and use the pre-filled email templates while creating a new email. To discard your email, select **Discard draft**. To attach any files with your email, select **Attach File**.

6. Select **Send email** to send the email or close the email form to save it in the **Draft Emails** tab.


Manage leads using Kanban view

Personalize and manage the leads information that is most relevant to you and your stakeholders using the Kanban view.


Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Leads > All**.
3. Select the **View Kanban** button.

By default, the leads are grouped by different stages and displayed on the page.

- To change a lead stage, drag the lead card from one state and drop it into another state.
- To view the leads by different categories, such as industry, source, and reason, select **Group by:** drop-down menu on the page.
- You can take various actions for your leads, such as creating a lead task, assigning a lead, and composing an email by selecting the three vertical dots () either on a lead card or vertical leads stage header.
- To create a new lead directly from this page, select **New** button. To learn more, see [Create a lead](#).


Convert a lead into an opportunity

Convert a lead into an opportunity in Lead Management.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Leads > All** and select the lead that you're working with.
 - For a business customer, select **Convert lead > to an account** and fill in the fields in the form.

Convert lead form

| Field | Description |
|-------------|---|
| Account | Name of your customer account. <ul style="list-style-type: none"> ▪ Create new: Select if you want to create an account. ▪ Choose existing: Select if the customer is your existing account. |
| Contact | Name and email of your customer contact. <ul style="list-style-type: none"> ▪ Create new: Select if you want to create a contact. ▪ Choose existing: Select if the contact already exists. |
| Opportunity | Details to create an opportunity. To learn more, see Create an opportunity . <ul style="list-style-type: none"> ▪ Create new: Select if you want to create an opportunity. ▪ Choose existing: Select if you already have an existing opportunity. |

| Field | Description |
|-------|---|
| | <p>i Note: Select the check box if you don't want to create an opportunity for the lead.</p> |

- For a consumer account, select **Convert lead > to a consumer** and fill in the fields in the form.

Convert lead form

| Field | Description |
|-------------|---|
| Consumer | <p>Name and email of your consumer.</p> <ul style="list-style-type: none"> ▪ Create new: Select if you want to create a contact. ▪ Choose existing: Select if the contact already exists. |
| Opportunity | <p>Details to create an opportunity. To learn more, see Create an opportunity.</p> <ul style="list-style-type: none"> ▪ Create new: Select if you want to create an opportunity. ▪ Choose existing: Select if you already have an existing opportunity. <p>i Note: Select the check box if you don't want to create an opportunity for the lead.</p> |

3. Select Convert Lead.

A dialog box appears for the successful conversion of your lead into an opportunity. You can select the new opportunity record that was created.



Disqualify a lead

Disqualify a lead in Lead Management.

Before you begin

Role required: sales_agent or sales_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Leads > All** and select an existing lead that you're working with.
3. Open the lead record, select three-dot menu () at the top-right corner on the lead header and select **Disqualify lead**.

i Note: You can only disqualify a lead that is in New or Contacted or Nurturing stage.

4. On the **Disqualify lead** dialogue box, select a **Reason**.

5. Select **Disqualify**.

What to do next

To learn more, see [Using Lead Management](#).

Export leads

You can export a quote as a JSON file in Lead Management and provide it to a customer.


Before you begin

Role required: sales_agent

About this task

The export lead feature in Lead Management exports a list of all leads. Use the following steps to export leads.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Leads > All**.
3. Select the **File Type**:
 - o Excel
 - o CVS
 - o JSON
 - o PDF
4. Select the **Delivery Type**:
 - o Email - Enter a valid email address.
 - o Download - Downloads the export to a local drive.

The list of leads is exported according to the parameters set.

Using Opportunity Management

Use the Opportunity Management to create your opportunity.

The Opportunity Management interface has tabs for creating and managing your opportunities.

Opportunity Management tabs

| Opportunity Management tabs | Description |
|-----------------------------|--|
| Details tab | Add and review details of the opportunity such as account, sales cycle, and stage information. |
| Catalog tab | Use the product catalog to add line items to the opportunity. |
| Needs tab | Add more accurate information about your customer's business requirements to the opportunity. |
| Line Items tab | Add and review opportunity line items to an opportunity. |

Opportunity Management tabs (continued)

| Opportunity Management tabs | Description |
|-----------------------------|---|
| Competitors tab | Add competitors information to your opportunity. |
| Tasks tab | Create opportunity tasks. |
| Emails tab | Create emails to send to the required stakeholders. |
| Quotes tab | Create quotes directly from the Opportunity tab. |


Create an opportunity

Create a new product opportunity in the Opportunity Management application by entering the details, such as account, sales stage, sales cycle type, and deal size.


Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. In the **Opportunity - All** list, select **New**.
The **Create new opportunity** dialog box opens.
3. Use the following table to fill in the information.

| Fields | Description |
|--------------------------|---|
| Short Description | Fill in a short description for the opportunity. |
| Account | Provide account information. |
| Stage | Enter a stage of the opportunity. For example: Qualify, Develop, Propose, Negotiate, Closed-Won, or Closed- Lost. |
| Deal Size | Provide an approximate value of the deal. |
| Sales Cycle Type | Enter the type of sales cycle during the creation of the opportunity. For example: NEW CUST, RENEW, or UPSELL. |
| Consumer | Select a consumer. |
| Contact | Fill in the contact information. |

4. Select **Save** to save the opportunity and **Close** to return to the main Opportunities window.
5. Select Refresh  to see the new opportunity in the list.

What to do next

Start adding more information to your opportunity. To learn more, see [Add and view the details of an opportunity](#).

Add and view the details of an opportunity

Use the Details tab to add and view information about your opportunity, including the source and competitor.

Before you begin

Role required: sales_agent

Procedure

1. Select the opportunity that you're working with from the **Opportunity List** window.
2. Fill in all the information on the Details tab.

Opportunity Details tab

| Fields | Descriptions |
|---------------------|--|
| Number | The system-generated number of the opportunity. |
| Account | Company name of the customer account. |
| Contact | Name of the individual in the company that you interact with. |
| Sales Cycle Type | Type of sales, for example NEWCUST, RENEW, or UPSSELL. |
| Stage | Phases of the opportunity. For example, Qualify, Develop Propose, Negotiate, Closed-Won or Closed-Lost. |
| Owner | Sales agent or sales representative assigned to this opportunity. |
| Short Description | Brief description of the opportunity. |
| Description | |
| Primary Quote | |
| Industry | Name of the industry. For example, Telecommunications or Manufacturing or Healthcare or Banking. |
| Estimated Deal Size | Amount of potential opportunity. |
| Probability % | Estimated percentage of the sales opportunity's success. |
| Amount | <p>Note: If an opportunity doesn't have any line items, then the amount picks up the same value as the Estimated Deal Size. When opportunity line items are added, the amount value changes as the value is picked up from Total TCV.</p> |
| Weighted Amount | Total revenue adjusted by the probability percentage. |

| Fields | Descriptions |
|-------------------|--|
| | The Weighted Amount for an opportunity is calculated by multiplying the Probability % with the Amount . For example, if the probability percentage for an opportunity is 10 (0.1%) and the amount is 100\$, the weighted amount is $0.1 \times 100 = 10.00$. |
| Opportunity Group | |
| Lost To | Name of the competitive customer to whom this deal is lost to. |
| Source | Name of the source this opportunity information is gathered from. |

3. Fill in the following fields in the **Pricing** section of the **Details** tab.

i Note: The **Total MRR**, **Total ARR**, **Total ACV**, and **Total TCV** fields are calculated automatically based on the value of the opportunity line items associated with an opportunity.

Opportunity Pricing section

| Field | Description |
|----------------------|---|
| Currency | Currency of the price list, for example USD for US dollars. |
| Price List | Default price list for the opportunity. |
| Term (months) | Subscription period of the opportunity line item. The default term is 12 months. |
| Total one-Time Price | Total price of all one-time products or services in the opportunity. |
| Total MRR | Total monthly recurring revenue (MRR) amount for all recurring products and services. |
| Total ARR | Total annual recurring revenue (ARR) amount for all recurring products and services each year. |
| Total ACV | Total annual contract value (ACV), which is the yearly amount revenue for all products and services from a customer contract. |
| Total TCV | Total contract value (TCV), which is the total amount of revenue from a customer contract expected over the lifetime of the contract. |

4. Select the customer's preferred mode of communication.

- Do Not Call
- Do Not Email
- Do not Share

5. In the **System Information** section of the Details tab, fill in the required fields with information about when the opportunity was created and by whom and enter any related **Work Notes**.

6. Select **Save**.

What to do next

Use the Product Catalog tab to add products to your opportunity.

Get product recommendations using needs analysis

Choose a needs template from the product selection guide in the product catalog to get product recommendations for sales opportunities.

Before you begin

Role required: sales_agent

About this task

A needs template is a questionnaire that you complete to create product recommendations based on input or requirements that you receive from a customer. The product selection guide lists the needs templates available for a particular catalog.


Procedure

- 1.** In the CSM Configurable Workspace, select the List view.
- 2.** Navigate to **Opportunity > All**.
 - To work on an existing opportunity, select the opportunity.
 - To [create an opportunity](#), select **New**.

Immediately after you create the opportunity, a message confirms that the opportunity was created. To continue working on the opportunity, select the link in the message.

The product catalog displays in the Catalog tab of the opportunity.

- 3.** In the Catalog tab, select **Product selection guide** in the catalog hierarchy. The needs template cards for the guide are displayed.
- 4.** In the needs template card that best matches what your customer wants, select **Capture Needs**. The questionnaire for the selected template opens.
- 5.** Answer the series of questions.
- 6.** After replying to the last question, review or select the recommendations:

- To review your responses, select the **Edit**  icon. You can change your responses if needed.
- To view product recommendations, choose **Select Recommendations**. The Catalog tab displays the recommended products.

7. Choose a recommendation by selecting **Add** in the card for the product that best matches your customer needs.
The selected product is added to the opportunity. The Needs tab displays the needs template that you selected. You can review the needs template and if needed, change your answers, which might result in different product recommendations.


Add line items to an opportunity

Create a new product line item for your opportunity by entering the details, such as product offering and quantity.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, navigate to the **List** view  and select **Opportunity - All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and select the **Line Items** tab.
3. Select **New** to start a new opportunity line item or select an existing opportunity line item to make changes.
4. Fill in the fields in the Opportunity Line Item form.

Opportunity Line Item form

| Fields | Descriptions |
|------------------|---|
| Number | The system-generated number of the opportunity line item. |
| Opportunity | The system-generated id of your opportunity. |
| Product Offering | The product offering that is selected for the opportunity line item. |
| Unit of Measure | The measuring unit of the opportunity line item. |
| Unit Net Price | Price per unit after adjustments, if any. Note: The Unit Net price and Unit List Price fields have the same values if the opportunity isn't in sync with the quote. |
| Term (months) | Subscription period of the opportunity line item. The default term is 12 months only for recurring products. |
| Quantity | The quantity of the opportunity line item. |
| Service location | Service location to which the opportunity line item applies. |
| Price List | Default price list based on the opportunity created. |

| Fields | Descriptions |
|---------------------------|---|
| Periodicity | <p>Periodicity is based on the pricing method selected for the product offering.</p> <ul style="list-style-type: none"> ○ If the pricing method is selected 'One time', the periodicity is set to 'None'. ○ If the pricing method is selected 'Recurring', the periodicity can be set to 'Monthly' or 'Annually'. |
| Unit List Price | <p>Unit list price of the product offering included in the opportunity line item.</p> <p>Note: The Unit Net price and Unit List Price fields have the same values if the opportunity isn't in sync with the quote.</p> |
| Cumulative One-Time Price | <p>One-time price of the opportunity and opportunity child line items.</p> <p>Cumulative One-Time Price = Quantity * Unit Net Price.</p> |
| Cumulative MRR | <p>Cumulative monthly recurring revenue of the opportunity and any child lines.</p> <ul style="list-style-type: none"> ○ If periodicity is monthly, Cumulative MRR = Unit Net Price * Quantity. ○ If periodicity is annual, Cumulative MRR = Unit Net Price/12 months * Quantity. <p>Customer can change this formula in case of they customize their own values for periodicity.</p> <p>This field is populated only if the periodicity of the opportunity is recurring in nature.</p> |
| Cumulative ARR | <p>This field is populated only if the periodicity of the opportunity is recurring in nature.</p> <p>Cumulative ARR = Cumulative MRR * 12</p> |
| Cumulative ACV | <p>Total annual contract value (ACV), which is the yearly amount revenue for all products and services from a customer contract.</p> <p>Cumulative ACV = Cumulative One-Time Price + Cumulative ARR.</p> |
| Cumulative TCV | <p>Total contract value (TCV), which is the total amount of revenue from a customer contract expected over the lifetime of the contract.</p> |

| Fields | Descriptions |
|------------|---|
| | Cumulative TCV = Cumulative One-Time Price + Term * Cumulative MRR. |
| Work Notes | Any additional information related to the opportunity line item. |

5. Select Save.

The Opportunity Line Item is added to the main opportunity.

What to do next

Add a task to your opportunity. To learn more, see [Add opportunity tasks](#).


Add competitors to an opportunity

Capture competitor details for your opportunity so that you can have winning sales conversations with your customer.

Before you begin

Role required: sales_manager

Procedure

1. Navigate to **List** view  and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Competitors** tab.
3. Select **New** to start a new opportunity competitor or select an existing opportunity competitor to make changes.
4. Fill in the fields in the Opportunity Competitor form.

Opportunity Competitor form

| Fields | Descriptions |
|-------------|--|
| Company | The company's name that is a competitor. |
| Opportunity | The opportunity number. |
| Strengths | Strengths of the competitor. |
| Weaknesses | Weaknesses of the competitor. |

5. Select Save.

The competitor information is added to the main opportunity.


Add opportunity tasks

Create opportunity tasks to capture additional details of your customer's requirements.

Before you begin

Role required: sales_manager

Procedure

1. Navigate to **List** view  and select **Opportunity - All**.
2. Select the opportunity that you want to work with and select the **Tasks** tab.
3. Select **New** to start a new opportunity task or select an existing opportunity task to make changes.
4. Fill in the fields in the Opportunity Task form.

Opportunity Task form

| Fields | Descriptions |
|-------------------|---|
| Number | The system-generated number of the opportunity task. |
| Opportunity | The opportunity number. |
| Due date | The date by which the opportunity task has to be completed. |
| Short description | More information about the opportunity task. |
| State | State of the opportunity task. |
| Assigned to | The name of the sales agent to whom the sales manager has assigned this opportunity task. |
| Work notes | Additional notes about the opportunity task. |

5. Select **Save**.
The Opportunity task is added to the main opportunity.

What to do next

You can create appointments in your opportunity tasks. To learn more, see [Create appointments](#).

Create appointments

Create appointments with the required stakeholders to move the business discussion forward for your opportunity.


Before you begin

Role required: sales_manager

About this task

You can create appointments only after creating an opportunity task. To create an opportunity task, see [Add opportunity tasks](#).

Procedure

1. Navigate to **List** view  and select **Opportunity Tasks**.
2. Select the opportunity task that you want to work with and select the **Appointments** tab.
3. Select **New** to start a new appointment or select an existing appointment to make changes.
4. Fill in the fields in the **Create New Appointment** form.

Create New Appointment form

| Fields | Descriptions |
|----------------|--|
| From | The email id of the sender. |
| To | The email id of the receiver. |
| Activity state | The state of the appointment. |
| Start time | The start time of your appointment. |
| End time | The end time of your appointment. |
| Reminder | The time interval for a reminder. |
| Subject | The subject information of your appointment. |
| Location | The appointment location. |
| Message | Any additional message for your appointment. |

5. Select Save.

The appointment is added to your opportunity task.


Compose emails

Create an email to communicate to your customer the product information that meets their business requirements or the product demo as required by your customer.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to **List view**  and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Emails** tab.
3. Select the **Compose Email** button from the top-right corner to start a new email or select an existing email to make changes.
4. Fill in the fields in the Email Draft form.

Opportunity Email Draft form

| Fields | Descriptions |
|---------------|-----------------------------|
| From | Email id of the sender. |
| To | Email id of the receiver. |
| Subject | Subject of your email. |
| Email message | Body details of your email. |

Note: You can create your own email templates and use the pre-filled email templates while creating an email. To attach any files with your email, select **Attach File**.

5. Select **Send email** to send the email or close the email form to save it in the **Draft Emails** tab.


View an existing opportunity

View an existing opportunity to make changes, such as updating its status or additional details.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to the **List** view  and select **Opportunity - All**.
 - All- shows all the opportunities in the instance.
 - Opportunity Tasks- shows your opportunity tasks.
2. Select the opportunity that you're working with.
3. Make updates to the opportunity as needed.
4. Select **Save**.

Track opportunities using the Kanban view

Personalize and manage the opportunities information that is most relevant to you and your stakeholders using the Kanban view.

Before you begin

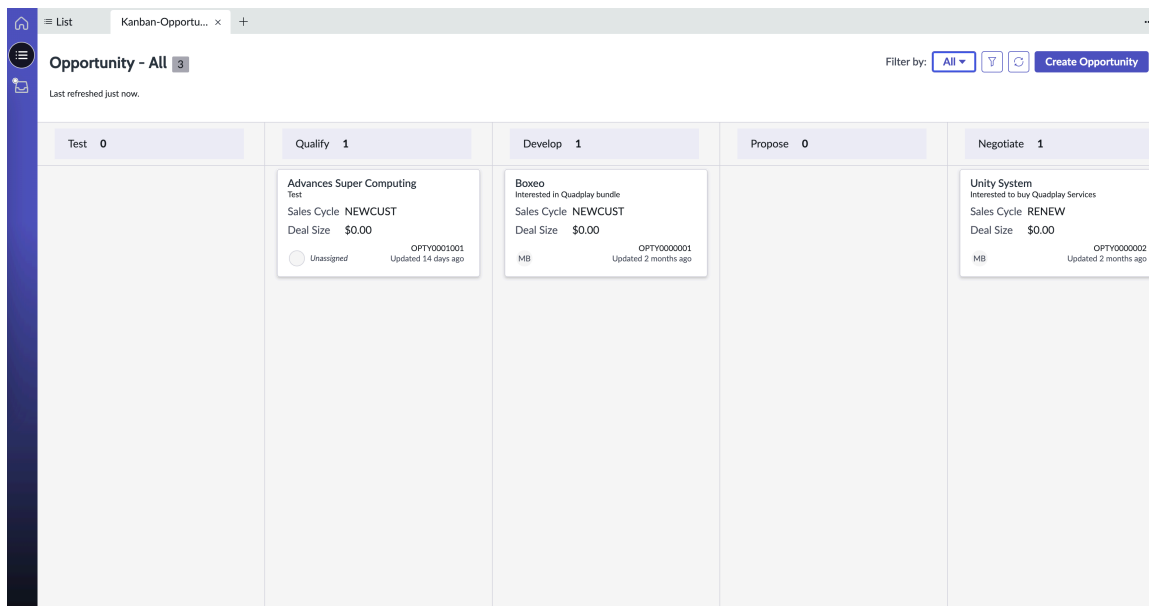
Role required: sales_agent

About this task


A Kanban view is a visual representation of your data that enables users to drag and drop the data records according to the business flow. The Kanban view feature in Opportunity Management provides the following benefits:

- Viewing the opportunities of all stages and filtering them on the basis of sales cycle types.
- Easily updating the state of an opportunity by navigating them in between different stages.

The Kanban view as part of Opportunity Management in Sales Customer Relationship Management.



Procedure

1. Navigate to the **List** view  and select **Opportunity - All**.
2. Select the **View Kanban** button.
 - To change an opportunity state, drag the opportunity card from one state and drop it into another state.
 - To view the opportunities of different sales type, use the Filter by option on the page.
 - To create a new opportunity directly from this page, select the **Create Opportunity** button. To learn more, see [Create an opportunity](#).

Create a quote from an opportunity


Create a quote directly from an opportunity using the Quotes tab.

Before you begin

Ensure that you have captured and provided all the information for your opportunity, such as opportunity details, line items, and competitor's information.

Role required: sales_agent

Procedure

1. Navigate to the **List** view  and select **Opportunity - All**.
2. Select the opportunity that you want to work with and select the **Quotes** tab.
3. Select **Create Quote** to create a quote from the selected opportunity.


Create a quote from an opportunity line item

Create a quote from the selected line items in an opportunity record.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to the **List** view  and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Line Items** tab.
3. Select one or more line items and select **Create new quote** to create a quote from the selected line items.

A dialogue box appears that indicates the creation of a new quote. Select the new quote record to view it. Or you can also navigate to the Quotes tab to view the new quote record.

What to do next

To learn more about using the Quote Management workspace, see [Using Quote Management](#).


Export opportunities

Export a list of all opportunities in a specified file format, such as JSON or Excel, in Opportunity Management and provide it to a customer.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, navigate to the **List** view.  and select **Opportunity > All**.
2. Select **Export**.
3. In the Export dialog box:
 - a. Select the **File Type**:
 - Excel
 - CVS
 - JSON
 - PDF
 - b. Select the **Delivery Type**:
 - Email - Enter a valid email address.
 - Download - Downloads the export to a local drive.

- c. Select **Export**.

The list of opportunities is exported according to the parameters set.

Sync quote and opportunity

Sync quote information from the quote record to an opportunity record. This keeps the quote data consistent and accurate across both the records and enables sales agents to track revenue from opportunities accurately.

Establish a sync between quote and opportunity

As a sales agent, you can establish the sync between quote and opportunity records and ensure that a defined set of fields between opportunity-quote and opportunity line items-quote line items remain synchronized.

When a quote is created through an opportunity, the **Source Opportunity** field on the quote record is automatically populated with the details of the opportunity through which the quote is created. To create a quote through an opportunity, see [Create a quote](#).

When a quote is created with child line items, the revenue metrics and prices for the quote are automatically calculated. To learn more about the revenue metrics and how they're calculated, see [Subscription revenue metrics](#).

When the quote record is synchronized with the opportunity record, the prices and revenue metrics are also synced and are consistent across both forms.

The **Synced** banner on the **Details** tab on the opportunity record displays whether the quote is in sync with its opportunity. To automatically sync the first quote with its source opportunity, set the autoEnableSyncFirstQuote system property to **true**.

To learn more about establishing a sync between quote and opportunity and automatically enable sync, see [Sync a quote with an opportunity](#).

You can create a new version of a quote from a quote record to establish a sync between the new revised quote with the initial opportunity.

Note: The new version of the quote is in sync with the opportunity only if the previous version was also in sync.

View the new quote revisions from the **Revisions** tab on the quote record.

On the quote record, mark the **State** as **Accepted** or **Completed** to move the synced opportunity to **Closed-won**.

Map quote and opportunity header fields and line items

As a sales agent, you can only edit and make changes on the fields on an opportunity record that aren't in sync with a quote.

The following is a list of default field mappings between opportunity line items with quote line items and opportunity header with quote header fields. To learn more about the fields and their descriptions, see [Subscription revenue metrics](#).

Default synced fields between opportunity header and quote header

| Opportunity header | Quote header |
|----------------------|-------------------------------|
| Term (months) | Term (months) |
| Total one-time price | Total one-time price |
| Total MRR | Total Monthly Recurring price |
| Total ARR | Total Annual Recurring price |
| Amount | Total Amount |
| Primary Quote | Quote id ref |
| Currency | Currency |
| Price list | Price list |

Default synced fields between opportunity line-item and quote line-item fields

| Opportunity Line items | Quote Line items |
|---------------------------|------------------------------------|
| Term (months) | Term (months) |
| Cumulative one-time price | Cumulative one-time price |
| Cumulative MRR | Cumulative Monthly Recurring price |
| Cumulative ARR | Cumulative Annual Recurring price |
| Cumulative TCV | Cumulative Net price |
| Product offering | Product Offering |
| Price list | Price list |
| Unit of measure | Unit of measure |
| Unit list price | Unit list price |
| Quantity | Quantity |
| Periodicity | Periodicity |
| Unit net price | Unit net price |

Note: When an opportunity and quote header, and an opportunity line item and quote line item are in sync with each other, the addition and deletion of line items on the opportunity record is disabled. All the synced fields on the opportunity and opportunity line item record becomes read only.

Collaborate with stakeholders by using the sidebar


Initiate a discussion with internal and external stakeholders, such as sales agents, solution consultants, and subject matter experts using sidebar integration with Microsoft Teams.

Before you begin

Role required: sales_agent or sales_manager

Before using the sidebar integration, you must first complete configuring the sidebar integration with your opportunity. To learn more, see [Configuring Sidebar](#).

Procedure

1. Navigate to the **List** view  and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with.
3. Select **Discuss** on the opportunity header.
4. On the form, fill in the fields.

| Field | Description |
|---|---|
| Record number | Number of the opportunity record. |
| Subject | Description about the opportunity. |
| Add participants | Name of the other users that you want to add to the opportunity discussion. |
| Include a brief message for participants | Additional information that you want to add for your users. |

5. Select **Start discussion**.
A Microsoft Teams chat is created for your collaboration.

What to do next

Make your collaboration more effective by sharing emojis, messages, and attachments.

Location-based transactions for Opportunity Management

Agents can create opportunities and support product configurations and services for different locations.

Agents can use the location filter in the product catalog to select a particular customer location. The catalog only displays the products associated with that location. This enables the agents to add appropriate product lines to an opportunity. Agents can also copy products and services from one location to the other within a single transaction. This eliminates the need to create multiple opportunity line items for each location. To learn more about copying locations, see [Copy opportunity line items to a location](#).

Using location-based transactions

To use the location filter in Opportunity Management, complete the following steps.

Note: As an agent, you can use the location feature if the [location-based transactions property](#) is enabled by your admin and [eligibility rule filters and product eligibility rules](#) have been configured by your product catalog admin.

Using location-based transactions

| Step | Description | Role |
|---|---|-------|
| Use location filter to add opportunity line items | Use the Service location filter in the Catalog tab to add opportunity line items to a location. | Agent |
| Copy opportunity line items to a location | <p>Copy existing line items to another location in the opportunity based on the eligibility rules set up by your product catalog admin</p> <p>The copy line items modal is displayed when selecting Copy on the line items related list. If the system property is false, all the line items are copied.</p> | Agent |

Use location filter to add opportunity line items

Use the **Service location** filter in the product catalog to add products (line items) to a location.

Before you begin

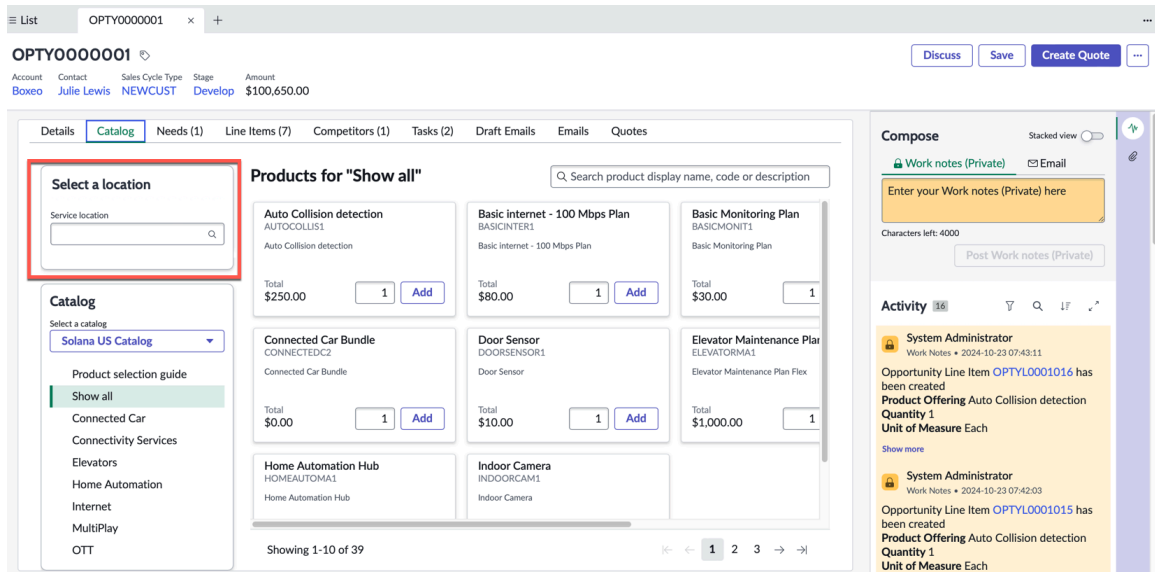
Role required: sales_agent

About this task

You can add opportunity lines by location if the [location-based transactions property](#) is enabled by your admin and [eligibility rule filters and product eligibility rules](#) have been configured by your product catalog admin for location-based transactions.

