Zurich Telecommunications, Media, and Technology

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Telecommunications, Media, and Technology (TMT)

The ServiceNow® Telecommunications, Media, and Technology (TMT) product suite brings together customer care, operations, order management, and partner ecosystems so that service providers can scale their business to capitalize on the fast-growing “everything-as-a-service" opportunity.

Customer Success Management

Streamline, automate, and measure critical workflows across the enterprise.

Field Service Management for Telecommunications

Manage the field service workflow for the telecommunication industry customers.

Now Assist for Sales CRM for Telecommunications

Helps customers to automate enrichment, fulfillment tasks, and move order.

Now Assist for Telecommunications, Media, and Technology

Helps to summarize service problem cases, generate the case resolution notes, and summarize tests.

Proactive Service Experience Workflows

Deliver end-to-end workflows to resolve network related incidents, and proactively notify impacted customers.

Sales Customer Relationship Management for Telecommunications

Capture, manage, and fulfill customer and external service orders.

Service Exchange

Help customers and providers connect and track service requests directly between their instances.

Strategic Portfolio Management for Telecommunications

Define and customize the tasks and requirements for your Fiber Rollout and 5G projects.

Telecommunications Network Inventory

Build and monitor your physical, logical networks, and provisioned services.

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Telecommunications Service Operations Management

Proactively monitor the health of your networks and services to prevent downtime.

Customer Success Management

The ServiceNow® Customer Success Management application enables service providers to streamline, automate, and measure critical workflows across the entire enterprise customer journey—from onboarding and adoption to renewals.

Important: Account Lifecycle Events has been renamed to Customer Success Management in Zurich.

Get started

By embedding workflow automation into customer success management, Customer Success Management helps providers enhance customer experiences, accelerate time to value, and maximize return on investment. It also fosters seamless collaboration between the accounts, sales, and delivery teams, all within the unified ServiceNow AI Platform.

Explore	Configure
Learn about the key features and benefits of Customer Success Management	Plan and customize Customer Success Management to meet your needs

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Use	Reference
Use Customer Success Management to manage the account lifecycle	Get information about the data model and installed components

Additional resources

- Learn more about what's new and changed, see the Customer Success Management release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Customer Success Management features at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the ServiceNow Impact.
- Connect with other Customer Success Management users at Now Community.

Field Service Management for Telecommunications

The ServiceNow Field Service Management for Telecommunications (FSMT) application enables you to manage the field service workflow for the telecommunications customers. Use this application to streamline the appointment booking, service delivery, and assurance processes.

The ServiceNow Field Service Management for Telecommunications (FSMT) application integrates with the Field Service Management (FSM) to manage and streamline field service workflows for the telecommunications industry. The FSMT supports the TM Forum-aligned Open APIs and their functionalities that enable an open digital ecosystem. These APIs promote faster integration with Field Service Management to manage appointment booking, service delivery, and assurance processes.

To learn more about Field Service Management application, see Field Service Management.

Managing the appointments for telecommunication services

Manage the appointments for the field services to enable the installation, activation, and site assessments that are needed for connectivity services.

With the use of the ServiceNow Telecommunication Open API application, you create appointments from your system for the connectivity-related field services. You can book an appointment on an existing work order and assigned it to the field service agent. To learn more about booking appointments, see Managing appointments.

The Telecommunication Open API application uses the TM Forum 646 API to support the external system to create and manage appointments for the field services.

This feature supports the following:

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- Supports POST operation for appointment via `appointment management API`.
- Understands the appointment data model available in the Field Service Management application.
- Supports POST operation to create an appointment in the Field Service Management application for a work order.
- Supports required validations for the incoming data for appointment creation for an available time slot via `search time slot API`.

Configuring the appointment booking feature

To manage appointment bookings in your system, you must create, modify, or enable the application configuration and the individual service configurations. Do the following steps to configure the appointment booking feature:

1. Configure an appointment booking record producer.
2. Create or modify service configuration for Appointment Booking.
3. Configure variables in a record producer for appointment booking.

Managing work orders for telecommunication services

Manage the work orders for the field services to support the installation, activation, and site assessments that are needed for connectivity services.

With the use of the ServiceNow® Telecommunication Open API `(com.sn_tmf_api)` application, you create and manage work orders from your system for the connectivity-related field services. To learn more about managing work orders in Field Service Management, see Manage work orders.

This feature supports the following:

- Create a new work order
- Update an existing work order
- Fetch the details of a work order
- Cancel a work order

The Telecommunication Open API application uses the TM Forum 697 Service Order Management API specification to support the external system to create and manage work orders for the field services. To learn more, see Work Order Management API.

Now Assist for Sales CRM for Telecommunications

Use the ServiceNow® Now Assist for Sales CRM for Telecommunications application to automate enrichment and fulfillment tasks. This helps customers introduce new offerings without the need to build complex subflows. These AI Agents automatically suggest new tasks based on similarities with previous orders and also provide flexibility by auto-correcting the agent's inputs related to new tasks.

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servicenow

Get started

Explore	Use
Learn more about Now Assist for Sales CRM for Telecommunications	Use generative AI capabilities offered by Now Assist for Sales CRM for Telecommunications

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 AI & 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.

For more information, see the Now Assist documentation.

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Exploring Now Assist for Sales CRM for Telecommunications

With the Now Assist for Sales CRM for Telecommunications application, you can use standalone AI agents to create a customer move order capture journey, create enrichment tasks, identify the tasks required for domain orders by using historical data from similar orders.

Using agentic workflows in Now Assist for Sales CRM for Telecommunications

Use the Now Assist for Sales CRM for Telecommunications to complete tasks autonomously.

Enable security implementation to execute AI agents and agentic workflows through access control lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see Implement access control in Now Assist AI agents.

> **Important:** By default, all agentic workflows and AI agent records are read only.
>
> To run the AI agents autonomously, you must first duplicate the agentic workflow, and then proceed with the following steps:
>
> - Activate the agentic workflow.
> - Activate all agents within the agentic workflow.
> - Activate the trigger to invoke the agentic workflow automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

Once you duplicate the agentic workflow, adjust the settings according to your requirements. Next, you activate the duplicated agentic workflow. You can also test the agentic workflow to analyze its performance in the AI Agent Studio, while it executes the instructions that you defined.

Looking for an AI agent?

- There might 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 might not be installed on your instance, visit the AI Agent Marketplace on the ServiceNow Store.

Standalone agents in Sales CRM for Telecommunications

Use these standalone AI agents to autonomously complete Sales CRM for Telecommunications tasks.

Standalone agents in Now Assist for Sales CRM for Telecommunications

The following AI agents are available with Now Assist for Sales CRM for Telecommunications:

- Order enrichment AI agent
- Order fulfillment AI agent
- Move order voice AI agent
- Order fallout AI agent
- Image to task plan template AI agent

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Now Assist for Sales CRM for Telecommunications AI agent Move order voice AI agent

Use this agent to automatically create a customer move order capture journey.

Move order voice AI agent overview

The move order voice AI agent helps to manage your inventory by:

- Collecting information over the phone.
- Matching the gathered information to existing records in the system.
- Sharing relevant details.
- Creating a move order based on the captured information.

