



Yokohama Retail Industry

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Retail

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

Get started

<p style="text-align: center;">Explore</p>  <p style="text-align: center;">Learn more about the benefits of Retail and how it's used.</p>	<p style="text-align: center;">Configure</p>  <p style="text-align: center;">Install Retail and configure your environment.</p>	<p style="text-align: center;">Manage customer complaints</p>  <p style="text-align: center;">Create, track, and close customer complaint cases in Workspace.</p>
<p style="text-align: center;">Manage store inquiries</p>  <p style="text-align: center;">Create, manage, track, and resolve the store inquiries through the retail portal, workspace, or mobile app.</p>	<p style="text-align: center;">Track store inquiry cases</p>  <p style="text-align: center;">Track store inquiry cases from the Retail portal.</p>	<p style="text-align: center;">Reference</p>  <p style="text-align: center;">Get details about Retail components such as fields, tables, and properties.</p>

Troubleshoot and get help

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

Exploring Retail

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

Retail overview

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

Retail helps you accomplish the following:

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

Retail users

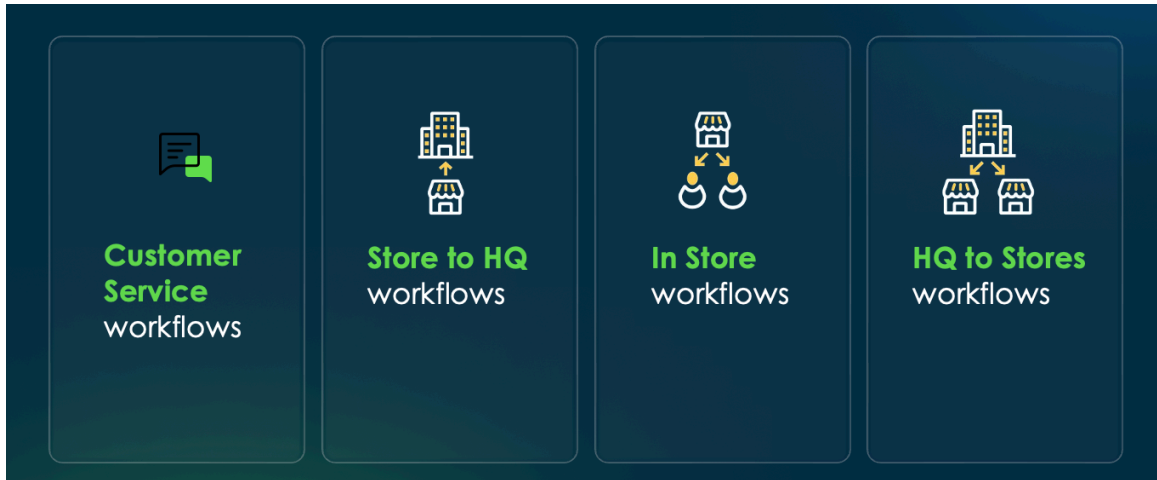
Users

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

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

Retail workflow

Retail



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

The case types available are:

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

Retail data model

Retail benefits

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

Retail data model also includes:

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

What to explore next

To learn more about configuring and using Retail, see:

- [Configuring Retail](#)
- [Manage customer complaints](#)
- [Manage store inquiries](#)
- [Track cases and tasks from Retail portal](#)
- [Retail reference](#)

Retail case overview

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

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

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

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

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

For retail case table attributes, see [Retail organization data model tables](#). For unified data model of cases and tasks, see [Retail unified case and task data model](#).

Retail portal

Retail portal provides an enhanced experience to use self-service tools, view cases, and gain visibility into metrics for your retail organizations. You must install Retail core to use the Retail portal. You must enter `<instance>/rsp` in the browser URL to access the Retail portal.

servicenow. Tours James Bennett

Catalog Knowledge Cases & tasks More information

Good Morning James Bennett
How can we help you today?

[Browse catalog](#)

Search or request something

BostonMart

- 1** Cases requested by me
- 0** Awaiting info cases
- 0** Open critical cases

Recently updated

- Cases
- Tasks

Cases

Number	Short description	Requesting retail organization	Supporting retail organization	State
RS10001001	Store inquiry testing	BostonMart		New

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

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

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

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

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

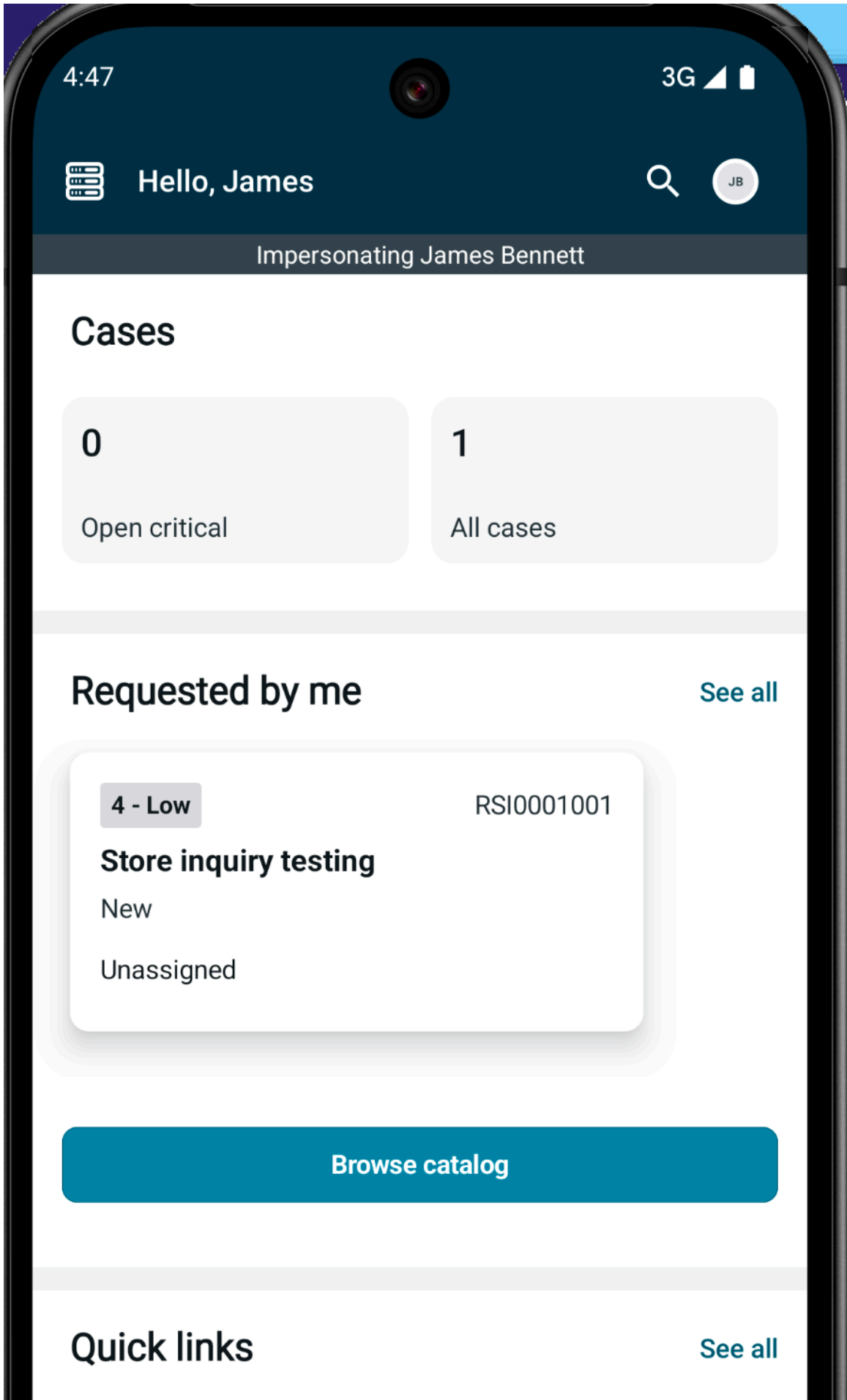
For information on using Retail portal, see the following topics:

- [Add and configure the Retail KPI widget](#)
- [Create a store inquiry case from the Retail portal](#)
- [Manage a store inquiry case from the Retail Portal](#)
- [Track cases and tasks from Retail portal](#)

Retail mobile application

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

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



Menu Options

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

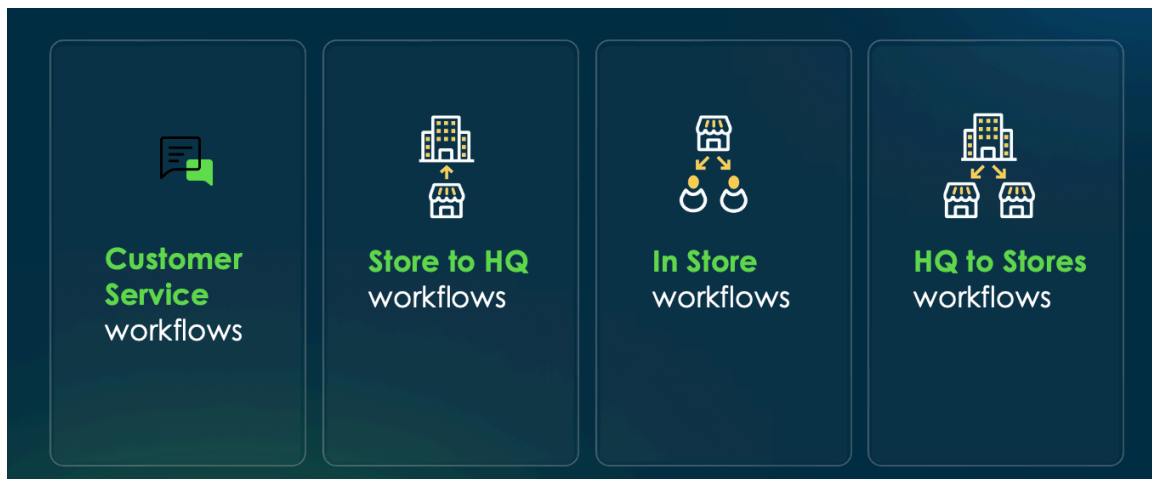
- **My Store:** includes all Store inquiry cases.
 - Cases: displays the Open Critical and All cases KPIs.
 - Requested by me: displays cases that are requested by you.
 - Quick links: displays the most frequently visited links.
 - Store details: displays the details of the store.
 - Store members: lists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