Procedure

1. Navigate to the **List** view and select **Opportunity-All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and navigate to the **Catalog** tab.
3. In the **Select a location** filter, pick a location to which you want to add the line items. After you select a location, only the opportunity line items that are eligible for the selected location are displayed.



4. Select **Add** to create an opportunity line item.
5. Navigate to the **Line Items** tab to view the details of the newly added opportunity line item.

Copy opportunity line items to a location

Duplicate existing line items to another location using **Copy** on the Line items tab.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to the **List** view and select **Opportunity-All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and select the **Line Items** tab.
3. Select one or more opportunity line items that you want to copy to another location.
4. Select **Copy**.
5. In the **Copy line items** dialog box, choose one of the options.

| Option | Description |
|-------------------------------|--|
| Keep original location | New line items for the selected opportunity are created and the source location is retained. |
| Choose new location | This copies the line items to a new location. In the Service location filter, select the new location that you want the line items to be copied to. |

Note: Select the **Continue to copy only eligible lines for this location (exclude ineligible)** option in the **Copy line items** dialog box.

This selection copies the eligible line items to your preferred location and skips the line items that aren't eligible. If this option isn't selected, no opportunity line items are copied.

6. Select Copy.

Using Quote Management

Use the Quote Management application to build quotes. The Quote Management application provides the following features to help you create and manage product quotes.

Quote management features

Quote management lets agents create and manage customer quotes. Once quotes are agreed to by customers, quotes can be converted into product and service orders.

Quote Management tabs and fields

| Quote Management fields | Description |
|--|--|
| Details field | Add details to a quote, such as customer address and contact information. |
| Enable a sales agreement in a quote | Enables a sales agreement quote. A sales agreement quote uses the agreement parameters to filter products and services for agents to choose from. |
| Line Items fields | Add quote line items to a quote. Quote line items are products and services for the customer. The prices are displayed and totaled for the customer to review. |
| Catalog fields | Use product catalogs to add products to your quote. The catalogs contains simple product or bundled products that have option that agents can select. Products can also be filtered by location. |
| Revisions fields | Create multiple versions of a quote. As information changes, agents can version quotes to keep track of the quote process. |
| Customer Orders fields | Convert a quote to a product sales order. When agents have quotes that are ready, they can easily convert them to customers orders. |
| Pricing adjustment fields | Add manual pricing adjustments to products and services in a quote. This lets agents add incentive to customers through pricing adjustments. |
| Add subscription start and end dates to a quote | Add a subscription start date and end date for the subscription items such as warranties and service agreements. See to learn more about subscription pricing. |
| Control cascading quantity values in child product offerings | Cascade quantity specifies that the desired quantity from a parent line item is cascaded to the child line item through a system level parameter. |
| Sync a quote with an opportunity | Agents can sync the information in a quote back to an opportunity to keep records update to date and accurate. |

Quote workflow

The following table shows the basic tasks for creating, building, and managing a quote.

Building and managing quotes

| Quote tasks | Description |
|--|---|
| Enable a sales agreement in a quote. | See Create a quote and Add details to a quote for more information. |
| Enable a sales agreement quote. | Sales agreement quotes are built according to the linked sales agreement. |
| Build your quote by adding products from the product catalogs. | See Add products to a quote for more information. |
| Select options to products using the product configurator. | See View and update products in a quote for more information. |
| Add pricing adjustments to quotes. | See View manual pricing adjustments for more information. |
| Create quote revisions. | See Create quote versions for more information. |
| Convert your quotes to customer orders. | See Convert quotes into orders for more information. |
| Enable a sales agreement quote. | If your organization is using sales agreements, you can create a sales agreement within the quote by selecting the Generate Sales Agreement option. To learn more about sales agreements, see Using Sales Agreement Management . For details on using a quote to generate a sales agreement, see Enable a sales agreement in a quote |

Create a quote

Create a quote in Quote Management to start the quote building process.

Before you begin


Role required: sales_agent

About this task

When you start a quote, a pop-up prompts you for quote information. You can choose to create a quote for a customer account or consumer. The pop-up changes depending on your choice.

- Account – The quote is created for an existing customer account.
- Consumer – The quote is created for an existing consumer.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quote > All-Quotes** and select **New**.
3. In the **Create new quote** dialog box, fill in the fields.
 - To create a quote for an account, select the **Account**.
 - To create a quote for a consumer, select the **Consumer** name.

| To | Description |
|------------------------------------|--|
| Create quote for an account | Enter the following: <ul style="list-style-type: none"> ○ Contact: Name of the primary customer contact. ○ Short description: Brief description of the quote for this account. ○ Expiration date: Date and time that the quote expires. |
| Create quote for a consumer | Enter the following: <ul style="list-style-type: none"> ○ Short description: Brief description of the quote for this consumer. ○ Expiration date: Date and time that the quote expires. |

4. Select one of the following to continue.

| To | Description |
|---------------------------------|--|
| Close and save the quote | Select Save and close . The quote is saved and a message appears showing the quote number. Continue working on the quote by selecting the number. |
| Add line items | Select Add line items . The quote opens in the Details form. |

5. Fill in the information in the quote form.


Add details to a quote

Use the Details tab to add basic information to a quote.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quotes > All** and select your quote.
3. In the Details tab, fill in the basic information.

Details tab

| Field or option | Description |
|-----------------|---|
| Number | Automatically generated field. |
| Version | Automatically generated field. |
| State | The State option contains options for tracking the quote status. |

| Field or option | Description |
|-------------------------------------|--|
| | <ul style="list-style-type: none"> ○ Draft - The default state of a quote that indicates the quote is still in development. ○ In review - Use this state to indicate that the quote is in a review state. ○ Pending customer acceptance - Set this state when the customer is reviewing the quote. ○ Accepted - Use this state to indicate that the quote was accepted.. ○ Revised - Revised indicates that changes have been made to the quote.. ○ Expired - Shows that the quote is beyond its expiration date. Reset the expiration date to make the quote active again. ○ Canceled - Use this state to show that the quote is canceled. ○ Closed - Shows that the quote is closed. ○ Completed - Shows that the quote is completed. When a quote is set to Completed, the quote can be used to create an order. If Sales agreement is selected, the quote can be using to create a sales agreement. For more info, see Convert quotes into orders and Enable a sales agreement in a quote. ○ Rejected - Managers can reject quotes if there are errors or other issues. Rejected quotes can be returned to a draft state to fix any errors. |
| Created by | Automatically generated field. |
| Account | The account is linked to the quote and contains important information such as addresses and contacts. |
| Contact | The contact person for the account linked to the quote. |
| Short description | Descriptions that help agents by adding important details about the quote. |
| Active option | Option indicating that the current quote is the active quote. |
| Enable Sales Agreement quote option | <p>Option indicating that you want the quote to generate a sales agreement. The quote can't have any line items. Add line items once the option is selected. When the quote state is changed to Complete, the Create Sales Agreement button appears.</p> <p>If you select the Enable sales agreement quote option, also add an Agreement start date and Agreement end date.</p> <p>See Create a sales agreement for more information.</p> |
| Partner account | Partner accounts are linked to the main account and contain partner information such as partner address and partner contact information. |
| Partner contact | Partner contract is the person associated with the partner account. |
| Assignment group | Groups are secondary groups on the quote that manage services and entitlements. |
| Assigned to | The person from the assignment group designated as the contact for questions and issues. |
| Synced | When checked, Sync shows that information in the quote is synced to opportunity. |

| Field or option | Description |
|-------------------------|---|
| Source opportunity | Shows the opportunity the quote information is synced with. Syncing ensure that information is consistent between opportunities and associatd quotes. |
| Quote date | The date that the quote was start |
| Expiration date | Quotes can be given an expiration date so that quotes do not remain open in the system forever. |
| Contract state date | Contract state date is the date a service contract or entitlement contracts start.. |
| Contract end date | Contract end date is the date when a service contract or entitlement contract ends. |
| Term (months) | Monthly terms for the subscription pricing selected. Monthly terms reflect the monthly subscription cost of the product or service. |
| Subscription start date | Subscription state date is the date when an entitlement or service begins. |
| Subscription end date | Subscription end date is the end date for an entitlement or a service. |
| Pricing fields | <p>The fields are:</p> <ul style="list-style-type: none"> ○ Currency - The currency for the price matches the currency stated in the account information. ○ Price list - The Standard Price List field is the default price list for the product catalogs referenced in the quote. If configured, additional price lists may be available. ○ Cost book - The Standard Cost Book is the default cost book for the product catalogs referenced in the quote. ○ Total one-time price - The total price of the quote. ○ Total monthly recurring price - The total cost for any recurring prices for the quote. ○ Total annual recurring price - The total annual cost of recurring prices. ○ Total amount - The total amount of all recurring pricing. |

4. Select Save.

Add products to a quote

Use the Catalog tab in Quote Management to add products to your quote.

Before you begin


Role required: sales_agent

About this task

You can use the Catalog tab to search for and select product offerings from catalogs and add them to your quote. You can choose simple and complex product offerings. Complex product offerings are configurable with options that you select using the product configurator.

Note: Check your entitlements to see if the product configurator is available.

Procedure

1. In the Configurable Workspace, select the **List** view .
2. Navigate to **QuotesAll** and select the quote that you want to work with.
3. Select **Catalog**.
4. Use the following table to learn about the functionality of the **Catalog** form.

Catalog tab

| Form and options | Description |
|---------------------------|---|
| Product catalog hierarchy | This option selects the product catalog. |
| Location | Selecting a location filters the catalog for products and services from that location. |
| Customize button | The Customize button appears on cards with configurable product offerings. Selecting the Customize button opens the product configurator. |
| Add button | The Add button adds the product to the quote. The Add button appears for simple products that don't have any selectable options. |
| Search field | Use the search field to search for a product in the product catalog hierarchy selected. |

5. Select **Customize** to open the *product configurator* and choose options for a product.

Product configurator

| product configurator | Description |
|----------------------|---|
| Option fields | Option that lets order agents select product options. |
| Reprice | Option that recalculates all pricing and removes manual pricing adjustments. |
| Save | Option that saves your selections and updates the pricing page. |
| Current selection | Pane that shows selected pricing options and totals. Select the plus sign to see more information about each option selected. |
| Validate | Option that validates the selections made in the product configurator. |
| Add | Option that adds the product offering to the quote as a quote line item. |

6. Select **Add**.
The product offering is added to the quote as a line item.


View and update products in a quote

Use the **Quote Line Items** tab to review and update products in your quote and to add additional line items.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view and select **Quotes > All**.
2. Select the quote that you're working with and select the **Quote Line Items** tab.
3. Select **New** to start a quote line item or select an existing quote line item to make changes.
4. Fill in the fields in the Quote Line Items.

Quote line item fields

| Field | Description |
|--------------------------|---|
| Quote | Automatically generated field. |
| Number | Automatically generated field. |
| Parent line item | Automatically generated field. |
| Price list | Price lists are added to the product line item. Price lists show pricing that is already configured. |
| Term (months) | Monthly terms for the price list selected. Monthly terms reflect the cost monthly of the product or service. |
| Subscription start dates | Subscription state date is the date when an entitlement or service begins. |
| Subscriptions end date | Subscription end date is the end date for an entitlement or a service. |
| Contract start date | Contract state date is the date a service contract or entitlement contracts start. |
| Contract end date | Contract end date is the date when a service contract or entitlement contract ends. |
| Product offering | Product offering let agents select the product or service for the quote. |
| Quantity | Quantity is the number of a product that is selected for the quote. |
| Unit of measure | Agents can select a unit of measure for products that come in quantities. |
| Service location | Service location allows agents to select a location for the service that is added to the quote. |
| Short description | The description field for the service location, which provides information about the location such as address and phone number. |

5. Select the **Quote Line Characteristics** tab to add or modify the quote characteristics.
6. Select the **Pricing Adjustment** tab to add or modify a manual pricing adjustment to the quote line item.

7. Select Save.

The Quote Line Item is updated to the main quote.

Add pricing adjustment to a quote line item

Add pricing adjustments to quote line items after the line item is created. Pricing adjustments can help support agents as they work through the quote building process.

Before you begin

Role required: sales_agent


About this task

Agents can make pricing adjustments for quote line items as a way to incentive customers during the quote process. Sales agents have the following price adjustment options:

Pricing adjustment types

| Adjustment Type | Description |
|-----------------|---|
| Markdown % | Percentage for a markdown in price. |
| Markdown amount | A dollar amount of a markdown in price. |
| Markup % | Percentage for the markup in price. |
| Markup amount | A dollar amount for a markup in price. |
| Price Override | Overrides the product price with a new price. |

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Select **Quotes > All**.
3. Select the quote line item for a pricing adjustment.
4. In the adjustment dialog, use the Adjustment type menu to select an adjustment type.
5. Enter an adjustment value in the Adjustment value.
6. Add a description of the price adjustment.
7. Select **Save**.


Update product characteristics

Use the Quote Characteristics tab to make updates to product characteristics.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Select **Quotes > All**.
3. Select the line item for the product characteristic change.
4. Select the Quote Line Characteristics tab.
5. Select the quote characteristic that you want to update.
6. Make the characteristic change and select **Save**.


Add tasks to a quote

Create a single or multiple tasks for a quote and assign those to different agents. Tasks are the various actions that agents perform to create a quote.

Before you begin

Role required: sales_manager

Procedure

1. In the CSM Configurable Workspace, navigate to the **List** view  and select **Quotes > All**.
2. Select the quote you want to work with and select the **Tasks** tab.
3. Select **New** to start a new quote task or select an existing quote task to make changes.
4. Fill in the fields in the Quote Task form.

Quote Task form

| Field | Description |
|-------------------|---|
| Number | System-generated number of the quote task. |
| Quote | Number of the quote. |
| Due date | Date by which the quote task has to be completed. |
| Short description | Information about the quote task. |
| State | State of the quote task. |
| Assigned to | Name of the sales agent to whom the sales manager has assigned this quote task. |
| Work notes | Additional information about the quote task. |

5. Select **Save**.
The quote task is added to the main quote.

Create quote versions

Use the Revisions tab to create and view the versions of your quote.



Before you begin

Role required: sales_agent

About this task

The Revisions tab shows all the versions of a quote. Version numbers are sequential. If the quote is active, the **Active** field is selected.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Select **QuotesAll**.
3. Select the quote that you're working with.
4. Select the **Revisions** tab.
5. Select the **More Actions**  icon and select **Create new version**.

A new version of the quote is created. Select the quote in the message to open the new version. The **Active** option, if selected indicates the **Active** version of the quote. Use the Revisions tab to view a list of all the current quote versions. quote in the message to open the new version. Version numbers are sequential.

6. Return to the **Quote** list view and refresh the view to see the latest version created.
7. Select the **Active** option as a reminder of the active quote.

Convert quotes into orders

Use the Customer Order tab to convert a quote into a customer order in Quote Management.

Before you begin


Role required: sales_agent

About this task

The quote must be Active and the quote state must be set to Completed. Then the Customer Orders tab becomes active.

Note: Verify your entitlements to see if you have access to this feature.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Select **Quotes > All**.
3. Select the quote that you want to convert to a customer order from the **Quote List** view.
4. In the Details tab, change the quote State to **Completed** and select **Save**.
5. Select **Create Order**.
When the order is created, a message appears with the order number.
6. Select the Order number in the message to open the order.
The **Order Line Item** view displays the order line items, pricing adjustments, and order tasks.


Create an order from a quote line item

Create orders from quote line items by using the **Create new order** UI action.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select **List**  view and select **Quotes > All**
2. Select the quote, which must be in the Completed state, and select the Line items tab.
3. Select a quote line item and select **Create new order**.
A dialog box indicates the creation of a new order. Select the new order record to view it. Or you can also navigate to the Customer Orders tab to view the new order record.

View manual pricing adjustments

Use the Pricing Adjustments tab in Quote Management to view and update manual pricing adjustments made to order line items in your quote.


Before you begin

Role required: sales_agent

About this task

To create a pricing adjustment, see [Add pricing adjustment to a quote line item.](#)

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Select **Quotes > All**.
3. Select the quote that you want to view in the **Quote List**.
4. Select the **Pricing Adjustment** tab.
5. Select the price adjustment line item that you want to update.
6. Make the pricing adjustment.
7. Select **Save**.
The pricing adjustment is updated and reflected on the overall quote pricing field.



Initiate a contract request


Initiate a contract request from the Quote Management application.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Select **Quotes > All**.
3. Select the quote in the Completed state for which you want to create a contract.
4. Select the **More Actions**  menu and select **Initiate contract**.
5. On the form, fill in the fields.

| Field | Description |
|----------------|--|
| Type of paper | Type of paper to be used in the contract. Select Own paper. |
| Contract type | Type of contract to be generated. Select Sales Contract. If you want to generate a different type of document, select Other types of contract. |
| Signature type | Type of signature to do to complete the contract. <ul style="list-style-type: none"> ○ Electronic signature: You sign the document through electronic medium. ○ Wet signature: You download the document and sign it manually. |
| Start date | Date that the contract begins. |
| End date | Date that the contract ends.  Note: The End date must be later than the Start date. |

6. Select *Initiate*.

A contract management request is generated in the Contract documents tab. Select the record to view the document.


View an existing quote

View existing quotes to update the quote status or make other changes.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Select **Quotes > All**.
 - All Quote- shows all the quotes in the instance.
 - My Quotes- shows your quotes.
 - My Teams Quote- shows the team quotes.
3. Select the quote that you're working with.
4. Make updates to the quote as needed.
5. Select **Save**.


Export quotes

Export a list of all quotes in Quote Management and provide it to a customer.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quotes > All**.
3. Select **Export**.
4. Select the **File Type** to be exported:
 - Excel
 - CSV
 - JSON
 - PDF
5. Select the **Delivery Type**:
 - Email - Enter a valid email address.
 - Download - Downloads the export to a local drive.
6. Select **Export**.

The list of quotes is exported according to the parameters set.

Enable a sales agreement in a quote

Agents can enable a sales agreement for a quote. Once enabled in Quote Management, sales agreements are generated that show the product and service lines and other relevant details for the quote.

Before you begin

Role required: pricelist_manager and sales_manager



About this task

A sales agreement is a document that outlines the terms and conditions of a sale between a seller and a buyer.

The agreement specifies the details of the transaction including the goods or services being sold, the price, the quantities, delivery terms, and any other relevant conditions, for a specific period.

Sales agreements filter the product catalog according to the agreement.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quote > All-Quotes** and select **New**.
3. Add quote details to the quote and select **Enable sales agreement quote**.
When the **Enable sales agreement quote** is selected, the quote is set on a sales agreement workflow. See [Using Sales Agreement Management](#) for more information.
4. Fill in the **Sales agreement start date** and **Sales agreement end date**.
5. Select **Save**.
6. Use the **Catalog** tab to add quote line items to the quote.
See [Add products to a quote](#) for more information.
7. Make other updates to the quote.
8. Once the quote is ready, select **Submit for approval**.
9. When the quote is at an **Approved** state, change the quote to **Completed** by either updating the **State** field or selecting the context menu  and choosing **Mark as complete**.
The quote is saved to a **Completed** state and the **Create sales agreement** button appears in the quote details form.
10. Select **Create sales agreement**.
A sales agreement is created. The message displays the sales agreement number.
11. Select the sales agreement message to open the sales agreement.


Sync a quote with an opportunity

Agents can sync quote information with an opportunity to ensure that information is consistent between both applications in Quote Management.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quote > All-Quotes** and select a quote that you want to sync with an opportunity.

3. In the **Details** tab of the quote, go to the **Source Opportunity** option and choose the opportunity you want to sync with.
4. Select **Save**.
The **Enable sync** button is enabled.
5. Select the **Enable Sync** option.
Current Information and future changes to the quote are automatically synced. The following areas show the sync status.
 - The **Sync** check box shows that the quote is synced.
 - The **Sync** flag on the secondary header changes to **Yes**.
 - The **Synced** column in the Quotes related list on the Opportunity record shows **Yes** when sync is activated and **No** when the quote isn't synced.
6. Turn off automatic sync by selecting the **Disable sync** button.

Note: When sync is enabled, the following conditions occur:

- No changes can be made to that opportunity (for example, adding line items, changing quantities).
- Additional changes should be made to the quote record.
- The opportunity record is updated in real-time with the latest product offerings and prices that are added to the quote.
- The synced opportunity state changes to closed when the quote is marked as complete

Add covered products to a quote

Agents can add a covered product to line items in a quote in Quote Management.


Before you begin

Role required: sales_agent or sales_manager

About this task

Covered products are products that are added to a warranty or entitlement. Once you have added a warranty or entitlement to your quote line items, the covered product option becomes available.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quote > All-Quotes** and select a quote that you want to add covered product too.
3. From the **Quote line items** tab, select the quote line item.
4. Select **More > Covered product**.
5. In the **Covered Product** tab, select **New**.
6. In the **Create New Covered Product** form, select the covered product line item you want to add.

There are three types of covered products types that you can add to a line item:

| Covered product type | Description |
|--------------------------------|--|
| Covered quote line item | Select a quote line item to be added as a covered product. |

| Covered product type | Description |
|----------------------------------|---|
| Covered sold product | Select a covered sold product to be added as a covered product. |
| Covered install base item | Add an install base item as a covered product. |

7. Select **Save**.
8. On the quote line item page, select the contract start date and the contract end date.
9. Change the state to **Complete**.
A contract is created with the contract details for the order line.

Add subscription start and end dates to a quote

Agents can add subscription pricing to a quote or quote line items in Quote Management.

Before you begin

Role required: sales_agent

About this task


Subscription pricing is a pricing model where customers pay a recurring fee for products or services, typically at regular intervals such as monthly or annually.

On a quote, the agent can set the subscription pricing start date and end date, or they can enter a term and the subscription end date is automatically calculated.

Subscription pricing can be added at the quote header level or at the quote line item level.

See [Subscription revenue metrics](#) for more information about how subscription pricing works.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quote > All-Quotes**
3. Select the quote that you're working with.
4. In the **Quote Details** tab, add a **Subscription pricing start date** and a **Subscription pricing end date**.

When the dates are entered, the following information automatically updates.

| Field | Description |
|-------------------------------|---|
| Total monthly recurring price | Shows the monthly recurring price based on the dates entered in subscription pricing. |
| Total annual recurring price | Shows the total annual recurring subscription pricing based on the dates entered. |
| Total amount | Shows the total amount of the subscription pricing according to the the subscription pricing start and end dates. |

| Field | Description |
|-------|--|
| Term | Shows the number of months the subscription is valid based in the start and end dates. |

5. Select **Save**.


Filter catalogs by location in a quote

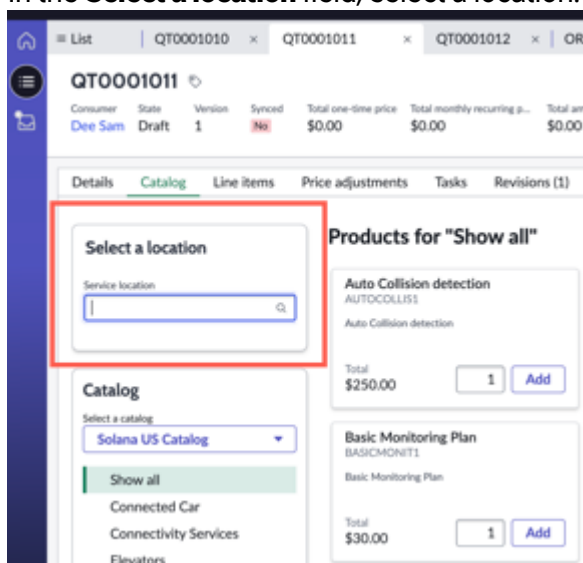
Agents can use the location option on the catalog tab to filter products by location in Quote Management.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quote > All-Quotes**.
3. Select the quote that you're working with.
4. Select the **Catalog** tab.
5. In the **Select a location** field, select a location.



The products in the catalog are filtered according to the selected location.


Copy locations for quote line items

Agents can use the copy location function to change the location of multiple quote line items in Quote Management.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. From the **Quote List**, select the quote you want to work with and select the **Line Items** tab.

3. Select one or more quote line items that you want to copy to another location.
4. Select **Copy**.
5. In the **Copy line items** window, choose any one of the options.

| | |
|-------------------------------|---|
| Keep original location | Line items for the selected quote are created and the source location is retained. |
| Choose new location | <p>This action copies the quote line items to a new location.</p> <p>In the Service location filter, select the new location that you want the line items to be copied to.</p> |

Note: Be sure to select **Continue to copy only eligible lines for this location (exclude ineligible)** within the **Copy line items** window.

This selection copies the eligible line items to your preferred location and skips the line items that aren't eligible. If the option isn't selected, no quote line items are copied if any line item is ineligible.

6. Select **Copy**.

Using Sales Agreement Management

Learn how managers, agents, and administrators use the Sales Agreement Management application to generate sales agreements from quotes.

To create a sales agreement from a quote, the following conditions must be met:

- Make sure that the selected quote is not converted to another sales agreement. You cannot create multiple sales agreements from a single quote.
- The quote is in a closed or complete state.
- A sales agreement can be created from a quote that is for an account, not a consumer.

The Sales agreement window has the following tabs that help you create and manage your sales agreement.

Sales agreement tabs

| Sales agreement tabs | Description |
|----------------------|---|
| Details | Details of the related quote, start and end date of the agreement, and so on. |
| Sales Agreement Line | Details about the product and the services agreed between the buyer and the seller. |
| Order | Displays the list of all the orders placed with the current sales agreement. |
| Price List | Details about the account and currency that is updated from quote header. In the Price List Line table, you can view the actual pricing details about the products and services from the related quote. |


Create a sales agreement

Create a sales agreement from a quote between a buyer and a seller for future transactions.

Before you begin

Role required: sn_csm_pricing.pricelist_manager and sn_sales_common.sales_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quote > All-Quotes** and select the quote to enable a new sales agreement.
3. Select **Enable sales agreement quote**.

After the sales agreement is created, a message displays the sales agreement number. The request tracker enables agents to monitor the progress of sales agreements creation. All the information on the sales agreement is captured from the selected quote.

For more info, see [Enable a sales agreement in a quote](#).

4. Select the sales agreement number.
The new sales agreement is displayed. The price list created for this new sales agreement is referred in the Default price list field.

What to do next

An order can be placed in the Order Management application based on a sales agreement. For more info, see [Add a sales agreement to an order in Order Management](#).

Using Order Management

You can manage and fulfill customer orders and service orders in the Order Management application.

Action types for orders

The Order Management application supports the following types of customer and service orders.

Order action types

| Order action type | Description |
|-------------------|---|
| Add | Add a customer order that is not associated with an existing order from the same customer. |
| Change | Change an existing order, which changes a previously ordered or fulfilled product or service. |
| Delete | Deletion of an existing customer order line item or product order. |

Methods for capturing orders

You can capture customer (product) and service orders from the following sources:

- Your agents can capture customer and service orders using the CSM Configurable Workspace.
- If you have a Telecommunications Service Management subscription, you can capture orders from the following:

- Third-party order management systems through the Product Ordering Open (TMF622) or Service Order Open (TMF641) APIs.
- Through the Service Exchange in the San Diego and later releases.