To create a move order, AI agent collects these details:

- Existing service location
- Product or services to be moved
- New service location

To integrate AI agent with supported third-party CCaaS (Contact Center as a Service) providers, see Integrating voice assistant with CCaaS provider.

To add tools and information, see Add tools and information to an AI agent for details.

Role required: sn_customerservice.consumer

Important: In the select channels and status page, make sure that the **Active** button is turned on to activate the AI agent.

Configure Move order voice AI agent

To configure the AI agent:

1. Navigate to **All** > **Assistant Designer** > **Assistants**.
2. In Now Assist Voice Deployment tile, select **Edit**.
3. Select **Settings** tab and review the details.

To create SoftPIN, see Configure Soft PIN.

Move order voice AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Move Order Voice AI agent**.

Now Assist for Sales CRM for Telecommunications AI agent collection order enrichment AI agent

Use the order enrichment AI agent to collect customer order information, identify if the order needs enrichment, and create enrichment tasks.

Order enrichment AI agent overview

The order enrichment AI agent creates a task and triggers the order fulfillment AI agent on its completion. On closure of the enrichment task, the order fulfillment agent is invoked.

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For each top order line Item (OLI) and its child OLIs, the order enrichment agent uses historical data from similar orders to determine which enrichment tasks are required.

To activate the Group Action Framework (GAF), see Activate Group Action Framework for Now Assist for Sales CRM for Telecommunications.

If needed, the outcome of the order tasks can be modified by the agent.

When an OLI is created, if an enrichment process isn't defined for that order line specification, a place order task is created. When this task is assigned to an agent, it triggers the order enrichment AI agent for this order line item.

If the specification enrichment tasks defined in the decision table aren't available to create the enrichment tasks, the default flow trigger enrichment AI agent is triggered to create the enrichment tasks for an order line item during the enrichment process. To configure the order enrichment flows using Decision Tables, see Configure order enrichment flows using Decision Tables.

To modify the order enrichment AI agent, Duplicate an agentic workflow, and adjust the settings according to your requirements.

Role required: sn_somt_gen_ai.sales_and_order_fulfillment_ai_agent

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Order Enrichment AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Order Enrichment AI agent**.

Testing the AI agent

To access the use case testing page:

- Navigate to **All** > **AI Agent Studio** > **Testing**.
- On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

Activate Group Action Framework for Now Assist for Sales CRM for Telecommunications

Activate the Group Action Framework (GAF) to enable Now Assist AI agents to collect information about the related records across your instance.

Before you begin

Select the Now Assist for Sales and Order Management for Telecommunications application scope.

In the Request definitions, select **Index All Tables**.

In the request_characteristic, select **Index All Tables**.

Role required: admin

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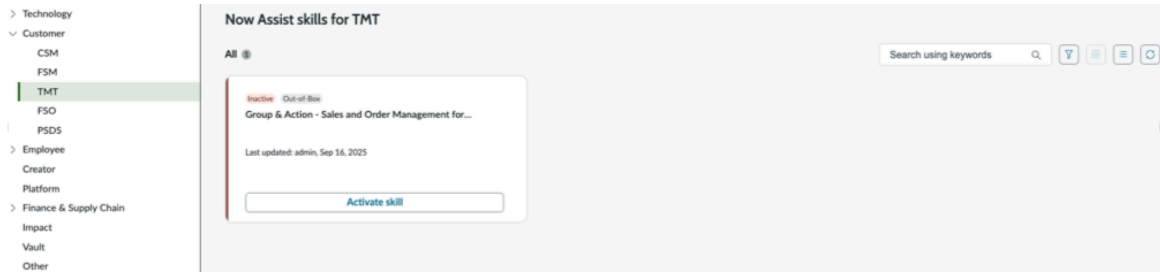
Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills** > **Customer** > **TMT**.
2. In Group & Action - Sales and Order Management for Telecommunications, select **Activate skill**.



3. **Optional:** On the Group & Action - Sales and Order Management for Telecommunications form, change the values by selecting **Edit**.
4. Select **Save and continue**.
5. On the **Review and activate** tab, select **Done**.

Result

GAF is activated on your instance for the Now Assist application and can be used by AI agents to find related records.

Now Assist for Sales CRM for Telecommunications AI agent collection order fulfillment AI agent

Use the order fulfillment AI agent to identify the tasks required for domain orders by using historical data from similar orders.

Order fulfillment AI agent overview

The order fulfillment AI agent uses historic order tasks to create the order tasks. If the historic data doesn't return any results, then a large language model (LLM) is used to get the response. After decomposition, the order fulfillment AI agent creates order tasks by checking historical and applicable tasks.

Based on the domain order, this agent retrieves a list of tasks that must be fulfilled. For each such domain order, the agent uses historical data from similar orders to find all such tasks.

If the Product offering or Category fulfillment tasks defined in the decision table aren't available to create the fulfillment tasks for product, service, and resource, the default flow Service order trigger fulfillment AI agent, resource order trigger fulfillment AI agent, and Product order trigger fulfillment AI agent are considered to create the fulfillment tasks for an order line item during the fulfillment process. For more information on configuring decision tables, see Decision tables.

When a domain order is created, if a fulfillment process isn't defined for that domain order specification category, a place order task is created. When this task is assigned to an agent, it triggers the order fulfillment AI agent for this domain order.

To modify the order fulfillment AI agent, Duplicate an agentic workflow, and adjust the settings according to your requirements.

The order fulfillment AI agent adds tasks apart from the generated tasks from Group Action Framework (GAF). To activate the GAF, see Activate Group Action Framework for Now Assist for Sales CRM for Telecommunications. The GAF and AI search are both used for order tasks.

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Role required: sn_somt_gen_ai.sales_and _order_fulfillment_ai_agent

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Order Fulfillment AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Order Fulfillment AI agent**.

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Testing the AI agent

To access the use case testing page:

- Navigate to **All** > **AI Agent Studio** > **Testing**.
- On the Overview page, select **Test use cases**.

Now Assist for Sales CRM for Telecommunications AI agent Order fallout AI agent

Use the AI agent to automatically create the fallout records based on reported issues on the task's notes.

Order fallout AI agent overview

Use the Order fallout AI agent to:

- Eliminate manual review of completed orders by automatically analyzing work notes.
- Reduce manual effort in the fallout creation and assignment process.
- Ensure that all relevant fallouts are captured and linked to original order tasks.

The agent automatically creates a fallout in case of an order task failure. The agent identifies the correct category in which the fallout must be created. The agent doesn't create a fallout if the fallout is already created.

This agent analyzes the order fulfillment tasks when a task status is changed to on hold and automatically creates relevant fallout records based on issues identified in work notes. It leverages Now LLM Service to match task observations with predefined fallout types, streamlining the post-fulfillment issue tracking process.

Order fallout AI agent performs the following task:

1. Analyzes all the order task work notes.
2. Identifies reported issues.
3. Matches issues with available fallout types.
4. Creates appropriate fallout records.