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

- [Create a store inquiry case from a mobile app](#)
- [Manage a store inquiry case from a mobile app](#)

Retail case types

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



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

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

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

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

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

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

The case types available are:

[Store inquiry case](#)

[Customer complaint case](#)

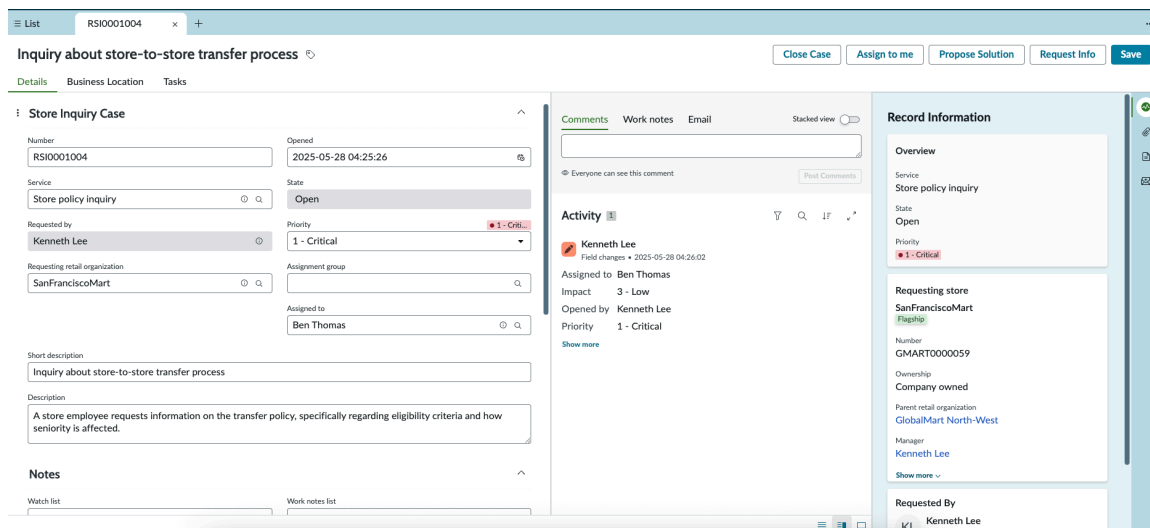
[HQ communications case](#)

[In-store operations case](#)

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

Store inquiry case

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



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

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

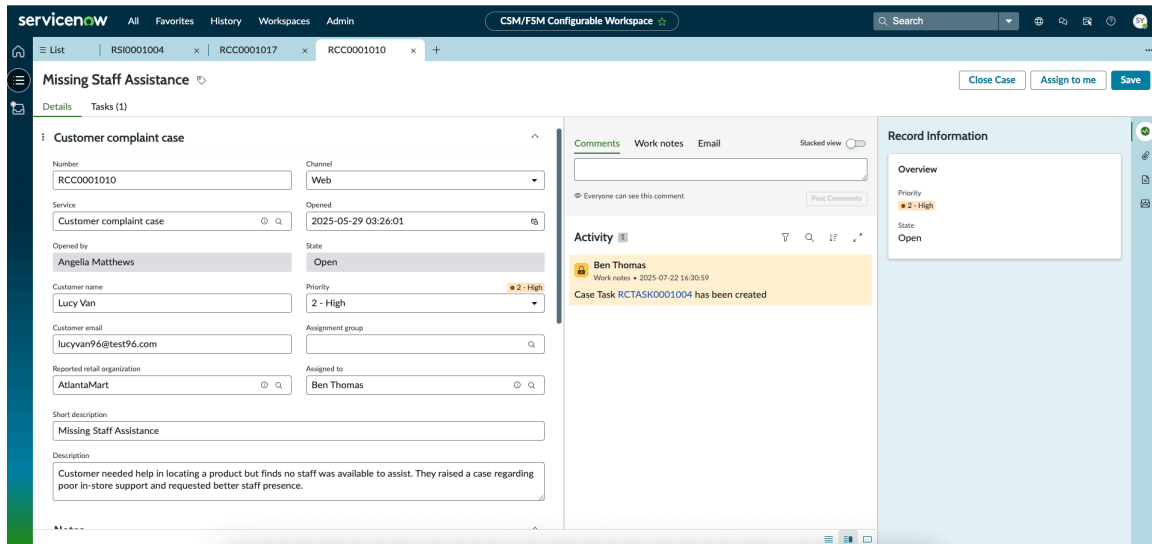
- Reduce errors and costs associated with operational questions, information, or issues.
- Reduce compliance issues and improves processes.
- Improve employee productivity.

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

For information on the components installed with store inquiry case type, see [Components installed with Retail Store Services](#).

Customer complaint case

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



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

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

For information on the components installed with customer complaint case, see [Components installed with Retail customer complaint](#).

HQ communications case

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

Case	Contact	Company	Channel	State	Priority	Assigned to	Updated
Testing HQ OPS Communication RHIC001001	(empty)	(empty)	Web	New	4 - Low	(empty)	2025-07-24 01:14:43

For information on the components installed with HQ communications case, see [Components installed with Retail HQ Operations](#).

In-store operations case

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

Case	Contact	Company	Channel	State	Priority	Assigned to	Updated
Testing in-store operation and task RIS0001001	(empty)	(empty)	Web	New	4 - Low	(empty)	2025-07-24 01:16:23

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

For information on the components installed with in-store operations case, see [Components installed with Retail In-store Operations](#).

Configuring Retail

Plan and configure your implementation of Retail.

Configuration overview

1. [Activate plugins](#)
2. [Assign roles to Retail users](#)

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

3. [Configure related party configurations](#)

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

4. [Create a retail organization](#)

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

5. Add members to a retail organization

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

6. Configure your organizational structure

Configure the structure of your retail organization within Retail Core.

7. Set up your retail support team

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

8. Add and configure the Retail KPI widget

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

Activate plugins

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

Before you begin

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

Role required: admin

About this task

The following items are installed with Retail:

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

For information about the components installed with each plugin, see respective associated links in [Components installed with plugins](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.

2. Find the Retail plugin using the filter criteria and search bar.

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

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

3. If you're prompted, follow the links to the ServiceNow® Store to get any additional entitlements for dependencies.

4. Select **Install**.

- Note:** When domain separation and delegated admin are enabled in an instance, the administrative user must be in the global domain. Otherwise, the following error appears: Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.

You will see a message after installation is completed.

Assign roles to Retail users

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

Before you begin

Role required: admin

About this task

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

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

Note:

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

For the list of roles included with each plugin, see the roles section in each of the plugin links in [Components installed with plugins](#).

For instructions on assigning roles to individual users, see [Assign a role to a group](#).

Procedure

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

Configure related party configurations

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

Before you begin

Role required: admin

About this task

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

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

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

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

For more information, see the Service Organizations responsibilities table in [Create related party configurations](#).

Procedure

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

Create a retail organization

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

Before you begin

Role required: admin

About this task

Procedure

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

Field	Description
Identification number	Alphanumeric code used for identifying this retail organization. This field is optional.
Name	The name of this retail organization.
Ownership	The ownership type of this retail organization. Options are:

Field	Description
	<ul style="list-style-type: none"> ○ Company owned ○ Franchise
Parent Service Organization	<p>The parent retail organization linked to this retail organization.</p> <p>Defines the hierarchy of the retail organizations that you create.</p>
Type	<p>The type of retail organization. Options are:</p> <ul style="list-style-type: none"> ○ Business Location ○ Business Group <p>If you want to create a region or area, select Business Group. If you want to create a store, select Business Location.</p>
Retail Subtype	<p>The retail subtype. Options are:</p> <ul style="list-style-type: none"> ○ Store ○ Region ○ Division ○ Area ○ District
Business Function	<p>Type of functions the business is involved with</p> <ul style="list-style-type: none"> ○ Type: Glide List ○ Choice list values: Service, Sales ○ Default choice: Service
Manager	<p>The manager associated with this retail organization.</p> <p>The user associated with this value is automatically assigned the Location Manager Contributor responsibility for this location.</p>
Flagship	<p>Indicates whether this retail organization is considered a flagship retail organization location.</p>
Street	<p>The street address at which this organization is located.</p>
City	<p>The city in which this organization is located.</p>
Country	<p>The country in which the organization is located.</p>
ZIP/Postal Code	<p>The ZIP/postal code associated with this organization's location.</p>
Phone	<p>The phone number associated with this retail organization.</p>

Field	Description
Email	The email address associated with this retail organization.
Website	The website associated with this retail organization.

5. Select **Submit**.

Add members to a retail organization

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

Before you begin

Role required: admin

Procedure

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

Field	Description
Retail Organization	The associated retail organization that the member should be added to.
Add Member	Denotes if this user is a new member or an existing member. If this user is an existing member, you can use the Members panel to select the person from the Available panel. Then, use the right arrow to move them into the Selected panel.
First Name	Member's first name.
Last Name	Member's last name or family name.
User ID	The associated user ID of this member.
Email	The email address associated with this member.
Member Type	The type of member. Options are: <ul style="list-style-type: none"> ○ Store associate ○ Store associate - Fulfiller ○ Store manager ○ Area manager ○ Area manager - Fulfiller

Field	Description
	<ul style="list-style-type: none"> ○ Regional manager ○ Regional manager - Fulfiller

5. Click **Submit**.

What to do next

Ensure that this member has the appropriate role. For more information, see [Assign roles to Retail users](#).

