Zurich Retail Industry

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Retail

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

Get started

Explore

Learn more about the benefits of Retail and how it's used.

Configure

Install Retail and configure your environment.

Manage customer complaints

Create, track, and close customer complaint cases in Workspace.

Manage store inquiries

Create, manage, track, and resolve the store inquiries through the retail portal, workspace, or mobile app.

Track store inquiry cases

Track store inquiry cases from the Retail portal.

Reference

Get details about Retail components such as fields, tables, and properties.

Track and monitor store plans

Track and monitor store plans from the workspace.

Now assist for Retail

Use Now Assist for Retail to enhance user productivity and efficiency through proactive experiences using generative AI.

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.

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

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.

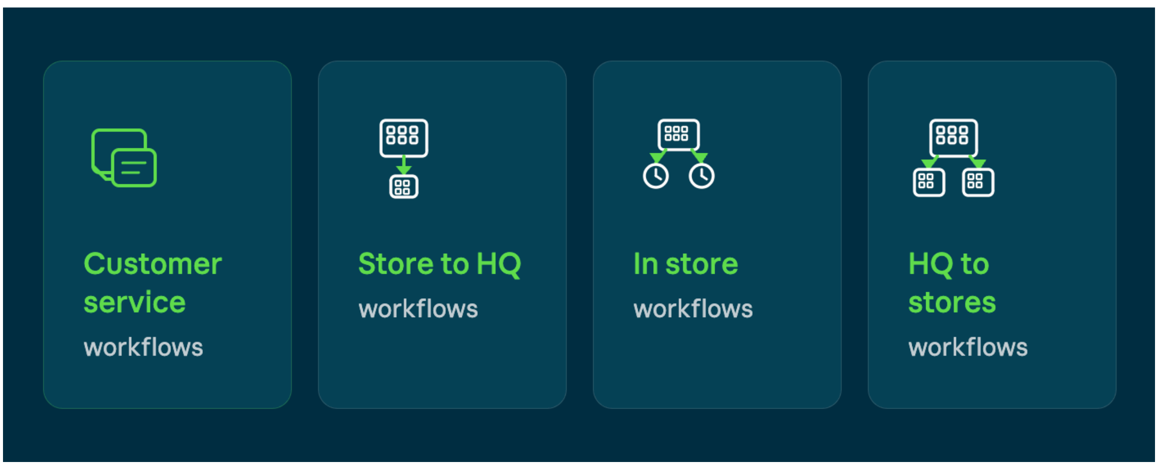
Users (continued)

User	Description
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
- Tracking cases and tasks from the Retail portal
- Retail reference

Retail case overview

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

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

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

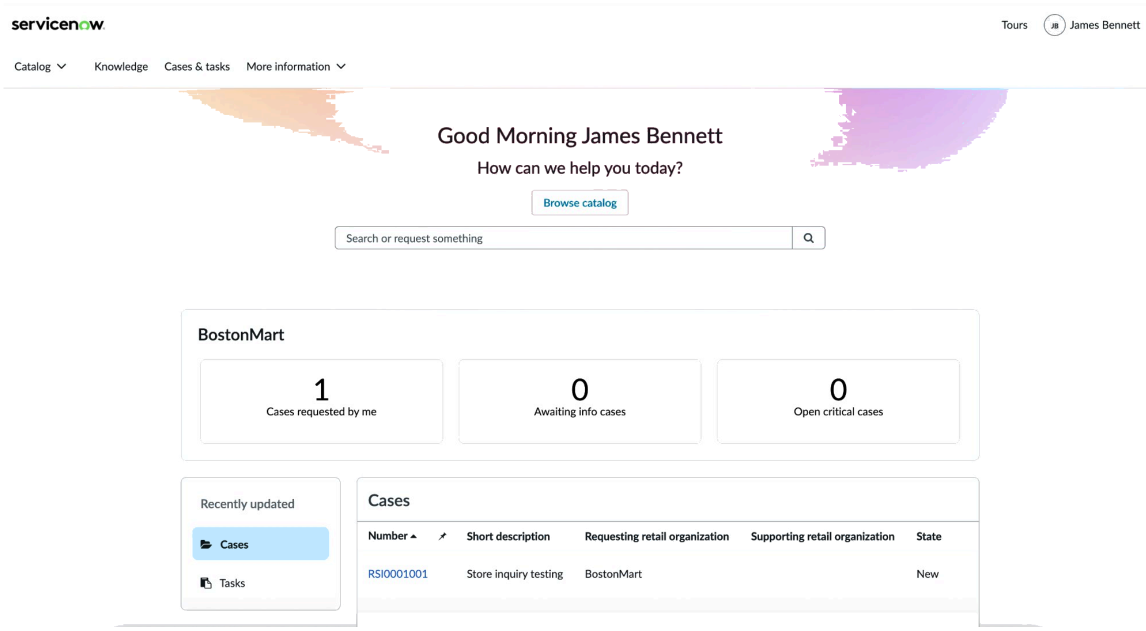
The retail case type introduced within retail builds on existing Customer Service Management case functionality to provide users with retail-specific fields. For more information on these changes, see the Impact analysis and guidance: Retail case table updates [KB2216547] article in the Now Support Knowledge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

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

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

Retail portal

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



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.

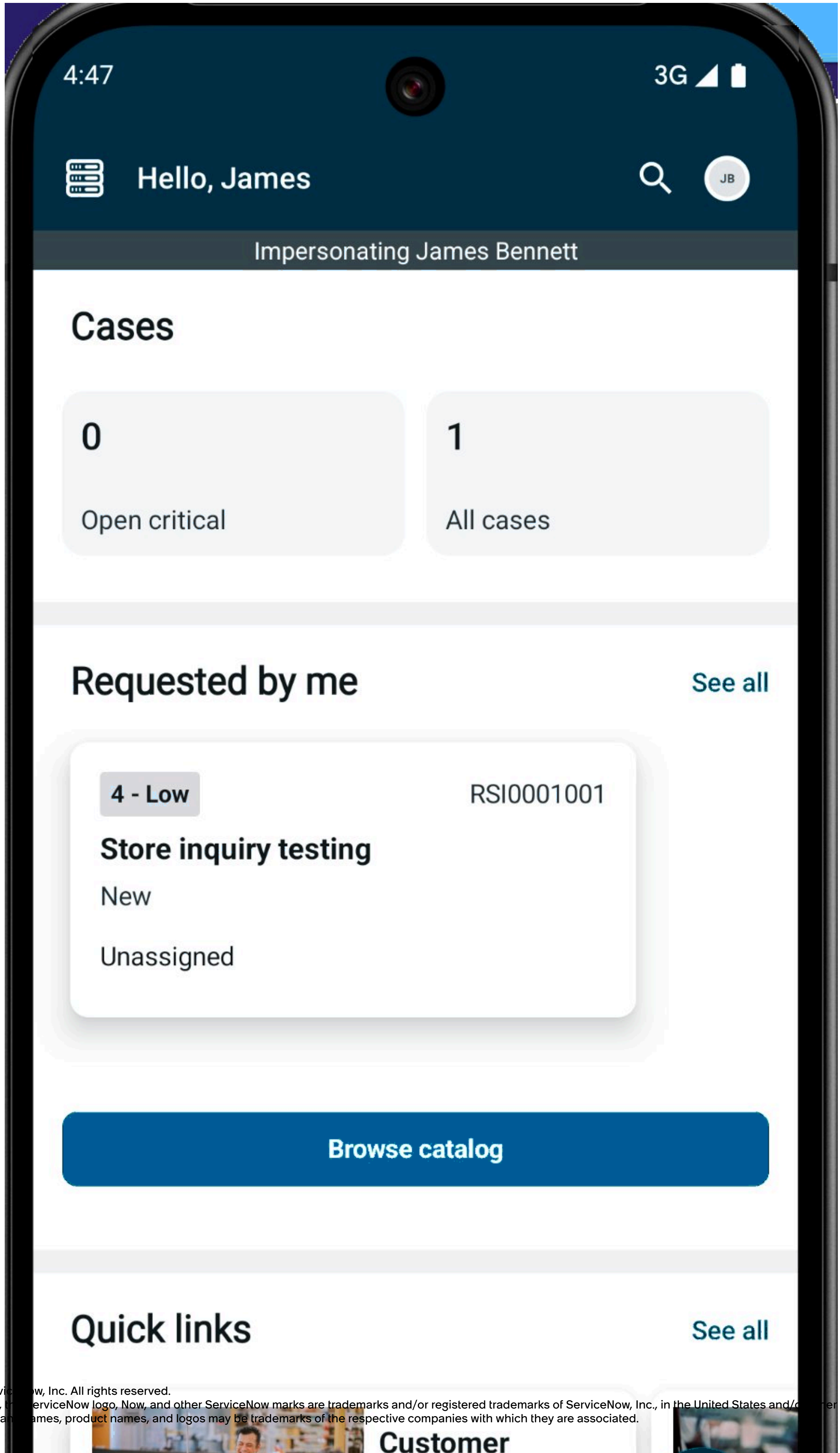
For information on using Retail portal, see the following topics:

- 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
- Tracking cases and tasks from the Retail portal

Retail mobile application

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

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.