To modify the Order fallout AI agent, Duplicate an agentic workflow, and adjust the settings according to your requirements.

To add tools and information, see Add tools and information to an AI agent for details.

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> **Important:** In the Select channels and status page, make sure that the **Active** button is turned on to activate the AI agent.

Role required: sn_somt_gen_ai.sales_and_order_fulfillment_ai_agent

Order fallout AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. Select **Order fallout AI agent**.

Testing the AI agent

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

Now Assist for Sales CRM for Telecommunications AI agent Image to task plan template AI agent

Use the AI agent to create a task plan template for a given specification based on the uploaded image file.

Image to task plan template AI agent overview

This agent processes uploaded image file, extract tasks and tasks dependencies and store them as a task plan template for a given specification and order action.

The AI agent integrates with order action catalogs, file upload services, and template management systems to produce standardized task plan templates with dependency graphs and action mappings. NOW LLM does not support this agent.

The uploaded image should define the tasks and the tasks flow and dependency in a clear chart, with clear text visualization.

From the image the agent always expects the first node or the root node as the specification and not tasks and all others will be tasks.

Example image supported by AI agent for task plan template

Guidelines for image:

- Size of the image must be less than 10MB.
- Format of the image must be PNG, PDF, JPG.
- Connecting lines of tasks and node must not overlap.

Images not supported by AI agent for task plan template

To modify the Image to task plan template AI agent, Duplicate an agentic workflow and adjust the settings according to your requirements.

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To add tools and information, see Add tools and information to an AI agent for details.

Role required: sn_task_plan.admin and sn_prd_pm.product_catalog_admin

Important: In the select channels and status page, make sure that the **Active** button is turned on to activate the AI agent.

Image to task plan template AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Image to task plan template AI agent**.

Testing the AI agent

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

Now Assist for Telecommunications, Media and Technology (TMT)

Use the ServiceNow® Now Assist for Telecommunications, Media and Technology (TMT) application to summarize service problem cases, account onboarding cases, engagements, touchpoints, generate the case resolution notes, and summarize tests. You can enable your agents to understand the case context and test results so that they can propose quicker resolutions to your customers. Additionally, you can automate transformation mapping between provider and consumer instances in Service Exchange.

Get started

Explore	Configure	Use
Learn more about Now Assist for Telecommunications, Media and Technology (TMT)	Configure the Now Assist for Telecommunications, Media and Technology (TMT)	Use generative AI capabilities offered by Now Assist for Telecommunications, Media and Technology (TMT)

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Important:

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- 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 AI & 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 case summarization) and test run information (for test summarization). 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.

Exploring Now Assist for Telecommunications, Media and Technology (TMT)

With the Now Assist for Telecommunications, Media and Technology (TMT) application, your agents can use generative AI to summarize service problem cases, account onboarding cases, engagements, touchpoints, internal plays, customer plays, successive initiatives, tests, risk signal and issues, and generate resolution notes. Additionally, you can automate transformation mapping between provider and consumer instances in Service Exchange.

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Overview of Now Assist for TMT

The following generative AI capabilities are available:

Telecommunications Now Assist capabilities

- A service problem case summary enables an agent to gather the case context on long-running or complex cases. Because these cases can contain several details, including conversation with customers or other agents, generating a summary can help agents to get a quicker understanding of the case.
- The case resolution notes can help an agent to wrap up cases faster and provide the context about the case resolution to the other agents who might encounter similar issues.
- A test summary assists an agent with obtaining the test results that were generated after executing the test runs. It provides a high-level overview of the test run in a clear format.
- Knowledge generation can help an agent to streamline content creation. An agent can automatically generate knowledge articles by using the relevant data from the case record after proposing a resolution or closing the case. By not having to generate knowledge articles manually, this feature can save your agents valuable time and effort.
- The customer service summary skill provides you with a concise summary of a sold product, including the current situation, root cause indicators, critical actions, and resolution details.

Technology Now Assist capabilities

- An account onboarding case summary enables an agent to gather case context on onboarding cases. Agents can generate a summary to gain understanding of any stage of the onboarding cycle.
- An engagement record summary can enable an agent to summarize initiatives, outcomes, risks, and internal plays associated with an engagement.
- A touchpoint record summary can enable an agent to summarize meetings and emails exchanged during the engagement life cycle.
- A customer play record summary that includes details of the record and all the associated tasks.
- A internal play record summary that includes details of the record and all the associated tasks.
- A success initiative record summary that includes details of the record and all the associated tasks.
- Collects and analyzes metric data, processes large data sets, identifies patterns and anomalies.
- Transform map assist enables providers to automatically generate transform maps between provider and consumer tables.
- The risk signal and issues summarization skill provides you with a summary of risk history and resolution context.

Skills

The Now Assist for TMT application includes the following generative AI skills:

Customer service summary

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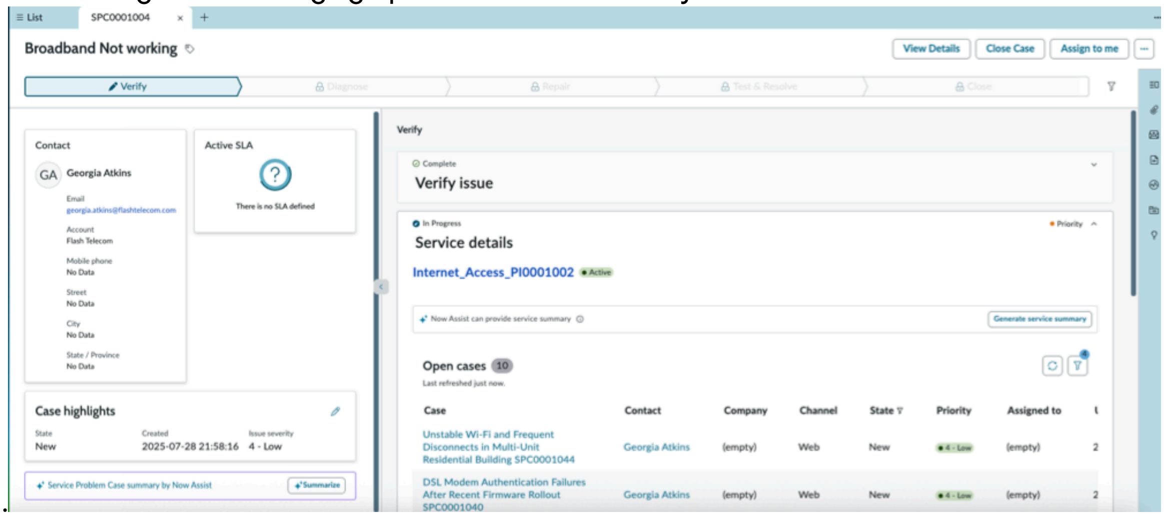
Summarize the service details mentioning the current situation, any critical actions to be taken and find the root cause indicators using the knowledge graph and service summary skill.



Service Problem Case summarization

Generates a summary of a service problem case, including the issue and the actions taken. An agent can generate a summary of a case to understand the case context, refresh the summary so that it includes the latest updates to the case, and post the summary to the case work notes.