Create an order in Order Management

Create a product or service order in Order Management.

Before you begin

Role required: sn_ind_tmt_orm.order_agent


About this task

When you start an order, a pop-up prompts you for order information. You can choose to create a product order for a customer account or consumer. The pop-up changes depending on your choice.

- Account – The order is created for an existing customer account.
- Consumer – The order is created for an existing consumer.

Note: The following steps explain how to create a customer order. Whether you’re creating a customer order or a service order, the steps are the same.

Procedure

1. In the **Configurable Workspace**, select the **List**  view.
2. Navigate to **Customer Orders > All** and select **New**.
The **Create a new Order** pop-up opens.
3. In the **Create a new Order** pop-up, fill in the fields.
 - To create an order for an account, select the **Account**.
 - To create an order for a consumer, select the **Consumer** name.

| To | Description |
|---------------------------------------|---|
| Create an order for an account | Enter the following: <ul style="list-style-type: none"> ○ Order Type: Order type can be service or customer. ○ Contact: Name of the primary customer contact. ○ Order action: Select the type of order action. |
| Create an order for a consumer | Enter the following: <ul style="list-style-type: none"> ○ Order Type: Order type can be service or customer. ○ Order action: Select the type of order action. |

4. In **Order action**, select **Add**.
The **Order action** menu contains the following options.

| Order Action | Description |
|--------------|-------------------|
| Add | Creates an order. |
| Move | M |

| Order Action | Description |
|--------------|-------------------------|
| Change | Creates a change order. |

5. Select Create.

The order is started and the **Order Catalog** opens.

Related topics

[Add products or services to an order in Order Management](#)

Add products or services to an order in Order Management

Once an order is started, add order lines for products or services using the product catalog and product configurator in Order Management.

Before you begin

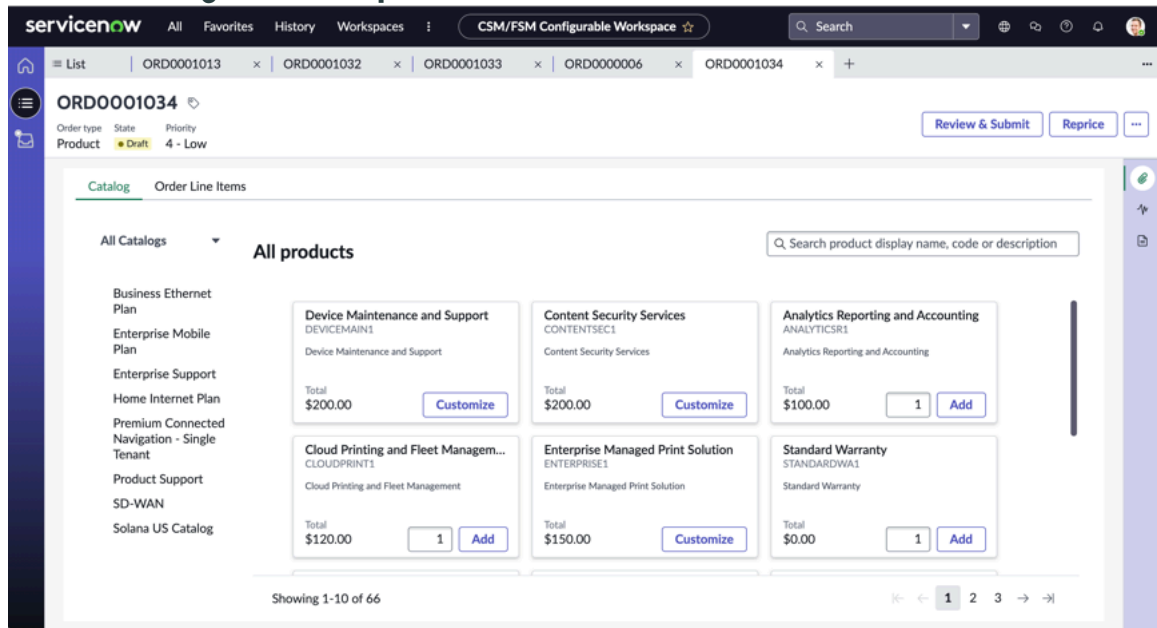
Note: Check your entitlements to see if the product configurator is available.

Role required: sn_ind_tmt_orm.order_agent

About this task

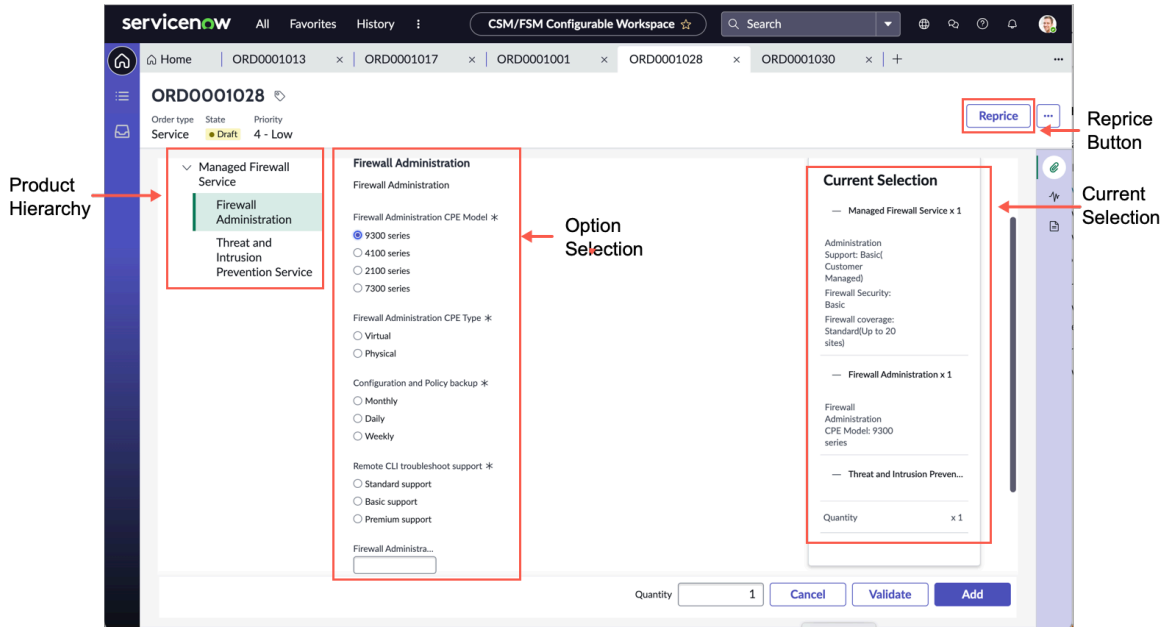
The product catalog shows tiles that contain product information. Simple products have an **Add** button that adds the product to the order with no options available.

Product Catalog used to add products to orders




Products with options have a **Customize** button that opens product configurator that lets agents select product options.

Product configurator used to select product options



The product configurator consists of three columns. The Product Hierarchy column displays product catalog items and child products associated with the product. The Option Selection column shows any available options for the product or service and order lines and order tasks. The Current Selections column shows the products options selected and the pricing.

Procedure

1. In the **Configurable Workspace**, select the **List**  view.
2. Navigate to **Customer Orders > All**.
3. Select your order.
4. Select **Add** to add a simple product (product with no options) to your order.
5. Select **Customize** to add products that have options.
The **Customize** button opens the product configurator that lets you choose available options for the product or service. The following table explains the product configurator options.

Product configurator form

| Field | Description |
|-------------------|--|
| Product Hierarchy | Field shows the hierarchy of the catalog items and includes parent level products and child level products. |
| Options Selection | The field displays the options available for the product. |
| Current Selection | The field lists the selected products with pricing. |
| Reprice Button | The button resets the pricing and updates the total price when changes are made. If cascading pricing is enabled, pricing information is cascaded from parent to child line items. See Control cascading quantity values in child product offerings for more information. |
| Validate Button | The button validates the product and prices when changes are made. |

| Field | Description |
|------------|---|
| Add Button | The button adds the product to the order. |

6. Select **Add** to add the product to your order.
The product or service is added to the order as an order line item.
7. Select the **Order Line Item** tab to view products and services in your order.

Related topics

[Set up and review product order lines in Order Management](#)

Add a sales agreement to an order in Order Management

Add a sales agreement to your order. A sales agreement is a contract to order a pre-identified set of products and services for a set price.

Before you begin

Role required: sn_ind_tmt_orm.order_agent


About this task

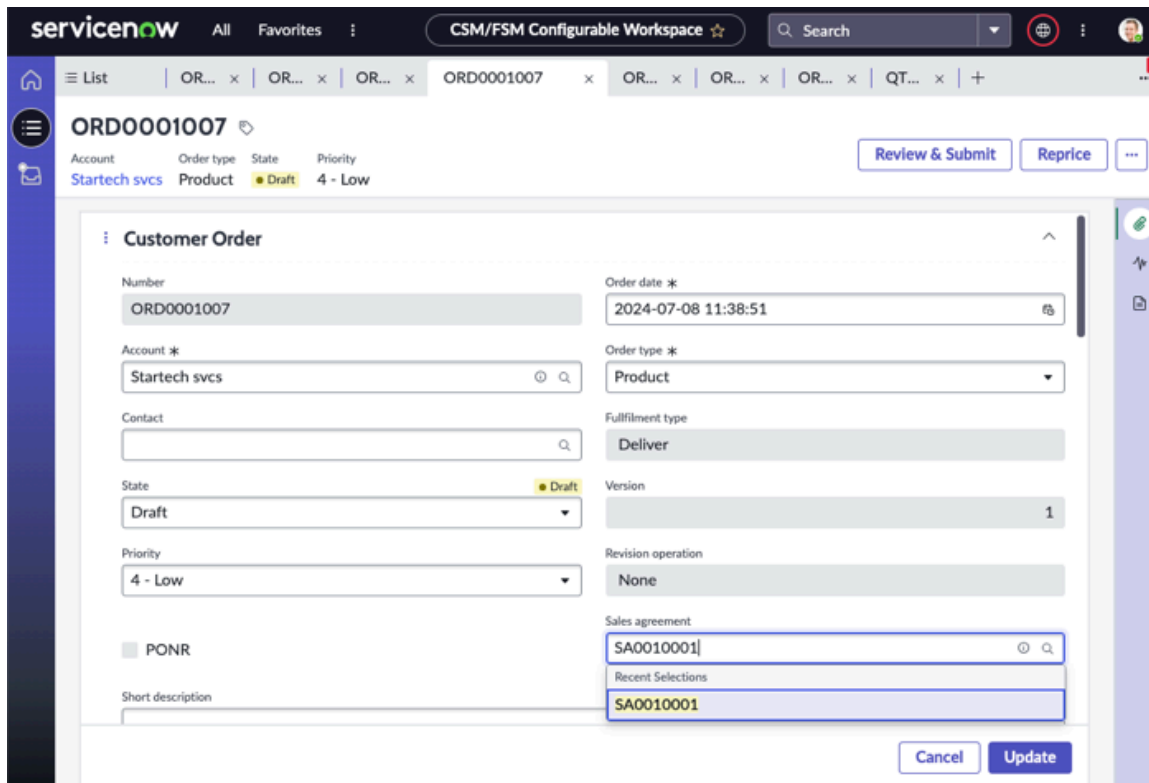
A sales agreement is a contract to order a set of products and services for a set price. Sales agreements let agents move quickly through the order process because the sales agreements establish the products and pricing for the order.

- Sales agreement terms are defaulted for the order.
- Price lists are defaulted based on the pricing terms in the sales agreement.
- The order catalog is filtered for products and options by the terms of the Sales Agreement.
- Agents can configure product bundles for orders with sales agreements.

See [Using Sales Agreement Management](#) and [Create a sales agreement](#) to learn more about creating a sales agreement.

Procedure

1. Navigate to **All > Customer orders > All** and select the order you're working with.
2. Navigate to the **Order Details** tab by selecting the more icon  and choosing **Order Details**.
3. In the **Customer Order** form, find the **Sales Agreement** field and select the sales agreement you want.



4. Select Update.

The sales agreement with its product offerings and price lists is added to the order.

Related topics

- [Sales Agreement Management](#)
- [Configure Sales Agreement Management](#)

Set up and review product order lines in Order Management

Once products and services are added to an order in Order Management, you can set up order lines with order characteristics, pricing adjustments, and other items.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

About this task


About this task

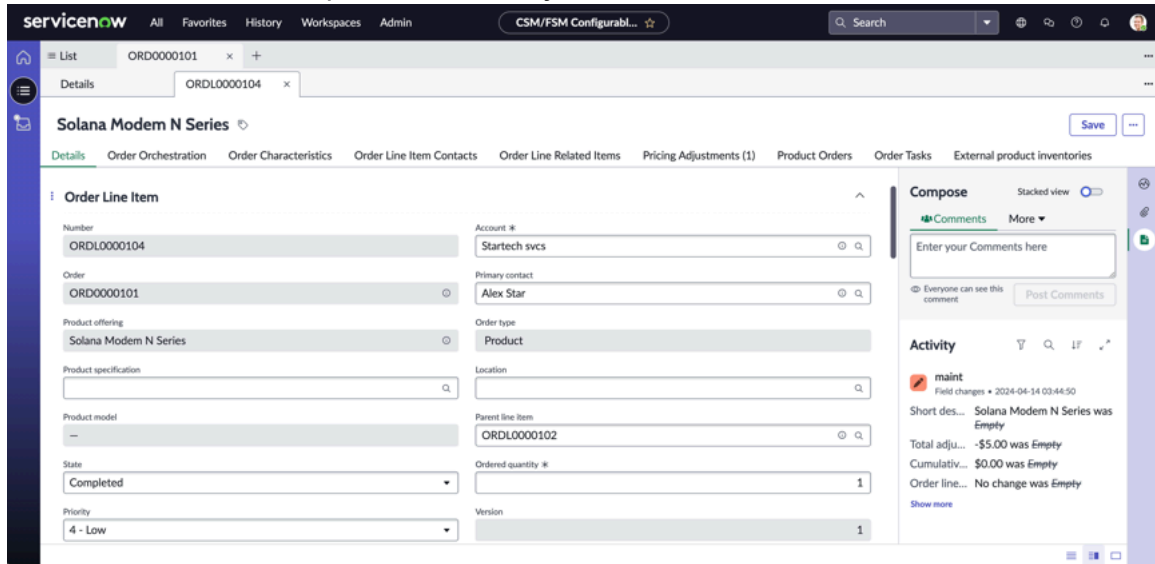
Product and service order lines items contain the product or service that you have added to your order. You can also make the following changes and updates to the order line items.

- Details - shows the details of the order including the name and address fields for the order.
- Order Orchestration
- Order Characteristics - add characteristics to a product and service orders.
- Order Line Item Contacts - add a contact for each product order line item.
- Order Line Related Items - connect this order line item with other order line items
- Pricing Adjustments - add pricing adjustments to a product order.
- Products Orders - lets agents create product orders and add them to the current order.

- Order Tasks - tasks that are assigned to complete the orders.
- External product Inventories - connect to external product inventories.

Procedure

1. In the **Configurable Workspace**, select the **List**  view.
2. Navigate to **Customer Orders > All**.
3. Select the order that you're working with.
4. Select the order line tab and choose the order line item that you want to update. The order line item form opens with a variety of tabs available.



5. Select the tab that you want and fill in the fields.

| Field | Description |
|------------------------------|---|
| Details | Details include shipping address and product information. Details tab also contains pricing, general information, and contract start and end dates. |
| Order Orchestration | Open this tab to see the steps needed to execute the order. |
| Order Characteristics | Characteristics are the options available. |
| Order Line Item Contacts | Add contacts that enable agents to find more information about an order. |
| Order Line Related Items | Connect this order line item with other order items. |
| Pricing adjustments | Agents can adjust product pricing. |
| Product Orders | Shows the product orders that are part of this order. Also lets agents add products to the order. |
| Order Tasks | Shows order tasks that must be completed. |
| External Product Inventories | Agents can view external product inventories. |

6. Select **Save** to save the changes to the order line.

Related topics

[Review and submit a product or service order in Order Management](#)


Review and submit a product or service order in Order Management

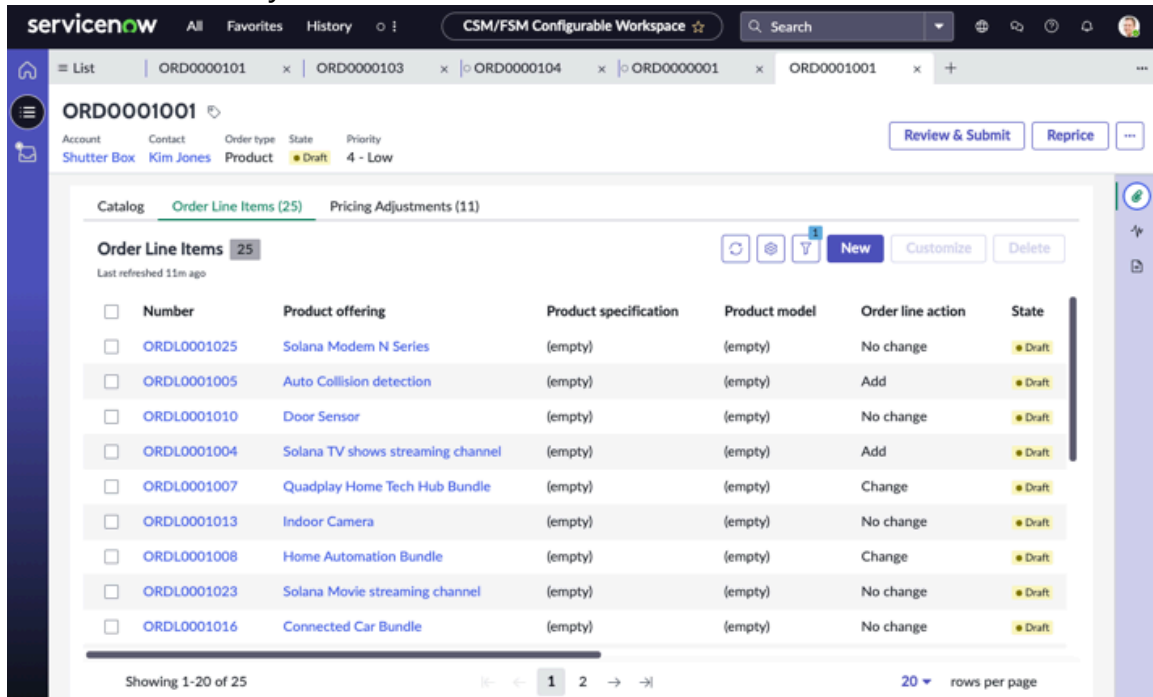
After adding products and services to your order, review the order line items and submit the order for approval.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

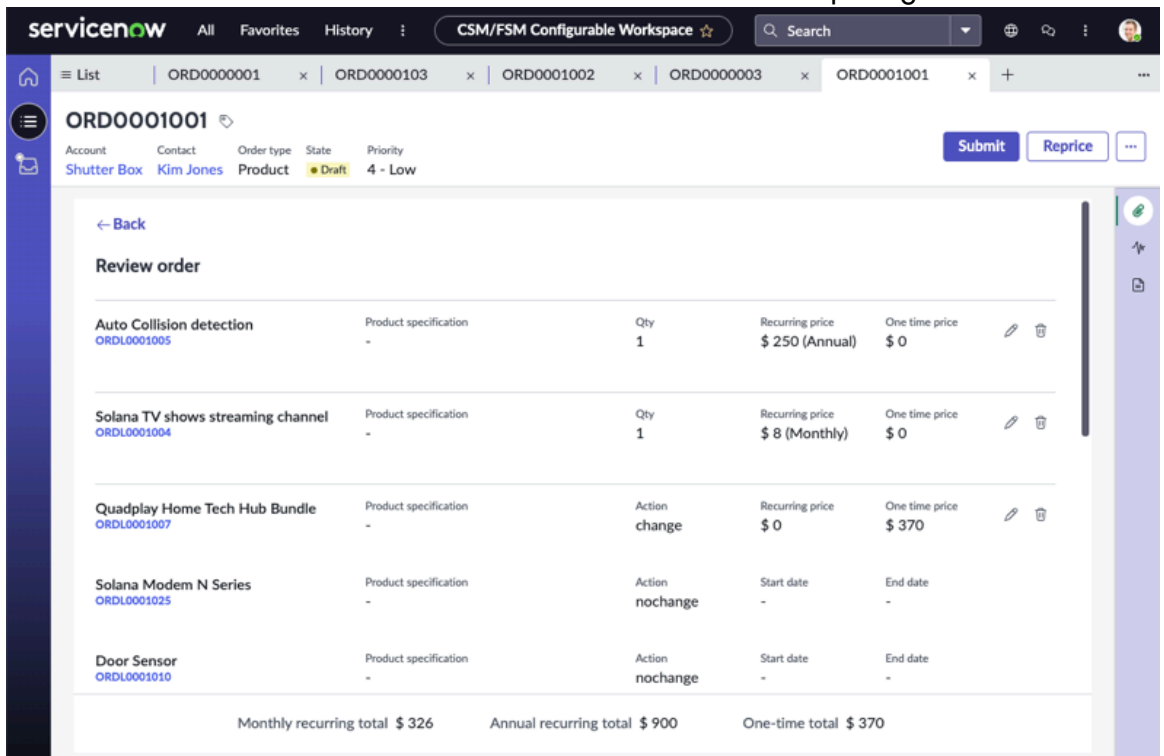
Procedure

1. In the **Configurable Workspace**, select the **List**  view.
2. Navigate to **Customer Orders > All**.
3. Select the order that you want and review the order line items.



4. Save any changes or updates and select the **Reprice** button to reset the total pricing.
5. Select **Review & Submit** to move the order to the ready for approval state.

The **Review order** window shows all the order line items and also shows total pricing if



applicable.

6. After reviewing the order, select **Submit**.

The state of the order changes from **Draft** to **Submitted** and becomes available to the product manager to review and approve.

Related topics

[Approve a product or service order in Order Management](#)


Approve a product or service order in Order Management

When an order is submitted, the next step is to review the order and approve it. Approved orders are ready to begin the fulfillment process in Order Management.

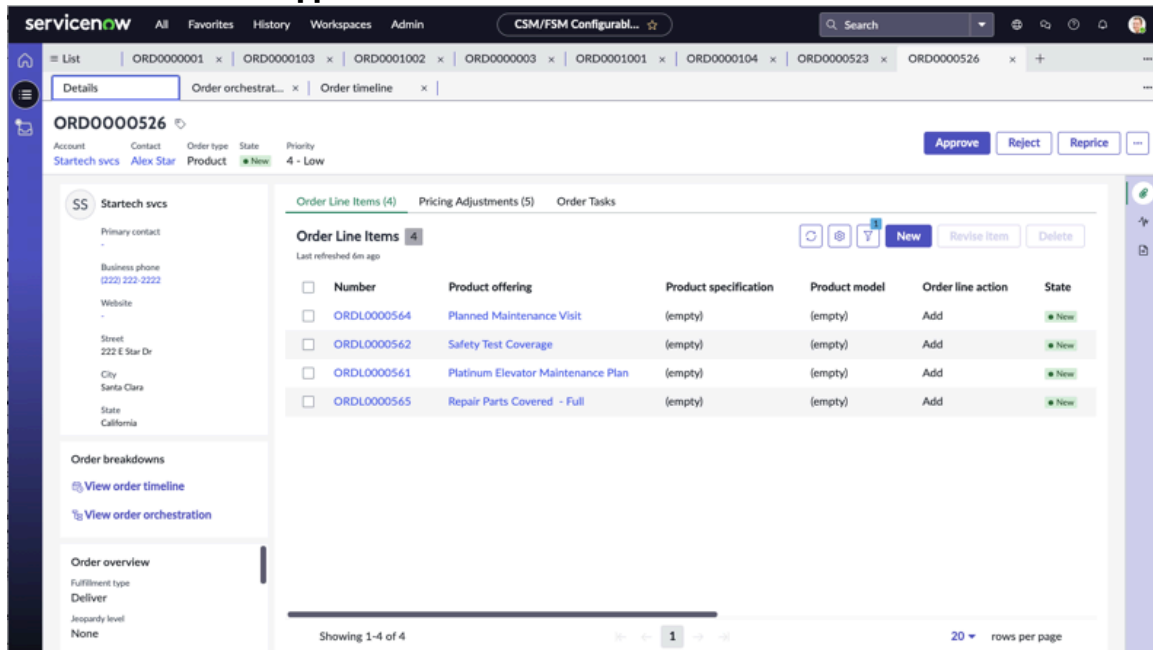
Before you begin

Role required: sn_ind_tmt_orm.order_approver

Procedure

1. In the **Configurable Workspace**, select the **List**  view.
2. Navigate to **Customer Orders > All**.
3. Select the order that you want to review and approve.
Orders ready for approval are in a **Submitted** state.

4. Fill in the fields in the **Approval** form.



Order approval form

| Field | Description |
|--------------------------|---|
| Approve button | Approve orders using the Approve button. The order is updated to a Complete state and enters fulfillment. |
| Reject button | This button rejects the order, which changes the order state to Rejected . Rejected orders are made available to order agents to make changes and updates. |
| Reprice | Recalculate prices using the Reprice button when updates are made to the order line items. |
| View order timeline | To view the order timeline, select Timeline . |
| View order orchestration | Opens the Order Orchestration form, which is a visual reference to the steps needed to fulfill the order. |
| New | To add a new order line to the existing order, select New . |
| Revise item | Make changes to order line items by selecting the Revise item button. |
| Delete | To delete an order line item, select Delete . The line items are deleted and the prices are recalculated. |

5. Select **Approve**.

The order is approved and the order state changes to **Complete**.

Updating specification versions

Enterprises frequently create and update new versions of product and service specifications. When these changes occur, it's important to update the existing product specification in ServiceNow®. Failure to update the product specifications can lead to difficulties with MACD (Move, Add, Change, Delete) operation when orders enter fulfillment.

Updating specification versions helps with:

- Introducing new characteristics along with their options.
- Adding new options to existing characteristics and removing existing characteristics or their options.
- Renaming existing characteristics and options.
- Incorporating new relationships and updating or removing existing relationships.
- Adding compatibility rules.

Specification version updates

The following list shows the types of specification version updates that can occur:

- Characteristics
 - New
 - Changed - enumerations
 - Removed
- Child Relationships (bundled/composed)
 - New
 - Removed
 - Change cardinality
- Horizontal Relationships/Compatibility Rules
- Attribute Mapping Rules

Batch specification version update

A set of specification versions can be updated using the batch specification utility in Sales Customer Relationship Management. The specification can also be scheduled.

What to do next

[Configure update specification versions](#)

Configure update specification versions

Configure specification version updates so that product specification versions can be updated to reflect changes and updates.

Before you begin

Role required: system_admin

About this task

To configure the product specification version change, modify the check-for-an-incoming-specification ID and the product inventory specification ID.

Procedure

1. Navigate to **All** and enter `sys_properties.list` in the search area to open the **System Properties** list.
2. In the **System Properties** list, search for `sn_ind_tmt_orm.allowSpecVersionUpdateInChangeOrder` then select to open the system property.

If the system property record is in an uneditable state, select the message to make the record editable.

3. In the **Value** field, set the value to `true`.

4. Select **Update**.

The specification version update is activated.

Batch update for product specification versions

Use the inventory batch update job to update product specifications when changes occur from one version to another.