Configure your organizational structure

Configure the structure of your retail organization within Retail Core.

Before you begin

Role required: admin

About this task

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

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

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

Procedure

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

Set up your retail support team

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


Before you begin

Role required: admin

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

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

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

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

Procedure

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


Set up Retail Portal

Add and configure the Retail KPI widget

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


Before you begin

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

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

Role required: admin

Procedure

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

```
[
  {
    "title": "KPIs for area manager and regional manager",
    "relatedPartyTypes": [ "0598ebfd105a0e90f877992571046f22",
      "02a86f3510da0e90f877992571046f2e" ],
    "reports": [
```

```

{
  "report_id": "7e80564b43561210ae0a620465b8f2fc",
  "link": "/rsp?id=rsp_cases&category=escalated%20cases"
},
{
  "report_id": "8ec2120f43561210ae0a620465b8f253",
  "link":
  "/rsp?id=rsp_cases&category=action%20needed&sub_category=open%
20p1%20cases"
},
{
  "report_id": "e68538d743961210ae0a620465b8f2f2",
  "link":
  "/rsp?id=rsp_cases&category=action%20needed&sub_category=sla%2
0breached%20cases"
}
],
"order": 10
},
{
  "title": "KPIs for store manager fulfiller",
  "relatedPartyTypes": ["4c78677510de0e90f877992571046f17"],
  "reports": [
    {
      "report_id": "8ec2120f43561210ae0a620465b8f253",
      "link":
      "/rsp?id=rsp_cases&category=/action%20needed&sub_category=open%
20p1%20cases"
    },
    {
      "report_id": "f827385b43961210ae0a620465b8f2fe",
      "link":
      "/rsp?id=rsp_cases&category=cases&sub_category=unassigned"
    },
    {
      "report_id": "b297b45b43961210ae0a620465b8f272",
      "link":
      "/rsp?id=rsp_cases&category=cases&sub_category=my%20assigned%2
0cases"
    },
    {
      "report_id": "e68538d743961210ae0a620465b8f2f2",
      "link":
      "/rsp?id=rsp_cases&category=action%20needed&sub_category=sla%2
0breached%20cases"
    }
  ],
  "order": 20
},
{
  "title": "KPIs for store manager contributor",
  "relatedPartyTypes": ["36b4c8297701121080b68b457d5a9994"],
  "reports": [
    {
      "report_id": "8ec2120f43561210ae0a620465b8f253",

```

```

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20p1%20cases"
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20me"
},
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{
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"link":
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0breached%20cases"
}
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"order": 30
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"link":
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0cases"
},
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"link":
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},
{
"report_id": "8ec2120f43561210ae0a620465b8f253",
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20p1%20cases"
}
],
"order": 40
},
{
"title": "KPIs for store associate contributor",
"relatedPartyTypes": ["8d046b7d105a0e90f877992571046f3b"],
"reports": [
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"report_id": "85f7389b43961210ae0a620465b8f247",
"link":
"/rsp?id=rsp_cases&category=cases&sub_category=requested%20by%
20me"
}

```

```

},
{
  "report_id": "ed3cfc9343d61210ae0a620465b8f294",
  "link":
  "/rsp?id=rsp_cases&category=action%20needed&sub_category=await
ing%20info%20cases"
},
{
  "report_id": "8ec2120f43561210ae0a620465b8f253",
  "link":
  "/rsp?id=rsp_cases&category=action%20needed&sub_category=open%
20p1%20cases"
}
],
"order": 50
},
{
  "title": "KPIs for all users",
  "reports": [
    {
      "report_id": "8ec2120f43561210ae0a620465b8f253",
      "link":
      "/rsp?id=rsp_cases&category=action%20needed&sub_category=open%
20p1%20cases"
    },
    {
      "report_id": "b297b45b43961210ae0a620465b8f272",
      "link":
      "/rsp?id=rsp_cases&category=cases&sub_category=my%20assigned%2
0cases"
    },
    {
      "report_id": "85f7389b43961210ae0a620465b8f247",
      "link":
      "/rsp?id=rsp_cases&category=cases&sub_category=requested%20by%
20me"
    },
    {
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      "link": "/rsp?id=rsp_cases&category=escalated%20cases"
    }
  ],
  "order": 60
}
]

```

Note:

For more information, see [Retail KPI JSON parameters](#).

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

12. On the Instance form, fill in the fields.

13. Select **Save**.

Retail KPI JSON parameters

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

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

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

Manage customer complaints

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

For more information on customer complaints, see

- [Create and assign a retail customer complaint case in workspace](#)
- [Track a customer complaint case in Workspace](#)
- [Close a customer complaint case in workspace](#)
- [Customer complaint case](#)

Create and assign a retail customer complaint case in workspace

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

Before you begin

Roles required: sn_rtl_cs_cmplnt.agent, sn_rtl_cs_cmplnt.agent_manager

About this task

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

Procedure

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

Fields	Description
Service	Type of service request.

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

3. Select **Save**.

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

Note: View your existing tasks by selecting **Task** related list, or create a task by selecting **New**.

Track a customer complaint case in Workspace

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

Before you begin

Roles required: sn_rtl_cs_cmplnt.agent, sn_rtl_cs_cmplnt.agent_manager

Procedure

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

Close a customer complaint case in workspace

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

Before you begin

Roles required: sn_rtl_cs_cmplnt.agent, sn_rtl_cs_cmplnt.agent_manager

Procedure

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

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

Manage store inquiries

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

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

- [Create a store inquiry case from the Retail portal](#)
- [Manage a store inquiry case from the Retail Portal](#)
- [Track a store inquiry case from Retail portal](#)
- [Create a store inquiry case from a mobile app](#)
- [Manage a store inquiry case from a mobile app](#)
- [Track a store inquiry case from a Retail mobile app](#)
- [Resolve a store inquiry support request in workspace](#)
- [Store inquiry case](#)

Create a store inquiry case from the Retail portal

Create a retail store inquiry case from the Retail portal to report issues on behalf of the store that you are associated with.

Before you begin

You must have the Retail Store services plugin installed.

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

About this task

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

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

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

Procedure

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

Fields	Description
Requesting store	Retail store that is making this request.
Priority	Sequence in which this case must be resolved, based on the impact and urgency.
Briefly describe your policy inquiry	Brief description about this request.
Detailed description of the inquiry, including any specific questions	Details about this request.

3. Select **Submit**.

Manage a store inquiry case from the Retail Portal

Accept, reject, or close a store inquiry case from the Retail Portal.

Before you begin

Role required: Store associate, Store manager

Procedure

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

Track a store inquiry case from Retail portal

Track the status of a store inquiry case from the Retail portal.

Before you begin

Role required: Store associate, Store manager

Procedure

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

Create a store inquiry case from a mobile app

Create a store inquiry case from a mobile app to report issues on behalf of the store that you are associated with.

Before you begin

Role required: Store associate, Store manager

Procedure

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

Fields	Description
Requesting store	Retail store that is making this request.
Priority	Sequence in which this case must be resolved, based on the impact and urgency.
Briefly describe your policy inquiry	Brief description about this request.
Detailed description of the inquiry including any specific questions	Details about this request.

Manage a store inquiry case from a mobile app

Manage a store inquiry case from a mobile app by accepting or rejecting a proposed solution.

Before you begin

Role required: Store associate, Store manager

Procedure

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

Track a store inquiry case from a Retail mobile app

Track the status of a store inquiry case from a mobile app.

Before you begin

Role required: Store associate, Store manager

Procedure

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

Resolve a store inquiry support request in workspace

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

Before you begin

Role required: sn_rtl_stre_servcs.agent, sn_rtl_stre_servcs.agent_manager

Procedure

1. Navigate to **Lists > Retail Store Inquiry Cases > All**.
2. Select **My Open Cases** to open the case and work on it.
3. Select **Assign to me** to self-assign the case or then select **Accept** to work on it.
4. Select **Request Info** to request for more info on the case details.
The case state changes to Awaiting Info, in such scenario. Store persona provides more info and then the state changes to Open.
5. Select **Propose Solution** to propose a solution by adding the following resolution details.

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

Track cases and tasks from Retail portal

Track store inquiry cases from the Retail portal.

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

- [Track your cases and tasks from the Retail portal](#)
- [View your organization's knowledge articles from the Retail portal](#)
- [View your associated retail organizations from the Retail portal](#)

Track your cases and tasks from the Retail portal

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

Before you begin

Role required: Store associate, Store Manager, Regional Manager

Procedure

1. From the Retail portal, navigate to **Cases & tasks**.
2. From the Categories list, filter the displayed cases by selecting a category.
 - Action needed: Open P1 cases, Awaiting info cases, or Service Level Agreement (SLA) breached cases.
 - Cases: All cases that are assigned to your current assigned cases, unassigned cases, or cases requested by you.
 - Escalated cases: Cases that are currently in an escalated state.
 - Tasks: All tasks to be fulfilled by retail personas that are assigned to you, unassigned, or recently updated.
3. Select a case to see the details about it.

View your organization's knowledge articles from the Retail portal

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

Before you begin

Role required: Store associate, Store manager, Regional manager

Procedure

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

View your associated retail organizations from the Retail portal

Track your associated retail organizations from the Retail portal.

Before you begin

Role required: Store associate, Store manager, Regional manager

Procedure

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

Retail reference

Reference topics provide additional information about Retail components.

Components installed with plugins

Several types of components such as tables, user roles, and business rule are installed when you activate the plugins in Retail.