4:47
3G
Hello, James
JB
Impersonating James Bennett
Cases
0
Open critical
1
All cases
Requested by me
See all
4 - Low
RSI0001001
Store inquiry testing
New
Unassigned
Browse catalog
Quick links
See all
Customer

Menu Options

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

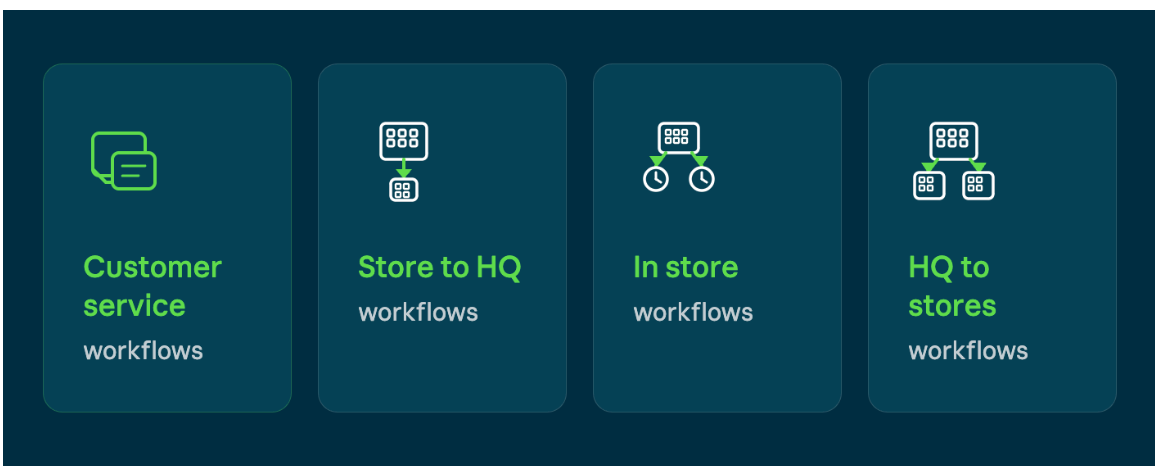
- **My Store**: includes all Store inquiry cases.
  - Cases: displays the Open Critical and All cases KPIs.
  - Requested by me: displays cases that are requested by you.
  - Quick links: displays the most frequently visited links.
  - Store details: displays the details of the store.
  - Store members: 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 the Retail mobile app
- Manage a store inquiry case from the Retail 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

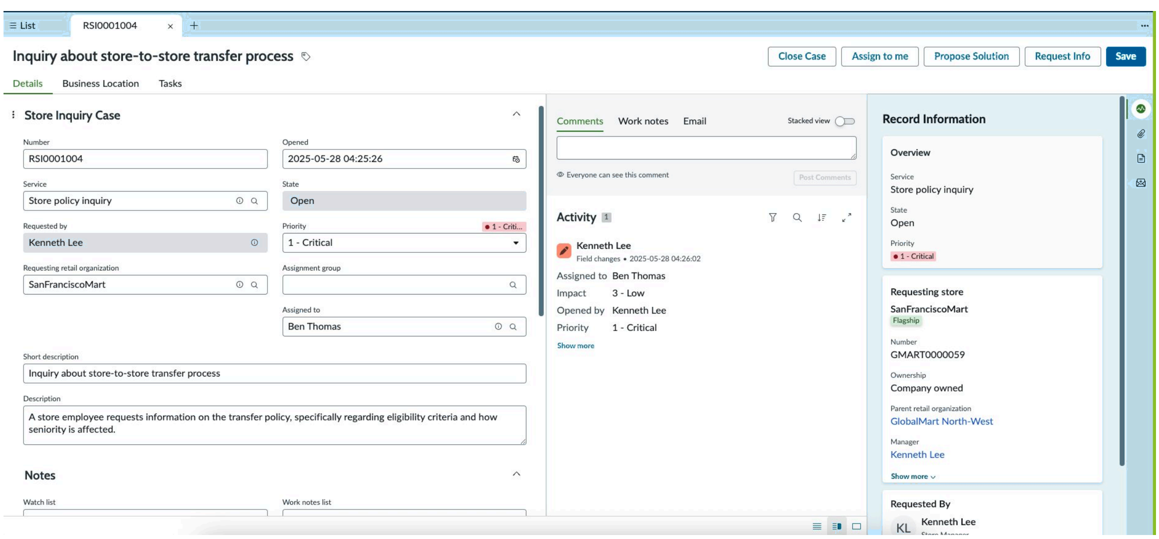
HQ communications case

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:

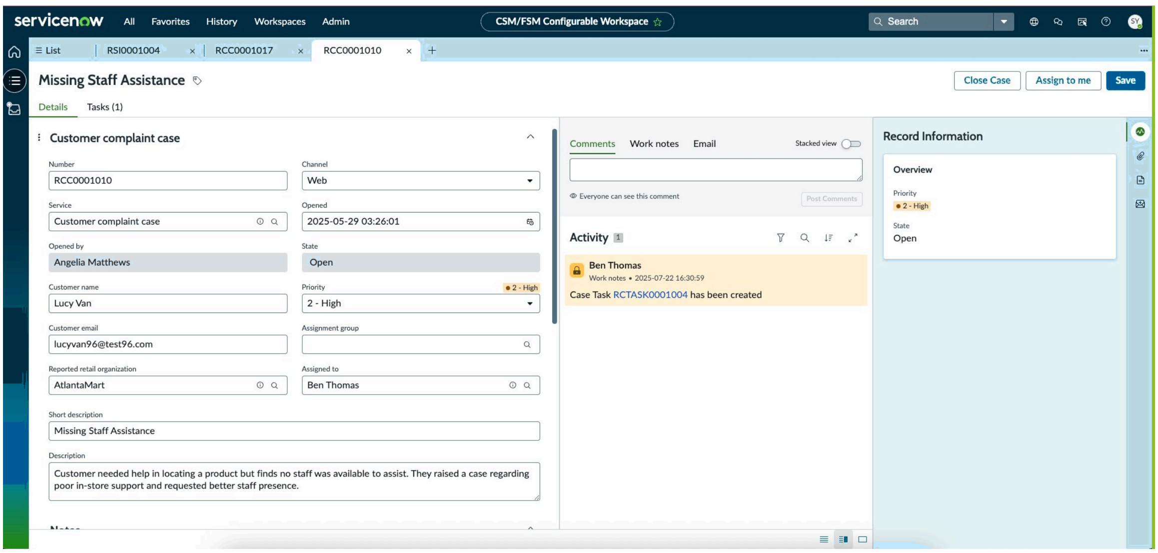
- Reduce errors and costs associated with operational questions, information, or issues.
- Reduce compliance issues and improves processes.
- Improve employee productivity.

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.

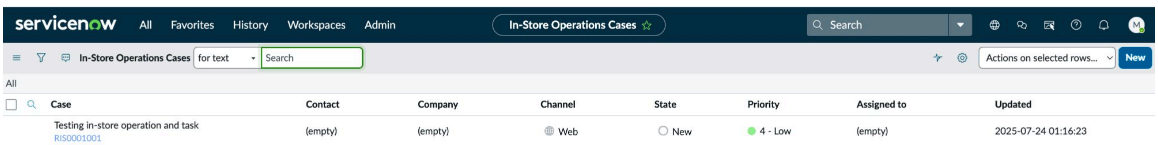
HQ communications case

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.

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

In-store operations case

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



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

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

Retail store plans

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

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

Retail store plans tracking

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

Once a plan is published and cases are generated, tracking gives plan authors a structured view of how each store is progressing.