Before you begin

Role required: `product_catalog_admin` and `product_catalog_manager`

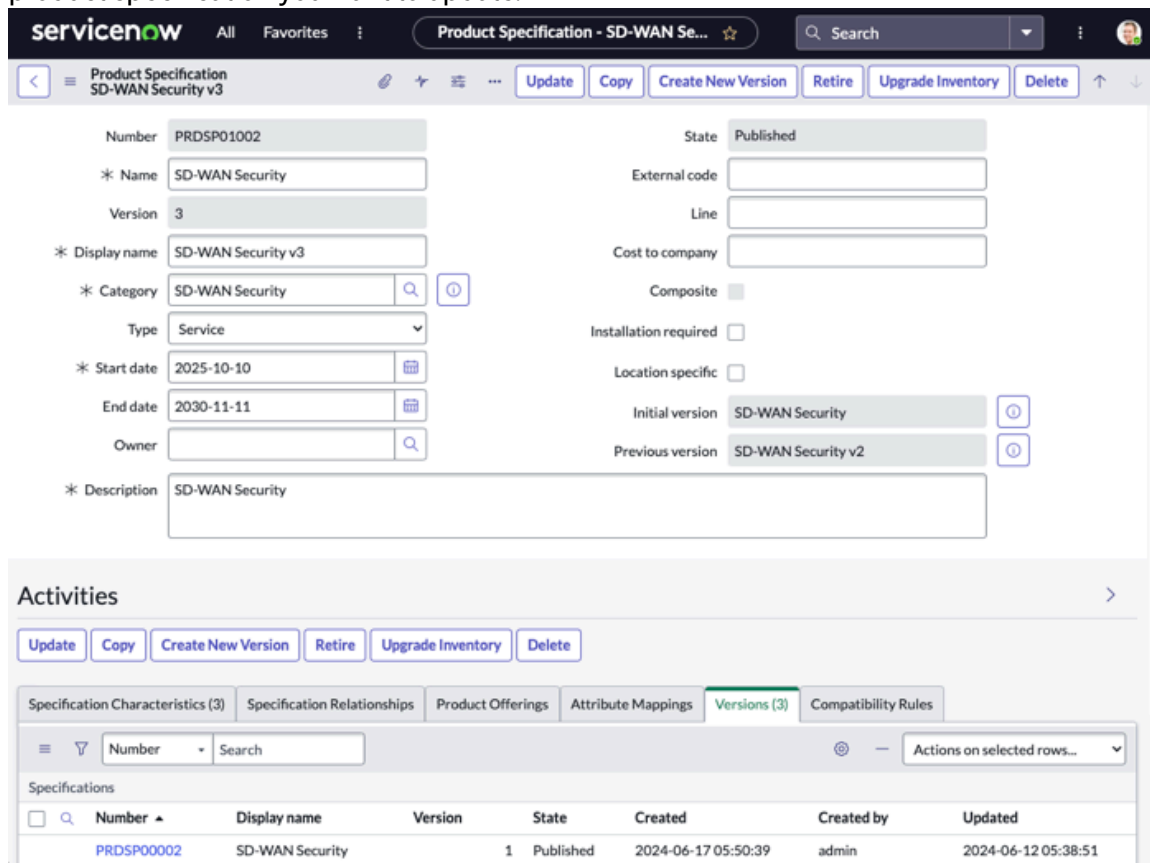
About this task

Batch inventory specification update lets catalog admins and product managers create an on-demand job that triggers a batch specification version update. The update doesn't create change orders but directly updates product inventory in orders. Batch updates also create a log that including errors.

There are two steps to perform this process. The first is to update the specification version from the source version to the target version. The second step is to run an inventory upgrade job.

Procedure

1. Navigate to **All > Product Catalog Management > Product Specifications** and select the product specification you want to update.

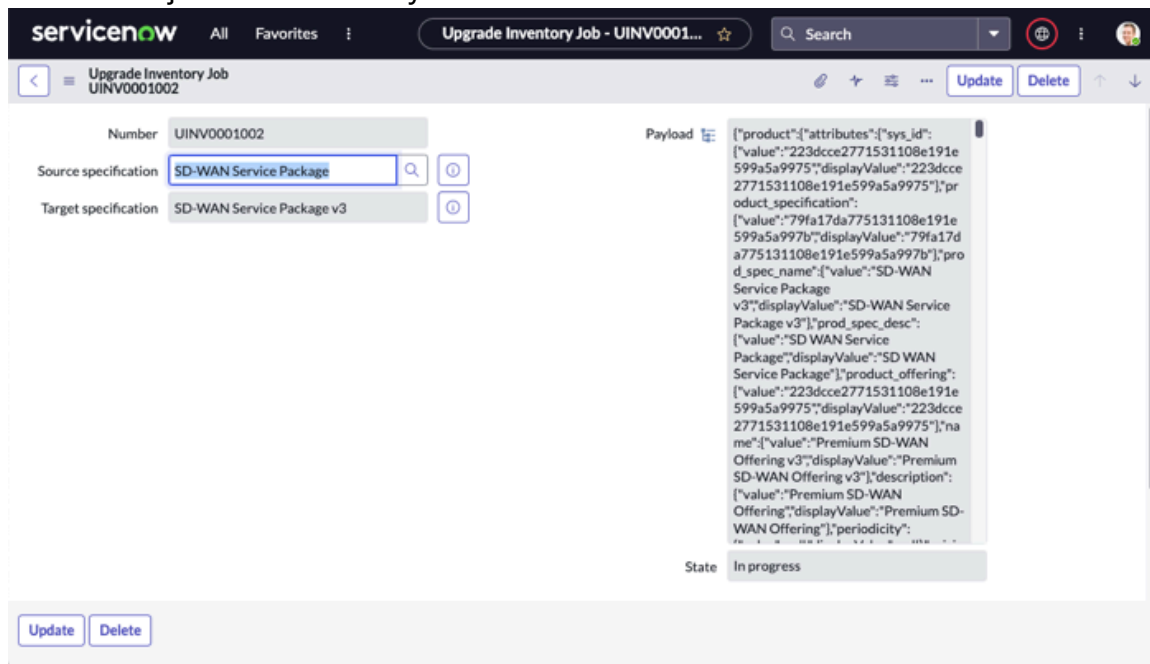


2. Select the **Create New Version** button to create a version of the specification.

3. Select **Publish** to publish the specification version, then select **Update** to update the specifications to add the new version.

Now there are two published versions of the specification. The initial version is considered the source version and the v2 version is considered the target version.

- To start the version update on existing product inventories, select **Upgrade Inventory** and select **Yes** at the prompt.
The job is created for the source specification as v1 and the target is automatically populated as the latest published version of the source specification. The inventory upgrade job starts and runs a series of validation steps to confirm the job runs successfully. When the validation is complete, the job enters an **In progress** state. If an error occurs, the job status turns to **Error**.
- Navigate to **All > Inventory upgrade job** and select the job you're working with to view the status of the job and address any errors.



- Navigate to **All > Inbound queue > Inbound requests** and select the record id you're working with to view the status.
The number of inbound queue requests indicates the number of product inventories that matched the source specification. Once all the inbound queue records are processed, the request creates a change order for each of the inbound queue records processed successfully.

View upgrade inventory job status

View the status of a specification upgrade job using the upgrade inventory Job status list form.

Before you begin

Role required: product_admin

Procedure

- Navigate to **All > Product Catalog Management > Upgrade Inventory Jobs** and select **All**.
- Select the inventory job that you're working with.

| Entry | Description |
|----------------------|--|
| Number | A system-generated number identifying the inventory job. |
| Target specification | The target specification that is going to be updated. |

| Entry | Description |
|---------|--|
| Payload | Payload is the specification data that is being added to the target specification. |
| State | Shows the state of the job. |

3. Select **Update** to save any changes.

Add covered products to order line items

Enhance orders by adding covered products such as contracts or entitlements at the order line level.


Before you begin

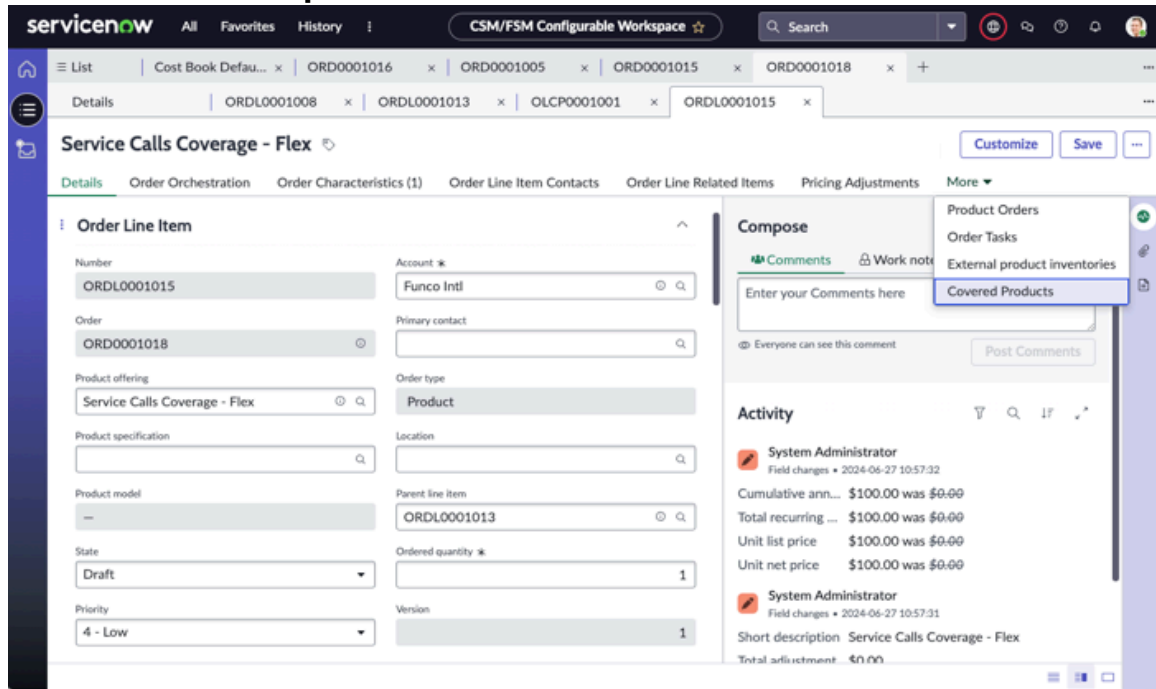
Role required: sn_ind_tmt_orm.order_agent

About this task

Order agents can add covered products to an order line during the order capture process.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Customer orders > All** and select the order that you're working with.
3. From the **Order line items** tab, select the entitlement or contract type of order line.
4. Select **More > Covered product**.



5. In the Covered Product form, select **New**.
6. In the Create New Covered Product form, select the covered product line item you want to add. There are three types of covered products types that you can add to a line item:

| Covered product type | Description |
|----------------------------------|---|
| Covered sold product | Add a sold product to an entitlement/contract type of order line to establish a coverage relationship between them. |
| Covered order line item | Add a covered order line item to the order line. |
| Covered install base item | Add an install base item to the order line. |

7. Select **Save**.

8. On the order line item page, select the contract start date and the contract end date.

9. Change the state to **Complete**.

A contract is created with the contract details for the order line.

Update product locations at the order line level

Agents can use the copy function to update product locations at the order line level Order Management.


Before you begin

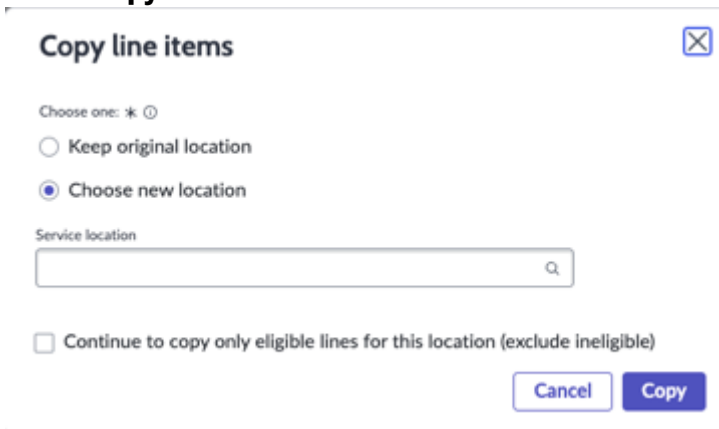
Role required: sn_ind_tmt_orm.order_agent

About this task

Agents can change the location of products at the order line level by using the copy function. When an order line item is copied, a dialog box opens allowing the agent to select a location. Agents can select one line item to update or multiple line items.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. From the **Customer Orders > All**, select the order you want to work with and select the **Line Items** tab.
3. Select one or more order line items that you want to change to another location.
4. Select **Copy**.



5. In the **Copy line items** window, choose any one of the options.

| | |
|--------------------------------------|---|
| <p>Keep original location</p> | <p>Line items for the selected quote are created and the source location is retained.</p> |
| <p>Choose new location</p> | <p>This action copies the quote line items to a new location.</p> <p>In the Service location filter, select the new location that you want the line items to be copied to.</p> |

Note: Be sure to select **Continue to copy only eligible lines for this location (exclude ineligible)** within the **Copy line items** window.

This selection copies the eligible line items to your new location and skips the line items that aren't eligible. If the option isn't selected, no quote line items are copied.

6. Select Copy.

The order lines are copied and added to the order line items list with a new location.


Filter product catalog by location

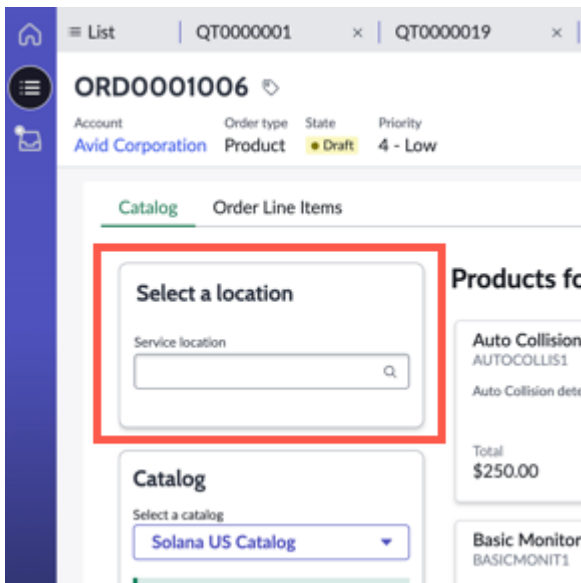
Agents can filter products in the catalog by using the location function in Order Management. The location filter helps agents be more efficient when creating orders.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Select **Customer Orders > All**, choose the order you want to work with. The order opens in the **Catalog** tab with the **Select a location** field available.
3. Select a location.



The products in the catalog are filtered according to the selected location.

Managing inflight order changes and cancellation requests

Manage how your organization receives changes for customer orders, service orders or individual line items that are still being orchestrated and fulfilled. By using inflight change order management, you can designate when you permit such changes. You can also assess the impact of the requested changes for an order or order line item, and automatically generate a plan to compensate for them when you approve the revision or cancellation request.

Overview

An inflight order is an order that is in the process of being orchestrated and fulfilled but has some work pending. Inflight changes and cancellations can occur in large enterprise orders. An inflight order change refers to a change that is issued for an order line item that is currently undergoing fulfillment and pending completion.

Enterprise telecommunications order management is complex. It can take weeks or months to fulfill a multi-site order. Enterprise orders can involve the large-scale purchases of products and services, often for multiple locations around the world. Inflight orders can go through revisions that incorporate changes that are submitted by customers or identified by internal personnel during the order fulfillment process.

To revise an inflight order or order line items that have already been decomposed to suborders, service provider employees have to assess the impact of the requested changes. If there is no data-driven process and framework, users try to manage the changes with manual tasks that can lead to delays in the order delivery process and result in poor customer and employee experiences.

Types of Inflight order changes

Order change requests typically originate from your customers for purchased products and services or from internal personnel, such as order fulfillment agents, when they are managing their fulfillment. When you submit an inflight order revision, you assign a change type to track the types of order changes that are submitted by users. The ServiceNow AI Platform supports Characteristic, Contact, Quantity, related items, and Price change types.

Customer-initiated requests

Based on the types of customer requests, you update an inflight order to do the actions that are listed in the following table.

Customer-driven order changes

| Type of change | Example |
|---|--|
| Incorporate changes that are related to contact details. These changes can include an update, deletion, or addition of contact information for an order line item for a product or service in a location. | A customer supplies a new email address or the name and telephone number of a new corporate contact. |
| Incorporate changes that are related to pricing details. | A customer requests a reduction to a non-recurring charge or a monthly recurring charge on an order line item. |
| Add a product or service to an order. | A customer wants to add a new item to an existing order. |
| Increase or decrease the quantity of order line items in a product or service order. | A customer wants a higher or lower the quantity of an existing order. |

Customer-driven order changes (continued)

| Type of change | Example |
|---|---|
| Add, change, or cancel a product or service, or product or service options, in a related domain product or service order. | A customer wants to update the characteristic value of a product or service that the customer ordered at an earlier date. For example, the customer wants to change the speed of an internet service from 100 Mbps to 500 Mbps. |
| Incorporate changes that are applicable to the related items of a product or service order. | A customer wants to add or change an item to an order that has horizontal relationships. To learn more, see Defining a horizontal relationship . |

Fulfillment user-initiated requests

To expedite the completion of the order fulfillment process, the order fulfillment or service order agents and managers often request changes to product, service, or resource orders. Based on the types of internal requests, you update an inflight order to do the actions listed in the following table.

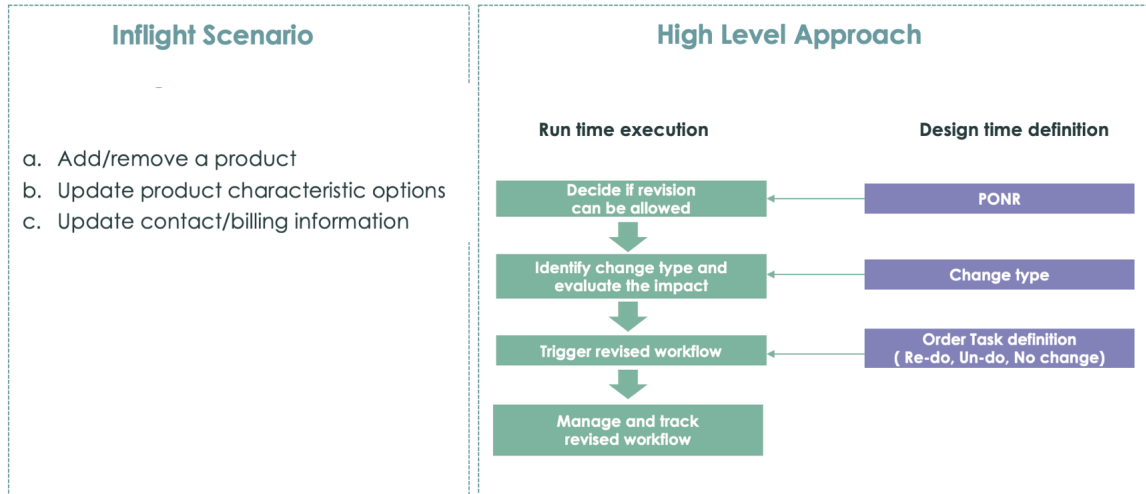
Fulfillment-driven order changes

| Type of change | Example |
|---|--|
| Incorporate changes that are related to contact details. These changes can include an update, deletion, or addition of contact information for an order line item for a product or service in a location. | A customer supplies information about a new corporate contact person on a pending delivery of an enterprise order. |
| Add, change, or cancel a product, including product options, in a related domain product order. | A customer orders a modem that is incompatible with the higher-speed 500-Mbps internet service that the customer ordered. It requires replacement by another modem model. |
| Add, change, or cancel the service domain orders and product inventory. | A customer wants to change the characteristics value of a product or service. For example, the customers wants to change the Firewall Security Service from Standard to Basic. |
| Add, change, or cancel a service, including service options, in a related domain service order. | A customer wants to change the standard warranty of 90 days to an extended service policy. |
| Add, change, or cancel a resource, including resource options, in a related domain resource order. | Revised installation instructions are available for a product that the customer ordered. |
| Incorporate changes that are applicable to the related items and product inventory of a product or service order. To learn more, see and . | A customer wants to add or change an item to an order that has horizontal relationships. To learn more, see Defining a horizontal relationship . |

Inflight Order Change processing

When a user or order fulfillment manager attempts to make any of these changes, the Inflight Change Order function proceeds through a structured processing sequence as shown in the following diagram.

Inflight order change high-level approach



The sequence for inflight change order processing is as follows:

1. The Inflight Change Order function determines where in the processing cycle the order is. You can only create inflight order revision and cancellation requests for orders that are in an In Progress state.
2. The ServiceNow AI Platform then determines whether the proposed revision can safely be made to the in-progress order. It evaluates the Point of No Return (PONR) status for the order and its current stage in the fulfillment process.

The PONR flag represents the no or go point at which you can't change an order:

- You can make an inflight change only for order line items with an In Progress state.
- You can't make inflight changes for an order that has already been decomposed into its domain product, service, or resource orders, and product installation has already started.

i Note: You can find the **PONR** option when you are viewing or maintaining customer or service orders in the Customer Order and Order Line Item forms. To learn more, see:

- and
-

3. After an operator makes the requested changes, this functionality evaluates the type of change and its magnitude and impact on the fulfillment process as follows:
 - Simple informational changes, such as contact data, may or may not impact the fulfillment as configured in the orchestration plan.
 - If the customer requests to delete an ordered product or service, the impact of the changes, if permitted, would be greater, depending on its progress in the order fulfillment process.
4. The ServiceNow AI Platform then creates a compensation plan to trigger the tasks to fulfill the revised scope of the order as follows:

- The compensation plan creates the automated revisions that are required to the fulfillment workflow to adjust to the requested order changes.
- If the customer adds products or services to the order, the compensation plan generates additional order tasks to handle the fulfillment of the newly ordered items.
- For a product substitution, the compensation plan generates an undo task to release the old product or service and a redo task for assignment of the new product or service. After the old product has been released, it can be sold to another customer.
- For a product characteristic change, the compensation plan undoes some tasks to revert the work that is not applicable for a new characteristic value or option. The compensation plan can also include a few tasks that are required for some of the completed tasks. There could also be a few existing tasks that are unaffected by the revisions that were submitted as part of the order revision.

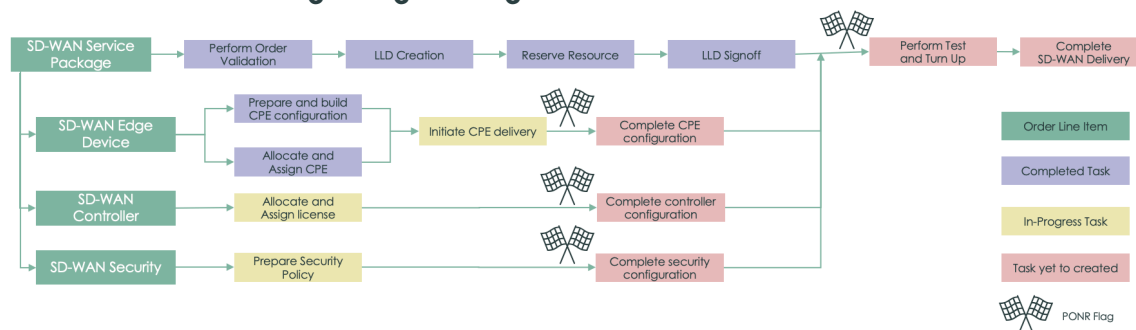
5. A manager can then track the revised workflow. By using the Inflight Order Change functions, your organization can gain the following benefits:

- Reduced manual intervention that is required to manage an inflight change order.
- Reduced time to create a revised plan for a change, which results in faster order fulfillment cycles.

Inflight order change example

The following diagram shows the process where PONR occurs for order changes that were made for an SD-WAN Service Package and its related products.

SD-WAN Service Package inflight change orders



For the top-level SD-WAN Service package, the PONR only occurs before the testing and turn up stage. A customer or internal fulfillment personnel can't change the ordered item after that point.

For subordinate products, such as the SD-WAN Edge device, the order can be changed before the Customer Premise Equipment (CPE) configuration completes. If CPE delivery is initiated but doesn't complete, and a product substitution is requested, the Inflight Change Order function can do the following actions:

- Generate an undo task for the original item.
- Generate a redo task for the replacement item.
- Create undo and redo tasks for the Prepare and build CPE configuration and Allocate and Assign CPE tasks that are completed before revision. The Inflight Change Order function can generate these undo and redo tasks because the CPE delivery task is not complete for the replacement item.

After the CPE configuration is complete, no further changes are allowed in the order for that device. This scenario also applies to the SD-WAN Controller and SD-WAN Security selections.

Key inflight order change and cancellation request fields

Learn how the ServiceNow AI Platform uses key fields in the Customer Order and Order Line Item forms to track your order changes and cancellation requests. You can see how these fields operate and what information they show you when you revise or request a cancellation of an order, or order line items.

Overview

The **PONR** (Point of No Return) option on the Customer Order and Order Line item forms indicates the PONR state for the order or order line item. While fulfillment is in process, you can use the PONR option to determine if you can revise or request cancellation of an order or an order line item. You can only do these actions for orders and order line items that are in an In Progress state and have yet to reach the PONR stage.

Note: The **Revise Order** and **Cancel Order** buttons are enabled only for order or order line items in this state.

Learn what happens with the **PONR** option:

- If you select the PONR option, it indicates that you can't revise or request a cancellation for the order or order line item while fulfillment is in progress. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order.
- If the check box is cleared, you can still revise or request a cancellation for the order or order line item.

Note: The **PONR** option is a system-assigned flag that you can't manually update.

By using the SET PONR action in Workflow Studio, your administrator can manually configure the PONR state in the fulfillment workflow. For example, in the demo data for the SD-WAN Edge product specification workflow, the PONR action is available after the Initiate CPE delivery task.

Version

A customer or service order can go through multiple revisions during its fulfillment cycle. The **Version** field tracks the number of times that you revised or requested a cancellation of the order or order line item during the fulfillment process. A new order without any revisions has a version of 1 and automatically increments for each inflight revision.

Revision Operation

The **Revision Operation** field indicates the type of revision operation, if any, that is taking place in the current version of the order or order line item. The types of revision are as follows:

None

No update or cancellation is taking place for the order or order line item. This setting is the default for new orders and is applicable for orders without any Inflight revisions.

Update

A Contact, Characteristic, Quantity, or Price inflight revision has been submitted for the order or order line item.

Cancel

An order or order line item is canceled, or in the process of being canceled.

Change Type

When you submit an inflight order revision, the ServiceNow AI Platform automatically assigns a change type for the tracking of the order changes that are submitted by users. Characteristic, Contact, or Price types are standard in the ServiceNow AI Platform.

The change types are automatically assigned to the order or order line item when an order fulfillment or service order agent makes the following types of changes.

Assigned change types

| Type of change made | Assigned change type |
|---|----------------------------------|
| Changes any of the order characteristics. | Characteristic |
| Adds, changes, or deletes the order contact information. | Contact |
| Changes any price field. | Price |
| Changes made to the order line item quantity for a product or service order. To learn more, see Order quantity support in Order Management . | Quantity |
| Changes made to the order line item quantity for a product or service order due to the change in characteristic value. To learn more, see Order quantity support in Order Management . | Quantity mapping characteristics |
| Changes made to the related order line items and related product inventory for a product or service order. | Related items |

Note: Your administrator can also define additional change types for tracking purposes.

The related Inflight Order Line Item Changes [sn_ind_tmt_orm_inflight_order_line_item_change] table contains the following columns to track the revisions that were submitted for order line items.