To see the components installed with each plugin, see:

- [Components installed with Retail core overview](#)
- [Components installed with Retail Mobile](#)
- [Components installed with Retail Store Services](#)
- [Components installed with Retail customer complaint](#)
- [Components installed with Retail HQ Operations](#)
- [Components installed with Retail In-store Operations](#)

Components installed with Retail core overview

Several types of components such as tables, user roles, and business rule are installed when you activate the Retail Core.

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

Tables installed with Retail Core

Table name	Description
Retail Task sn_retail_task	Stores information about the task details.

Base roles installed with Retail Core

For information on configuring these roles for retail, see [Assign roles to Retail users](#).

Role	Description	Contains roles
sn_retail.associate_contributor	Create, review, and comment on retail cases for the location in which the user is associated.	<ul style="list-style-type: none"> sn_customerservice.service_organization_co sn_retail.case_creator sn_retail.org_viewer sn_retail.report_viewer
sn_retail.associate_fulfiller	Creates, updates, and resolves retail cases associated with the location in which the user is associated.	<ul style="list-style-type: none"> sn_customerservice.svc_location_agent sn_retail.case_creator sn_retail.org_viewer sn_retail.report_viewer
sn_retail.support_agent	Creates, updates, resolves, and tracks retail cases across service organizations at the system level.	<ul style="list-style-type: none"> sn_customerservice_agent sn_retail.case_creator sn_retail.org_viewer sn_retail.report_viewer
sn_retail.manager_contributor	Creates, reviews, and monitors all retail cases for the location and hierarchy for the location in which the user is associated.	<ul style="list-style-type: none"> sn_customerservice.svc_location_manager_c sn_retail.associate_contributor sn_retail.report_viewer
sn_retail.manager_fulfiller	Creates, updates, and resolves retail cases for the location and hierarchy in which the user is associated.	<ul style="list-style-type: none"> sn_customerservice.svc_location_manager sn_retail.associate_fulfiller sn_retail.report_viewer

Related Party Configurations installed with Retail Core

Name	Default responsibility
Store Associate	Location Contributor

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

Plugins installed with Retail Core

Name	Description
Business Location [com.snc.business_location]	This plugin supports the Service Model Foundation, where the corporation does business with customers through physical channels such as stores and branches. For more information, see Configure Service Model Foundation .
Customer Service [com.sn_customerservice]	The Customer Service Management application enables you to provide service and support for your external customers using several communication channels, such as email, web, and telephone. A case is created to track the issue reported or service requested and assigned to groups or agents. Customer service agents in your organization work on the cases and resolve issues. For more information, see Customer Service Management .
CIWF UI Components (sn_ciwf_ui_cmpnt)	Includes common themes, widgets, and code artifacts for customer and industry workflow applications.

Table installed with Retail task

Retail task table

Field	Example
Name	RT00001
Subject	HQ creating a task to verify store tasks

Retail task table (continued)

Field	Example
Description	Verify if stores have completed tasks as per instructions
Requested by	HQ Agent
Due date	1 week from now (date/time)
Priority	Critical/High/Medium/Low
Assigned to	HQ Agent

Business rules installed with Retail Core

Business rule	Table	Rule criteria	Description
Add manager member for retail org	sn_customer_service_organization	After update or insert	Assigns the sn_retail.manager role to the user added as a manager in a retail organization.
Restrict SO update	sn_retail_organization	Before update	Restricts the user from updating the Service Organization field in the Retail Organization [sn_retail_organization] table.
Hide multistore child cases	sn_retail_case	Before Query	Filters retail cases whose parent's child case creation state is either none or Completed successfully.

Components installed with Retail Mobile

Certain dependencies must be considered when using the Retail Mobile plugin.

Plugins installed with Retail Mobile

Plugin Name	Description	Plugin Dependencies
Retail Mobile [com.sn_retail_mobile]	The Retail Mobile plugin offers a tailored mobile experience for retail operations, enabling frontline teams to efficiently manage store activities and resolve issues on the go. It provides real-time insights into key KPIs, supports issue tracking, and is compatible	<ul style="list-style-type: none"> • com.glide.sg • com.glide.sg.offline • com.glide.sg.agent_native_client • com.sn_retail_core

Plugin Name	Description	Plugin Dependencies
	with both Android and iOS platforms.	

Components installed with Retail Store Services

Certain roles and dependencies must be considered when using the Retail Store Services plugin.

Note:

- The Retail Store Services application installs the dependencies Retail Core and Retail Mobile.
- If Retail Core and Retail Mobile are already installed, then, only the com.sn_rtl_stre_servcs plugin gets installed with Retail Store Services.

Plugins installed with Retail Store Services

Plugin Name	Description	Plugin Dependencies
Retail Store Services [com.sn_rtl_stre_servcs]	This plugin facilitates streamlined communication between store teams and headquarters (HQ) regarding operational questions or issues. Store team members can request help directly from HQ, ensuring their day-to-day.	<ul style="list-style-type: none"> • com.sn_retail_core • com.sn_retail_mobile

Roles installed with Retail Store Services

Role	Description	Contains roles
sn_rtl_stre_servcs.agent	Create, update, and close store inquiry case across service organizations.	sn_retail.support_agent
sn_rtl_stre_servcs.agent_manager	Create, update, and close store inquiry case across service organizations.	<ul style="list-style-type: none"> • sn_rtl_stre_servcs.agent • sn_customerservice_manager
sn_rtl_stre_servcs.contributor	Create, update store inquiry case for their location.	

Components installed with Retail customer complaint

Certain roles and dependencies must be considered when using the Retail customer complaint plugin.

Plugins installed with Retail customer complaint

Plugin Name	Description	Plugin Dependencies
Retail Customer Complaint [com.sn_rtl_cs_cmplnt]	The customer complaint case type helps manage and resolve customer feedback related to store experiences. This case type enables customers to submit complaints anonymously to encourage honest feedback and help stores improve their service. This case type is included in the Retail customer complaint plugin.	<ul style="list-style-type: none"> com.sn_customerservice com.sn_retail_core

Roles installed with Retail Customer Complaint

Role	Description	Contains roles
sn_rtl_cs_cmplnt.agent	Create, update, and resolve retail complaint cases.	sn_retail.support_agent
sn_rtl_cs_cmplnt.agent_manager	Create, update, resolve, and manage retail complaint cases.	<ul style="list-style-type: none"> sn_rtl_cs_cmplnt.agent sn_customerservice_manager

Components installed with Retail HQ Operations

Certain roles and dependencies must be considered when using the Retail HQ Operations plugin.

Plugins installed with Retail HQ Operations

Plugin Name	Description	Plugin Dependencies
Retail HQ Operations [com.sn_rtl_hq_ops]	The Retail HQ Operations plugin enables effective coordination between HQ teams. It facilitates the execution of assigned work and allows HQ teams to monitor progress.	com.sn_retail_core

Roles installed with Retail HQ Operations

Role	Description	Contains roles
sn_rtl_hq_ops.agent	Create, update, and resolve HQ communications case.	sn_retail.support_agent

Role	Description	Contains roles
sn_rtl_hq_ops.agent_manager	Create, update, and resolve HQ communications case. The agent manager also manages the agents.	<ul style="list-style-type: none"> • sn_rtl_hq_ops.agent • sn_customerservice_manager
sn_rtl_hq_ops.location_agent	Create, update, and resolve HQ communications case for their location.	sn_retail.associate_fulfiller
sn_rtl_hq_ops.location_agent	Create, update, and resolve HQ communications case for their location.	<ul style="list-style-type: none"> • sn_rtl_hq_ops.location_agent • sn_retail.manager_fulfiller

Components installed with Retail In-store Operations

Certain roles and dependencies must be considered when using the Retail In-store Operations plugin.

Plugins installed with Retail In-store Operations

Plugin Name	Description	Plugin Dependencies
Retail In-store Operations [com.sn_rtl_in_store_ops]	The Retail In-store Operations plugin allows store team members to report and track in-store operational issues, whether for routine or cyclical demands. This ensures that issues are documented and monitored for consistent execution and support.	<ul style="list-style-type: none"> • com.sn_retail_core • com.sn_retail_mobile • com.snc.work_management

Roles installed with Retail In-store Operations

Role	Description	Contains roles
sn_rtl_in_store_ops.associate	Create, update, and close Store Operations case for their stores. Can view and close Store tasks for their stores.	<ul style="list-style-type: none"> • sn_retail.associate_fulfiller • wm_location_agent
sn_rtl_in_store_ops.manager	Can Create, update, and close Store Operations case for the stores and associated child locations they manage. Can create, update, and close Store tasks and assign tasks to others in the stores and associated child locations they manage.	<ul style="list-style-type: none"> • sn_rtl_in_store_ops.associate • sn_retail.manager_fulfiller • wm_location_assignment_manager