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

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

Stages of store plan tracking and monitoring

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

1. Plan authoring - An HQ operations manager or regional manager creates a store plan that defines the plan type, tasks to be completed, store locations to assign, and a schedule (one-time or recurring). This phase exists entirely in the Store Plan Authoring capability released in March 2026. Execution Tracking does not begin here.
2. Plan publication and case generation - Once the plan is published, the system generates parent HQ cases and child store cases according to the schedule. Each store assignment produces one store case containing the relevant tasks. This is the moment execution tracking becomes relevant and plan authors now need to monitor what has been generated.
3. HQ case review - The parent HQ case aggregates the status of all store cases generated under a plan. HQ operations managers review the HQ case details on the store record page to understand the overall completion state and identify which stores are overdue. From here they can drill into individual store cases or escalate directly.
4. Store-level execution - Regional managers access the store case list for their region, drill into specific store cases, and review the tasks being worked. They can monitor task-level status, reassign work, or flag blockers. This is the primary execution layer — where stores actually complete the plan.
5. Task and case closure - Once store tasks are completed, HQ managers can view the state and close the HQ tasks and Store managers can view and close store tasks. The same playbook pattern is reused across both closure flows, creating a consistent interaction model. The HQ case closed state marks the end of the plan execution cycle for that store assignment.

Scenarios for tracking store plans

Tracking can support several operational goals.

HQ Manager:

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

Regional Manager:

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

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

Implementation details

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

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

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
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.

Field	Description
	This field is optional.
Name	The name of this retail organization.
Ownership	The ownership type of this retail organization. Options are: ○ Company owned ○ Franchise
Parent Service Organization	The parent retail organization linked to this retail organization. Defines the hierarchy of the retail organizations that you create.
Type	The type of retail organization. Options are: ○ Business Location ○ Business Group If you want to create a region or area, select Business Group. If you want to create a store, select Business Location.
Retail Subtype	The retail subtype. Options are: ○ Store ○ Region ○ Division ○ Area ○ District
Business Function	Type of functions the business is involved with ○ Type: Glide List ○ Choice list values: Service, Sales ○ Default choice: Service
Manager	The manager associated with this retail organization. The user associated with this value is automatically assigned the Location Manager Contributor responsibility for this location.
Flagship	Indicates whether this retail organization is considered a flagship retail organization location.
Street	The street address at which this organization is located.
City	The city in which this organization is located.

Field	Description
Country	The country in which the organization is located.
ZIP/Postal Code	The ZIP/postal code associated with this organization's location.
Phone	The phone number associated with this retail organization.
Email	The email address associated with this retail organization.
Website	The website associated with this retail organization.

5. Select **Submit.**

Add members to a retail organization

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

Before you begin
Role required: 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:

Field	Description
	◦ Store associate ◦ Store associate - Fulfiller ◦ Store manager ◦ Area manager ◦ Area manager - Fulfiller ◦ Regional manager ◦ Regional manager - Fulfiller

5. Click **Submit**.

What to do next

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

Configure your organizational structure

Configure the structure of your retail organization within Retail Core.