Inflight Order Line Item Changes table columns

| Column | Description |
|--------------------|---|
| Order Line item | Identifier for the changed order line item. |
| Order Line version | Latest change version for the order line item. It tracks the number of times that you revised or requested a cancellation of the order line item during the fulfillment process. |
| Change Type | Type of change performed on the order line item. Characteristic Change made to any of the characteristics on an existing order line item. Contact Changes made to the contact information on an existing order line item. Price |

Inflight Order Line Item Changes table columns (continued)

| Column | Description |
|------------|--|
| | <p>Changes made to the pricing information on an existing order line item.</p> <p>Quantity</p> <p>Changes made to the order line item quantity for a product order.</p> <p>Other change types</p> <p>Additional change type that is defined by your administrator.</p> |
| Updated by | Name of the person who updated the order line item. |
| Updated | Date and timestamp for the order line item change. |

State when initiating and approving inflight order revisions

When you initiate, and then approve, inflight order revisions, the affected order, order line items, domain orders, and order tasks go through different states.

When initiating an inflight order revision

To initiate an inflight order change, click **Revise Order** in the Customer Order form or in the Order Line Item form. The following actions take place:

1. The customer or service order moves from an In Progress to a Revision in Progress state.
2. The associated order line items move from an In Progress state to a Revision in Progress state.
3. The associated product, service, and resource domain orders move from their current states to an On Hold state.
4. The associated order tasks move to an On Hold state.

When approving an inflight order revision

To approve an inflight revision, an order fulfillment or service order manager clicks **Approve** in the Customer Order form. The following actions take place:

1. The updated order and order line item information triggers the decomposition process as follows:
 - The decomposition process may create additional domain product, service, and resource orders to incorporate the characteristic changes that were submitted as part of an inflight order change.
 - It may also cancel existing domain orders that are not relevant to the requested change. For example, if a customer upgrades their purchased internet service to a higher speed, it would create a domain order for a modem that supports the higher speed service. It then would cancel the existing domain order for the modem that only supported lower speeds.
2. The customer or service order moves from a Revision in Progress state to an Acknowledged state. When the order decomposition is complete, it then moves back to an In Process state.
3. The associated order line items move from a Revision in Progress state to an Acknowledged state. When the order line item decomposition is complete, they then move back to an In Process state.

4. The associated product, service, and resource domain orders change from an On Hold state to a Scheduled state. The associated subflows change the state again during fulfillment processing.

New domain orders may also be created, based on the revisions that were submitted by the customers. They remain in either the Draft or the In Progress states, depending on the configuration of the fulfillment flow for the parent domain order.

5. The ServiceNow AI Platform refreshes the fulfillment flows for all the decomposed orders. The ServiceNow AI Platform also reassesses all order tasks, depending on the sequencing of the tasks in the corresponding fulfillment workflow. The associated order tasks then move to one of the states that are listed in the following table:

Assigned order task states

| State | Description |
|-----------------|--|
| Scheduled | An order task moves to this state and remains there until processed, as per the fulfillment workflow. |
| In Progress | If an order task was in an In Progress state at the time you initiated the inflight order revision, it remains in this state. If the task requires a re-execution to perform a redo or undo action, it can also move from a Closed state to an In Process state. |
| Closed Complete | If an order task was in a Closed Complete state at the time you initiated the inflight order revision, it stays in this state. It stays in this state as long as the task isn't in an inflight configuration due to other changes that were submitted as part of an inflight order revision. |

6. After the order decomposition is complete and the fulfillment flow restarts, order fulfillment agents can go ahead and work on the associated order tasks to complete fulfillment.

State when initiating and approving order cancellation requests

When you initiate and approve an order cancellation request, the affected order, order line items, domain orders, and order tasks go through different states during processing.

When initiating an order cancellation request

To initiate a cancellation request, you click **Cancel Order** in the Customer Order form, or **Cancel Order Line Item** in the Order Line Item form. The following actions take place:

1. The order moves to an Assessing Cancellation state.
2. The associated order line items move to an Assessing Cancellation state.
3. The associated product, service, and resource domain orders move from their current states to an On Hold state.
4. The associated order tasks move to an On Hold state.

When approving an order cancellation request

To approve an inflight revision or cancellation request, an order fulfillment or service order manager clicks **Approve** in the Customer Order form. The following actions take place:

1. The decomposition process is triggered with the updated order and order line item information.
2. The order moves from an Assessing Cancellation state to a Cancellation in Progress state.
3. The associated order line items move to a Cancellation in Progress state.
4. The associated domain product, service, and resource domain orders move from their current state to an On Hold state.
5. The associated order tasks move to an On Hold state.

Revise an inflight order or request a cancellation

Revise an inflight order, or order line item, or request a cancellation of a customer order or a service order when a user requests it or your internal personnel determine an order revision or cancellation is necessary.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_manager,
sn_ind_tmt_orm.service_order_manager

About this task

Order revision or cancellation is a two-step process. First, an operator makes the required updates or requests that an order or order line item is to be canceled. Next, when the order is created, an order fulfillment or service order manager approves the revision or cancellation request.

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.
2. Select, revise, or request a cancellation of the customer order, customer order line item, service order, or service order line item.

Review and approve order revisions or cancellation requests

Review a customer or service order that has a pending revision or cancellation request so that you can make sure that the order is correct and complete. You can also approve the order and order line item revisions or cancellations requests.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager,
sn_ind_tmt_orm.service_order_manage, sn_ind_tmt_orm.service_order_agent

About this task

When you approve a revised order, it enables it to continue in its modified state through the rest of the fulfillment process. When you approve a cancellation request, it finalizes the cancellation and prevents the order from continuing through fulfillment processing.

To learn more about how the states of orders change when you approve them, see [Key inflight order change and cancellation request fields](#).

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.
2. Select the customer order or service order that you want to approve revisions or cancellation requests for.

3. In the customer order or service order, review the revision or cancellation request, and then click **Save** if you made any changes.
4. To formally approve the order revision or cancellation, click **Approve**.

Result

Orders with unapproved revisions have a Revision in Progress state. When you approve them, their state changes to In Progress. Orders with unapproved cancellation requests have an Assessing the Cancellation state. When you approve them, their order state changes to Cancellation in Progress.

Managing order fallout

Learn how Fallout Management enables you to identify, investigate, and resolve order issues so that orders can be processed to completion.

Overview

Order fallout refers to the failures that occur due to errors and exceptions that may take place during order fulfillment. These exceptions include the following:

- Incorrect data
- Connectivity problems
- Inadequate inventory supply
- Other unforeseen issues

Some issues could originate in inbound and outbound external systems that integrate with Order Management. A single order task can have multiple types of fallout issues.

The following table provides examples of fallout errors and exceptions that can occur during order processing:

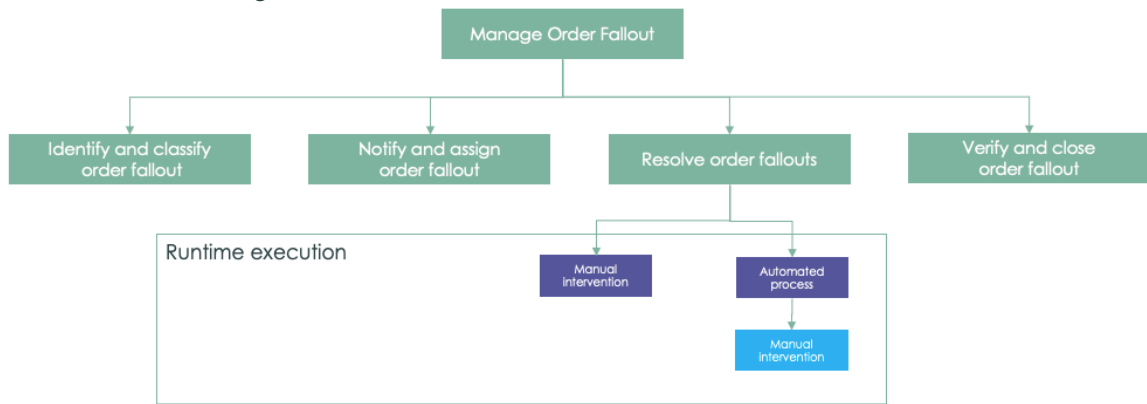
Fallout errors and exceptions

| Type of failure | Description |
|---|--|
| Failures in downstream fulfillment systems | Fulfillment system can't process the request due to incorrect or missing data. |
| Failure to complete system interaction in a timely manner | Timeouts that occur during system interactions. |
| Failure in connection | <ul style="list-style-type: none"> • Network connectivity issue. • Unable to locate or route a request to a target system. |
| Unavailable inventory | Inventory stock isn't available in the Enterprise Resource Planning (ERP system) to fulfill certain items on the order. |

Fallout Management functions

With Fallout Management, you can track each order fallout and automatically trigger the actions and interventions that can resolve your order fallout in a timely manner. The following diagram shows the order fallout management flow.

Order Fallout Management flow



Fallout Management enables you to identify the orders in a failed state. Fallout tasks can be triggered and automatically routed to the appropriate team to investigate, diagnose, and resolve the underlying issue that is stopping order fulfillment. With Fallout Management, you can identify, route, assign, manage, and monitor the entire life cycle of an order fallout.

Fallout Management tools

The Fallout Management function includes the following tools:

Order fallout tracking

With this tool, you can assign a unique number to each order fallout to track the progress of the fallout, from inception through resolution. By using an Order Fallout dashboard, a designated order fallout manager can view the status of all open fallout records. To learn more, see [Review a fallout record](#).

Fallout resolution

With this tool, you can use the ServiceNow AI Platform features such as routing, notifications, and Workflow Studio to process order fulfillment exceptions in an automated manner. To learn more, see [Create automated and manual fallout records](#).

For example, your customer orders a router, but insufficient inventory quantities are available in your ERP system to reserve the item and fulfill the order.

- You create a fallout record for tracking and investigative purposes. This record places the customer order line item on hold.
- An order fulfillment agent can follow up to determine what is causing the shortage. It can be due to the unavailability of the host ERP system or because of an actual stock outage for the ordered item. If it's due to a stock outage, someone can take remedial action to contact the customer, reorder the item, or find a suitable replacement.

After you resolve the issue, you can restore the customer order line item back to a normal state for completion of the order.

Without a fallout management process, your order fulfillment personnel would have to analyze and resolve these fallout issues manually. These additional tasks would result in a longer fulfillment process and could lead to poor customer and employee experiences.

Creating automated and manual fallout records

With Fallout Management, a provider can create manual or automated fallout records for specific order tasks so that your orders can continue processing through to completion.

Creating automated fallout records

To enable creation of automated fallout records, you configure an order fulfillment workflow in the Workflow Studio.

- To do so, use the **Create fallout** action when defining processing scenarios and conditions.
- You can define workflows for the parent records that the order tasks originate from. Generally, order tasks originate from the customer or service orders and order line items.

To learn more, see [Flow Designer](#) .

You might encounter the following scenarios when you are attempting to fulfill customer and service orders.

Scenarios of fallout failures with downstream systems

This fallout scenario could be a situation where failures are expected to be temporary and resolved over time. Ideally, order processing should not be affected, and work should resume after the network and system resources come back online. A typical scenario is as follows:

- The order task sends a request to an external or provisioning system.
- The response from the external system comes back as `Timeout` or `Unable to reach`.

You can queue the task to be sent to the downstream system for processing, up to a predefined number of times. If the error persists after the predefined number of times, you should change the status of the order task to `Failed`, and then create an incident. You can define a workflow that automatically creates a fallout record whenever you send or retrieve order data to or from an external system that is not available.

Scenarios that involve data problems

If data problems originate with an order that you captured from an external order system, you should revise the order there. You then submit the revised order to the Order Management for Telecommunications, Media, and Technology application. If data problems originate with the tasks that are executed earlier in the process, you can do the following actions:

- Create an exception from the order task.
- Enable the revision of the existing order.
- Create an order task.

Inventory availability issues

You can define a workflow that automatically creates fallout records whenever inventory availability issues prevent the fulfillment of order line items.

External system issues

Even when the right data structure is submitted in an external system, errors can happen due to the business logic that is implemented in the external system.

Create a manual fallout record

Create a fallout record manually for an order task that has a condition or issue that prevents it from being completed.



Before you begin

Role required: `sn_fallout_mgmt.fallout_manager`

About this task

You can create manual records as needed basis so that you can raise awareness of an issue or condition that is preventing order fulfillment. By creating a record manually, you can also assign it to a person for resolution.

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. From the Configurable Workspace Lists icon () click **Customer Orders**
 - a. Click **Customer Orders** or **Service Orders**.
 - b. Click **All** for all customer orders, or click **Open** for open, unfulfilled customer orders only.
3. Select and open an existing customer or service order.
4. To view the line item details, click **Order Line Items (n)** where (n) represents the number of the total number of line items for the order.
5. In the Order Line Items form, select the order line item that you want to review.
6. Click **Order Tasks (n)** where (n) is the number of order tasks that are associated with the selected order line item.
7. In the Order Tasks form, select the order tasks that you want to review.
8. When you finish updating the order task, or encounter issues preventing its closure, click the options icon () next to the **Save** button and then click **Create Fallout**.
9. On the form, fill in the fields.

For information about field descriptions, see the Create Fallout form fields section in [Field descriptions for Fallout Management](#).

10. Click **Save**.

Result

When you create a manual fallout record, or an automated one is generated, the following occurs in the related order task:

- Its **State** field changes to On Hold, with a comment on which logged-in user caused it to change.
- In the Activity section, a work order note indicates that the order task state has changed from its former state, usually In Progress, to On Hold. A work order note with the message A fallout record F0nnnn has been created also appears.

Related topics

[Fallout Management data model](#)

[Flow Designer](#) 

[Flows](#) 

[Create a flow](#) 

Review a fallout record

Review a fallout record to make sure that the detailed information is correct and complete.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

About this task


You select fallout records to review in CSM Configurable Workspace. You can also review and track all fallout records for a specific order by using the **Fallouts (n)** icon where n is the number of fallouts. This icon appears when you view the related fallout record.

Procedure

1. Navigate to **All > Fallout Management > Workspace > Configurable Workspace Home**.

Note: If you are not currently using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#) .

If you have an assigned Fallout Manager or Fallout Agent role, the Fallout Management workspace appears. If the Fallout Management workspace does not appear, do the following actions:



a. From the **Configurable Workspace Lists** icon () , click **Fallouts**.

b. Do one of the following actions:

- To view all fallout records, click **All**.
- To view only those fallout records that are assigned to you, click **My Fallouts**.

Note: To learn more about creating or updating fallout details, see [Update a fallout record](#).

c. Select the fallout record that you want to review:

- To refresh the form, click the refresh () icon.
- To filter existing service orders, click the filter () icon.

2. In the Fallout Management workspace, select the fallout record to review by selecting the appropriate tile.

For information about field descriptions, see the Fallout workspace fields section in .

Update a fallout record

Review the detailed information for a selected fallout record to verify that the information is correct and complete. You can change the fallout type, state, or priority. You can even assign it to a specific person to follow up on.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

About this task

If you have a fallout agent role, you can change the state of the fallout records, create work notes in them, or assign them to other users.

Procedure

1. On the form, review the fallout record that you selected.

For information about the field descriptions, see the Fallout form fields section in .

2. In the Details pane, review the details of the fallout record:

- To show the Details pane in the full screen, click the show form in full screen icon (☰).
- To show the Details, Compose, Activity, and Attachments panes, click the show form and activity icon (☰☑) (default).
- To show the Activity pane in the full screen, click the show activity in full screen icon (☑).

3. Select **Save**.

Reviewing customer or partner accounts

Learn how your order entry and fulfillment agents, managers, and fulfillers can use the 360 View in the Order Management application to get a better perspective about the activity that is associated with a customer's or partner's account.

Overview

As an order agent, manager, or fulfiller, you can use your customer's or partner's account Information to gain a clear understanding of the contact, order, customer service, product inventory, and installed base item activity for an account. With this information, you can track the following types of information:

- How many service contracts have been created or renewed for the account.
- How many customer and service orders have been submitted by the customer, and what are their current states of fulfillment.
- How many active requests or customer service cases the account has, and what are their current states.
- What products and equipment the customer has ordered or has installed at their sites. By using this information, your order agents can gain insights into what additional products or services they can sell to the customer.

Note: To learn how to create new customer accounts, see [Configure accounts and contacts](#) in Customer Service Management (CSM).

Review an account by using the 360 View

Review a customer or partner's account by using the 360 View in the Order Management application. You can track the service contracts of your customers or partners. You can also view customer and service orders, cases, products, and equipment to see how you can improve your customer service.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.
2. From the **Configurable Workspace Lists** tab (☰), select **Customer Accounts**.
3. In the Accounts list, select a customer account.

Note: You can also access an existing customer account by selecting a customer account link in the Account column of the Orders, Customer Orders, or Service Orders lists in the Configurable Workspace Lists.

4. In the Account Information form, in the Customer Summary section, review the general customer details for the selected account.

Account Information form - Customer Summary section

| Field | Description |
|-----------|--|
| Account | Name of the customer or partner, and the name of the primary contact for the account. To view the details for the primary contact, including the account, title, email, phone numbers, and time zone, select the contact name. |
| Contacts | Name of each contact for the account. <ul style="list-style-type: none"> To access the Customer Contacts form so that you can view all contacts for the account, select View All. To view the details for a contact when you are in the Customer Contacts form, select the contact name. |
| Contracts | Name of the contracts, if any, that are associated with this account. <ul style="list-style-type: none"> To view the details for a contract, select the contract number. To view all contracts for the account, select View All. |

5. In the Overview section, in the **Customer Orders** field, review the customer and service orders for the selected account.


Account Information form - Customer Orders section

| Field | Description |
|---------------------|--|
| Customer Orders (n) | (n) represents the total number of customer and service orders for this account. |
| Number | System-assigned identifying number for the order. <ul style="list-style-type: none"> To access the Customer Order form and view the order details for a customer order, select the order number. To access the Service Order form and view the order details for a service order, select the order number. To access the Customer Orders form to view all orders for the account, select View All. To view the detailed information for an order when you are in the Customer Orders form, select the order number. |
| Order Type | Type of order: |

| Field | Description |
|---------|--|
| | <p>Product</p> <p>Order for a product that you sell.</p> <p>Service</p> <p>Order for a product that you sell.</p> |
| Contact | Name of the customer contact that is associated with the order. To view the details for the contact, select the contact name. |
| State | State of the product or service order. To learn more, see these two topics: <ul style="list-style-type: none"> ○ ○ |

6. In the Cases section, review the customer service cases, if any, for the selected account.

Account Information form - Cases section

| Field | Description |
|-------------------|---|
| Number | System-assigned identifying number for the customer service case: <ul style="list-style-type: none"> ○ To view the details for a customer service case, select the case number. ○ To view all the customer service cases for the account, select View All. |
| Short description | Short description of the customer service case. |
| Contact | Name of the customer contact that is associated with the customer service case. To view the details for the contact, select the contact name. |
| State | State of the customer service case. To learn more, see Case states  . |

7. In the Product Inventory section, review the product inventory items for the selected account.

Account Information form - Product Inventory section

| Field | Description |
|-----------------------|--|
| Product Inventory (n) | (n) represents the total number of the product inventory items that were ordered for this account. |
| Number | System-assigned identifying number for the product inventory item: |

| Field | Description |
|---------------|--|
| | <ul style="list-style-type: none"> To view the details for a product inventory item, select the product inventory number. To view all the product inventory items for the account, select View All. |
| Specification | Product specification that is associated with the product inventory item. To view the details for a specification, select the specification number. |
| Location | Current location for the product inventory item. (<i>empty</i>) denotes that the product inventory item hasn't yet been installed at the customer site. |
| State | State of the product inventory item. <i>Installation Pending</i> denotes that the installation of the product inventory item is pending at the customer site. |

- In the Installed Base Items section, within the Product Inventory section, review the installed base items for the selected account.

Account Information form - Installed Base Items section

| Field | Description |
|--------------------------|--|
| Installed Base Items (n) | (n) represents the total number of the base items that were installed for this account. |
| Number | System-assigned identifying number for the installed base item: <ul style="list-style-type: none"> To view the details for an installed base item, select the installed base item number. To view all the installed base item numbers for the account, select View All. |
| Configuration Item | System-assigned identifying number for the configuration that is associated with the installed base item. To view the details for a configuration item, select the configuration item number. |
| Contact | Name of the customer contact that is associated with the order. To view the details for the contact, select the contact name. |


View an order timeline

View Gantt chart timelines that display the status of a domain order and order tasks, show dependencies between order tasks, and identify tasks that are in jeopardy.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** select the **List**  view.
2. Navigate to **Customer Orders > All**.
3. Select the order that you want to view.
4. In the **Order breakdowns** section of the order, select **View order timeline**.
The **Timeline** tab opens and displays the order tasks for the order line items and columns for the order task state and jeopardy status, if Jeopardy Management is enabled. Tasks in jeopardy are flagged with the jeopardy icon. For each task, a timeline shows the start and end dates of the task and any dependencies.
5. To change the information or elements displayed in the timeline view, use these options.

| Option | Description |
|---|--|
| Add or change columns | <ol style="list-style-type: none"> a. Select the gear icon. b. In the Columns tab of the Personalize pane, select the items to display or deselect the items that are no longer displayed. c. Select Apply. |
| Change the timeline elements displayed | <ol style="list-style-type: none"> a. Select the gear icon. b. In the Timeline tab of the Personalize pane, select the items to display or suppress, such as Bar labels or Dependency lines. c. Select Apply. |
| Adjust the time scale used | <p>In the time scale dropdown, select the time view, such as day, week month, or year.</p> <p>The time scale for the Gantt charts changes immediately.</p> |

Monitoring Jeopardy Management

Order managers and agents can monitor jeopardy-enabled fulfillment tasks. When a task enters jeopardy, managers can take action to ensure the fulfillment workflow isn't delayed.

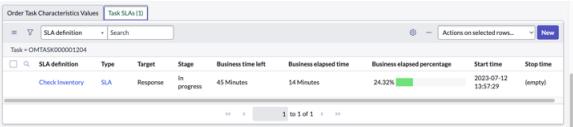
When Jeopardy Management is added to fulfillment task flows, Jeopardy Management tracks the time to complete tasks and creates a predictive assessment of the risk level to the fulfillment plan. If a task is taking longer than the defined time, jeopardy alerts are shared.

The following table describes where you can view the jeopardy status.

Jeopardy status alerts

| Jeopardy status | Description |
|--|--|
| In Jeopardy enabled order forms, look for the Jeopardy Level column | Look for jeopardy status in the Jeopardy Level column of the order status form. Jeopardy levels include Low, Medium, High, and Critical. |
| Order Orchestration View | Navigate to Customer Order > Order > Order Line Item > Orchestration . Each Orchestration tile shows the task and Service Level Agreements (SLA) progress. |

Jeopardy status alerts (continued)

| Jeopardy status | Description |
|-----------------------------|--|
| SLA Definition Progress Bar | <p>Navigate to Customer Order > Order > Order Line Item > Task > SLA and view the status bar. The status bar shows the SLA progress, for example:</p> <ul style="list-style-type: none"> • Green: SLA progressing on its time line. • Red: Task is near the end of the critical percentage of allotted time.  |

Using Lead-to-Cash Process Management

Sales process managers can use Lead-to-Cash Process Management to create sales process records and monitor and track sales processes through a consolidated dashboard.

Overview of creating and monitoring sales processes

Access the Lead-to-Cash Process Management application from the CSM Configurable Workspace to create sales process records and monitor the sales process using the sales process dashboard.

- [Create a sales process record](#)

Create a sales process record to monitor and track sales activities for a customer account.

- [Navigating the sales process dashboard](#)

Become familiar with the sales process dashboard so you can navigate and use the dashboard to monitor the sales process.

- [Monitoring and tracking sales activities](#)

Monitor and track sales activities for a customer account after you have created a sales process record.

- [Create and manage task checklists](#)

Create checklists to ensure thoroughness, consistency, and prevent errors while completing routine tasks and processes such as fulfilling orders.

- [Add attachments for a sales process record](#)

Attach files, documents, images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

- [View and send emails in Lead-to-Cash Process Management](#)

View consolidated emails for all hard-linked entities monitored within a sales process record and compose emails from the sales process dashboard.

- [Linking, delinking, and link conversion conditions](#)

Become aware of the conditions for linking, delinking, and hard or soft-linking records on the node map.

- [Create business process tasks](#)

Create business process tasks to track miscellaneous tasks at the sales process record-level.

Create a sales process record

Monitor and track sales activities for a customer account by creating a sales process record in Lead-to-Cash Process Management.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. Select the List icon (☰).
3. Navigate to **Lead to Cash Process Management > Sales Process Records**.
4. Select **New**.
5. On the form, fill in the fields.

Create new sales process record form

| Field | Description |
|-------------------|---|
| Short description | A brief summary of the business process record used for quick identification in lists and notifications. |
| Business process | A business process that you want to monitor such as order-to-cash. |
| Account | Customer account for which you want to monitor the sales activities. |
| Assigned to | (Optional) Person responsible for managing and monitoring the sales process record. |
| Business entity | The top-level sales entity that you want to monitor, for example, opportunity. Quotes and orders related to that entity are automatically included in the node map. |

When you select a business entity, all similar entities related to the selected account are displayed.

6. Select the records you want to monitor directly under the sales process record.
7. Select **Save and Open**.
A dashboard containing a hierarchical node map and details section related to the selected records is displayed.

What to do next

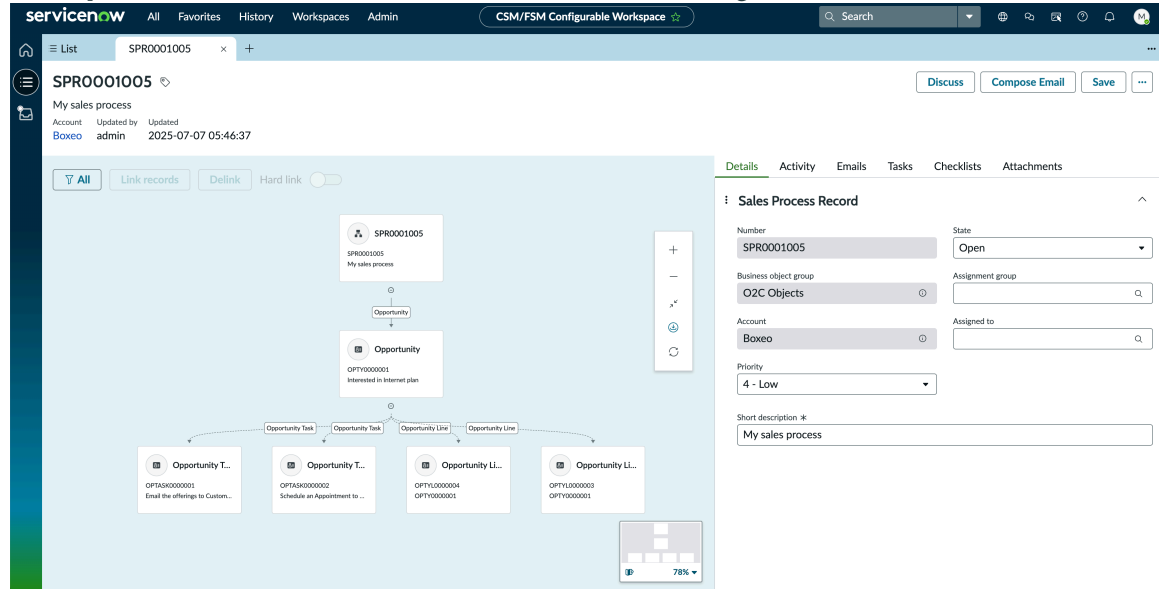
Track and manage sales process using the sales process dashboard. For more information, see [Navigating the sales process dashboard](#) and [Monitoring and tracking sales activities](#).