Table for in-store operations task

In-store operations task table

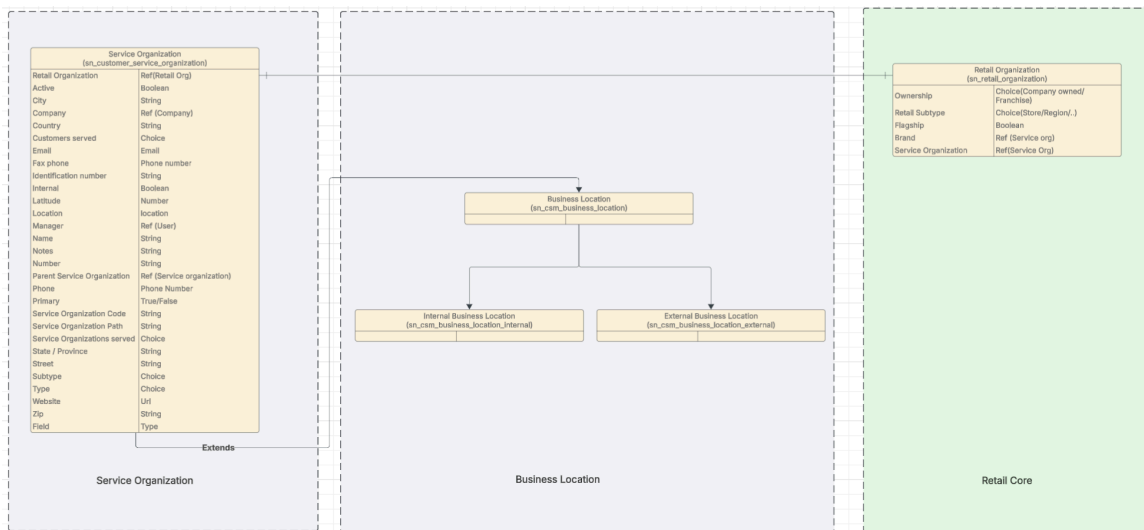
Field	Example
Number	RIS00001
Short description	Aisle 2 and 9 needs clean-up
Description	Aisle 2 and 9 is cluttered and lot of products are on the floor
Priority	High/Medium/Low
Assignment Group	Store Managers Group
Assigned to	Store Manager
Requesting retail Organization	Store of the persona, who is creating the case
Supporting retail organization	Same as requesting retail organization
Due Date	2 hours from now (date/time)

Retail organization data model

Learn about the Retail Core application by viewing the data model and role relationship diagrams. This diagram shows the relationship between the tables and roles within the application.

Data model

Retail Core provides you with a flexible data model that you can extend and leverage to fit your needs.



Retail organization data model tables

Tables configured within the Retail Operations application enable you to determine the data model, tasks, and product offerings for your Retail Operations workflows.

Retail organization table

The Retail organization [sn_retail_organization] table stores information about your retail organizations.

The Retail organization [sn_retail_organization] table has a one-to-one relationship with the Service Organization [sn_customer_service_organization] table.

Service Organization [sn_customer_service_organization] has an attribute of Retail Organization.

Retail-specific attributes should be maintained in this table.

Field	Description
Ownership	The ownership type of this retail organization. Options are: <ul style="list-style-type: none"> • Company owned • Franchise
Brand	The associated brand of this retail organization.
Service Organization	The associated service organization.
Retail Subtype	The retail subtype. Options are: <ul style="list-style-type: none"> • Store • Region • Division • Area • District
Flagship	Indicates whether this is considered a flagship retail organization location.

Retail case table

The Retail case [sn_retail_case] table stores information about your retail case types and provides the basis for retail case creation.

The Retail case [sn_retail_case] table extends the Customer Service Management case table. All functionality used through the Customer Service Management case remains intact.

The Retail case [sn_retail_case] table can be extended to expand the flow and logic for retail use cases.

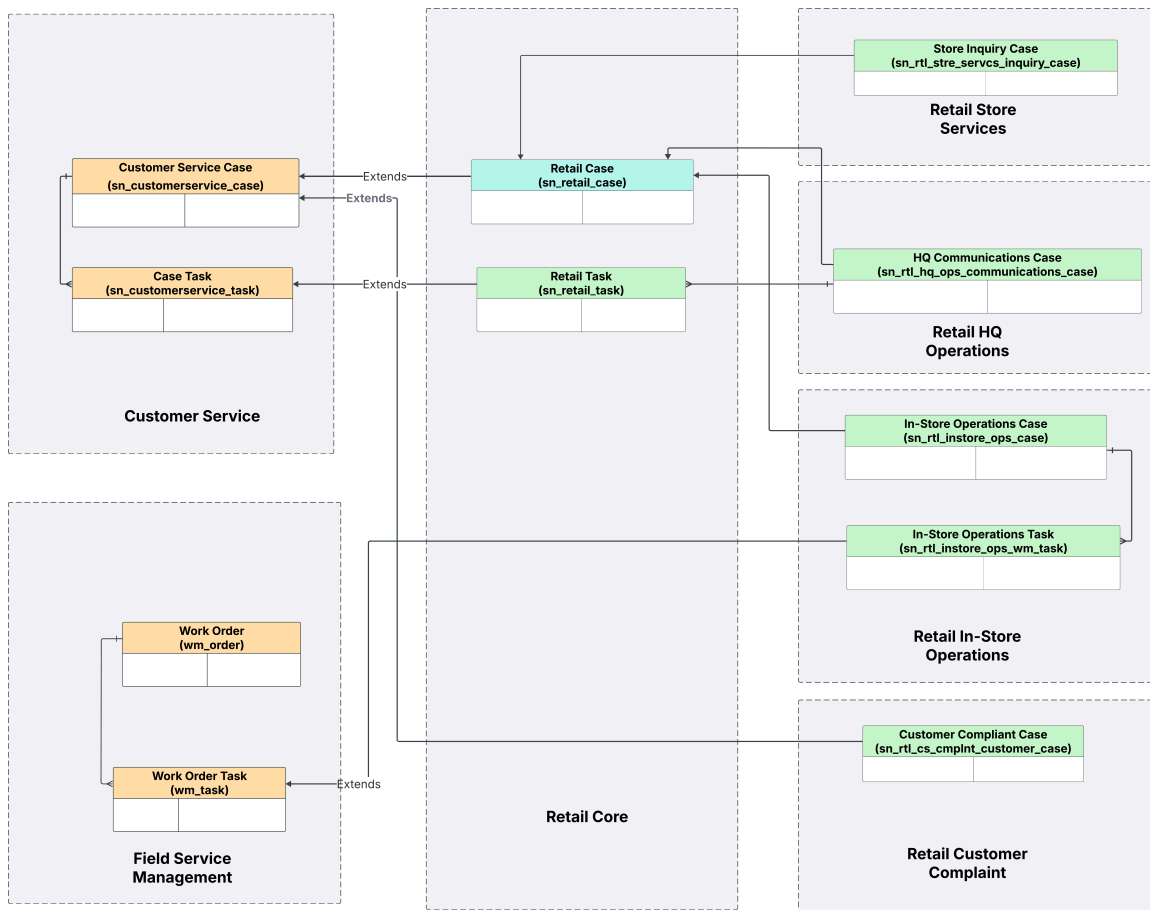
Field	Description
Number	Numerical code indicating the case number for this request.
Requested by	Internal user associated with this request.

Field	Description
Requesting Retail Organization	Retail organization this request is being created for.
Supporting Retail Organization	Retail organization responsible for fulfilling this request.
Short description	A short description of this request's purpose.
Description	A detailed description of this request's purpose.
Opened	Date and time at which this request was opened.
Priority	Sequence in which this case must be resolved, based on impact and urgency.
Assignment Group	The associated assignment group responsible for working on this request.
Assigned to	Person primarily responsible for working on this request.

Retail unified case and task data model

Learn about the unified retail case and task data model which helps understand the relationships between various case and task tables within retail. These extensions are designed to support distinct operational needs such as managing customer complaints, store inquiries, in-store operations, and HQ communications.

Data model



Domain Separation in Retail Core

Domain separation is supported for Retail Core. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Verify that data goes into the proper domain for the application’s service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer’s message, the customer must be able to see the SP’s response. For more information on support levels, see [Application support for domain separation](#).





Retail use case

- For the retail case, the domain column is inherited from the customer service case.
- For retail organization, the 'domain_master' attribute receives information from the Service Organization.




Retail Task Management

Use the ServiceNow® Retail Task Management application to optimize the planning, organizing, and assigning of tasks to staff in your retail environment. The broader ServiceNow® platform offers many tools to streamline and optimize task management. The Retail Task Management application enables specific retail use cases with a case generator that can create cases for multiple retail locations at once.

Get started

<p>Explore</p>  <p>Learn more about Retail Task Management and how it's used.</p>	<p>Configure</p>  <p>Install Retail Task Management and configure your environment.</p>	
<p>Multi-store case</p>  <p>Create a multi-store case.</p>	<p>Reference</p>  <p>Get details about Retail Task Management components such as fields, tables, and properties.</p>	

Troubleshoot and get help

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

Exploring Retail Task Management

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

Retail Task Management overview

Retail Task Management builds on the Retail Core application to optimize processes around planning, organizing, assigning, and executing tasks in retail environments.

By using the Retail Task Management application, retail organizations can:

- Reduce errors and costs associated with tasks.
- Reduce compliance issues.
- Improve employee productivity.

Retail Task Management users

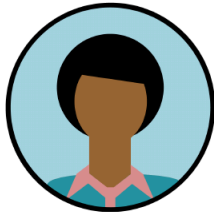
Users

User	Description
Store Associate	Store associates are responsible for on the ground task completion, along with standard job duties. They're often assigned tasks by store management, but if issues are found during task process they can be empowered to create work orders.
Store Manager	Store managers assign tasks to individual associates and coordinates between key parties. They're often responsible for logging issues and key paperwork.
Regional Manager	Regional managers oversee key issues involving the stores in their region. They're generally made aware of ad-hoc tasks being created, and can also be informed for issues found during routine tasks.
HQ Manager	Author of multi-store cases. Can create, monitor, and close multi-store cases.
Central Operations Support Agent	Central Operations support agents are responsible for making sure that stores are completing tasks on time, and if possible, helping resolve issues that arise.
Field Maintenance Technician	Field technicians are responsible for fixing some of the issues that can come up during tasks (for example, a store safety fix required).