The service problem case summarization skill generates a service problem case summary and displays it below the Case highlights card. The summary includes the information that the agent or customer enters in the following service problem case record fields:

- Short description
- Description
- Work notes
- Additional comments
- Diagnostic Task

  Fields:

  - Description
  - Short description
  - Work notes
  - state
  - sys id
- Resolution Task

  Fields:

  - Description
  - Short description
  - Work notes
  - state

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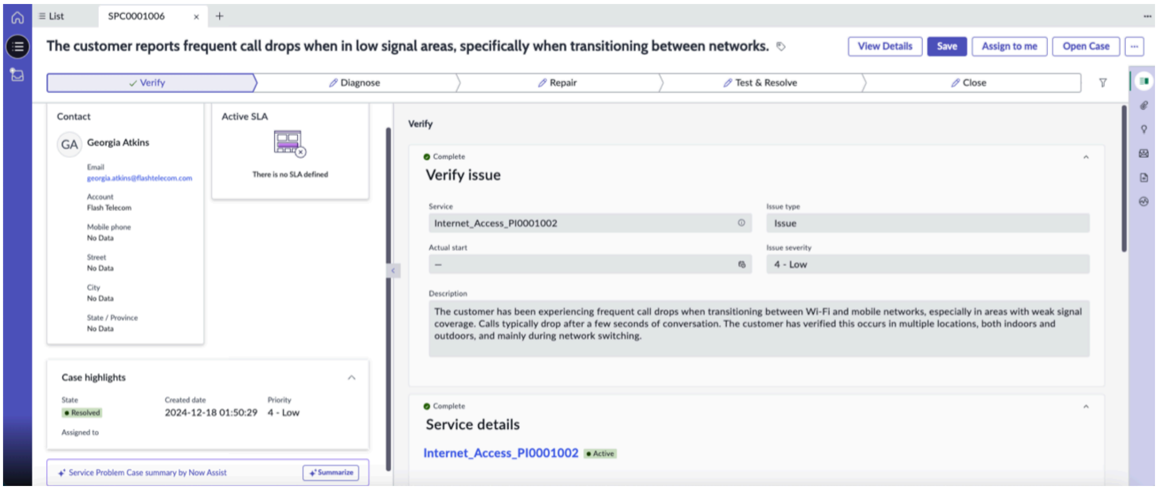
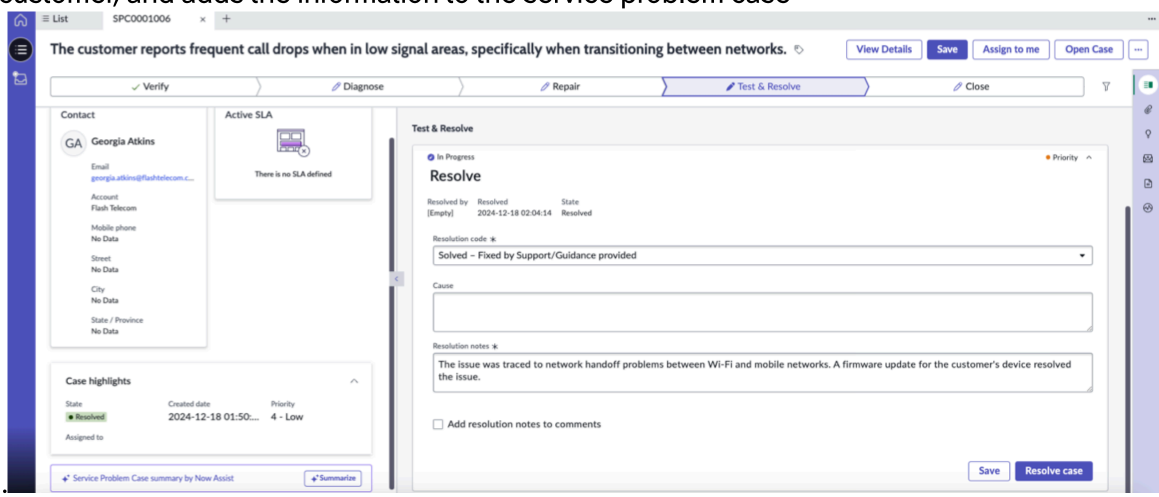


Resolution notes generation

Generates resolution notes for a service problem case, proposes the resolution to the customer, and adds the information to the service problem case



record.

Test summarization

Generates a test run summary after the test is executed. It includes the main points covered during the test execution, including the test output, test interpretation, and other defined test parameters. An agent can generate a test summary of the executed tests to identify the root cause of the problem.

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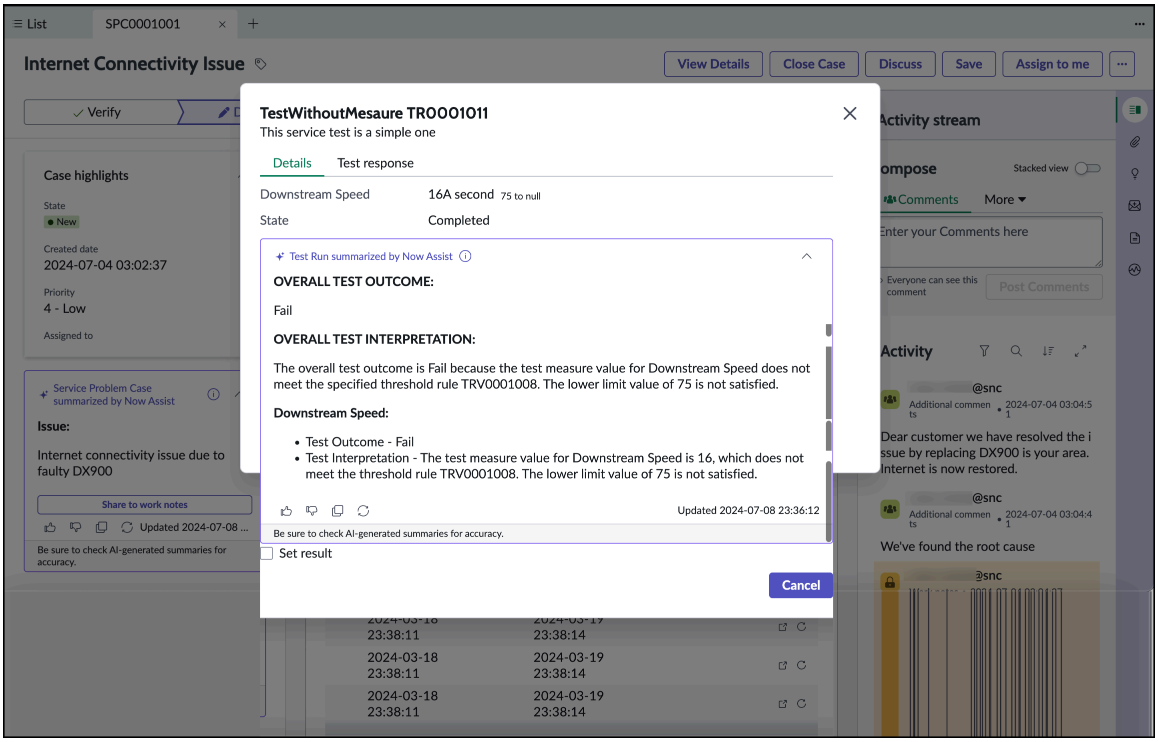
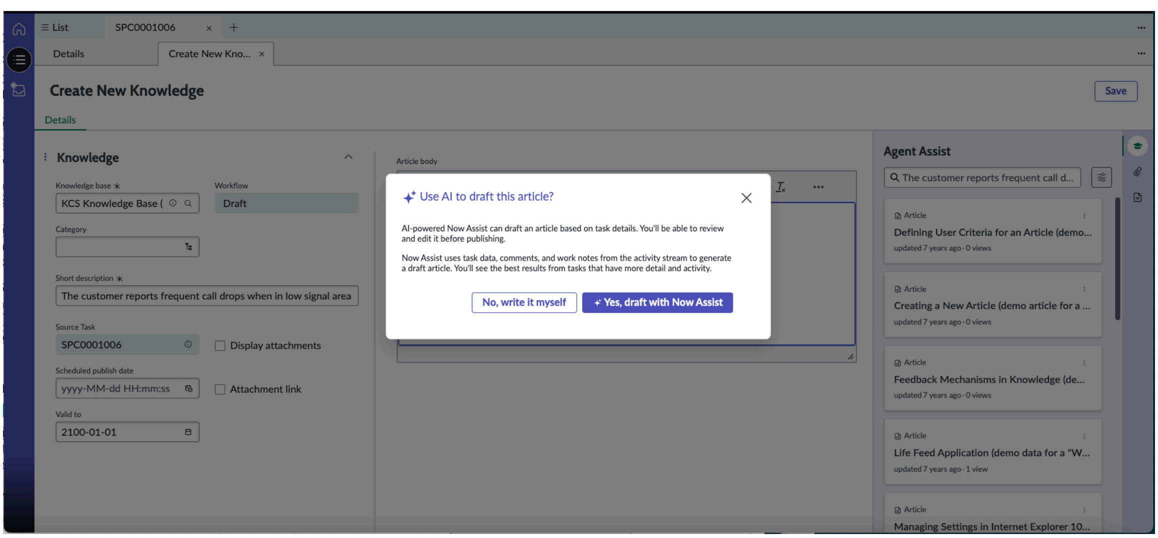