Before you begin

Role required: 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.

```
[
 {
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```

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```
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20me"
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0cases"
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 "link":
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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.
Customer name	Name of the customer. **Note:** The name of the customer might not get registered in the system.
Customer email	Email address of the customer.
Priority	Sequence in which this case must be re solved, based on the impact and urgency.
Assignment group	Associated assignment group that is responsi ble for working on this request.
Reported Retail Organization	Retail organization from which this request has been created.
Assigned to	Person who is responsible for working on this request.
Short description	Short description about this request.
Description	Details about this request.

3. Select **Save**.
4. Select the appropriate option to work on the case.

Field	Description
Assign to me	Self-assign the case
Accept	Work on the assigned case

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

Track a customer complaint case in Workspace

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

Before you begin

Roles required: sn_rtl_cs_cmplnt.agent, sn_rtl_cs_cmplnt.agent_manager

Procedure

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

Close a customer complaint case in workspace

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

Before you begin

Roles required: sn_rtl_cs_cmplnt.agent, sn_rtl_cs_cmplnt.agent_manager

Procedure

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

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

Manage store inquiries

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

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

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

Create a store inquiry case from the Retail portal

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

Before you begin

You must have the Retail Store services plugin installed.

Role required: sn_rtl_stre_servcs.contributor

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. On the form, fill in the fields.

Store policy inquiry form

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

3. Select **Submit**.

Manage a store inquiry case from the Retail portal

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

Before you begin

Role required: sn_rtl_stre_servcs.contributor

Procedure

1. In the Retail portal, select **Home** > **Cases & Tasks** from the menu bar.
2. Select the case.
3. If the HQ agent requests more information or proposes a solution, you can add more details, accept the solution, reject the solution, close the case, or reopen the case.

Option	Description
Notes	Add notes if the HQ agent requests more in formation.
Accept solution	Close the case. If the HQ agent proposes a so lution with the resolution, you can accept the solution or reject the solution.

Option	Description
Reject solution	Reopen the case if you reject the solution.

4. If you're the requester and the case is in the open state, close the case by selecting **Actions** > **Close case**.

Track a store inquiry case from the Retail portal

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

Before you begin

Role required: sn_rtl_stre_servcs.contributor

Procedure

1. In the Retail portal, select **Home** > **Cases & Tasks** from the menu bar.
2. Select the case number that you want to track.
   If the case number isn't available, search the case keywords by using the search bar on the home page or by using filters on the case list.

Create a store inquiry case from the Retail mobile app

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

Before you begin

Role required: sn_rtl_stre_servcs.contributor

About this task

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

The Store Inquiry Case [sn_rtl_stre_servcs_inquiry_case] table is extended from the abstract Retail Case [sn_retail_case] table.

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

Procedure

1. In the Retail mobile app, select **Browse Catalog** > **Store policy inquiry**.
2. On the form, fill in the fields.

Store policy inquiry form

Field	Description
Requesting store	Retail store that is making this request.
Priority	Task sequence to resolve this case. The tasks are based on the impact and urgency of this request.

Field	Description
Briefly describe your policy inquiry	Brief description about this request.
Detailed description of the inquiry including any specific questions	Details about this request.

A case gets created and you can track the case details.

Manage a store inquiry case from the Retail mobile app

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

Before you begin
Role required: sn_rtl_stre_servcs.contributor

Procedure

1. In the Retail mobile app, select **My Store** > **All cases** from the menu bar.
2. Select the case from the case list.
3. Add notes, close a case, or reopen a case.

Option	Description
Notes	Add notes if the HQ agent requests more in formation.
Accept solution	Close the case. If the HQ agent proposes a so lution with the resolution, you can accept the solution or reject the solution.
Reject solution	Reopen the case if you reject the solution.

4. If you're the requester and the case is in the open state, close the case by selecting **Actions** > **Close case**.

Track a store inquiry case from the Retail mobile app

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

Before you begin
Role required: sn_rtl_stre_servcs.contributor

Procedure

1. In the Retail mobile app, select **My Store** > **All cases** from the menu bar.
2. Select the case number that you want to track.
   If the case number isn't available, search the case keywords by using a search bar on the home page or by using filters on the case list.

Resolve a store inquiry support request from workspace

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

Before you begin
Role required: sn_rtl_stre_servcs.agent or sn_rtl_stre_servcs.agent_manager

Procedure

1. Navigate to **Lists** > **Retail Store Inquiry Cases** > **All**.
2. Open a case, self-assign a case, accept a case, or request information about a case.

Option	Description
My Open Cases	Open your cases.
Assign to me	Self-assign a case.
Accept	Work on the case.
Request Info	Request more information about the case de tails.

   The case state changes to Awaiting Info. When a requester provide more information, the state changes to Open.
3. Select **Propose Solution** to propose a solution by adding the following resolution details.