Retail Task Management workflow



HQ Manager



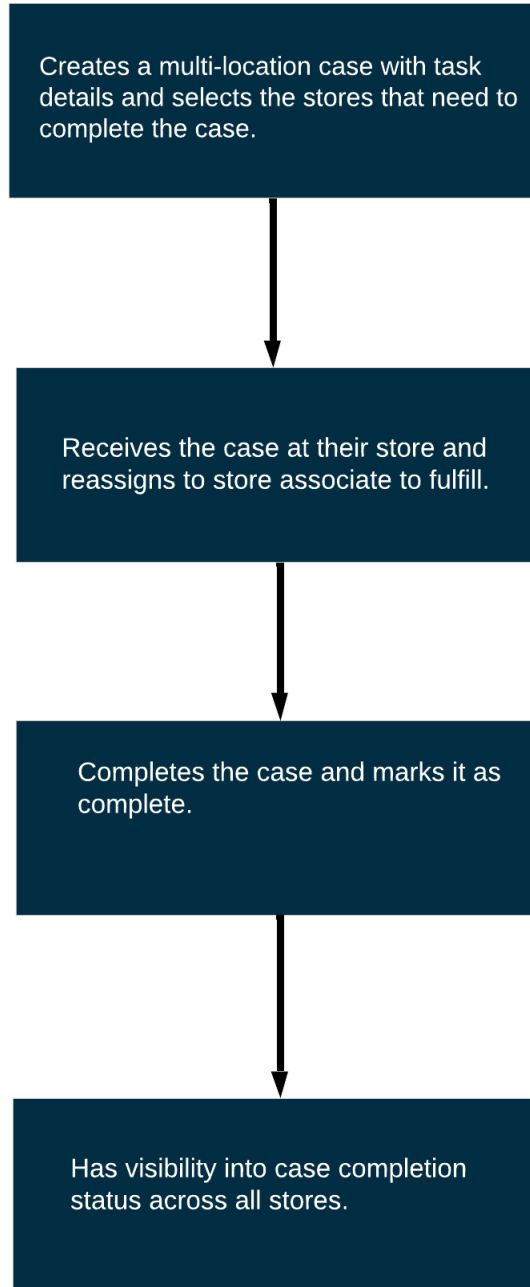
Store Manager



Store Associate



HQ Manager



1. A Retail Task Management administrator configures the application.
2. An HQ manager creates a multi-location case with case details and selects the stores that must complete the case.
3. A store manager receives the case at the store and reassigns to store associates for fulfillment.
4. A store associate completes the case and marks it as complete.
5. The HQ manager has visibility into case completion status across all stores.

Retail Task Management benefits

Benefit	Feature	Users
Use the multi-store case generator to assign work from HQ to multiple retail locations simultaneously. View and track these cases in the retail portal alongside other requests, monitoring completion status across all assigned locations.	Retail multi-store case	HQ Manager, Store Manager, Store Associate

What to explore next

To learn more about configuring and using Retail Task Management Core, see:

- [Exploring Retail Task Management](#)
- [Configuring Retail Task Management](#)
- [Create multi-store cases in Retail Task Management Core](#)
- [Retail Task Management reference](#)

Retail multi-store case

The retail multi-store case enables the creation of child cases along with relevant tasks for affected stores. The retail multi-store case also enables tracking at the store level granularity.

Multi-store cases can be leveraged for task management use cases such as promotions, freshness, product recall, and product counting.

This framework enables for a selection of affected retail stores which are participating in the multi-store use cases.

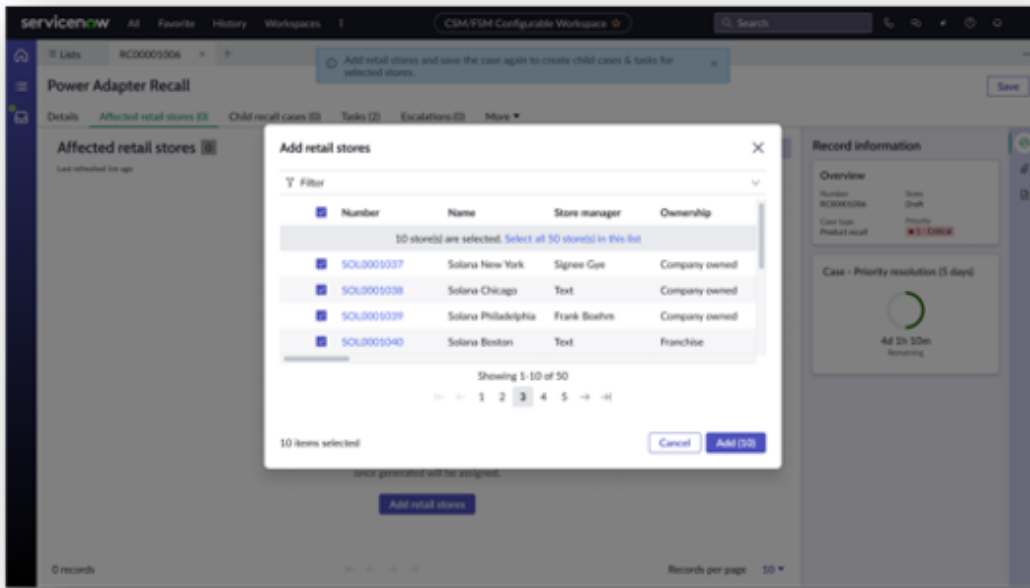
The retail multi-store case relies on the CSM table map entries created as part of the multi-case configuration in the new service definition that you create for creating multi-store cases.

For information on the setup process, see [Configuring Retail Task Management](#).

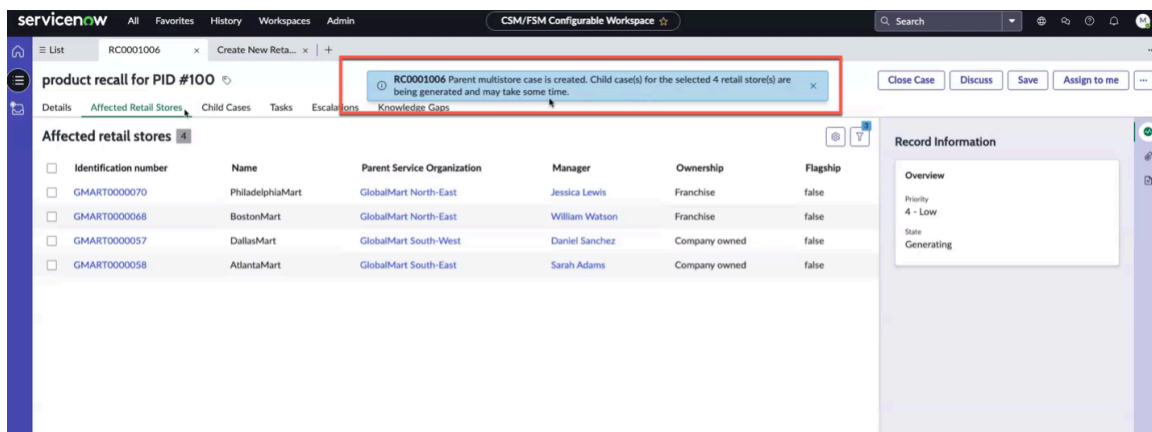
Retail multi-store case process

Using Retail Task Management Core, you can create a multi-store case for their retail organization using the CSM/FSM Configurable Workspace.

Once the case is saved, the **Affected Retail Stores** tab appears where you can select the stores for which child cases should be created.



After selecting the **Submitted** case, the parent multi-store case is saved and the child case creation process begins.



For more information on this process, see [Create multi-store cases in Retail Task Management Core](#).

Configuring Retail Task Management

Set up Retail Task Management Core.

Configuration overview

1. [Install Retail Task Management Core](#)
2. [Enable service selector for Retail Task Management Core](#)
3. [Configure service definitions for multi-store case creation for Retail Task Management Core](#)
4. [Create a CSM Table Map for Retail Task Management Core](#)

5. Create an entity in the Multiple Case Configuration table for multi-store creation in Retail Task Management Core
6. Create a service definition for multi-store cases in Retail Task Management Core

Install Retail Task Management Core

If you have the admin role, you can install the Retail Task Management Core application.

Before you begin

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

Role required: admin

About this task

The following items are installed with Retail Task Management Core:

- Roles
- Tables
- Plugins

For more information, see [Components installed with Retail Task Management](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Retail Task Management Core application using the filter criteria and search bar. You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow® Store. Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store.
3. If you're prompted, follow the links to the ServiceNow® Store to get any additional entitlements for dependencies.
4. Select **Install**.

Enable service selector for Retail Task Management Core

Activate the service selector to set up multi-store case capabilities.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Now Experience Framework > Declarative Actions > List Actions**.
2. Search for **Case Type Selector** under the **Specify Client Action** attribute.
3. Set **Active** to **true**.
4. Select **Update**.
5. **Note:** For users on releases prior to Utah only, the following additional steps must occur:

Navigate to **All > System Properties > All Properties**.

6. Search for the **sn_csm_case_types.service_definition_select** property.
7. Set **Value** to **true** to enable the 'Product Service Select' version of the Case Type Selector.
8. Select **Update**.

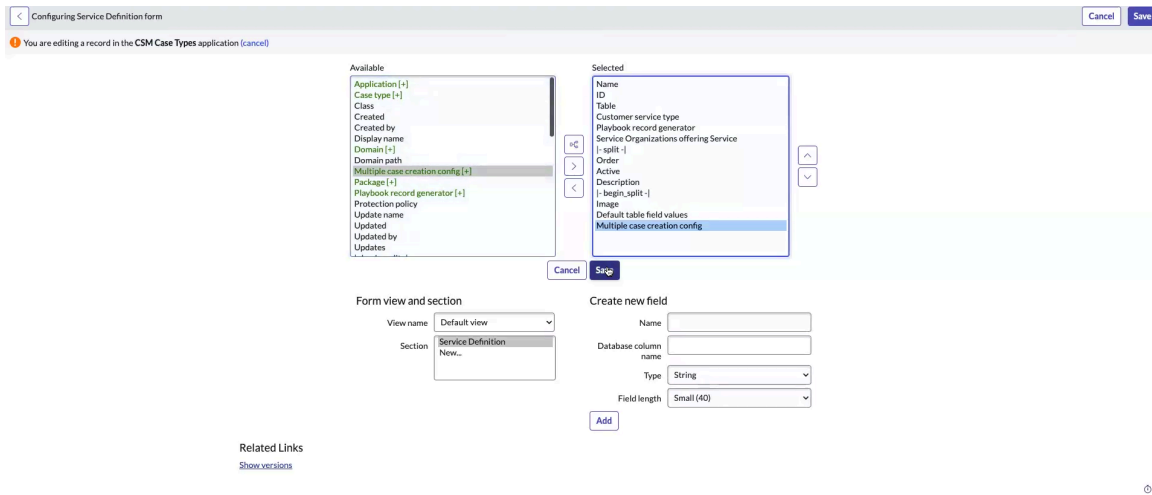
Result

The service selector is now active within the CSM/FSM Configurable Workspace for use with Retail Task Management Core.