Knowledge generation

Generates a knowledge article from a case after proposing a resolution or closing the case.

The knowledge generation skill displays a pop-up window that an agent can use to generate a knowledge article that is based on similar cases and review it before publishing the knowledge article draft.



Account onboarding case summarization

Summarizes an account onboarding case, including details about each stage in the account onboarding lifecycle. Agents can quickly get up to speed on the status of the onboarding case and case tasks with a high-level summary of key points of information.

The account onboarding summarization skill generates an onboarding case summary and displays it above the Activities card. The summary includes the

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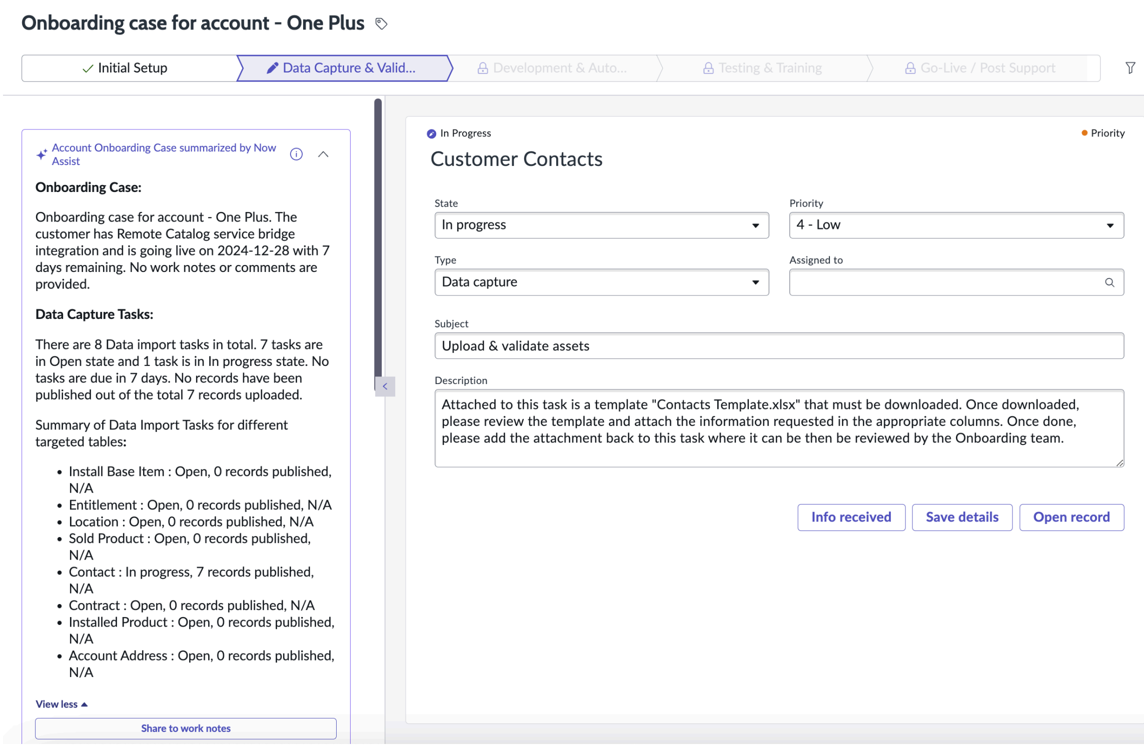
information that the agent enters during the following stages of the account onboarding lifecycle:

- Initial Setup
- Data Capture & Validation
- Development & Automation
- Testing & Training
- Go-live & Post-Support



Engagement summarization

Generates the summary for an engagement including preconfigured parameters such as risks, initiatives, outcomes, cases, and internal plays. Customer success managers can quickly get up to speed on all activities and the overall engagement with a high-level summary of the key points of information.