Navigating the sales process dashboard

Become familiar with the various elements that make up the sales process dashboard in the Lead-to-Cash Process Management application.

The sales process dashboard in the Lead-to-Cash Process Management application offers a consolidated view of sales activities across entities such as opportunities, quotes, and orders.


Sales process dashboard in Lead-to-Cash Process Management



Node map elements

The hierarchical node map visually represents the relationships of sales entities. Sales process managers and contract admins can dynamically manage this map by linking or delinking records, converting soft links to hard links for active monitoring. The following table describes the function of node map elements.

Node map elements

| Element | Function |
|---|---|
| Filter icon  | Filter link by types to view associated nodes. You can filter to view all nodes or hard-linked nodes. |
| Link records | Link more sales records to the selected node. To add more records, select Link records , then select a Business entity on the Link records pop-up window. Select specific records that you want to link and select Link selected . |
| Delink | Delete child record and its hierarchy. To delink a record, select a link connecting a parent node and its child nodes you no longer want to monitor, and select Delink . |
| Hard link | Enables you to convert soft links to hard links and vice versa. To convert a link, select it and select the Hard link toggle switch. |

By default, only three levels are displayed on the node map when you open a sales process record in the CSM Configurable Workspace. Admins can increase or decrease the number of levels displayed. For more information, see [Customize hierarchical node map levels for Lead-to-Cash Process Management](#).

Only 250 nodes can be displayed on the node map at a time. If you have more than 250 nodes, collapse some nodes and then expand and view the other nodes.

Details pane

A details section consolidates all relevant operational elements—tasks, emails, checklists, and attachments—into a single pane.

Note:

Related lists configured in the Sales cockpit view in Next Experience UI govern the tabs that are displayed for a sales entity on the sales dashboard.

Related topics

[Monitoring and tracking sales activities](#)

[Create and manage task checklists](#)

[Add attachments for a sales process record](#)

[Manage attachments for a sales process record](#)

[View and send emails in Lead-to-Cash Process Management](#)

[Linking, delinking, and link conversion conditions](#)

[Using Sidebar !\[\]\(b58ada4b88fd01243f7f92ed6cae6a81_img.jpg\)](#)

Monitoring and tracking sales activities

Monitor and track sales activities for a customer account after you have created a sales process record.



The **Details**, **Activity**, and **Tasks** tabs provide the following information when you select a node on the Lead-to-Cash Process Management sales process node map:

Sales entity details for an account


Access key information about a sales process record such as the record number, state, the agent assigned to the record, account, and priority, and additional details for related sales entities such as the product offering, quote date, pricing information, and so on to expedite decision making and issue resolution.

Activities

View a running history of updates such as field changes or the availability of new file attachments, enabling you to stay informed about the sales process record without having to switch contexts. Activities can only be viewed for a sales process record.

Filter, search, and sort activities using the Filter , Search  and Sort  icons respectively.

Task assignment and status

View a consolidated list of tasks that provides information about hard-linked entity records that are monitored using the sales process record, including business process tasks. The information includes the task's status, description and the agent assigned to it. You can also search and filter tasks using the task ID, short description, or state through the search box and Filter icon .

Related lists configured in the Sales cockpit view in Next Experience UI govern the tabs that are displayed for a sales entity on the sales dashboard. For example, you can display tabs such as **Line Items for an Opportunity** and **Line Characteristics for Opportunity Line** containing the respective record details.

By accessing the sales data and using integrated communication channels such as sidebar discussions and emails, you can promote record completeness and accuracy, and support downstream processes such as order fulfillment, revenue recognition, and reporting.

Related topics

- [Create and manage task checklists](#)
- [Add attachments for a sales process record](#)
- [View and send emails in Lead-to-Cash Process Management](#)
- [Linking, delinking, and link conversion conditions](#)
- [Using Sidebar !\[\]\(37ade79b4b50f3bd9b92e5324db29c76_img.jpg\)](#)


Create and manage task checklists


Create and manage checklists to track progress on completing routine or repetitive tasks and processes such as fulfilling orders.


Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.
5. Select the **Checklists** tab.
6. Select **Add item**.
7. Enter a task in the **Checkbox** field.
8. Repeat the steps to add more tasks to your checklist.

To remove a task while creating the checklist, select the Delete icon  next to the task entry.
9. Select **Save**.

You can add more tasks to your checklist by selecting **Edit**.
10. **Optional:** Modify a saved checklist by adding or deleting items.
 - a. In the sales process record on the dashboard, select **Checklists**.
 - b. Select **Edit**.
 - c. Add or delete an item.
 - To delete an item, select the Delete icon  next to the task entry.
 - To add an item, select **Add item** and provide the task name.
 - d. Select **Save**.

Add attachments for a sales process record

Attach files, documents, or images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.


Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

About this task


You can attach files only to a sales process record. To add attachments to child records, you must navigate to the respective entity's record page.

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.
5. Select the **Attachments** tab.
6. Upload files.

Note: The default maximum file size is 1 GB, but this may vary based on the size limit set by your admin on your ServiceNow instance.

| Method | Action |
|---------------------------------------|---|
| Drag and drop | Drag and drop the file from your system to the Attachments pane. |
| Select a file from your system | <ol style="list-style-type: none"> a. Select Select file. b. In the browse files pop-up window, select the file. c. Select Open. |

7. Select **Upload**.
8. **Optional:** Attach more files by selecting the Add icon .

What to do next

Download, rename, or delete attachments. For more information, see [Manage attachments for a sales process record](#).




Manage attachments for a sales process record

Rename, download, or delete files, documents, or images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
 2. Select the List icon .
 3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
 4. Select the sales process record.
 5. Select the **Attachments** tab.
 6. Select the attachment.
 7. Select the More actions icon  for the attachment entry.
 8. Select the desired action.
 - Download
 - Delete
 - Rename
-  **Tip:** For bulk deletions or downloads, select the files or select **All Files** and then select the action.
9. **Optional:** Select an attachment to preview it.

View and send emails in Lead-to-Cash Process Management


View consolidated emails for all hard-linked entities monitored within a sales process record and compose emails from the sales process dashboard.

Before you begin

You can compose and send emails related to a sales process record by default. To compose emails for child entities such as an opportunity or quote, you must be granted access to those entities. For more information, see [Setting conditions for enabling email access in Lead-to-Cash Process Management](#).

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Lead to Cash Process Management > Sales Process Records**.
4. Select the sales process record.
5. View emails from all hard-linked entities tied to the sales process record by selecting the **Emails** tab.
6. Compose and send the email.
 - a. Select **Compose Email**.
 - b. Enter the list of recipients.
 - c. Draft your email.
 - d. Select **Send email**.

Linking, delinking, and link conversion conditions

Several conditions can enable or disable you from linking, delinking, and hard or soft-linking records in Lead-to-Cash Process Management.

Difference between hard and soft-linked nodes

Links can be toggled between hard and soft types based on whether they need to be actively monitored.

Hard-linked nodes

A hard link is an active monitoring connection established by the sales process manager. When a record is hard linked, it's actively tracked, and its emails and tasks are consolidated and visible in the sales process record. Hard links are represented by solid lines in the node map.

Soft-linked nodes

A soft link is a passive connection based on database relationships. Records that are soft linked aren't actively monitored by the sales process manager, and their emails and tasks aren't consolidated in the sales process record. Soft links are represented by dotted lines in the node map.

Conditions for linking and delinking records

Linking records: You can link records to all hard-linked nodes, including those records that are converted from soft links to hard links.

Delinking records: You can delink only hard-linked records and they must meet either of the following conditions:

- The target node was added using the Link Records flow
- The target node is a top-level entity

Conditions for converting link types

Hard links cannot be converted to soft links if they meet the following conditions:

- The target node was added using the Link Record flow.
- The target node has immediate hard-linked child nodes but only one hard-linked source node.

Soft links can be converted to hard links only if the source node has at least one hard-linked record.

Create business process tasks

Track tasks for sales process records in Lead-to-Cash Process Management such as the closure of all linked opportunities or generating orders.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Lead to Cash Process Management > Business Process Tasks**.

4. Select **New**.

5. On the form, fill in the fields.

Business Process Task form

| Field | Description |
|-------------------------|---|
| Number | Unique ID of the business process task record. |
| Business process record | The sales process record. |
| Parent | (Optional) Parent record of the selected object. In this case, another business process task. |
| Priority | The order in which the task should be addressed. The available options are: <ul style="list-style-type: none"> ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low ○ 5 - Planning |
| State | State of the task record. The available options are: <ul style="list-style-type: none"> ○ Open ○ Work in Progress ○ Closed Complete ○ Closed Incomplete ○ Closed Skipped |
| Assignment group | User group to assign to the task. |
| Assigned to | The sales process manager to assign to the task. |
| Short description | (Optional) A brief description summarizing the task. |
| Work notes | (Optional) Records activities by internal users. |

6. Select **Save**.

What to do next

Monitor the business process task from the sales process dashboard. For more information, see [Monitoring and tracking sales activities](#).

Using Customer Engagement Sequences

Sales representatives view and work on sequence tasks assigned to them using the Customer Engagement Sequences application.

Overview of using Customer Engagement Sequences

Access the Customer Engagement Sequences app from the CSM Configurable Workspace to view your sequence tasks and complete predefined activities listed within it.


View sequence tasks

View sequence tasks assigned to you from the CSM Configurable Workspace.

Before you begin

Role required: sequence viewer [sn_crm_sequence.viewer]

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Sequences > My Sequence Tasks**.
4. View your in-progress sequence tasks by selecting **My Active Sequence Tasks**.
The following table describes the details displayed on the list view.

My Sequence Task list view

| Column | Description |
|------------------------|--|
| Number | ID of the sequence task record. |
| Sequence entity record | Sales entity record that triggered the sequence. For example, lead. |
| Sequence | Sequence that created the sequence task record. |
| Description | Description of the sequence. |
| State | Current state of the sequence task. The available options are: <ul style="list-style-type: none"> ○ Work in progress ○ Completed |
| Priority | Priority of the sequence task. |
| Due date | Date by which the sequence task must be completed. |
| Added at | Timestamp when the sequence task was created. |

5. View the sequence steps for a record by selecting it.

What to do next

Engage with your prospective customers by following the activities in the sequence steps. For more information, see [Complete predefined customer engagement tasks](#).


Complete predefined customer engagement tasks

Execute predefined sequence steps in your sequence tasks in the CSM Configurable Workspace to engage with your prospective customers.

Before you begin

Role required: sequence viewer [sn_crm_sequence.viewer]

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Sequences > My Sequence Tasks**.

4. Select a sequence task record.
5. When the record opens, select the **Sequence Steps** tab.
The navigation pane lists the activities or steps you need to complete. The activity details and actions are displayed in the work area.
6. After completing an activity, select an appropriate option to move to the next activity.
The sequence is marked as Completed when you finish all activities within the sequence task.

Customer self-service using the Business Portal

Customers can use the Business Portal to browse product catalogs, create product orders, create and view order cases in Order Management.

Creating orders using the Business Portal

The Business Portal uses the product catalog to let customers browse and configure products. Customers can also build orders and submit them for fulfillment.

The Business Portal product catalog

Viewing products in the shopping cart in the Business Portal

Customers can view products in their shopping cart using the Business Portal. Customers are also submit orders to start the fulfillment process.

Business Portal shopping cart

Creating and viewing order cases

Customers can create and view order cases for orders or order line items using the Business Portal.

Access the Business Portal

Customers can access the Business Portal from their instance to browse products and create orders.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Go to your instance and select the URL.
2. Edit the instance URL and append **/business_portal** to the end after the com.
The Business Portals opens.

Create orders from the Business Portal

Browse products in a product catalog and create orders in Order Management.

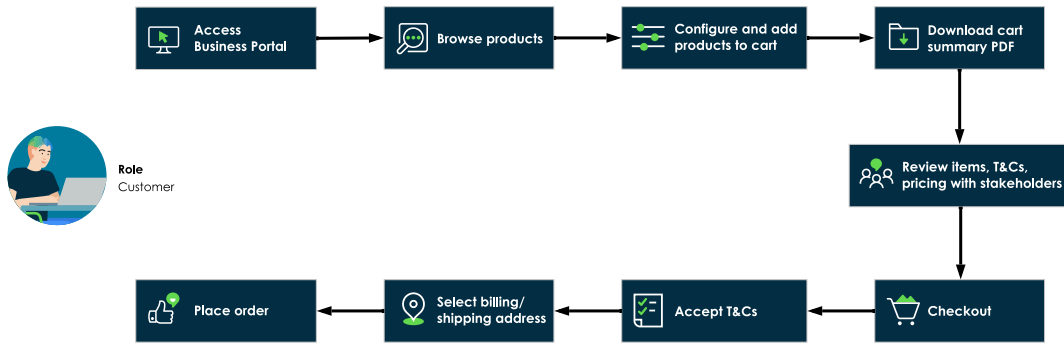
Before you begin

Role required: sn_customerservice.customer

About this task

The following illustration describes the process to create orders from the Business Portal:

Self-service order checkout process






Procedure

1. Log in to the Business Portal.
2. Browse the product catalog, select products, and add them to the cart.
 - a. Select **Product Catalog**.
If you are a contact of an account with an active sales agreement, only the products listed in the sales agreement are displayed.
 - b. Browse the products in the catalog.
 - c. If a product you want to order has available customizations, select **Customize** and select the product options.
 - d. Select **Add** to add products to the cart.
3. Review the cart contents.
 - a. Select the Cart icon .
The information listed in the following table is displayed.

My cart fields

| Field | Description |
|---------------------------|--|
| Number | Unique cart ID. |
| State | State of the cart. |
| Created | Cart creation timestamp. |
| Qty | Product quantity. |
| Unit list price | Price of a single item. |
| Cumulative monthly price | Total cost of a product and its child items, if any, over a month. |
| Cumulative one time price | One-time price of the product and its child items, if any. |

- b. If you need to modify the quantity or customization for a product in the cart, select the Edit icon  and modify the details.
 - c. If you want to delete an item, select the Delete icon .
- 4. Optional:** Add instructions for your order in the **Instructions** field.
- 5. Optional:** Save a copy of your cart in PDF format by selecting **Download**.
The default filename contains the cart ID. The PDF content and format is based on the Sales Cart Demo Template document template.
- 6. Check out.**
- a. Select **Proceed to Checkout**.
 - b. On the Terms and conditions page, select the confirmation checkbox after reading the terms and conditions of the seller and select **Continue**.
The terms and conditions are fetched from the Sales Cart Terms and Conditions Default document template.
 - c. On the Shipping details page, review the shipping and billing addresses and modify them if necessary by selecting the Edit icon .
- Note:** The address that you specify while checking out is only used for that order. It doesn't change your stored address in the seller's system.
- d. Select **Continue**.
 - e. Verify the details on the Review page and select **Submit**.

Result

The order is created and you're redirected to the Order details page. You can view your account details, order amount, order lines, and so on.

Related topics

[View an order on the Business Portal](#)

[Modify terms and conditions for the sales cart](#)

View an order on the Business Portal


Customers can view their orders using the Business Portal.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Log in to the Business Portal.
2. Select **Requests > View submitted request > View orders**.
The View order window has the following controls.
 - To search for orders - use the search option.
 - To sort, and filter orders - use the filter.

- To export as a PDF, Excel, or CSV - use the Action icon .
- To open and order - select the order number.
- To navigate back to the main window - use the breadcrumbs.

Related topics

[Create orders from the Business Portal](#)

Extending Order Management with ServiceNow applications and integrations

You can use various ServiceNow store applications and integrations to further extend the capabilities of Order Management.

Applications and integrations for extending Order Management

| Application or integration | Description |
|--|--|
| Order Management for providers with Service Exchange | Enable service providers and their customers to use Order Management to place and fulfill complex orders, including certain types of MACD orders, over Service Exchange. |
| Order Management integration with Field Service Management | Create field service work order requests automatically with Order Management, and track them in Field Service Management. |
| Order Management integration with Service Portfolio Management | Provide project oversight of complex, long-running orders and order tasks in Order Management, and manage them in Service Portfolio Management. |

Order Management for providers with Service Exchange

The Service Exchange Order Management for Providers application enables service providers to use Order Management to create product offerings and service specifications that Service Exchange consumers can order from service catalogs in their ServiceNow instances. Order agents and fulfillers can then complete the orders and requests on the provider instance.

Service Exchange Order Management for Providers Overview

The Service Exchange Order Management for Providers application supports the sales order and fulfillment process over Service Exchange. Published product offers and service specifications generate remote record producers (RRPs). These remote record producers create the remote catalog items that your consumers can order from the Service Portal on their instance.

The workflow for generating these remote record producers involves these basic steps:

- Product catalog admin or manager creates the product offerings and service specifications on a provider instance, specifying the distribution channel as Service Exchange and indicating that product offers are sellable items. When the offerings and service specifications are published, remote record producers (RRPs) are generated automatically to create the remote catalog items.
- Service Exchange admin associates consumer criteria to the remote record producers.

- Service Exchange admin reviews and activates the remote record producers on the provider instance. These remote record producers publish the remote catalog items to the service catalog on a consumer instance.
- Consumers request services using the remote catalog items on the service portal in their consumer instance. The requests automatically create a provider task for fulfilling the requests on the provider instance.
- On the provider instance, the order and order lines are created for order managers to approve and agents to fulfill.
- On the consumer instance, consumers receive updates on the order state and worknote comments from order agents.

Features

- Support simple and bundled product offerings with composite specifications.
- Support service specifications.
- Support quantity orders for order line items and selection of optional products and services.
- Synchronize product and service inventory records, which can be viewed by consumers in their instance.
- Allow consumers to:
 - Suspend, resume, and disconnect orders
 - Cancel an order from the consumer instance if the order hasn't reached the point of no return (PONR).

Benefits

- Automates the generation of remote record producers that publish offerings and service specifications to a remote catalog.
- Enables faster order fulfillment on the provider instance and improves order accuracy.
- Facilitates communication by updating comments between the provider and customer instance as well as sharing frequent order status updates.

Order state mapping

During order processing, note that order status states correspond to certain provider task states.

Order and provider task states

| Order state | Provider task state |
|------------------------|---------------------|
| Draft | Received |
| Submitted | Received |
| Enrichment in progress | Received |
| Enrichment on hold | Received |
| New | Received |
| Acknowledged | Work in Progress |
| Scheduled | Work in Progress |

Order and provider task states (continued)

| Order state | Provider task state |
|--------------------------|---------------------|
| Rejected | Awaiting info |
| In progress | Work in progress |
| Revision in progress | Received |
| Awaiting information | Awaiting info |
| On hold | Awaiting info |
| Assessing cancellation | Cancelled |
| Cancellation in progress | Work in Progress |
| Cancelled | Cancelled |
| Completed | Closed |

Next step

As a Service Exchange admin, review the setup tasks in [Configuring Service Exchange Order Management for Providers](#).




Configuring Service Exchange Order Management for Providers

Configure the Service Exchange Order Management for Providers application, which enables providers to use Order Management to create and fulfill product orders over Service Exchange. Providers publish the product offerings and service specifications as remote catalog items so that consumers can order from the Service Catalog on their own instance.


Configuration overview

Follow these tasks to set up the Service Exchange Order Management for Providers application, which uses Order Management to create product offerings and service specifications and publish them in your ServiceNow provider instance as remote record producers. Service Bridge admins can then activate these remote record producers to make the products and services available from the Service Catalog on consumer instances.

Setting up the Service Exchange Order Management for Providers application

| Configuration step | Description | Role |
|--|---|-------|
| Install Service Exchange for Providers  | Install the Service Exchange for Providers application from the ServiceNow Store. For more information on configuring this application, see Installing and configuring Service Exchange for Providers  . | Admin |
| Install Service Exchange for Consumers  | Install the Service Exchange for Consumers application from the ServiceNow Store. For details on configuring this application, see Installing and | Admin |


Setting up the Service Exchange Order Management for Providers application (continued)

| Configuration step | Description | Role |
|--|---|----------------------------------|
| | configuring Service Exchange for Consumers  . | |
| Install Service Exchange Order Management for Providers | Install the Service Exchange Order Management for Providers application from the ServiceNow Store. | Admin |
| Create a product offering for a remote catalog item | In the provider instance, create the product offerings to be added as remote catalog items to the service catalog for your consumers. | Product catalog admin or manager |
| Create a service specification for a remote catalog item | In the provider instance, create the service specification for a service to be added as a remote catalog item to the service catalog for your consumers. | Product catalog admin or manager |
| Associate consumer criteria to a remote record producer | In the provider instance, review the remote record producer and associate the customer criteria that entitles the catalog item for eligible Service Exchange consumers. | Service Exchange provider admin |
| Activate the remote record producer | In the consumer instance, activate entitlements for the remote record producers. | Service Exchange consumer admin |
| Retire a remote catalog item | Retire a product offering or service specification used in a remote catalog, which automatically retires the corresponding remote record producer and removes the item from the service catalog on the consumer instance. | Product catalog admin or manager |

Install Service Exchange Order Management for Providers

You can install the Service Exchange Order Management for Providers application (sn_sb_pro) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they're not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#) .
- Review the Service Exchange Order Management for Providers application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Service Exchange Order Management for Providers:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see [Find components installed with an application](#)  . .

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Service Exchange Order Management for Providers application ((sn_sb_pro)) using the filter criteria and search bar.

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

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Create a product offering for a remote catalog item

Create a product offering in a Service Exchange provider instance. When you publish the product offering, a remote record producer is created for the remote catalog item.


Before you begin

Role required: sn_prd_pm.product_catalog_admin and sn_prd_pm.product_catalog_manager

About this task



When you're creating the product offering, use the **Distribution channel** field to set the channel to Service Exchange.

Procedure

1. In the CSM Configurable Workspace on the provider instance, select the **List**  view.
2. Navigate to **Offerings > Product Offerings**.
3. Select **New**.

On the Details tab, fill in the fields.

Create New Product Offering form

| Field | Description |
|----------------------|---|
| Number | System-assigned number for the product offering. |
| Name | Alternative name for the product offering to help differentiate it from similar product names. |
| Display name | Name of the product offering that is added. |
| Offering type | Offering entity. Select one of the following types: <ul style="list-style-type: none"> ○ Product: A product entity that an agent can add to an order using the CSM Configurable Workspace. ○ Entitlement: An entity such as a warranty or subscription that can be added to an order by an agent. |
| Offering sub-type | Type of entitlement: <ul style="list-style-type: none"> ○ Warranty ○ Extended warranty ○ License ○ Subscription |
| Sellable | Option indicating that the product offering can be sold as a standalone item. If not selected, the product offering can be sold as part of bundle but not as a standalone item. <p>i Note: If you're using the Service Exchange Order Management for Providers application, select this option for a product offering. Only sellable product offers create remote catalog items. Offers with bundled configurations are not supported.</p> |
| Description | Short description of the product offering. The description helps the order agent understand the product when placing an order. |
| Start date | Date and time that the product offering is available for Sales Customer Relationship Management applications. Select the Calendar icon () to choose the start date and time, then select OK . |
| End date | Date and time that the product offering is deleted from Sales Customer Relationship Management applications. Select the Calendar icon () to choose the end date and time, then select OK . |
| State | State of the product offering. States include In Draft, Published, Retired, and Archived. You can update product offerings In Draft state. |
| Distribution channel | Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels. |

| Field | Description |
|--|--|
| | <p>i Note: If you're using the Service Exchange Order Management for Providers application, enter Service Exchange as the channel.</p> |
| Owner | Person responsible for the product offering. |
| Code | System-generated alphanumeric number based on the product name. Although system generated, you can edit the code to represent a SKU or any other industry specific product codes. |
| Product specification | <p>Product specification to associate with the product offering. It provides a functional view of a product offering that drives order fulfillment.</p> <p>i Note: Only published specifications appear.</p> |
| Product model | Name of the product model. |
| Copy child specification characteristics | Option that when selected copies all child specification characteristics in a specification hierarchy. For example, if the product offer has an associated product specification, selecting this option indicates that the characteristics are inherited from the child specifications in addition to the parent specification. |
| Pricing method | <p>Pricing method for the product:</p> <ul style="list-style-type: none"> ○ One-time: A single fee for the product. ○ Recurring: A fee that occurs at scheduled intervals. You can set the periodicity for a recurring fee. <p>i Note: Pricing information is not visible on the consumer instance. If a default or other price list is configured for an offer, the price is calculated and updated only on the provider instance.</p> |
| Periodicity | Recurring pricing: Monthly or annually. |
| Monthly recurring charges | Charges that recur every month. Monthly recurring charges are supported for backward compatibility. Use price lists to define prices. |
| Non recurring charges | Charges that are applied once. Supported for backward compatibility. Use price lists to define prices. |
| Create contract | Option that indicates to agents that entitlement contracts can be added to the product order. If selected, service contracts are created after order fulfillment. Used when entitlements are managed as contracts. |
| Contract term | <p>Length of the contract:</p> <ul style="list-style-type: none"> ○ 12 months ○ 24 months ○ 36 months |

| Field | Description |
|------------------|---|
| | <ul style="list-style-type: none"> ○ 48 months ○ 60 months |
| Version | Version number that is assigned to this product offering version. |
| Initial version | Name of the product offering at the time you created the initial version. |
| Previous version | <p>Name of the previous version of the product offering, For example:</p> <ul style="list-style-type: none"> ○ When you create the initial version of the product offering (for example, version 1), this field is empty. ○ When you create a version (version 2) with a slightly different name, the name of the product offering at its initial creation appears here. ○ When you create a subsequent version (version 3), the name of the product offering as it was at version 2 appears here. <p>You can't change this field.</p> |

4. Select **Save**.

5. Add additional characteristics to your product offering, if needed.

6. **Optional:** Add product visuals to your product offering.

a. In the Product Visuals tab, select **New**.

b. Enter a name for the visual.

c. To select an image file to upload, select **Click to add**.

d. To set your image as the primary image for the product, select **Set Primary**

Note: You can add multiple images for products, but the service catalog only supports one image per product when it is published to the service catalog.

7. When you finish creating the product offering version, select one of the following actions.

| Action | Description |
|----------------|--|
| Publish | <p>Publish the draft product offering so that you can use it in a product catalog:</p> <ul style="list-style-type: none"> ○ When you publish it, its state changes from Draft to Published. ○ After you publish a product offering, you can't change or delete it, unless you create a version for it. |
| Update | <p>Update the product offering with the new data that you added, but don't publish it for use in a product catalog.</p> |

| Action | Description |
|-------------|--|
| Copy | <p>Copy the data in this product offering so that you can create a product offering from it.</p> <p>For example, you can use the Copy function if you want to create a base version product offering that is similar to Premium SD-WAN Offering v3, but with a separate version track.</p> <p>When you use the Copy function, it creates a base version product offering and sets the values in these fields:</p> <ul style="list-style-type: none"> ○ Version: 1 (base version) ○ Initial Version: Premium SD-WAN Offering v3 ○ Previous Version: blank |

What to do next

[Associate consumer criteria to a remote record producer](#) for this remote catalog item.

Create a service specification for a remote catalog item

Create a service specification on a Service Exchange provider instance. When you publish the service specification, a remote record producer creates the remote catalog item for the service specification.

Before you begin


Define the characteristics, characteristic options, and specification categories before you create a service specification.

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_catalog_manager

About this task

When you create a service specification for a service request, use the **Distribution channel** field to set the channel to Service Exchange. When the service specification is published, a remote record producer is created for the specification.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Specifications > Service specifications** and select **New**.
On the Details tab, fill in the form.