Configure service definitions for multi-store case creation for Retail Task Management Core

Configure service definitions to include the Multiple case creation configuration field to create multi-store cases.

Before you begin
Role required: admin



Procedure

1. Navigate to **All > Service Definitions**.
2. Select and hold (or right-click) on the form header and select **Configure > Form Layout**.
3. Move the **Multiple case creation config** field from **Available** into **Selected**.
4. Select **Save**.

Result

Service definitions leveraging the multi-store case creation capability are enabled through use of the Multiple case creation config field.

Note: Ensure that the list view is configured to include the Parent Case related list and configure the form view to remove the "assigned to" field in the Parent Case.

Create a CSM Table Map for Retail Task Management Core

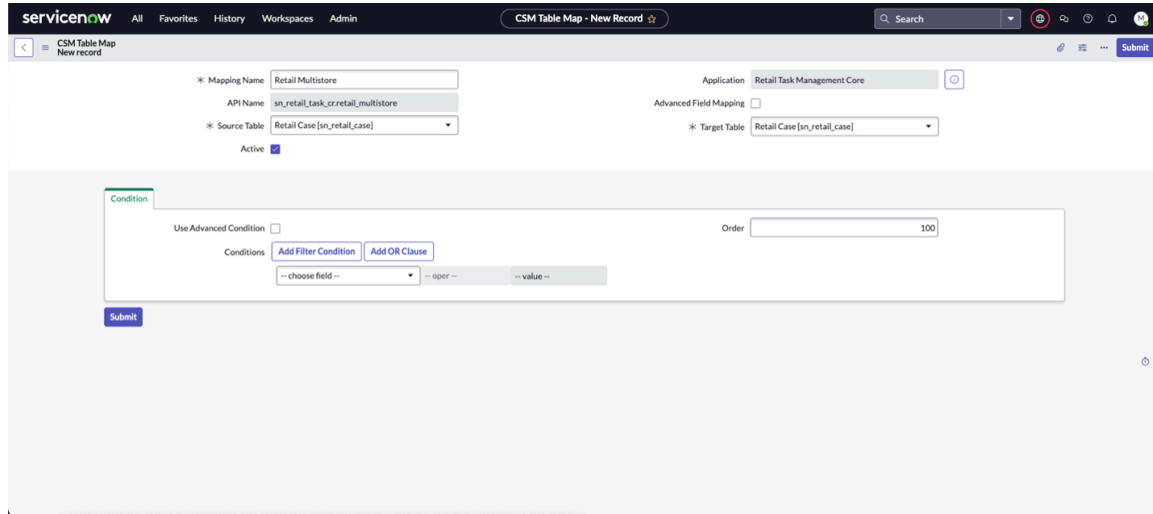
Create a CSM table map to create multi-store case configurations for use with your service definitions.

Before you begin

Role required: admin

Scope required: Retail Task Management Core.

About this task



In the preceding example, Retail Case is both the parent and child case type for this table mapping. This means that for parent cases of type Retail Case, child cases will also be of this type.

Procedure

1. Navigate to **All** and search for **csm_table_map.do**



2. Press enter.
3. In **CSM Table Map**, enter a mapping name.
4. In **Source Table**, select the desired parent table for your multi-store cases.
5. In **Target Table**, select the desired child table type for your multi-store cases.
6. Select **Submit**.

Result

Service definitions leveraging the multi-store case creation capability are now enabled through utilization of the Multiple case creation config field.

Once this mapping has been created, use the field mapping to define which fields are mapped from the parent to child case. This mapping should occur, at a minimum, for the following fields:

- Description
- Short description
- Priority

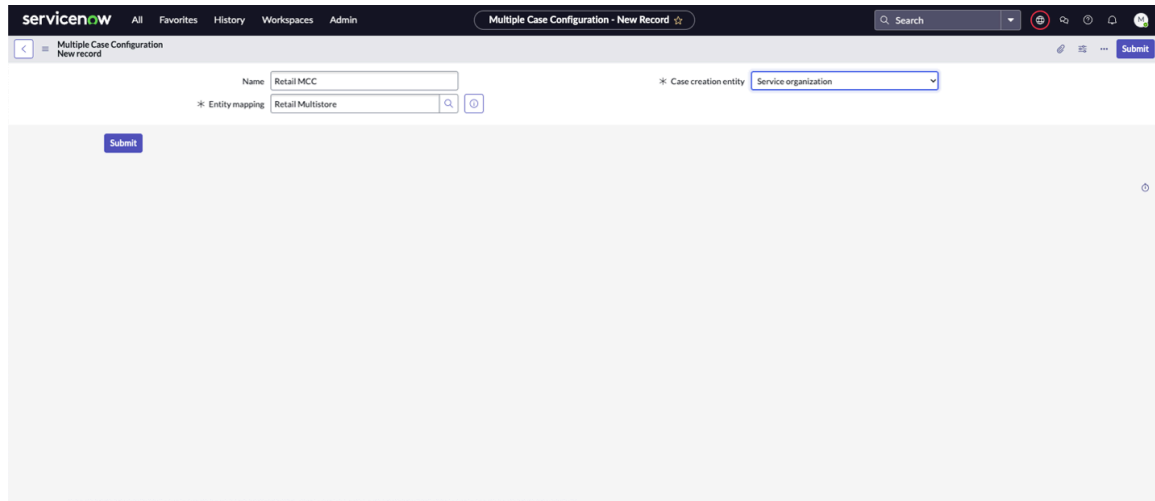
Create an entity in the Multiple Case Configuration table for multi-store creation in Retail Task Management Core

Create an entity in the multiple case creation config table based on the mapping that you created.

Before you begin

Role required: admin

About this task



Procedure

1. Navigate to **All** and search for **sn_case_creation_config.do**
2. Press enter.
3. In the **Multiple Case Configuration** table, fill in the following fields:

Field	Name
Name	A name for this multiple case configuration.
Entity mapping	Select the entity mapping for this multiple case configuration. This value determines what the source table and target tables are for this configuration.
Case creation entity	Specifies which field should create multiple cases.

Field	Name
	Select Service Organization .

4. Select **Save**.

Result

An entity has been created in the Multiple Case Configuration table.

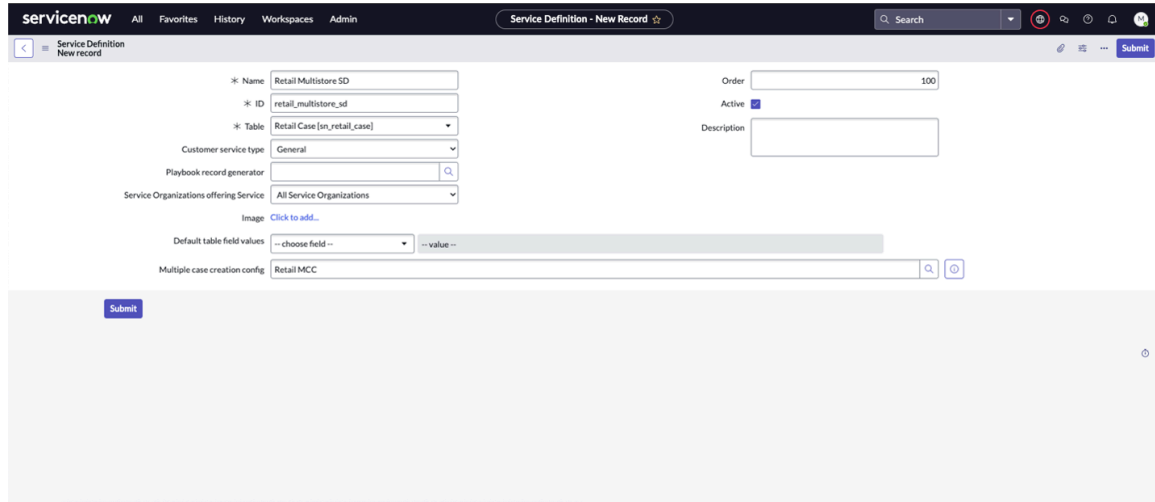
Create a service definition for multi-store cases in Retail Task Management Core

Create a service definition that leverages the multi-store creation engine to create multi-store retail cases.

Before you begin

Role required: admin

About this task



Procedure

1. Navigate to **All > Service Definitions**.
2. Fill in the **Name** and **ID** fields.
3. In the **Table** field, select **Retail Case [sn_retail_case]**.
4. In **Multiple case creation config**, select the Multiple Case Creation created for this service definition.

Note: For information, see [Create an entity in the Multiple Case Configuration table for multi-store creation in Retail Task Management Core](#).

5. Fill in other fields as needed.
For information on these fields, see .

Result

A new service definition has been created that can be leveraged to create multiple cases.

Create multi-store cases in Retail Task Management Core

Create multi-store cases that assign work from HQ to multiple retail locations simultaneously.