The engagement summarization skill generates a summary of the engagement including the status, go-live date, renewal date, worknotes, and any outstanding actions and displays it above the Account details card. The summary includes the information that the agent enters in the following engagement record fields:

- Title
- Description
- Work notes

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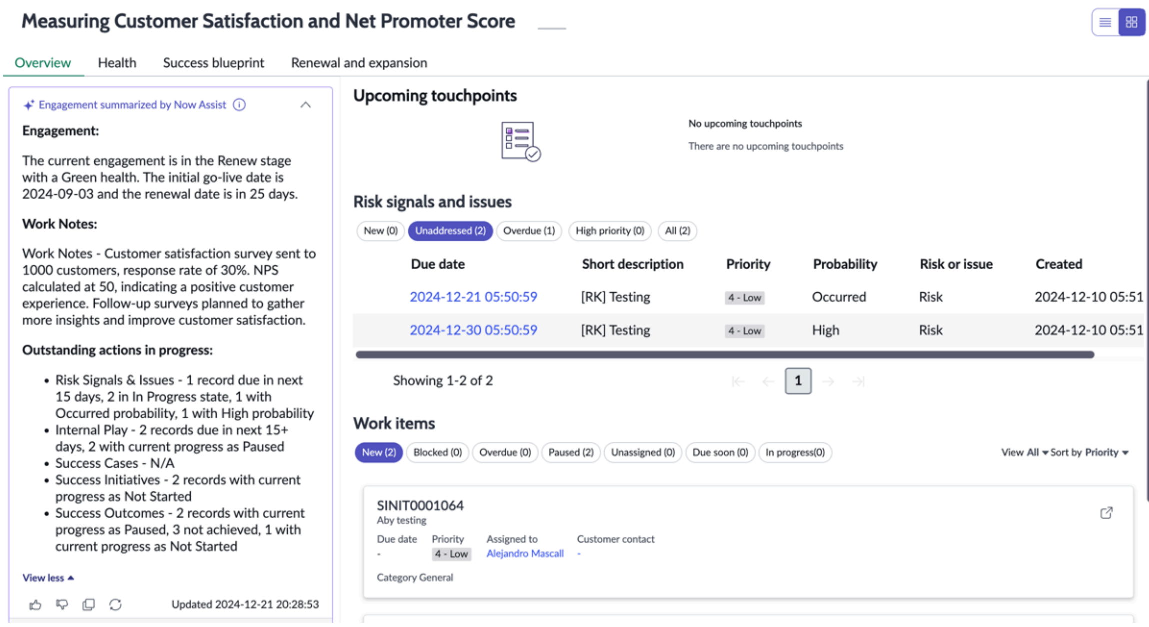
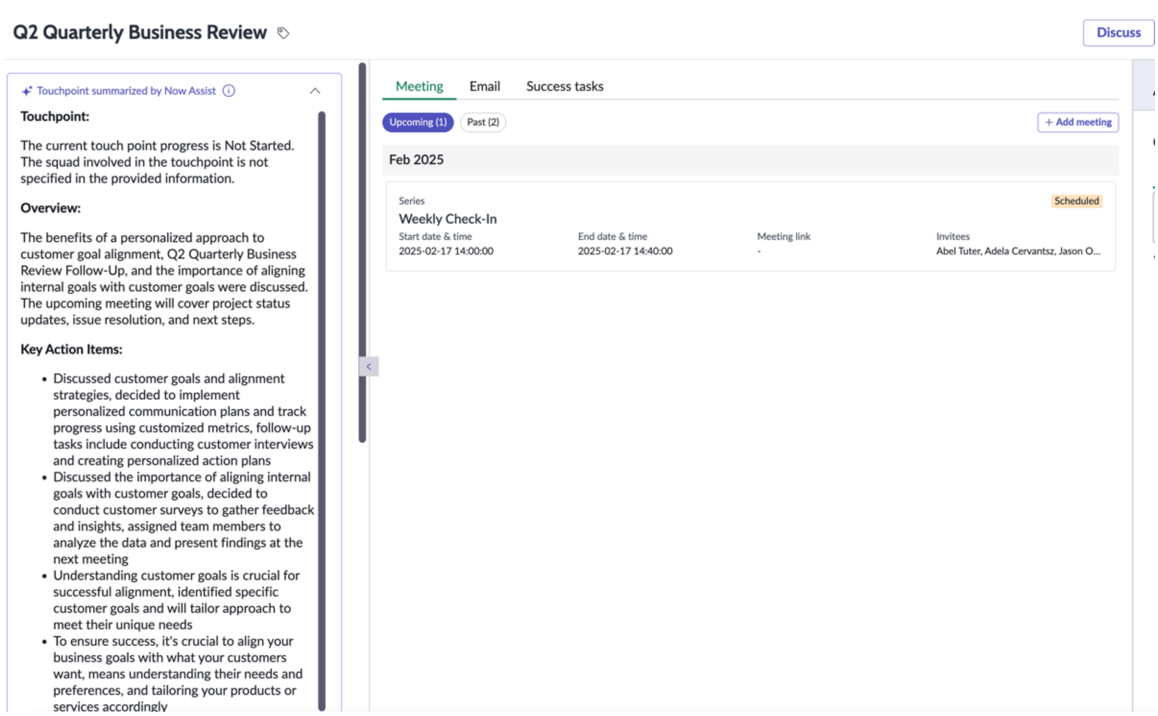


Touchpoint summarization

Generates a summary of the different touchpoints in the engagement lifecycle. Customer success managers can get a quick summary of all meetings and emails exchanged between the different stakeholders and any follow up activities.

The touchpoint summarization skill generates a summary of the touchpoints including the meeting agenda, meeting type, type of meeting, and emails. The summary includes the information that the agent enters in the following touchpoint record fields:

- Subject
- Description
- Work notes
- Additional comments



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Transform mapping assist

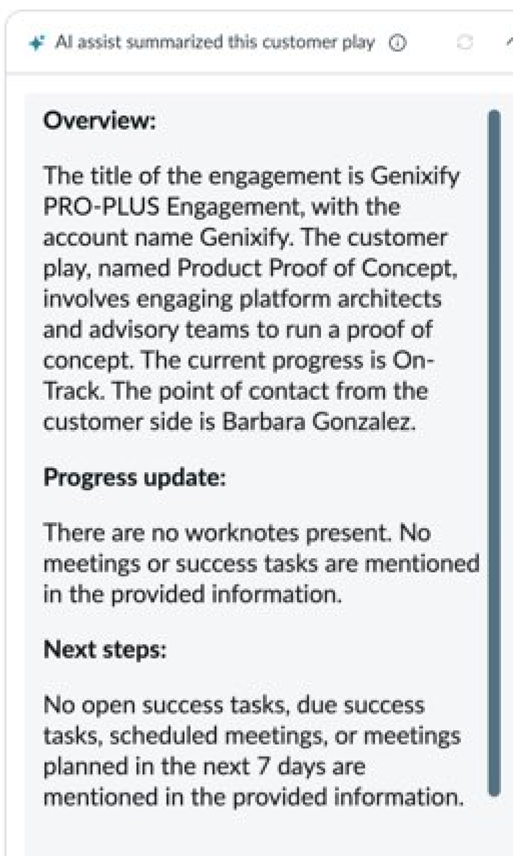
Uses the NOW Large Language Model (LLM) to enable Service Exchange providers to automatically generate a transform mapping between provider and consumer tables. This skill enables providers to streamline the transformation mapping process by reducing errors and improving overall efficiency.

Customer play summarization

Generates a summary of the customer play and includes the record details and associated customer play tasks.

The customer play summarization skill generates a summary of the customer play record and highlights critical information such as the number of tasks due in the 7 days or days remaining to close the record. The summary includes the following sections:

- Overview
- Progress updates
- Next steps



Internal play summarization

Generates a summary of the internal play and includes the record details and associated internal play tasks.