Service Specification

| Field | Description |
|---------|---|
| Number | Auto-generated ID for the service specification. |
| Name | Name of the service specification. |
| Version | Version number that is assigned to a specification: |

| Field | Description |
|--------------|---|
| | <ul style="list-style-type: none"> ○ When you create the initial version, 1 appears in this field, and can't be changed. ○ When you create subsequent versions of the specification, the next incremental number appears in this field after you select Create New Version. For example, 4 appears in this field if 3 was the previous version number. |
| Display name | <p>Display name that appears for the specification when this version of the specification is in effect.</p> <ul style="list-style-type: none"> ○ When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. ○ When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten. For example, SD-WAN Edge Device v2 appears in this field when: <ul style="list-style-type: none"> ▪ SD-WAN Edge Device is the name of the specification. ▪ Version 2 is the current version of the specification. |
| Category | <p>Specification category that the service specification belongs to.</p> <ul style="list-style-type: none"> ○ If the selected category that belongs to 5G services doesn't have any matching slice templates, the system checks for existing templates. ○ If the selected category has multiple templates mapped to it, the systems chooses the latest published template to the specification. |
| Type | <p>Type of service specification:</p> <p>Customer Facing</p> <p>Customers can create a ticket or a case for the service. When you select this type, the Distribution channel field is displayed to specify how the service is provided.</p> |

| Field | Description |
|------------|--|
| | <p>Note: If you're using Service Exchange Order Management for Providers, only Customer Facing Service specifications are eligible for remote catalog creation. Service Exchange must be specified as the distribution channel so that remote record producers can be created.</p> <p>Resource Facing Services are required for a resource to function properly.</p> <p>Not Applicable Service specification is not customer facing or resource facing.</p> |
| Sub type | <p>Sub-type of the specification. Choose Slice to define 5G network service specifications.</p> <p>Note:</p> <ul style="list-style-type: none"> When you select Slice as the sub type, the templates are automatically selected based on the mapping of templates with the specification categories of service specifications in the decision table. If you select None as the sub type, you can manually specify a template. |
| Start date | <p>Date that the specification is valid from. Use this field when you create a version to indicate when it takes effect. It's informational only and isn't used for actual processing.</p> |
| End date | <p>Date up until which the specification is valid. Use this field when you create a version to indicate when it's no longer in effect. It is informational only and isn't used for actual processing.</p> |
| Template | <p>Templates that you've defined if you're using 5G services.</p> |

| Field | Description |
|----------------------|--|
| | <p>Note: When you change a template, it deletes all the specification characteristics that are marked as true and are associated with the old template and re-associates the specification characteristics as per the new template that you've selected.</p> |
| Description | Description for the service specification. |
| State | <p>State of the service specification.</p> <p>Draft</p> <p>Unpublished draft service specification that is assigned when you first create the specification record.</p> <p>Published</p> <p>Published service specification that is assigned when you formally publish it for use in a product offering.</p> <p>Retired</p> <p>Service specification that is retired and can no longer be used to create another specification version.</p> <p>Archived</p> <p>Service specification is no longer used in the ordering or fulfillment process.</p> |
| Distribution channel | <p>Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels.</p> <p>Note: If you're using the Service Exchange Order Management for Providers application and have a customer facing specification, enter Service Exchange as the distribution channel so that remote record producers can be created for remote catalog creation.</p> |
| External code | Service code of the specification. |
| Line | Service line of the specification. |
| Cost to company | Cost to the company for this service specification. This field is for profit-calculation purposes only. |

| Field | Description |
|-----------------------|---|
| Composite | Option indicating that the service specification is a parent specification composed of multiple child specifications. |
| Installation required | Option indicating that someone must install the service on site. |
| Location specific | Option indicating that this service specification requires the location details for fulfillment and installation. |
| Initial version | Name of the base version of the specification that appears but can't be changed. |
| Previous version | Name of the previous version of the specification. For example: <ul style="list-style-type: none"> ○ When you create the initial version of the specification (for example, version 1), this field is empty. ○ When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. ○ When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here. You can't change this field. |

3. Select **Save and then **Publish**.**

A remote record producer creates the remote catalog item for the specification.

What to do next

[Associate consumer criteria to a remote record producer](#) for this remote catalog item.

Associate consumer criteria to a remote record producer

In the provider instance, associate the appropriate consumer criteria to the remote record producer created for a remote catalog item. The consumer criteria determines which consumers are entitled to the catalog item. Service Exchange automatically generates the entitlement records that are replicated to eligible consumer instances.

Before you begin

By default remote record producers are available to all consumers. If you have specific criteria for certain users, define the consumer criteria for Service Exchange those users. For more information, see [Creating entitlements in Service Exchange for Providers](#).

Role required: sn_sb.admin or admin

Procedure

- 1. In your provider instance, navigate to **All > Service Bridge Provider > Administration > Remote Catalog Items**.**
- 2. Select the remote record producer for the product offering or service specification that your product catalog admin or manager created.**
Review the record to validate that it was created as expected.

- Note:** A remote record producer, Manage Inventory, is created automatically when a product offering or service specification for a remote catalog item is published. You must associate the consumer criteria to this remote record producer so that your consumers can manage the product or service inventory from the service catalog on a consumer instance.

3. Navigate to the **Consumer Criterias** tab.
4. In the record for the Active criteria, under the **Remote consumer criteria** column, select and save the criteria to be associated to the catalog item.
5. Select **Publish**.
Service Bridge automatically generates the entitlement records that are replicated to eligible consumer instances.

What to do next

[Activate the entitlements for the remote record producer.](#)

Activate the remote record producer

Activate the remote record producer in a Service Exchange consumer instance.

Before you begin

Role required: sn_sb.admin or admin

Procedure

1. In the consumer instance, navigate to **All > Service Bridge Consumer > Provider Connections**.
2. Select the Number link to navigate to the Provider connection record.
3. In the Remote record producers tab (related list), select the remote record producer to be activated.
4. In the Remote record producer page, select **Activate**.
The product offering or service specification is now available in the Service Catalog in remote record producer format.


Retire a remote catalog item

Retire a product offering or service specification used in a remote catalog, which automatically retires the corresponding remote record producer. When the remote record producer is retired, the remote catalog item is removed automatically from the service catalog on the consumer instance.

Before you begin

Role required: sn_prd_pm.product_catalog_admin and sn_prd_pm.product_catalog_manager

Procedure

1. In the CSM Configurable Workspace on the provider instance, select the **List**  view.
2. Navigate to the published product offering or service specification to be retired.
 - To retire a product offering, navigate to **Offerings > Product Offerings** and select the product offering to be retired.
 - To retire a service specification, navigate to **Specifications > Service specifications** and select the service specification to be retired.

3. Select **Retire**.

The product offering or service specification is set to the Retired state. The state of the associated record producer for the item changes from Published to Retired, and the product catalog item is deleted automatically from the service catalog.

Creating orders from Service Portal catalog items

When consumers use the Service Portal on their instance, they can place orders for catalog items that have bundled product specifications. They can also cancel an order, and review and manage product and service inventory.

Orders for bundled products

Service Exchange remote catalog items can include bundled products that have composite components with different characteristic options that can be selected, including quantity.

Example bundled product in service catalog

The screenshot shows the 'SD-WAN Bronze Plan v3' order form in the Service Portal. The breadcrumb trail is: Home > Service Catalog > Provider Services > AT&T > SD-WAN Bronze Plan v3. A search bar is located at the top right. The main form area is divided into sections for shipping information, service packages, and bundled components. The 'SD-WAN Service Package' section includes a quantity dropdown highlighted with a red box, set to '1'. Below it, the 'SD-WAN Service Package - SD-WAN Edge Device' section includes a quantity dropdown set to '1', a 'CPE Model' dropdown set to 'ASR', and a 'CPE Type' dropdown set to 'Physical'. The 'SD-WAN Service Package - SD-WAN Controller' section includes a quantity dropdown set to '1' and a 'Tenancy' dropdown set to 'Advance (50 site)'. On the right side of the form, there are two buttons: 'Save as Draft' and 'Submit'.

Canceling an order

Consumers can cancel an order, if the order hasn't reached the point of not return (PONR). If the PONR has been reached, the consumer receives a status message indicating that the order can't be cancelled.

Managing product or service inventory

Consumers can view and manage the product or service inventory for products and services. They can use the **Location** field to filter the **Inventory** view by particular location. Consumers can also perform disconnect, suspend, or resume actions.

Manage inventory example in service catalog

The screenshot shows the 'Manage Inventory' form within a ServiceNow service catalog. The breadcrumb trail is: Home > Service Catalog > Provider Services > ZZZ Telecom Company >. The form contains the following fields:

- Type:** A dropdown menu with 'Product' selected.
- Location:** An empty dropdown menu.
- Product Inventory:** An empty dropdown menu.
- Action:** A dropdown menu with 'Resume' selected.
- Reason:** An empty text input field.
- Action Start Date:** A date and time picker showing 'YYYY-MM-DD HH:mm:ss'.

On the right side of the form, there are two buttons: 'Save as Draft' and 'Submit'. Below these buttons, a 'Required information' section is visible, with 'Product Inventory' highlighted as a required field.

Order Management integration with Field Service Management

Provides an integration between the Order Management and the Field Service Management applications. This integration is available to all ServiceNow customers with the Order Management (com.sn_ind_tmt_orm) plugin, Field Service Management Configurable Workspace (com.snc.uib.fsm_agent_workspace) plugin, and Field Service Management (com.snc.work_management) plugin.

Overview

This integration enables automatic and manual creation of work orders from the Order Management application to the Field Service Management application. This integration ensures collaboration between the Order Management and the Field Service Management applications to support the end-to-end order fulfillment process. Work orders are created for an order that requires field service work by field agents. The order fulfillment agents and managers can more efficiently manage order tasks and work order dependencies.

Key features

- Automation of work order creation, updates, and tracking.
- UI-based manual triggering of work order to Field Service Management. Schedule field service work and communicate work note updates to field service dispatchers and agents.
- Synchronization of information between Order Management and Field Service Management for status, work note, customer details, and other updates.
- Tracking and managing the end-to-end workflow of orders and associated work orders in the fulfillment process.

Configuring automatic creation of work orders

You can enable automatic creation of work orders from Order Management for Telecommunications, Media, and Technology to Field Service Management. Work orders are created for domain orders and order tasks. To configure the automatic creation of work orders, configure the decision tables in the decision builder.

Customer orders have multiple order line items that have multiple domain orders, such as product orders, service orders, resource orders, and order tasks. For automatic creation of work orders for a domain order, the conditions are specified in the Work Order Policy for Domain Order decision table. For the automatic creation of work orders for order tasks, the conditions are defined in the Work Order Policy for Order Task decision table.

After an order is approved by the manager, a work order is automatically created if the conditions that are defined in the decision builder are met. If required, the manager can also select **Create Work Order** to create a work order manually. The work order template in the decision table pre-populates the fields of the automatically created work order.

Configure work order creation for a domain order

Add a condition in the decision tree for automatic creation of work orders for domain order. The conditions are specified in the Work Order Policy for Domain Order decision table.

Before you begin

Role required: admin


About this task

Customer Orders have multiple order line items that have multiple domain orders, such as product orders, service orders, resource orders, and order tasks. For automatic creation of work orders for a domain order, the conditions are specified in the Work Order Policy for Domain Order decision table. For conditions not defined in the decision table, the manager can select **Create Work Order** to create a work order manually. The work order template in the decision table pre-populates the fields of the automatically created work order.

Procedure

1. Navigate to **All > Decision Builder**.
You can view all the decision tables.
2. Select the **Work Order Policy for Domain Order** decision table.
3. In the **Specification** column of the conditions section, select the service package to set a condition.
4. Select an action from the Domain Order Action list.
5. Select a template for the condition in the **WO Template** column.
6. Select **Save**.

Result

A condition is added in the decision table. If this condition in the decision table is met, a work order is automatically created for a domain order. For more information on decision tables, see [Use decision tables](#) .

Configure work order creation for order task

Add a condition in the decision tree for automatic creation of work orders for order tasks. The conditions are specified in the Work Order Policy for Order Task decision table.

Before you begin

Role required: Administrator


About this task

For the automatic creation of work orders for order tasks, the conditions are defined in the Work Order Policy for Order Task decision table. After an order is approved by the manager, a work order is automatically created if the conditions are met that are defined in the decision builder.

Procedure

1. Navigate to **All > Decision Builder**.
You can view all the decision tables.
2. Select the **Work Order Policy for Order Task** decision table.
3. In the **Specification** column of the conditions section, select the service package to set a condition.
4. Select **Add** for Domain Order Action.
5. Select a Request type for the order task in the **Request Type** column.
6. Select a template for the service package in the **WO Template** column.
7. Select **Save**.

Result

A condition is added in the decision table. If this condition in the decision tree is met, a work order is automatically created for an order task. For information, see [Decision Builder user interface](#) .

Synchronization of information between Order Management and Field Service Management - Workflow scenario

The integration between Order Management and Field Service Management provides support for the end-to-end order fulfillment process. The following scenario shows the seamless synchronization of data, customer information, status, and other updates between Order Management and Field Service Management.

Scenario

After the order fulfillment manager approves the order in Order Management, work orders are automatically created in Field Service Management for conditions that are specified in the decision tree. As the field service agents work on those work orders, the order fulfillment agent can see the updates in the Work Notes section of that Domain Order. An agent cannot close a domain order unless all the work orders associated with it are closed. This workflow shows synchronization of information between Order Management and Field Service Management.

1. An order fulfillment agent creates a new customer order in the Order Management workspace.
2. The agent then selects the location for which the order needs to be placed. For multiple locations, multiple order line items are created.

3. The agent then reviews and places the order.
4. The order fulfillment manager approves the order. The order line items have domain orders as part of the order fulfillment flow. According to the configurations in the decision table, work orders are automatically created in Field Service Management.
5. The agent can view the work orders created for the domain orders in the **Details** tab. In the Activity section, the agent tracks all the updates for the work orders in the work notes.
 - When the status of a work order changes in Field Service Management, the details are displayed in the work notes of the Order Management workspace.
 - If a work order is canceled, the work order status is displayed in the Order Management work notes section.
 - In case of in-flight changes, the work order is automatically updated. The current status and the updated information are displayed in the work notes section.
6. The agent can edit an order line item if required. If the agent selects the **PONR** (Point of No Return) option, no changes can be made to the order line item in the workflow anymore.
7. After all the work orders are closed, the order fulfillment manager can review the all the work orders and close the domain order.

Note: The agent cannot close a domain order unless all the work orders associated with that domain order are closed.

Order Management integration with Strategic Portfolio Management

The Order Management application provides an integration with the ServiceNow[®] Strategic Portfolio Management (SPM) application enables project oversight of complex order fulfillment tasks. Use this integration to handle order line items and planned order tasks as projects in SPM.

Features

- Automates the creation of SPM projects based on project oversight rules, enabling project managers to track order fulfillment activities within a project in SPM.
- Synchronizes order fulfillment tasks in Order Management to an associated project in SPM, providing project managers with real-time task activity updates via state change information, notes, and comments.
- Enable fulfillment agents, managers, and project managers to view related lists that show the relationship between an order line item and project, domain order and project task, and order task and project task.
- Supports tracking and synchronization of one or more order tasks.
- Supports staggered/in-flight orders for new tasks created as part of staggered decomposition or in-flight changes. Uses predefined planned order tasks that enable synchronization between order fulfillment and project tasks.
- Closes project tasks automatically when child tasks and associated order tasks or domain orders are completed or canceled.

Benefits

- Gives project managers end-to-end project oversight of complicated orders, such as long-running orders that require delivery to a specific customer account with multiple locations.
- Manages risks by identifying issues that affect project dependencies and timely order fulfillment.
- Eliminates manual tracking of order status between SPM and Order Management applications. Reduces inefficient communication between project managers, fulfillment agents and managers, and other project stakeholders.

How the SPM integration works

The Order Management integration with Strategic Portfolio Management uses the Project Portfolio Management (PPM) standard application in SPM to track fulfillment tasks as projects in your organization. This integration also works with the Customer Project Management application if you want to track customer order fulfillment tasks as customer projects automatically.

Configuration

Admins set up the SPM integration by configuring these items:

- **Project templates:** Create the PPM project templates that are used to generate the SPM projects automatically for orders requiring project oversight. Project templates also define the planned tasks for order delivery.
- **Order Management project oversight conditions and rules:** Set the conditions and decision rules that determine the orders that qualify for project oversight and the project templates used to create those projects. You use different Project Management Oversight decision tables to specify the conditions and rules for order lines, domain orders, and order tasks and the appropriate project template to be used.
- **Field mapping in CSM table maps:** Associate Order Management fields to SPM project fields by configuring the field mapping in the CSM table maps.
- **Property for automatic closure of project tasks:** Control the automatic closure of project tasks when associated child tasks are completed by using the `sn_ind_tmt_orm.project.task.auto.closure` system property.

SPM integration flow

After an order line is created and approved, Order Management performs the following processing steps.

- **Project oversight determination:** Qualifies the order line for project oversight.
 - Checks that the order line is valid and that the PPM Standard application is installed.
 - Reviews the project oversight conditions and decision rules for order lines.
 - If the order line matches the conditions, automatically creates the project and project tasks using the specified project template.

i Note: If multiple order lines are eligible for oversight, the system creates multiple projects.

- **One-time synchronization:** Synchronizes the order line with the project, establishing the relationship between the order line and the project.

- **Project task oversight determination:** After Order Management decomposes the order line item into domain orders and order tasks, it does the following:
 - Checks the project oversight conditions for domain orders. If a domain order meets the project oversight conditions, creates the associated project and planned tasks using the project template task specified.
 - Checks the project oversight conditions for order tasks. If order tasks meet the project oversight conditions, creates the associated project and planned tasks using the project template task specified.
 - Links domain orders and order tasks back to the parent project, synchronizing attributes from the domain orders and order tasks to the project tasks.
- **Order task state changes:** As order task states change in Order Management, synchronizes the state and status with corresponding project tasks in SPM so that project managers and other project stakeholders can view the changes in real time.
- **Updates to project notes and comments:** Automatically updates project notes and project task notes when fulfillment managers or agents post work notes and comments in order line items, domain orders, and order tasks.
- **Project task closure:** Automatically closes project tasks for order tasks, including child tasks, that have been completed in Order Management.

Plugins for the SPM integration

The SPM integration is included with the Order Management application. The integration requires the following plugins, which are activated by users with the admin role:

- **PPM Standard plugin (com.snc.financial_planning_pmo):** Activates the Project Portfolio Management Standard application, which installs Financial Management and the Project Portfolio Suite. The suite includes various applications for handling projects in your organization, such as Program Management, Project Management, and Demand Management. For more information on the Project Portfolio Suite, see [Project Portfolio Suite with Financials](#).
- **Customer Project Management plugin (com.snc.csm_ppm):** Activates the Customer Project Management integration with the PPM Standard application. This integration enables customer project managers to create and manage complex projects with multiple tasks. This integration also provides end users with visibility into those projects. For details on Customer Project Management, see [Integrating with Customer Project Management](#).

Access controls in the SPM integration

The SPM integration supports certain access controls for users with the following roles.

SPM integration access controls

| Role | Access controls in SPM integration | Contains roles |
|--|---|---|
| <ul style="list-style-type: none"> Order fulfillment agent [sn_ind_tmt_orm.order_fulfillment_agent] Service order agent [sn_ind_tmt_orm.service_order_agent] | <p>Order fulfillment agents have read access to product orders, product order tasks, service orders, and resource orders. Service order agents have read access to service order requests, service orders, resource orders, and related fulfillment tasks.</p> <p>Agents have access to the following project information:</p> <ul style="list-style-type: none"> Read access to the Project form fields. Read access to the Order Line Item to Project Relationship table. Read access to the Order Line Item and Order Task related lists in PPM. Read access to the Order task to Project Task related list in Order Management. | <ul style="list-style-type: none"> it_project_user sn_customerservice.projectmanager (if using Customer Project Management) |
| <ul style="list-style-type: none"> Order fulfillment manager [sn_ind_tmt_orm.order_fulfillment_manager] Service order manager [sn_ind_tmt_orm.service_order_manager] | <p>Order fulfillment managers receive orders, review order line items, verify that orders are ready for fulfillment, and then approve orders. Service order managers ensure that service orders are ready for fulfillment and then approve them.</p> <p>Managers can:</p> <ul style="list-style-type: none"> Post notes and comments on order lines and order tasks to communicate with the project manager. View the relationship between a project and an order line item, project tasks, and order tasks. Managers have the following access to project information: | <p>sn_ind_tmt_orm.order_creator</p> |

SPM integration access controls (continued)

| Role | Access controls in SPM integration | Contains roles |
|--|--|---|
| | <ul style="list-style-type: none"> ○ Read access to the Order Line Item to Project Relationship table. ○ Read access to the Order Line Item and Order Task related lists in PPM. ○ Read access to the Order task to Project Task related list in Order Management. | |
| IT project user [it_project_user] | <ul style="list-style-type: none"> • Read access to the Project form fields. • Read access to the Order Line Item to Project Relationship table. • Read access to the Order Line Item and Order Task related lists in PPM. • Read access to the Order task to Project Task related list in Order Management. • Read access to the Project Template Creation table. | sn_ind_tmt_orm.order_viewer |
| IT project administrator [it_project_admin] | <ul style="list-style-type: none"> • Configure access to all Project Management features. • Read and write access to the Project Template Creation table. • Read and write access to the Order Line Item related list in PPM. • Write access to the Order Task related list in PPM. • Read access to the Order Line Item to Project Relationship table. • Write access to the Order task to Project Task related list in Order Management. | <ul style="list-style-type: none"> • it_project_user • sn_ind_tmt_orm.order_creator |
| Administrator [admin] | <ul style="list-style-type: none"> • Creates the PPM project templates used to generate the projects for orders that require project oversight automatically. • Configures the mapping between order tasks and planned project | |

SPM integration access controls (continued)

| Role | Access controls in SPM integration | Contains roles |
|------|--|----------------|
| | <p>tasks associated with project templates</p> <ul style="list-style-type: none"> • Specifies the conditions and decision rules for determining project oversight and the project templates used to create those projects. • Controls automatic closure of project tasks | |



Next step

As an admin, review the setup tasks in [Configuring the Strategic Portfolio Management integration](#).

Configuring the Strategic Portfolio Management integration

Configure the Strategic Portfolio Management integration so that order delivery tasks in Order Management can be tracked as planned project tasks in SPM.

As an admin, follow these tasks to set up the SPM integration.

| Configuration step | Description |
|--|---|
| Activate PPM Standard (Project Portfolio Management)  | <p>Install the PPM Standard (com.snc.financial_planning_pmo) plugin.</p> <p>If you're tracking customer projects, you must also activate the Customer Project Management (com.snc.csm_ppm) plugin. For information on setting up Customer Project Management, see Integrate with Customer Project Management using Guided Setup .</p> <p>Note: If you installed the Order Management application before activating the PPM Standard or Customer Project Management plugins, you must repair the Order Management (com.sn_ind_tmt_orm) plugin to get the plugin-dependent updates and demo data for the SPM integration.</p> |
| Create project templates and project template tasks | Use the Project Portfolio Management application to create the project templates for order lines and project template tasks for domain orders and order tasks. |
| Configure field mapping between orders and projects | Configure the CSM table maps to associate fields in order lines, domain orders, and order tasks to projects in SPM. |

| Configuration step | Description |
|--|--|
| Set up project oversight conditions and decision rules | Configure the conditions and decision rules for determining the order lines, domain orders, and order tasks that qualify for project management oversight. You also specify the project templates to be used to create those projects. |
| Control the automatic closure of project tasks | Manage the automatic closure of project tasks when related child tasks are completed or cancelled. |

Creating project templates and project template tasks

You create the project templates and project template tasks that Order Management uses to instantiate projects for order lines and associated domain orders and order tasks.

In the SPM integration, project templates define the structure of a project for order lines and the project planned tasks that map to the order fulfillment tasks for the order line. You specify project templates and project template tasks in the project oversight decision rules. Order Management uses these rules to determine which order items require oversight and the project template or project template tasks used to create the projects.

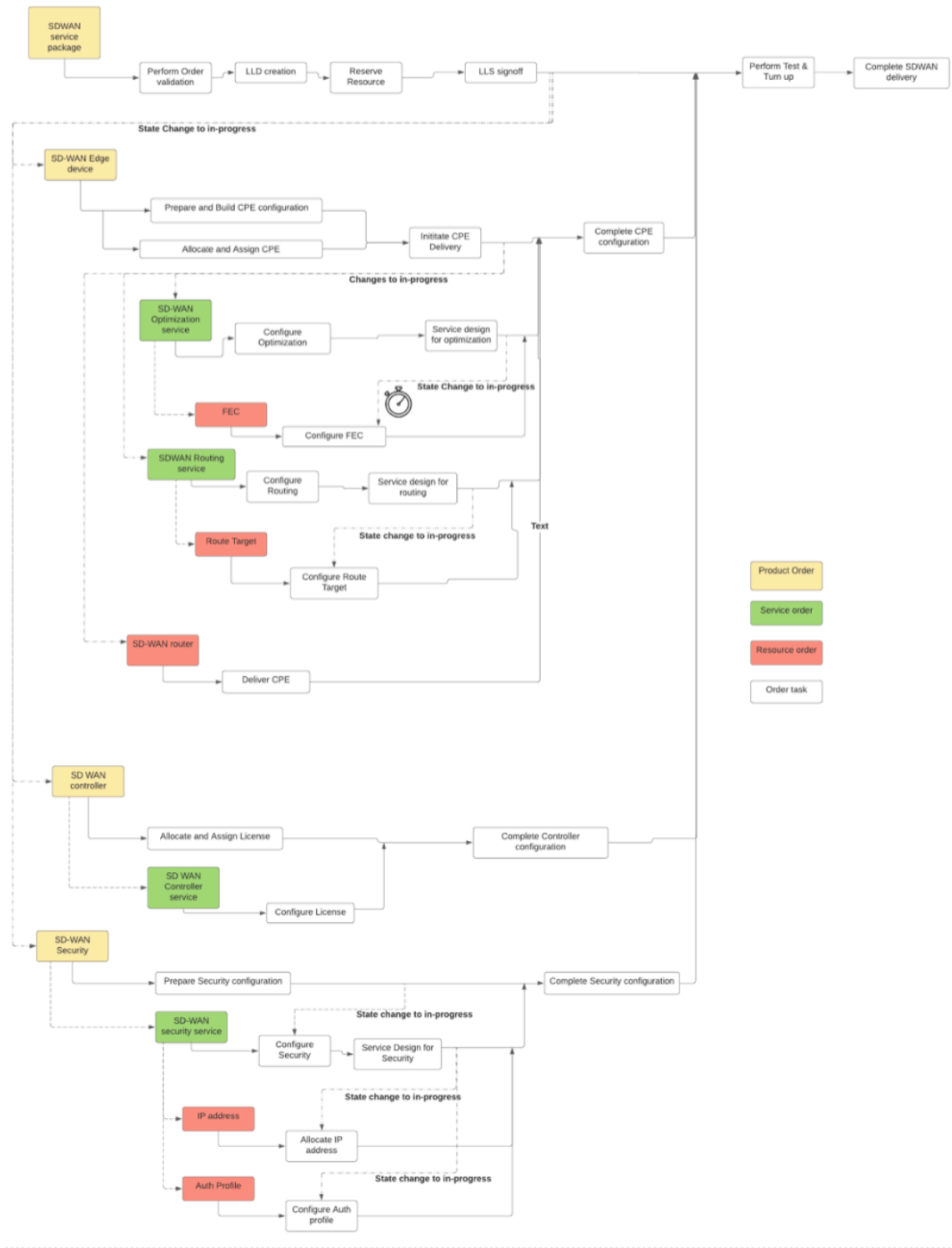
As an admin or user with the `it_project_manager` role, you create project templates and the project template tasks in Project Portfolio Management. For more information, see [Project templates](#) and [Create a project template](#). The demo data with the Order Management application includes project templates that you can copy and change as needed.