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

Tracking cases and tasks from the Retail portal

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

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

- Track your cases and tasks from the Retail portal
- Search for 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. By tracking your cases and tasks from the Retail portal, you can immediately get visibility into the progress, issues, or status of your case.

Before you begin
Role required: Store associate, Store Manager, Regional Manager

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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 that are assigned to you, unassigned, or recently updated.
3. Select a case to see the details about it.

Search for your organization's knowledge articles from the Retail portal

View the knowledge articles that were posted by your organization directly from the Retail portal. You can see the most viewed articles so that you can stay up to date with what's going on in your organization.

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 one of these ways:
   - In the **Search Knowledge** field, enter the keywords to search for an article and select the Search icon (🔍).
   - Select an article from the Top Rated Articles or Most Viewed Articles lists.
   - From the Categories list, filter the articles by selecting a category.

View your associated retail organizations from the Retail portal

Track your associated retail organizations from the Retail portal so that you can stay up to date with what's going on with those organizations.

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 the retail organizations that are associated with the current user.
2. From the list, select a retail organization to see a detailed view of all the cases, tasks, and members.

Manage store plans

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

Manage store plans to generate cases and tasks

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

Create a store plan from the workspace

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

Before you begin

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

Procedure

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

Add HQ case details to the HQ communication plan

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

Before you begin

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

Procedure

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

Add HQ task details

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

Before you begin

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

Procedure

1. Select **Add**.
   A new HQ task form appears.

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

Add store case details

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

Before you begin

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

Procedure

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

Add store task details

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

Before you begin

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

Procedure

1. Select **Add**.
   A new `Store Task` form appears where you must add the store task details.
2. On the Store task form, select the required option from the **Priority** drop-down list.
3. Enter the short description in the **Short Description**.

4. Enter the description in the **Description**.
5. Select the **Add file** in the Attachments, if any.
6. Select **Save** to save the details.
7. Select **Continue**.
   A new prompt `Continue without saving` appears.
   a. Select **Yes** to continue without saving the details.
   b. Select **No** to remain in the same form.
8. Select **Cancel** to discard the details.
9. Select **Save** to save the details.
   The new store task added appears.
   a. Select to delete the new store task.
   b. Select to edit the store task details.
   c. Select **Continue** to go next step.

Add affected Retail stores

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

Before you begin

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

Procedure

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

Schedule the store plan

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

Before you begin

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

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

Procedure

1. On the Schedule form, select **Immediate** to generate a case immediately.
   a. Select the date by selecting the calendar and enter the time in the **Due date and time**.
2. Select **One time** to generate a case in future at the scheduled time.

a. Select the date by selecting the calendar and enter the time in the **Schedule details** > **Effective Start**.
b. Enter the number of days for the case to be due from the effective start date in the **Schedule details** > **Lead time**.

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

Result
The summary gets generated based on the store plan schedule.

Review store plan details

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

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

Procedure

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

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

   a. Select **Delete** to confirm the plan deletion.
3. Select **Publish** to generate the store plan as per the schedule selected.

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

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

Monitor a published store plan across multiple stores

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

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

Procedure

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

Clone a store plan

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

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

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

The cloned store plan includes the store plan items.

Note:

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

Procedure

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

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

Delete or deactivate a store plan

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

Delete a store plan

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

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

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

Deactivate a store plan

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

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

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

Track In-store operations cases and tasks

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

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