The internal play summarization skill generates a summary of the internal play record and highlights critical information such as the number of tasks due in the 7 days or days remaining to close the record. The summary includes the following sections:

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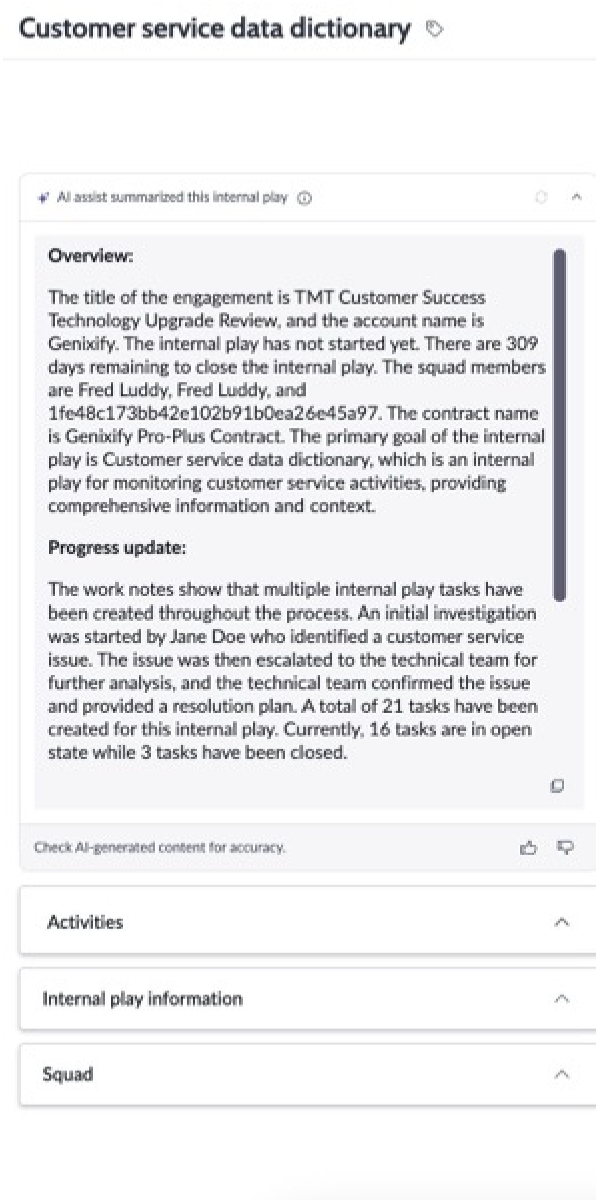
- Overview
- Progress updates
- Next steps



Success initiative summarization

Generates a summary of the success initiative and includes the record details and associated success tasks.

The success initiative summarization skill generates a summary of the success initiative record and highlights relevant critical information. The summary includes the following sections:

- Overview
- Progress updates
- Next steps

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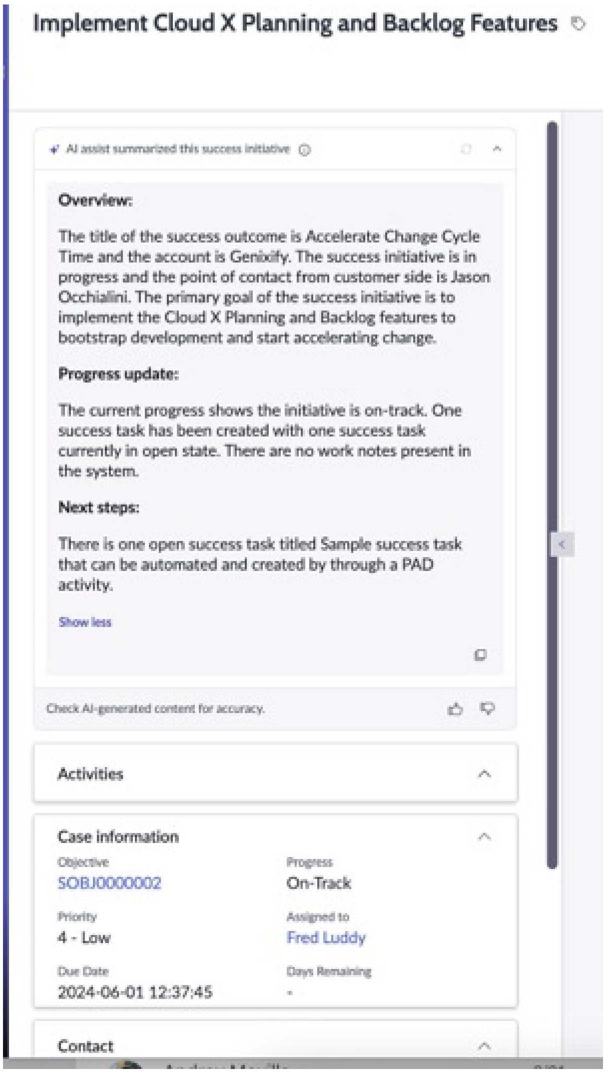

Analyze metric data trend

Collects and analyzes metric data, processes large data sets, identifies patterns and anomalies. Provides clear actionable insights that enables the Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow to make informed decisions and take appropriate actions.

Risk signal and issues summarization

Generates a summary from a risk signal and issues summarization record, risk solution and risk occurrences.

The risk signal and issues summarization skill generates a summary of the risk signal and issues record and highlights relevant critical information. The summary includes the following sections:

- Overview
- Progress update
- Next steps

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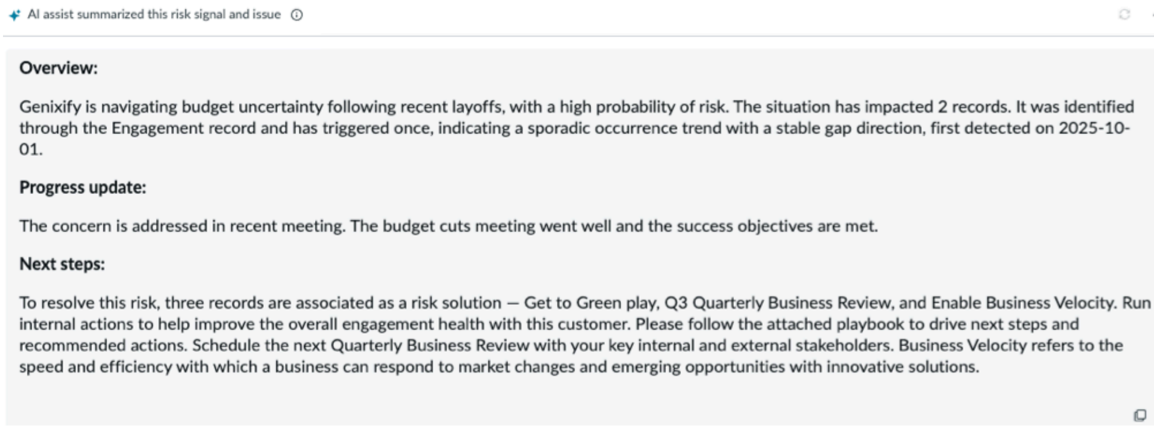

Now Assist panel in CSM/FSM Configurable Workspace

An agent can use the Now Assist panel in CSM/FSM Configurable Workspace.