1. [Create a parent multi-store case in Retail Task Management Core](#)
2. [Manage child cases in Retail Task Management Core](#)
3. [Retail multi-store case states](#)

Create a parent multi-store case in Retail Task Management Core

Create a parent multi-store case for your retail organization using Retail Task Management Core.

Before you begin

Role required: sn_retail.support_agent

- Note:** If the child case creation fails due to platform or instance issues, there's no retry mechanism in place. As a result, the parent case is marked as **Canceled with error(s)**. In this situation, create a parent case from the beginning.

Procedure

1. In **CSM/FSM Configurable Workspace**, navigate to **Retail Cases**.
2. Select **New**.
3. In the service selector, select the service definition with multi-store case creation capabilities then select **Create case**.
4. In the multi-store retail case, fill in initial details as needed.
5. Select **Save**.

Once the initial case information is filled in and you save the case, the **Affected Retail Stores** tab appears. The **Affected Retail Stores** tab enables you to create child cases for the stores you select.

6. In the multi-store retail case, navigate to **Affected Retail Stores**.
7. Select **Add retail stores**.
8. Select the stores that you want added as child cases using the check box column and select **Add**.

Only retail stores are available for selection here as multi-store case creation doesn't include areas, regions, districts, or divisions.

You can also choose to select all.

9. Select **Save**.

Note:

Selecting Save doesn't submit the cases for creation. You can still add, edit, or remove cases until you select the **Submit case**. Then, the parent retail case is submitted, and the child cases creation process begins.

10. Once all child cases are added and reviewed, select **Submit case** to submit the parent case. The child cases then begin to generate.

11. Once the case has been submitted, a new related list called **Child cases** appears which will display all child cases created for this parent case after the generation process has completed.
12. **Optional:** Use the Tasks related lists to add any tasks to this parent case.
13. **Optional:** Use the Escalate case or Report Knowledge Gap from the more menu as needed.
14. Once all child cases have been sufficiently closed, use **Close Case** to close the parent case.

Manage child cases in Retail Task Management Core

You can manage child cases created from a parent multi-store case in Retail Task Management Core.

Before you begin

Role required: sn_retail.manager_fulfiller

Responsibility required: Store Manager – Fulfiller.

For information on adding roles and responsibilities, see [Assign roles to Retail users](#).

About this task

Child cases created from a multi-store case can be reassigned to users with the sn_retail.associate_fulfiller role for fulfillment, or fulfilled by managers themselves.

Procedure

1. In CSM/FSM Configurable Workspace, navigate to **Retail Cases**.
2. Select the Retail case that you want to manage.
3. Use the **Assigned to** field to assign the case as needed.
4. Note that in the **Activity** panel, the parent case number is listed.
5. Fulfill the case and manage as needed.

Retail multi-store case states

The following table lists all possible states for the Retail multi-store parent case.

Retail multi-store parent case states

The following table lists all possible states for the Retail multi-store parent case.

State	Description
Draft	Indicates that parent case is still in draft state and hasn't yet been submitted.
Generating	Indicates that the parent case has been submitted, and child cases are currently being generated.
Open	Indicates that the parent case is open.
Canceled with error(s)	Indicates that the parent case has been canceled, typically due to an instance or platform issue. Any child cases that were generated will be canceled automatically, and this parent case must be re-created.
Closed	Indicates that the parent case is closed.

Retail multi-store child case states

State	Description
New	Indicates that the child case is newly created.
Open	Indicates that the child case is open.
Canceled with error(s)	Indicates that the parent case has been canceled, typically due to an instance or platform issue. Any child cases that were generated are automatically, and this parent case must be re-created.
Resolved	Indicates that the child case has been marked as resolved.
Closed	Indicates that the child case is closed.

Retail Task Management reference

Reference topics provide additional information about Retail Task Management components.

Components installed with Retail Task Management

Several types of components such as tables, user roles, and business rule are installed when you activate the Retail Task Management plugin.

Plugins installed with Retail Task Management Core

Name	Description
Retail core com.sn_retail_core	Provides the retail base case functionality and roles used in Retail Task Management Core.
Multi-case creation com.sn_multi_case_creation	Provides the framework for multi-store case creation.

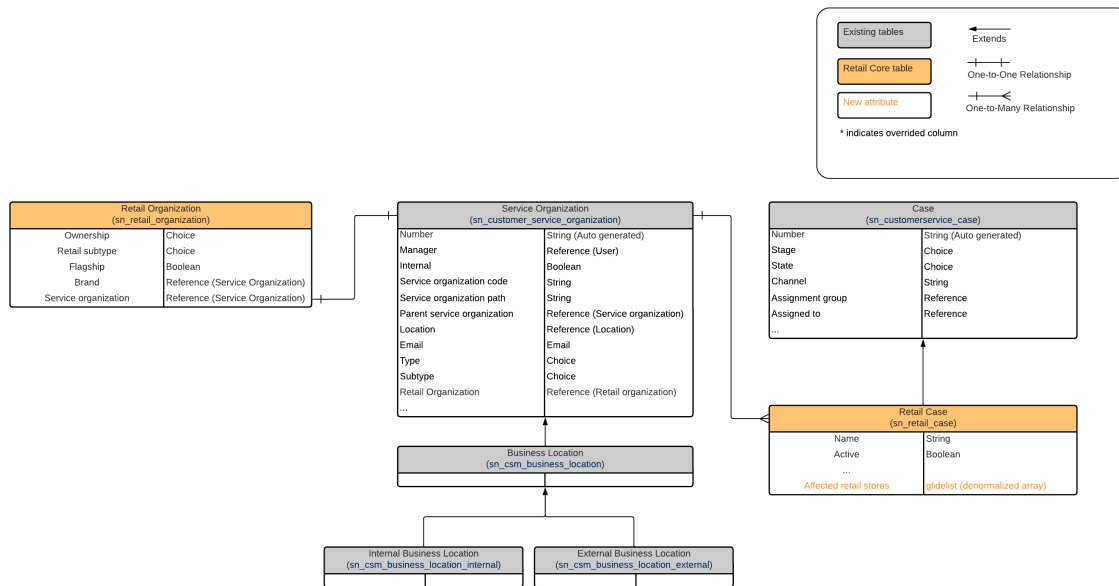
Note:

If Retail Core is already installed, then only the **com.sn_multi_case_creation** plugin installs with Retail Task Management Core.

Retail Task Management Core data model

Learn about the Retail Task Management application by viewing the data model and role relationship diagrams. These diagrams show the relationships between the tables and roles within the application and provide an overall picture of how the Retail Task Management application operates.

Retail Task Management data model



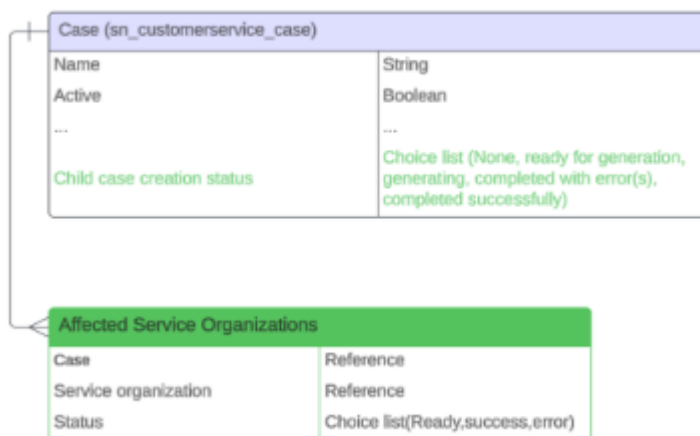
Installing Retail Task Management Core introduces the **Affected retail stores** field into the Retail case [sn_retail_case] table.

The **Affected retail stores** field in the Retail case [sn_retail_case] table is used to generate affected retail stores within a list for the multiple case creation context.

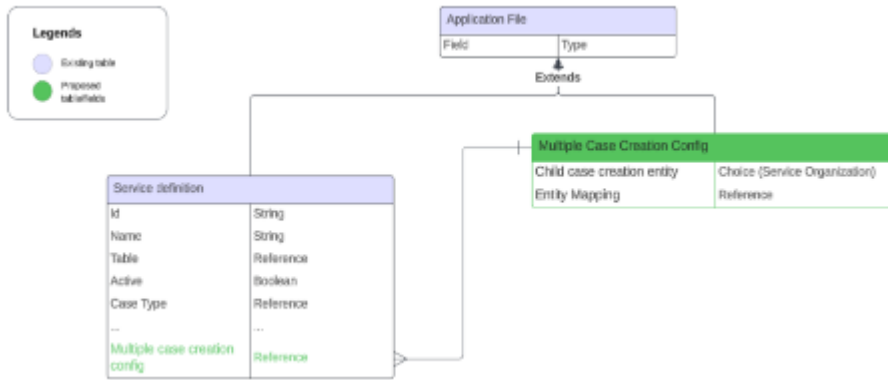
Changes introduced by the Multi-case creation framework plugin

Installing Retail Task Management Core automatically installs the Multi-case creation plugin, adding a new internal field child case creation status to track the state of child case creation. If child case creation is completed successfully, the main State field of the parent case is set to Open.

The Multi-case creation plugin also introduces a new internal table Affected Service Organizations. This table maintains a many-to-one mapping between Service Organizations (SOs) and Cases.



Note: Both the child case creation status field and the Affected Service Organizations table are hidden from end users. They're only used internally by the multi-case engine to manage and track case creation processes.



Installing the Multi-case creation plugin adds the Multiple case creation config field into the Service Definition table. This field references a new table, Multi Case Creation Config, which is also created during the plugin installation.

The Multi Case Creation Config table holds the necessary information for multiple case creations.

For more detailed information on how these fields are involved with the multi-store creation process, refer to [Configuring Retail Task Management](#).