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

Before you begin
Role required: sn_rtl_instore_ops.manager

Procedure

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

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

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

Before you begin
Role required: sn_rtl_instore_ops.manager

Procedure

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

Fulfill In-store operations cases and tasks in Retail Mobile

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

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

Review all assigned in-store operations cases and tasks in the My Work tab of Retail Mobile.

Before you begin

Role required: sn_rtl_instore_ops.manager or sn_rtl_instore_ops.associate

Procedure

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

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

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

Before you begin

Role required: sn_rtl_instore_ops.manager or sn_rtl_instore_ops.associate

Procedure

1. In **Retail Mobile**, select **My Work**.
2. Select the **Filter** icon.
3. Choose a filter type:
    - All - Filters both cases and tasks.
    - Cases - Filters only cases.
    - Tasks - Filters only tasks.
4. Enter your filter criteria as needed in the fields which display.

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

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

Work on an In-store operations case

Track and fulfill an in-store operations case within Retail Mobile.

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

Procedure

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

Work on an In-store operations task in Retail Mobile

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

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

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

Procedure

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

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

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

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

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

Procedure

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

Track and monitor store plans

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

Track a store plan on the workspace

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

Before you begin
Role required: sn_rtl_hq_ops.agent_manager or sn_rtl_hq_ops.location_manager

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

Procedure

1. Navigate to **Store Plan** > **All**.
2. Select the fields on the store plan to view associated details.

Fields	Description
HQ communications store plan record	Displays the record details.
Track Plan	Displays the list of HQ cases.
HQ case	Displays the HQ case details.
Tasks within HQ case	Displays the HQ tasks.
Store cases within HQ case	Displays the store cases.
Store case	Displays the store tasks.

Track a store case from an HQ case

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

Before you begin
Role required: admin

Procedure

1. Navigate to **Store Plan** > **All**.
2. Select a store plan and then select **Store Plan** > **All** > **Track plan** > **HQ case** > **Store case**.
3. Select the fields on the HQ case details page such as the store cases and tasks.

Fields	Description
Store cases	Displays the list of store cases created under the Store Plan.
Store case	Displays the selected store case details.
Tasks	Displays the associated store tasks.

Now Assist for Retail Service Management (RSM)

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

Get started

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

Important:

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

Troubleshoot and get help

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

AI limitations

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

Data processing

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

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect case information (for chat summarization, resolution notes generation, knowledge generation, call summarization), chat transcripts (for chat recommendation), and email information (for email response). Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Explore Now Assist for Retail Service Management (RSM)

Now Assist for Retail Service Management (RSM) streamlines store inquiries and service requests by leveraging generative AI to deliver accurate, context-aware responses. It enhances collaboration between store teams and HQ teams. It drives faster resolutions, improves customer experiences, and enables smarter retail service management.

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

The Store inquiry AI agent is designed to understand store agent intents, perform relevant actions such as data retrieval or record updates, and provide clear and helpful responses based on available information. This enables efficient and effective support for HQ agent, leveraging the AI agent's capabilities to streamline interactions and improve overall experience.

Store inquiry AI agent capabilities

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

- Retrieve case details: Access and return information about a specific case, ensuring that AI agent has the necessary details to proceed with the inquiry.
- Identify similar cases: Find and retrieve cases that share similarities with a given case, facilitating the identification of patterns or relevant precedents.
- Retrieve relevant knowledge base (KB) articles: Locate and provide KB articles that are relevant to a case or query, offering AI agent, valuable context and information.

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

Configure Now Assist for Retail Service Management (RSM)

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

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

Enable store inquiry AI agent trigger

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

Before you begin
Role required: sn_rtl_stre_servcs.agent

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

Procedure

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

Use Now Assist for Retail Service Management (RSM)

Use store inquiry AI agent to improve and enhance the store inquiry processes in Retail Service Management(RSM).

Store inquiry agent capabilities

AI agent capabilities	Description
Automated inquiry parsing	Analyzes incoming questions from stores and identifies key topics like discount policy, returns, and exceptions. It accurately categorizes and tags these inquiries, streamlining the processing and response to store queries

Store inquiry agent capabilities (continued)

AI agent capabilities	Description