Note: When you create project template tasks for domain orders and order tasks, be sure to anticipate inflight changes that may require additional planned tasks. Define those potential planned tasks in the template tasks so that the system can synchronize the planned tasks with the additional order tasks resulting from inflight changes in Order Management.

Before creating project templates and project template tasks

Before you create your project template and project task templates for the SPM integration, consider the level of project oversight required for customer orders to be fulfilled. For example, in the following SD-WAN fulfillment flow, the top order line is SD-WAN Service Package, which defines the order line project to be created. Next, identify the domain orders and then the order tasks that require project task oversight.

SD-WAN fulfillment flow



Setting up project oversight conditions and decision rules

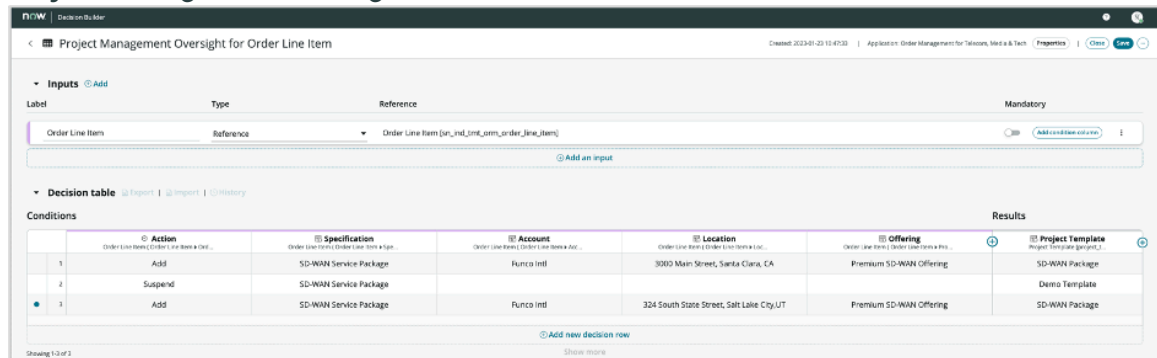
As an admin, you create and maintain the conditions and decision rules that determine whether an order item qualifies as a project that can be tracked in Strategic Portfolio Management. You also specify the project template that Order Management uses to create that project for the order item.

Set the conditions and decision rules for project oversight of order lines and associated domain orders and order tasks by using Decision Builder forms for order lines, domain orders, and order

tasks. These forms have a decision table for specifying the conditions and rules to be applied when Order Management determines eligibility for project oversight.

For example, in the Project Oversight Management for Order Line Item form, you use the decision table to add or change condition columns. You also specify the decision rules, including the project template, to be applied.

Project Management Oversight for Order Line Item



For more information on adding or changing conditions in decision tables, see [Decision Builder user interface](#).

Note: If Order Management demo data is installed, the decision table for each project oversight form displays the condition columns and the decision rows added for demo data. You can add, change, or delete the condition columns and decision rows as needed.

Configure project oversight for order lines

Specify the conditions and decision rules that qualify an order line for project oversight. You also specify the project template used by Order Management to create the project for the order line.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Order Line Item Decision Builder to add or change the conditions and decision rules that must be met for an order line to be tracked as a project. For example, if you want projects to be created for order lines that have a particular product, customer account, and location, you can add condition columns for **Specification**, **Account**, and **Location**.

Procedure

1. Navigate to **All > Decision Management > Decision Builder**.
2. Select the **Project Management Oversight for Order Line Item** decision table. The Order Line Item is displayed in the **Inputs** and the **Project Template** column in the **Results**.
3. Add a condition that an order line must match.
 - a. Select **Add Condition column**.
 - b. On the form, fill in the fields.

New Condition Column form

| Field | Description |
|------------------------|--|
| Condition column label | Label for the column. |
| Description | Brief overview of the condition. |
| Input | Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type. |
| Table | If the data type is Reference, the name of the reference table is displayed. For order line items, the table is Order Line Item [sn_ind_tmt_orm_order_line_item]. |
| Data to evaluate | For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select Field and choose a field from the Order Line Item table, such as Account , to specify a customer account. |
| Condition type | Data type selected for the condition column. |
| Default operator | How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False. |

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row.**

a. Select the **Add** action and enter the conditions that the order line must match and the project template for creating the project.

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

Result

The system uses the specified project template to create projects for order lines that match the conditions and decision rules defined in the Project Oversight for Order Line Items decision table.

Configure project oversight for domain orders

Specify the conditions and decision rules that qualify domain orders for project oversight. You also specify the project template task used by Order Management to create the project for domain orders.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Domain Order Decision Builder to add or change the conditions and decision rules that a domain order must meet to be tracked as a project. For example, if you want projects to be created for domain orders for a particular product, you can add a condition column for **Specification**.

Procedure

1. Navigate to **All > Decision Management > Decision Builder**.
2. Select the **Project Management Oversight for Domain Order** decision table.
The Domain Order item is displayed in the **Inputs** and the **Project Template Task** column in the **Results**.
3. Add a condition that a domain order must match.
 - a. Select **Add Condition column**.
 - b. On the form, fill in the fields.

New Condition Column form

| Field | Description |
|------------------------|---|
| Condition column label | Label for the column. |
| Description | Brief overview of the condition. |
| Input | Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type. |
| Table | If the data type is Reference, the name of the reference table is displayed. For domain items, the table is Domain Order [sn_ind_tmt_orm_domain_order]. |
| Data to evaluate | For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select Field and choose a field from the Domain Order table, such as Specification (Domain Order.specification) to specify a product. |
| Condition type | Data type selected for the condition column. |

| Field | Description |
|------------------|---|
| Default operator | How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False. |

- c. Select **Save**.
 - d. Repeat steps 3a through 3c for each condition to be added.
4. Enter a decision rule by selecting **Add new decision row**.
- a. Select the **Add** action and enter the conditions and project template task to be used.

Note: If there are duplicate project template tasks that have the same **Short description**, it may be difficult to identify and select the appropriate project template tasks. For details on differentiating between similar project template tasks, see [Choosing a project template task when duplicates exist](#).

- b. Select **Save**.
- c. Repeat steps 4a through 4c for each decision rule to be added.

Result

The system uses the specified project template task to create projects for domain orders that match the conditions and decision rules defined in the Project Oversight for Domain Order decision table.

Configure project oversight for order tasks

Specify the conditions and decision rules that qualify order tasks for project oversight. You also specify the project template task used by Order Management to create the project for order tasks. The project template task defines the project tasks for the order tasks.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Order Task Decision Builder to add or change the conditions and decision rules that an order task must meet to be tracked as a project. For example, if you want projects to be created for order tasks for a particular request type, you can add a condition column for **Type**.

Procedure

1. Navigate to **All > Decision Management > Decision Builder**.
2. Select the **Project Management Oversight for Domain Order** decision table.
The Order Task item is displayed in the **Inputs** and the **Project Template Task** column in the **Results**.
3. Add a condition that a domain order must match.
 - a. Select **Add Condition column**.
 - b. On the form, fill in the fields.

New Condition Column form

| Field | Description |
|------------------------|--|
| Condition column label | Label for the column. |
| Description | Brief overview of the condition. |
| Input | Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type. |
| Table | If the data type is Reference, the name of the reference table is displayed. For domain items, the table is Order Task [sn_ind_tmt_orm_order_task]. |
| Data to evaluate | For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select Field and choose a field from the Order Task table, such as Request Type (Order Task.request_type) to specify a request type. |
| Condition type | Data type selected for the condition column. |
| Default operator | How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False. |

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row.**

a. Select the **Add** action and enter the conditions and project template task to be used.

i Note: If there are duplicate project template tasks that have the same **Short description**, it may be difficult to identify and select the appropriate project template task. For details on differentiating between similar project template tasks, see [Choosing a project template task when duplicates exist](#).

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

Result

The system uses the specified project template task to create projects for order tasks that match the conditions and decisions rules defined in the Project Oversight for Order Task decision table.

Choosing a project template task when duplicates exist

As an admin, when you're configuring the decision rules for domain orders and order tasks, you may find that there are multiple project template tasks with the same **Short description**. It may be difficult to determine the correct project template task to select.

For example, the following decision table for Project Oversight for Domain Order shows two options with the same name for the project template task: Product Order for SD-WAN Security. This project template task has the same **Short description** for two different project template tasks, one for SD-WAN Package and the other for SD-WAN Customer Product Bundle.

Duplicate project template tasks in Project Management Oversight for Domain Order

The screenshot shows the 'Decision Builder' interface for 'Project Management Oversight for Domain Order'. It features an 'Inputs' section with a table containing one input: 'Domain Order' (Reference type, Domain Order [sn_ind_tmt_srm_domain_order]). Below this is the 'Decision table' section, which includes a table with four rows of conditions and actions. The 'Results' column shows a dropdown menu with multiple entries for 'Product Order for SD-WAN Security', demonstrating the duplication of short descriptions for different project template tasks.

You can determine the appropriate project template task by finding and verifying the `sys_id` of the project template task to be used. For more information, see [Verify the sys_id of a project task template](#).

Verify the sys_id of a project task template

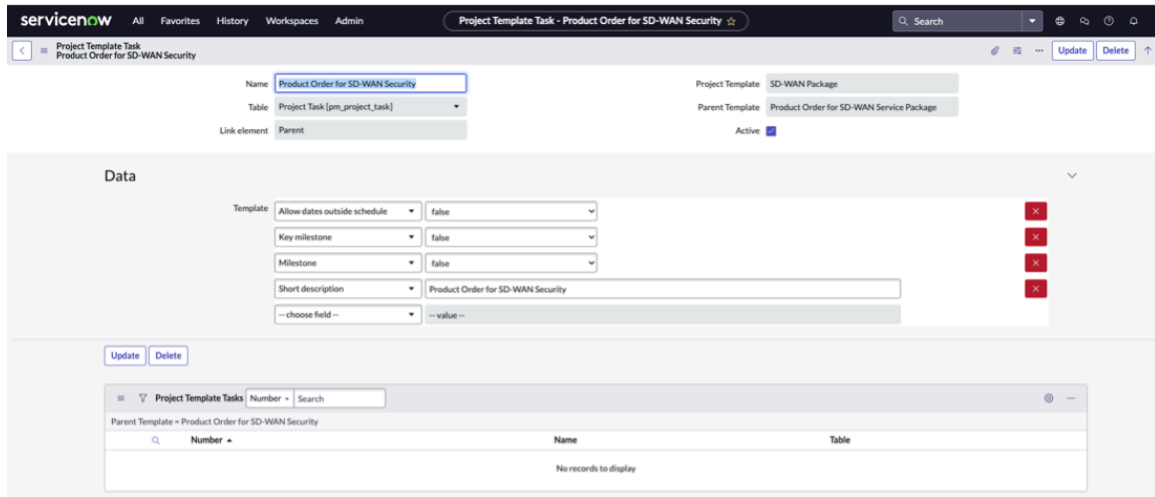
Determine if you're using the correct project task template for domain orders or order tasks by checking the `sys_id` of the project template task.

Before you begin

Role required: admin

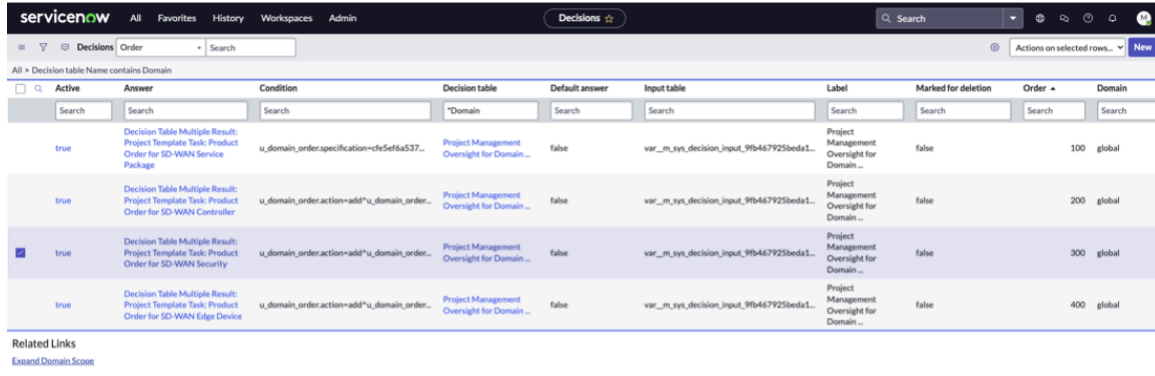
Procedure

1. Navigate to **All**, and in the filter enter `project_template_task.list`.
2. Select the record for the project template task to be verified.



For example, in the Project Template Task record for Product Order for SD-WAN Security, which belongs to the SD-WAN Package project template, the sys_id is 183910354fcd2110c5ff2624b2ce0b49.

3. Check the value of the sys_id in the associated Decisions table entry.
 - a. Navigate to **All** and in the filter, enter `sys_decision_question.list`.
 - b. In the Decisions [sys_decision_question] table, locate the record of the corresponding decision table entry, for example Project Management Oversight for Domain Order.
 - c. In the record for the project template task, select the **Answer** column.



The resulting record for the **Answer** field opens.

4. In the resulting record for the Decision Table Multiple Result, view the XML output by right-clicking the header bar of the record and selecting **Show XML**.
5. Review the XML and locate the sys_id value in the file.

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```

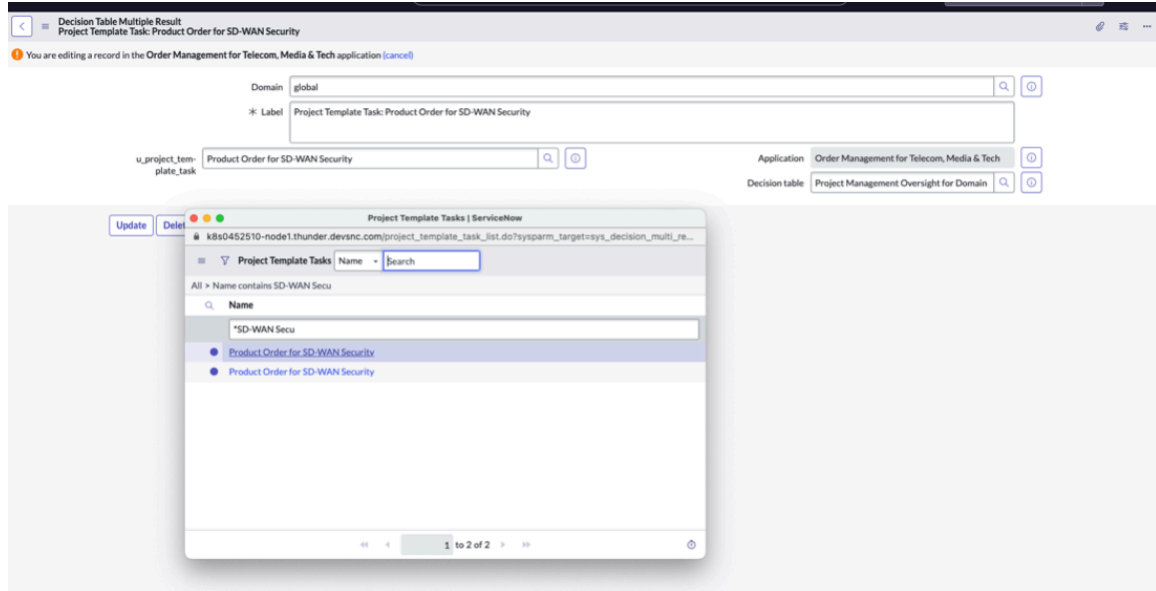
<xml>
  <sys_decision_multi_result>
    <decision_table display_value="Project Management Oversight for Domain
    Order">9fb467925bedall10235d85cced81c723</decision_table>
    <label>Project Template Task: Product Order for SD-WAN Security</label>
    <result_elements/>
    <sys_class_name>sys_decision_multi_result</sys_class_name>
    <sys_created_by>admin</sys_created_by>
    <sys_created_on>2023-03-15 18:29:26</sys_created_on>
    <sys_domain>global</sys_domain>
    <sys_domain_path>/</sys_domain_path>
    <sys_id>514aeb965bedall10235d85cced81c7ca</sys_id>
    <sys_mod_count>0</sys_mod_count>
    <sys_name>Project Template Task: Product Order for SD-WAN Security</sys_name>
    <sys_package display_value="Order Management for Telecom, Media & Tech"
    source="sn_ind_tmt_orm">3c58f5d55b0310102dff5e92dc81c711</sys_package>
    <sys_policy/>
    <sys_scope display_value="Order Management for Telecom, Media & Tech">3c58f5d55b0310102dff5e92dc81c711</sys_scope>
    <sys_update_name>sys_decision_multi_result_514aeb965bedall10235d85cced81c7ca</sys_update_name>
    <sys_updated_by>admin</sys_updated_by>
    <sys_updated_on>2023-03-15 18:29:26</sys_updated_on>
  </sys_decision_multi_result>
  <sys_variable_value action="delete_multiple" query="document_key=514aeb965bedall10235d85cced81c7ca"/>
  <sys_variable_value action="INSERT OR UPDATE">
    <document>sys_decision_multi_result</document>
    <document_key>514aeb965bedall10235d85cced81c7ca</document_key>
    <order>100</order>
    <sys_class_name>sys_variable_value</sys_class_name>
    <sys_created_by>admin</sys_created_by>
    <sys_created_on>2023-03-15 18:29:26</sys_created_on>
    <sys_id>554aeb965bedall10235d85cced81c7ca</sys_id>
    <sys_mod_count>0</sys_mod_count>
    <sys_updated_by>admin</sys_updated_by>
    <sys_updated_on>2023-03-15 18:29:26</sys_updated_on>
    <value>183910354fed2110c5ff2624b2ce0b49</value>
    <variable display_value="Project Template Task">8d4aeb965bedall10235d85cced81c7a3</variable>
  </sys_variable_value>
</xml>

```

Value

The sys_id value should match the sys_id of the project template task determined in Step 1. If the sys_id doesn't match, proceed to the next step.

6. In the Decision Table Multiple Result record, select the **u_project_template_task** and check the XML view of another project template task to verify the sys_id of the project task template.



Configure field mappings

Configure the CSM table maps to associate fields in order lines, domain orders, and order tasks to projects in Service Portfolio Management.

Before you begin

Role required: admin

About this task

Order Management provides Customer Service Management table maps for associating order line items, domain orders, and order tasks to projects and project tasks in SPM. The tables that

you configure depend on whether you're using the PPM Standard application to track projects in your organization or the Customer Project Management integration to track customer projects.

- If you're using PPM, configure the field mapping for these CSM table maps:

Table maps for PPM

| Table map | Source table | Target table |
|------------------------------|---|-----------------------------------|
| Order Line Item to Project | Order Line Item [sn_ind_tmt_orm_order_line_item] | Project [pm_project] |
| Domain Order to Project Task | Domain Order [sn_ind_tmt_orm_domain_order] | Project Task [pm_project_task] |
| Order Task to Project Task | Order Task [sn_ind_tmt_orm_order_task] | Project Task [pm_project_task] |

- If you're using Customer Project Management, configure the field mapping for these CSM table maps:

Table maps for Customer Project Management

| Table map | Source table | Target table |
|---------------------------------------|---|--|
| Order Line Item to Customer Project | Order Line Item [sn_ind_tmt_orm_order_line_item] | Customer Project [customer_project] |
| Domain Order to Customer Project Task | Domain Order [sn_ind_tmt_orm_domain_order] | Customer Project Task [customer_project_task] |
| Order Task to Customer Project Task | Order Task [sn_ind_tmt_orm_order_task] | Customer Project Task [customer_project_task] |

The source and target tables in each table map are pre-populated.

- i Note:** If you installed demo data for Order Management, the field mapping for the **Source Field** and **Target Field** display the values used for demo data. You can use the existing field mapping or change it as needed.

Procedure

1. Navigate to **All** and in the filter enter `csm_table_map.list`.
2. Do one of the following:
 - If you're using PPM, select the Order Line Item to Project table map.
 - If you're using Customer Project Management, select the Order Line Item to Customer Project table map.
3. Go to the **Basic Field Mapping** related list and define a field mapping.

- i Note:** If Order Management demo data is installed, the **Source Field** and **Target Field** values in the Basic Field Mapping related list display the mapping for demo data. You can use the mapping or change it as needed.

| Option | Steps |
|--|---|
| <p>Define a new field mapping</p> | <p>a. Select New.</p> <p>b. In the Source Field, select an item from the source table.</p> <p>For example, select an item such as Short Description from the Order Line Item [sn_ind_tmt_orm_order_line_item] table.</p> <p>c. In the Target Field, select an item from the Project [pm_project] table, such as Project Name.</p> <p>d. Select Submit.</p> <p>In this example, the order line Short Description is used as the Project Name in SPM.</p> |
| <p>Change an existing field mapping</p> | <p>a. Select the field mapping record.</p> <p>b. In the Source Field, select a different item from the Order Line Item source table, as needed.</p> <p>c. In the Target Field, select a different item from the Project target table, as needed.</p> <p>d. Select Update.</p> |

4. Do one of the following:

- If you're using PPM, select the Domain Order to Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.
- If you're using Customer Project Management, select the Domain Order to Customer Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.

For example, you can select the **Short Description** field in the Domain Order source table and map it to the **Short Description** field in the Project Task target table.

5. Do one of the following:

- If you're using PPM, select the Order Task to Project table map if and repeat Step 3 to define a new field mapping or update an existing mapping.
- If you're using Customer Project Management, select the Order Task to Customer Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.

For example, you can select the **Short Description** field in the Order Task source table and map it to the **Short Description** field in the Project Task target table.

Result

The fields in the Order Management source tables are mapped to the fields in the SPM target table.

Control automatic closure of project tasks

Manage the automatic closure of projects in the SPM integration by using the `sn_ind_tmt_orm.project.task.auto.closure` system property.

Before you begin

Role required: admin

About this task

In the SPM integration, Order Management closes project tasks automatically when all associated order tasks are completed and there are no open child tasks that have project task dependencies. If a project task has open child tasks, Order Management doesn't automatically close the project task. You can use the `sn_ind_tmt_orm.project.task.auto.closure` property to suppress or reactivate the automatic closure of project tasks.

Procedure

1. Navigate to **All** and in the filter, enter `sys_properties.list` and press **Enter**.
2. Search for and open the `sn_ind_tmt_orm.project.task.auto.closure` property.
3. In the **Value** field, set the value for the property.
 - To suppress automatic project task closure, enter `false`.
 - To reactivate automatic project task closure, enter `true`.
4. Select **Update**.
Automatic project task closure in the SPM integration is immediately suppressed or reactivated based on the value that you entered. If automatic closure is suppressed, any order task-to-project task updates occur only when order tasks are in an in-progress state.

Tracking order tasks and associated projects

With the SPM integration, project managers and fulfillment agents or managers can track projects in Strategic Portfolio Management that have associated order tasks in Order Management.

Tracking projects for planned order tasks in SPM

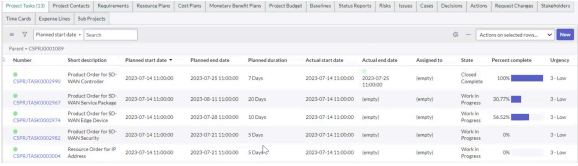
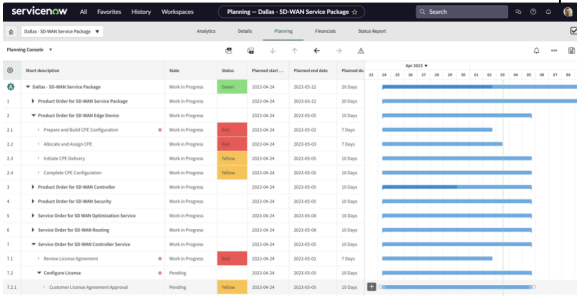
As a project manager, you can review and update projects that have been created for tracking planned order tasks using the Project Portfolio Management application in SPM. When fulfillment managers and agents update or complete order tasks, Order Management automatically synchronizes project states between SPM and order line items, task and domain order states, and project task and order task states as fulfillment managers and agents complete order tasks.

A project manager has the `it_project_manager` role for tracking and updating projects.

Project manager tasks

| Task | Details |
|---|---|
| Review an order fulfillment project and state | <ol style="list-style-type: none"> 1. Navigate to All > Projects > Project Workspace. 2. Select the project for the order item. <p>Note: The Project Name is the name assigned when Order Management created the project using the specified project template.</p> |

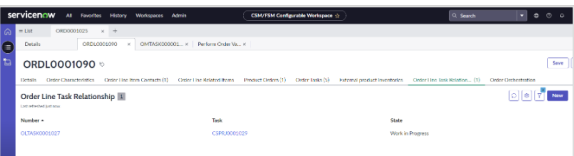
Project manager tasks (continued)

| Task | Details |
|--|---|
| | <p>3. Select the Details tab then scroll down to the Project Tasks tab to review project tasks, State, and Percent complete,</p>  |
| <p>Review the project state and project task state to assess the project status</p> | <ol style="list-style-type: none"> 1. Navigate to All > Projects > Project Workspace. 2. Select the project for the order item. 3. Select the Planning tab. <p>The Gantt chart view</p>  <p>displays.</p> |
| <p>Review notes and comments on order tasks from fulfillment agents and managers</p> | <ol style="list-style-type: none"> 1. Navigate to All > Projects > Project Workspace. 2. Select the project for the order item. 3. Go to the Notes tab and view the comments and status updates from Order Management. |

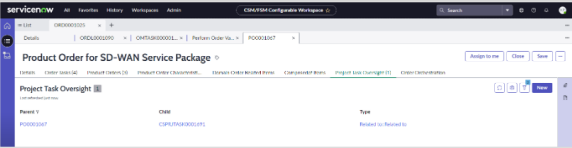
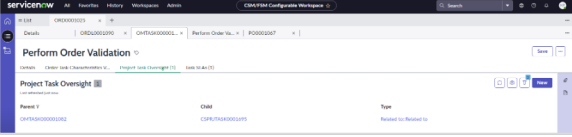
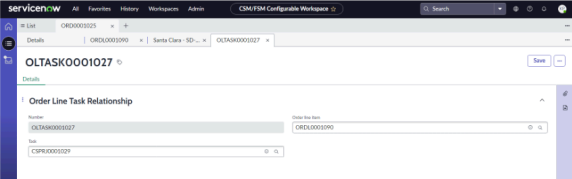
Tracking fulfillment tasks that have associated projects in Order Management

As a fulfillment agent or manager, you can view the relationship between a project and order line item, project tasks, and order task in the Configurable Workspace. You can also post notes and additional comments on order lines and order tasks to communicate with the project manager responsible for project oversight of the order management tasks.

Fulfillment agent or manager tasks

| Task | Example |
|--|--|
| <p>View order line-to-project relationship in order line item form</p> |  |

Fulfillment agent or manager tasks (continued)

| Task | Example |
|--|--|
| View project task-to-domain order relationship in domain form |  <p>The screenshot shows a ServiceNow interface for a 'Product Order for SD-WAN Service Package'. It features a 'Project Task Oversight' section with a table containing columns for 'Parent ID', 'OIDM', and 'Type'. The 'Parent ID' field contains the value 'P000000001'.</p> |
| View order task-to-project task relationship in order task from |  <p>The screenshot shows a ServiceNow interface for a 'Perform Order Validation' task. It features a 'Project Task Oversight' section with a table containing columns for 'Parent ID', 'OIDM', and 'Type'. The 'Parent ID' field contains the value 'O0000000000000000000'.</p> |
| View Details tab in order task relationship to see task number, project number, and order line item number relationship |  <p>The screenshot shows the 'Details' tab of a ServiceNow interface for an 'Order Line Relationship'. It displays a table with columns for 'Task' and 'Order Line Item'. The 'Task' field contains the value 'OLTASK0001027' and the 'Order Line Item' field contains the value 'O000000000'.</p> |