Intelligent policy look-up	Searches across multiple sources—such as past resolved cases, knowledge base articles, and their attached documents—to deliver precise and contextually relevant guidance
Response drafting with policy references	Automatically generates a suggested reply using clear policy language and provides the accurate source of the suggested reply for traceability by attaching or linking it
Learning from resolved cases	Continuously improves by indexing newly resolved inquiries, which expands its ability to respond to similar future cases
Update case information	Enables the HQ agent to accept, edit, or reject the suggested resolution, and automatically updates the case resolution notes and status for accepted or edited responses, or add work notes for rejected ones

This workflow begins when a store associate or manager creates a store inquiry case, a new the case gets created. The case gets assigned to an HQ agent. The HQ agent can then leverage the Now Assist agent by selecting the Now Assist icon ✦ to launch the Now Assist chat panel. The Now Assist agent automates parsing of store questions, intelligently search the KB articles and past cases, and the documents attached to the KB articles, and draft responses with policy references. It prompts the HQ agent to select preferred options like Accept, Edit, or Reject solution.

The HQ agent can select the below options:

- Accept: The case state is set to Resolved. The proposed solution gets added to resolution notes automatically.
- Edit: The AI agent prompts the HQ agent to provide custom response. Then, the case state is set to Resolved. The custom response gets added to resolution notes automatically.
- Reject: The proposed solution is not added to the resolution notes. The AI agent asks the agent whether they would like to update the work notes with the resolution provided. If the HQ agent accepts, the proposed solution gets added to the work notes automatically.

Important: By default, all agentic workflows and AI agent records are read-only.Looking for an AI agent?

- There may be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available on your instance, see Find AI agents.
- To find agents that may not be installed on your instance, visit the AI Agent Marketplace on the ServiceNow Store.

AI agents security

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

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

See Implement access control in Now Assist AI agents for more information.

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
- 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

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

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Tables installed with Retail Core

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

Base roles installed with Retail Core

For information on configuring these roles for retail, see Assign roles to Retail users.

Role	Description	Contains roles
sn_retail.associate_contributor	Create, review, and comment on retail cases for the location in which the user is associated.	• sn_customerservice.service_organization_co • sn_retail.case_creator • sn_retail.org_viewer • sn_retail.report_viewer
sn_retail.associate_fulfiller	Creates, updates, and resolves retail cases associated with the location in which the user is associated.	• sn_customerservice.svc_location_agent • sn_retail.case_creator

Role	Description	Contains roles
		• 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.	• 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.	• sn_customerservice.svc_location_manager_c • sn_retail.associate_contributor • sn_retail.report_viewer
sn_retail.manager_fulfiller	Creates, updates, and resolves retail cases for the location and hierarchy in which the user is associated.	• sn_customerservice.svc_location_manager • sn_retail.associate_fulfiller • sn_retail.report_viewer

Related Party Configurations installed with Retail Core

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

Plugins installed with Retail Core

Name	Description
Business 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.

Name	Description
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
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.

Business rule	Table	Rule criteria	Description
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 with both Android and iOS platforms.	• com.glide.sg • com.glide.sg.offline • com.glide.sg.agent_native_client • com.sn_retail_core

Components installed with Retail Store Services

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

Note:

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

Plugins installed with Retail Store Services

Plugin Name	Description	Plugin Dependencies
Retail Store Services [com.sn_rtl_stre_servcs]	This plugin facilitates streamlined communication between store teams and headquarters (HQ) regarding operational questions or issues. Store team members can request help directly from HQ, ensuring their day-to-day.	• com.sn_retail_core • com.sn_retail_mobile

servicenow

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.	• 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.	• com.sn_customerservice • com.sn_retail_core

Roles installed with Retail Customer Complaint

Role	Description	Contains roles
sn_rtl_cs_cmplnt.agent	Create, update, and resolve retail complaint cases.	sn_retail.support_agent
sn_rtl_cs_cmplnt.agent_manager	Create, update, resolve, and manage retail complaint cases.	• sn_rtl_cs_cmplnt.agent • sn_customerservice_manager

Components installed with Retail HQ Operations

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

Plugins installed with Retail HQ Operations

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

Roles installed with Retail HQ Operations

Role	Description	Contains roles
sn_rtl_hq_ops.agent	Create, update, and resolve HQ communications case.	sn_retail.support_agent
sn_rtl_hq_ops.agent_manager	Create, update, and resolve HQ communications case. The agent manager also manages the agents.	• sn_rtl_hq_ops.agent • sn_customerservice_manager
sn_rtl_hq_ops.location_agent	Create, update, and resolve HQ communications case for their location.	sn_retail.associate_fulfiller
sn_rtl_hq_ops.location_manager	Create, update, and resolve HQ communications case for their location.	• sn_rtl_hq_ops.location_agent • sn_retail.manager_fulfiller

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.	• com.sn_retail_core • com.sn_retail_mobile • com.snc.fsm_work_types

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.	• 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.	• 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)

Components installed with Retail Playbook for Store Plan

Certain roles and dependencies must be considered when using the Retail Playbook for Store Plan.

Plugins installed with Retail Playbook for Store Plan

Plugin Name	Description	Plugin Dependencies
Retail Playbook for Store Plan [com.sn_rtl_str_plan_pb]	The Retail playbook for store plan enables HQ and regional managers to easily create structured operational plans	• com.sn_retail_core • com.sn_csm_playbook • com.sn_tsk_plan_pb_act

Plugin Name	Description	Plugin Dependencies
	with tasks and cases, linked to store locations and schedules.	• com.sn_pwm_pb_act • com.sn_rtl_hq_ops

Activity Name	Activity Description
Create Template item	Allows to create only one record through this activity. Displays a form based on the table and form view configured in the corresponding template item configuration, and creates the corresponding template item record. The form runs any UI policies that apply. The system displays any validation error messages in the Workspace playbook.
Create template items	Allows to create only multiple records through this activity. Displays the form based on the table and form view configured in the corresponding template item configuration, and creates the corresponding template item records. The form runs any UI policies that apply. The system displays any validation error messages in the Workspace playbook.
Select multiple records	Specify the template item to attach multiple records and activity experience configurations to render modal for record selection and insertion into an m2m table.
PWM Schedule	Allows creation of a schedule for task creation using a task plan template through the PWM scheduler.
Plan Summary	A summary view of the all activities configured in a playbook together for users to be able to edit before they publish the plan

Playbook	Description
HQ communication	Allows to create a plan with cases and tasks for multiples stores by a HQ/Regional manager.

Components installed with Task Plan Template Playbook

Certain roles and dependencies must be considered when using the Task Plan Template Playbook.

Plugins installed with Task Plan Template Playbook

Plugin Name	Description	Plugin Dependencies
Task Plan Template Playbook Activities [com.sn_tsk_plan_pb_act]	The task plan template playbook activities plugin enables task plan templates to be integrated into playbook experiences.	• com.sn_task_plan_templates • com.playbook_experience

Components installed with PWM Playbook Activities

Certain roles and dependencies must be considered when using the PWM Playbook Activities.

Plugins installed with PWM Playbook Activities

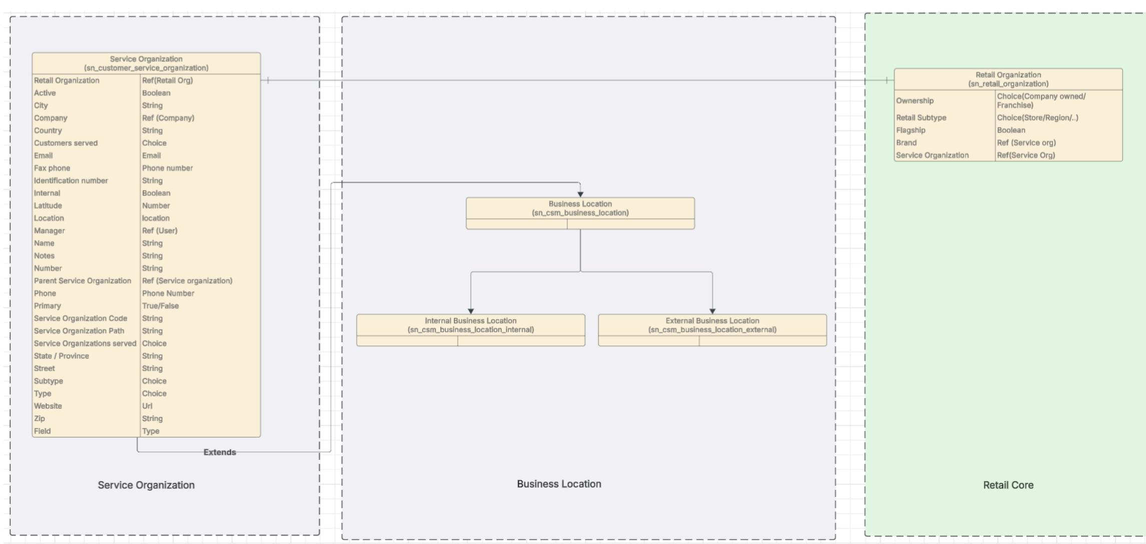
Plugin Name	Description	Plugin Dependencies
PWM Playbook Activities [com.sn_pwm_pb_act]	The PWM playbook activities plugin integrates PWM scheduling capabilities into playbook activities linked to task plan templates.	• com.snc.fsm_planned_work_management • com.sn_task_plan_templates • com.playbook_experience

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: • Company owned • Franchise
Brand	The associated brand of this retail organization.
Service Organization	The associated service organization.
Retail Subtype	The retail subtype. Options are: • 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.

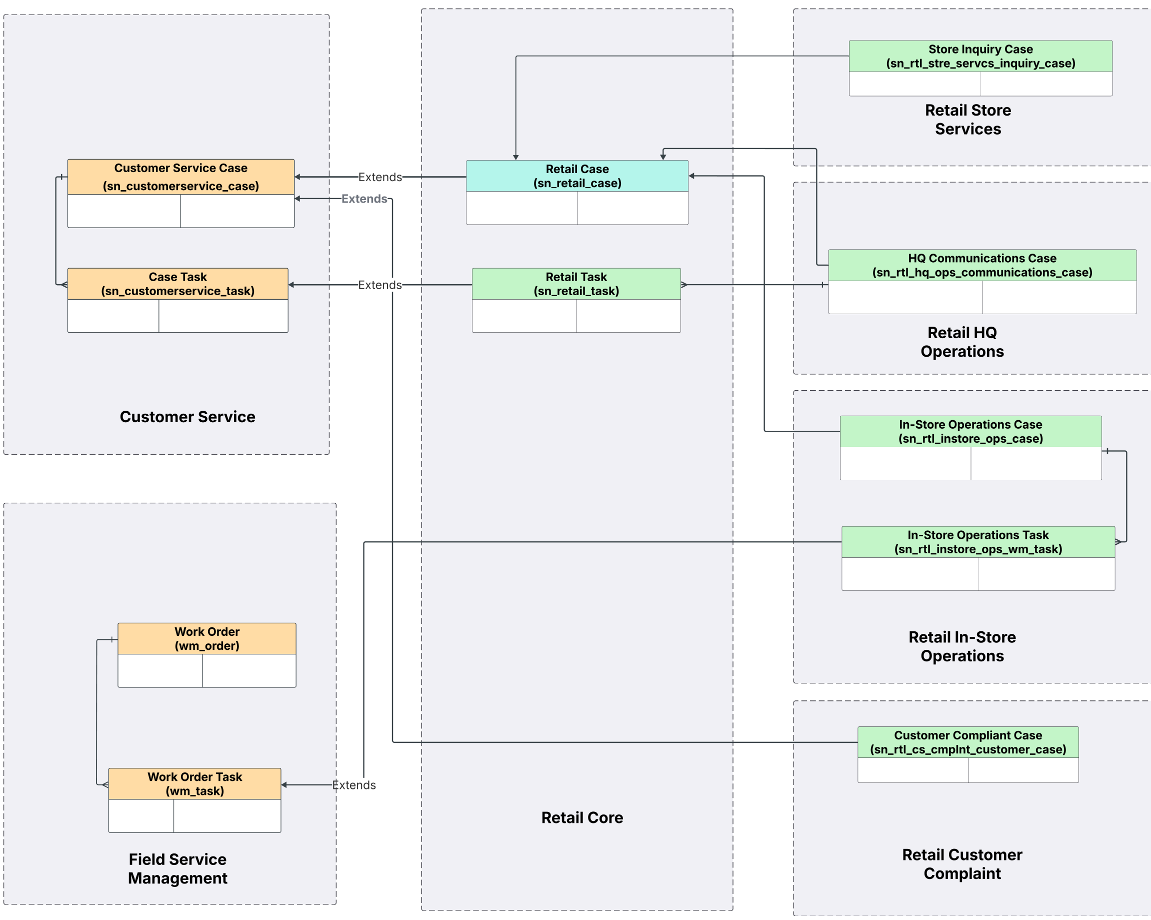
Field	Description
Number	Numerical code indicating the case number for this request.
Requested by	Internal user associated with this request.
Requesting Retail Organization	Retail organization this request is being created for.
Supporting Retail Organization	Retail organization responsible for fulfilling 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.

Field	Description
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

Explore	Configure	
Learn more about Retail Task Management and how it's used.	Install Retail Task Management and configure your environment.	

Multi-store case	Reference	
Create a multi-store case.	Get details about Retail Task Management components such as fields, tables, and properties.	

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

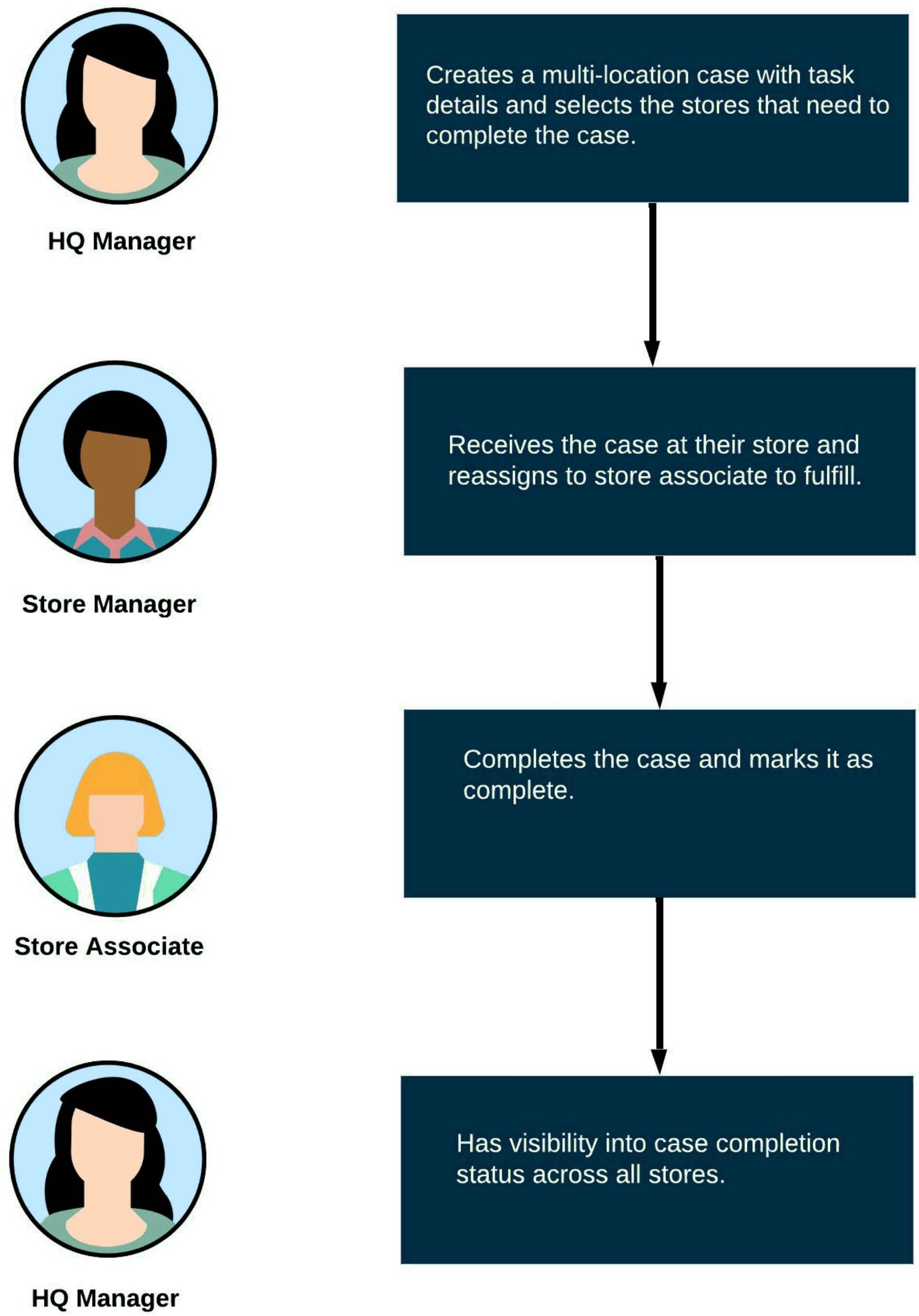
Users

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

Users (continued)

User	Description
	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



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.

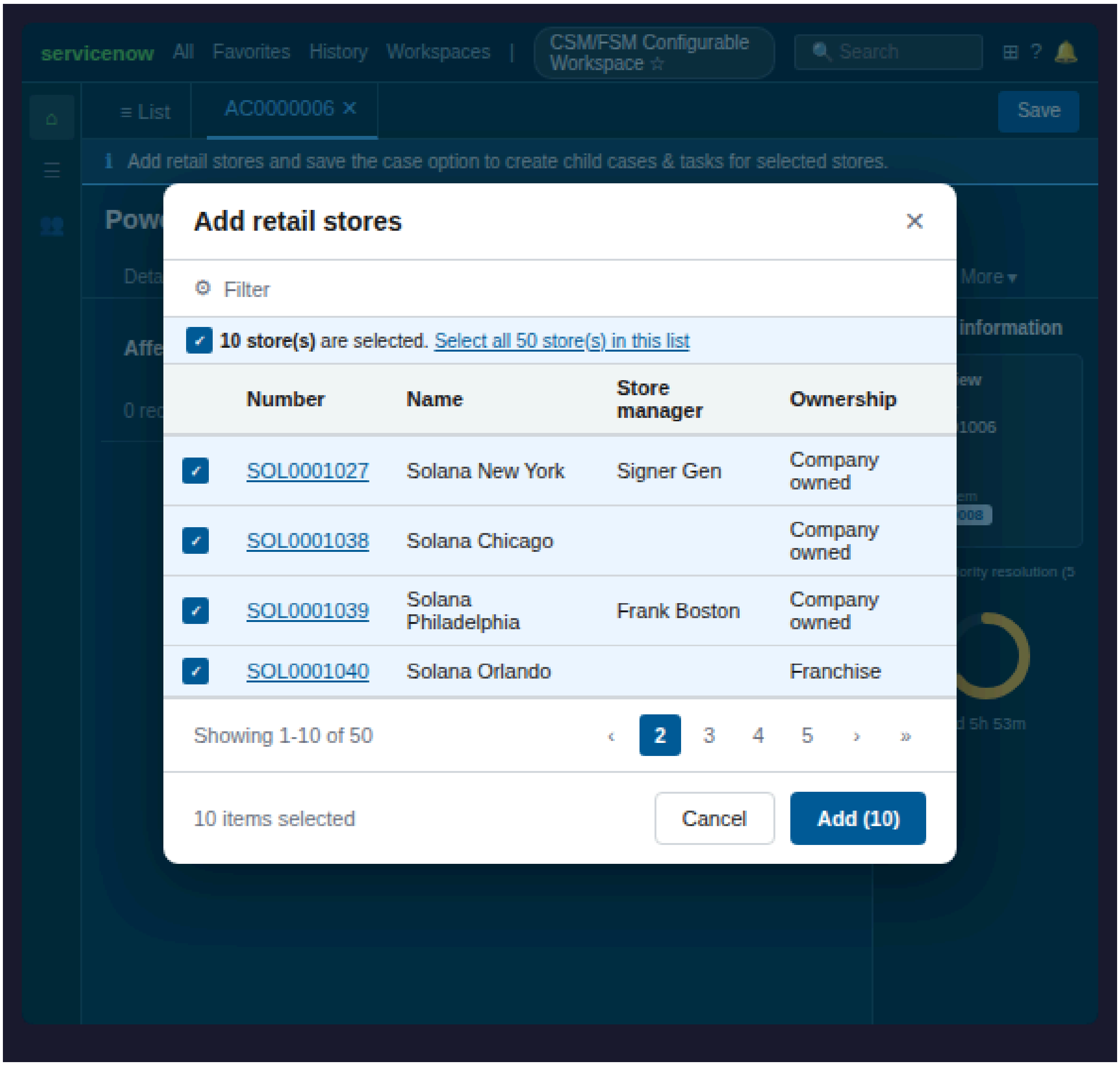
The retail multi-store case relies on the CSM table map entries created as part of the multi-case configuration in the new service definition that you create for creating multi-store cases.

For information on the setup process, see Configuring Retail Task Management.

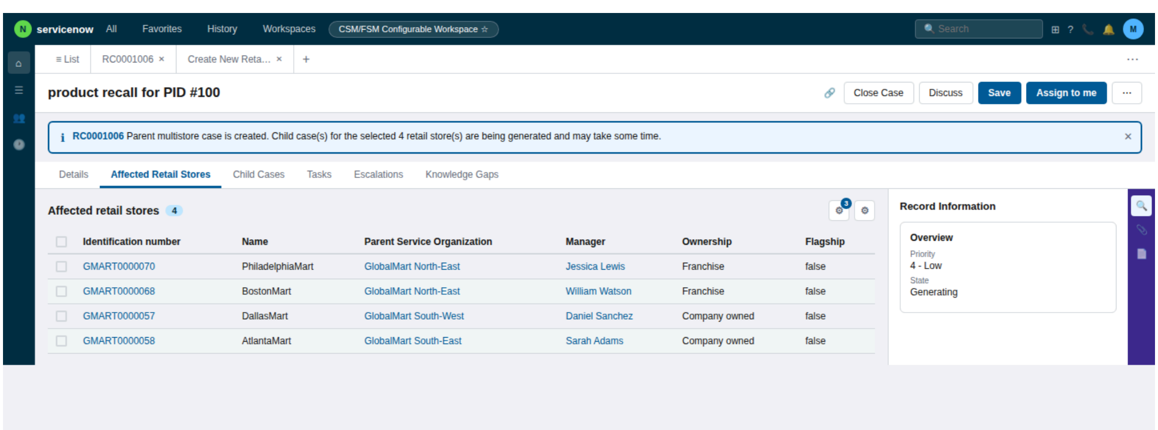
Retail multi-store case process

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

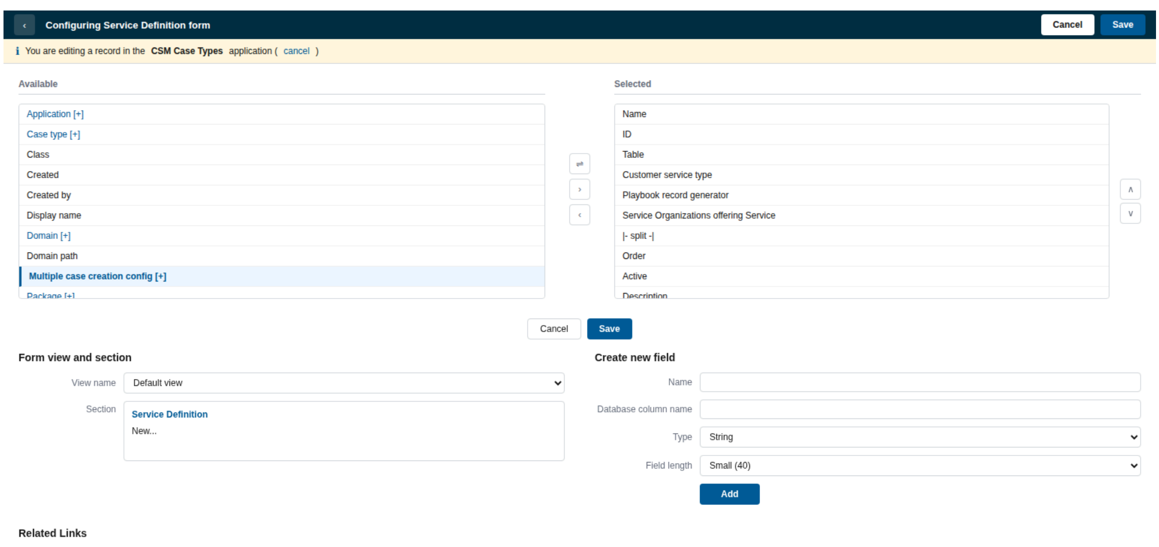
The service selector is now active within the CSM/FSM Configurable Workspace for use with Retail Task Management Core.

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

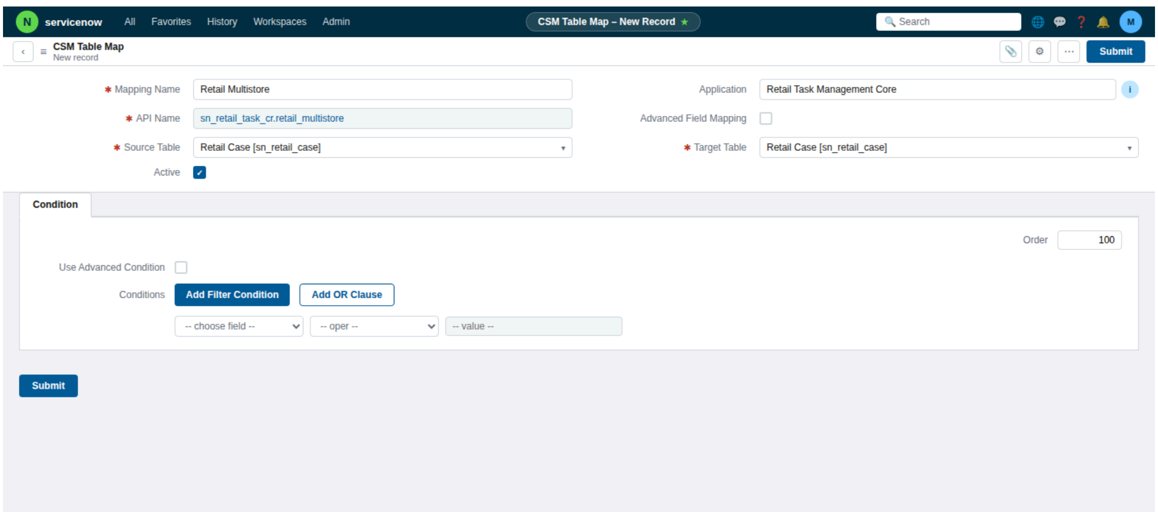
Create a CSM table map to create multi-store case configurations for use with your service definitions.

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

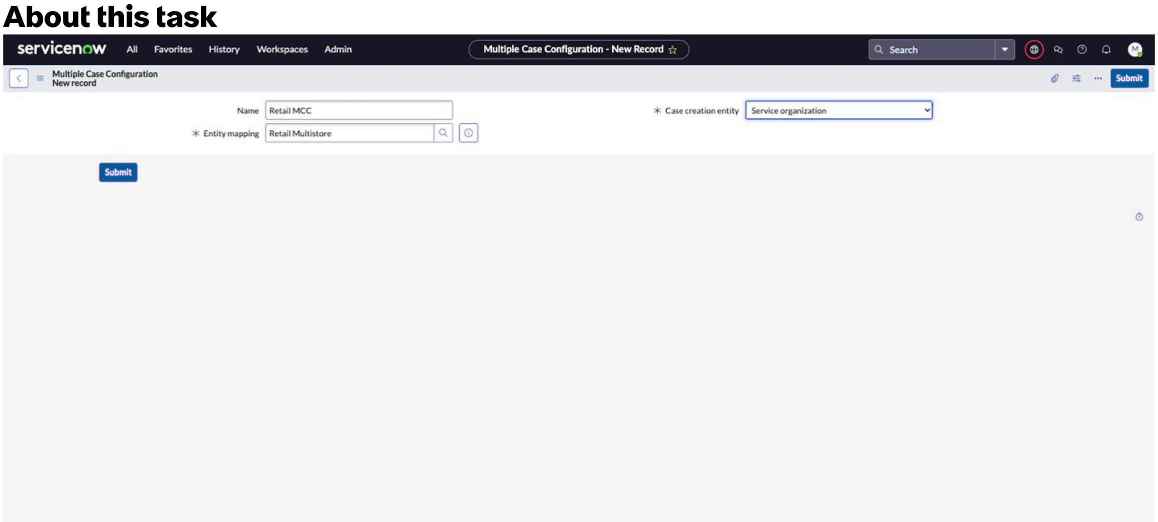
Create an entity in the Multiple Case Configuration table for multi-store creation in Retail Task Management Core

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

Before you begin

Role required: admin

About this task



Procedure

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

Field	Name
Name	A name for this multiple case configuration.

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

4. Select **Save**.

Result

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

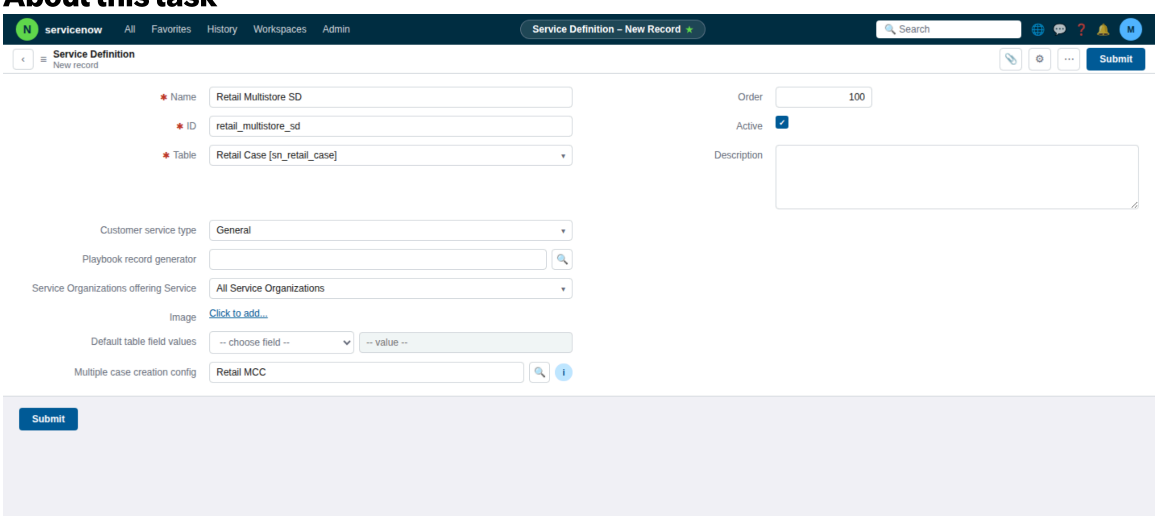
Create a service definition for multi-store cases in Retail Task Management Core

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 mangers themselves.

Procedure

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

Retail multi-store case states

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

Retail multi-store parent case states

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

State	Description
Draft	Indicates that parent case is still in draft state and hasn't yet been submitted.
Generating	Indicates that the parent case has been submitted, and child cases are currently being generated.

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.

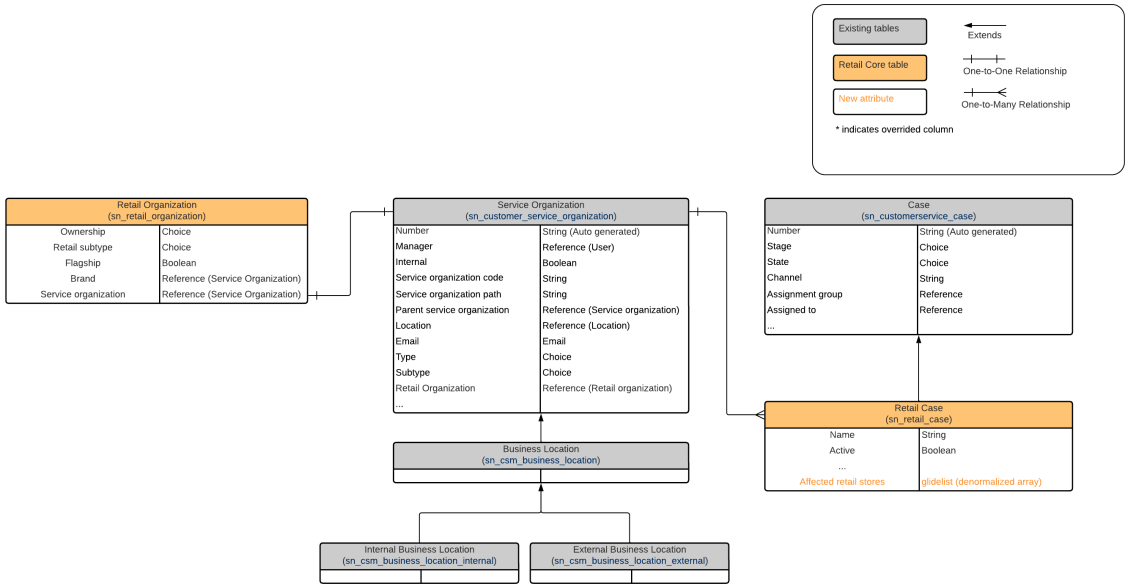
Note:

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



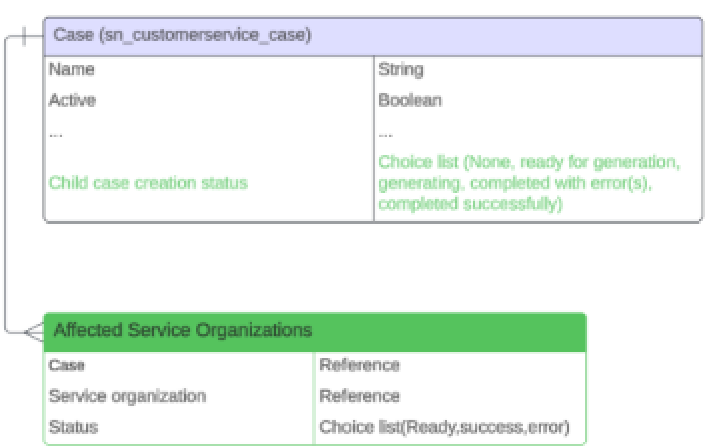
Installing Retail Task Management Core introduces the **Affected retail stores** field into the Retail case [sn_retail_case] table.

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.

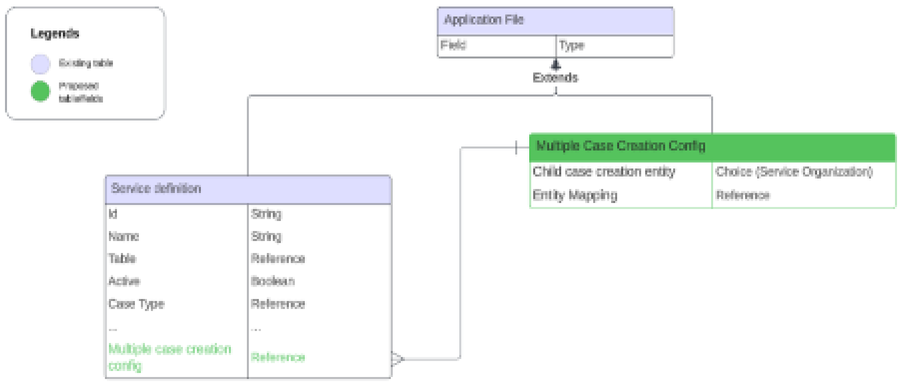
Changes introduced by the Multi-case creation framework plugin

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.