This conversational interface enables an agent to request a service problem case summary and generate the service problem case resolution notes. For more information about the Now Assist panel, see Now Assist panel.

Related topics

- Now Assist
- Exploring Now Assist Admin

Supporting information for Now Assist for Telecommunications, Media and Technology (TMT)

Get a quick overview of the important information that is related to the Now Assist for Now Assist for Telecommunications, Media and Technology (TMT).

Supported versions

Now Assist for TMT is supported starting with Xanadu.

Supported user interfaces

Now Assist for TMT application includes the skills that are listed in the following table.

Now Assist for TMT supported interfaces

CSM/FSM Configurable Workspace	• Service problem case summarization • Resolution notes generation • Test summarization • Knowledge generation • Account onboarding case summarization • Engagement record summarization • Touchpoint record summarization • Customer service summary • Customer play summarization

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Now Assist for TMT supported interfaces (continued)

	• Internal play summarization • Success initiative summarization • Risk signal and issues summarization
Core UI	• Service problem case summarization • Test summarization • Knowledge generation • Account onboarding case summarization • Engagement record summarization • Touchpoint record summarization • Customer play summarization • Internal play summarization • Success initiative summarization • Mapping assist • Risk signal and issues summarization

Application information

Activate the Now Assist for TMT (sn_tmt_gen_ai) store app to use the service problem case summarization skills and to generate case resolution notes.

This store app has the dependency on Customer Service Problem Management.

Activate the applications in the following order:

1. Customer Service Problem Management
2. Now Assist for TMT

For more information, see Configuring Now Assist for Telecommunications, Media and Technology (TMT).

Configuring Now Assist for Telecommunications, Media and Technology (TMT)

Configure the Now Assist for Telecommunications, Media and Technology (TMT) application so that your agents can use the generative AI skills in the CSM/FSM Configurable Workspace and in Core UI.

Before you begin
Role required: admin

About this task
Use the Now Assist Admin console to configure Now Assist for TMT. For information needed to install the Now Assist plugins and configure generative AI skills, see Overview tab in Now Assist Admin.

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TMT features and skills in the Now Assist Admin console

TMT features	Skills
Service Problem Case	• Case summarization • Resolution notes generation • Test summarization • Knowledge generation • Customer service summary
Customer Success Management	• Account onboarding case summarization • Engagement summarization • Touchpoint summarization • Customer play summarization • Internal play summarization • Success initiative summarization • Analyze metric trend • Risk signal and issues summarization
Service Exchange	Transform mapping

Note: The ServiceNow® large language model (Now LLM Service) is currently the only provider for this Now Assist application's skills.

Procedure

1. Install the Now Assist for Telecommunications, Media and Technology (TMT) plugin (sn_tmt_gen_ai).
   - For information about the plugin dependencies and plugin activation order, see Application information.
   - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
   If you're already in the Now Assist Admin console, you can select the **Now Assist Skills** tab on the screen.
3. Activate and configure the skills for the Now Assist for TMT features.
   These features are grouped under the Customer workflow group. Each feature has its associated skills.
4. Select **TMT** under the **Customer** workflow group.
5. On the Now Assist skills for TMT page, select **Activate skill** for the skill that you would like to activate.
   The page for the skill that you activated opens with the General details section highlighted.
6. Review the inputs for the selected skill.

   The input table fields are read-only. For information about the inputs and triggers for each skill, see Skill inputs for Now Assist for Telecommunications, Media and Technology (TMT).

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7. After reviewing the inputs for the selected skill, select **Save and continue** to go to the next step. You can return to a previous step by using the **Back** button.
8. In the Define availability section, choose one of the following:
   - To enable the skill everywhere it is available, select **Skill is always available**.
   - To manually set the conditions for when the skill is available, select **Customize skill availability**.
9. After you configure the skill availability, select **Save and continue** to go to the next step.
10. Select where you would like to display the skill.
    - To display the skill on the Mobile Agent app, select **In-product**.
    - To display the skill in the Now Assist panel, select **Now Assist panel**.

      For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.
11. After you configure the display for the selected skill, select **Save and continue** to go to the next step.
12. Review your choices and select **Activate** to complete the configuration.

Result
Your skill is configured.

Skill inputs for Now Assist for Telecommunications, Media and Technology (TMT)

Use inputs for each skill to configure how and when a skill is used.

Overview of Now Assist for TMT

Depending on the selected skill, you can configure inputs. These settings determine how a skill is used. An input identifies the data that is used for a skill, such as the table and fields that are used to generate a service problem case summary, resolution notes summary, customer service summary, and test summary.

Domain separation allows users to separate data, processes, and administrative tasks into logical groupings known as domains. Domain separation enables users to independently manage skill configurations, data visibility, and other settings within each domain. Domain separation is possible at the skill level and at the individual configuration level.

Domain separation is possible at the skill level and at the individual configuration level.

Enable security for Now Assist skills and flows through access control lists (ACLs) and user identities. For more information, see Configure ACLs for AI agents and agentic workflows.

To understand more about the ServiceNow domain separation, see Exploring domain separation.

Risk signal and issues summarization skill

The risk signal and issues summarization skill includes the inputs that identify the table and fields that are used when a risk signal and issues summary is generated.

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Inputs for the risk signal and issues summarization skill

Input	Description
Input table	Risk signal and issues
Input fields	• Account Name • Priority • Description • Short description • State • Source record • Category Name • Probability

Related input for risk signal and issues summarization skill

Input	Description
Input table	Risk solution
Input fields	• Source record • Source table • impacted_record • impacted_table

Related input for risk signal and issues summarization skill

Input	Description
Input table	Risk occurrence
Input fields	• Start date • End date • Threshold • Gap • Current value • Notes

Customer service summary skill

The customer service summary skill helps user to get information on the customer service issues from their knowledge graph. You can configure the input in the following customer service summarization stages:

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- General details
- Graph questionnaire

  To add or modify the queries, see Configure the graph questionnaire Now Assist for Telecommunications, Media and Technology (TMT).

- Customize prompt

  To customize the prompt, see Customize a skill in Now Assist for TMT.

- Define access
- Select display
- Review and activate

Inputs for the customer service summary skill

Input	Description
Input table	Service Problem Case [sn_sprb_mgmt.admin]

Service problem case summarization skill

The service problem case summarization skill includes the inputs that identify the table and fields that are used when a service problem case summary is generated. You can configure the input in the following service problem case summarization stages:

- General details
- View input
- Customize prompt
- Define availability
- Select display
- Review and activate

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

Inputs for the service problem case summarization skill

Input	Description
Input table	Service Problem Case [sn_sprb_mgmt_case]
Input fields	• Description • Short description • Work notes • Additional comments • Diagnostic Task Fields:

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Inputs for the service problem case summarization skill (continued)

Input	Description
	◦ Description ◦ Short description ◦ Work notes ◦ state ◦ sys id • Resolution Task Fields: ◦ Description ◦ Short description ◦ Work notes ◦ state
Input templates	• Verify • Diagnose • Repair • Test & Resolve • Close

Resolution notes generation skill

The resolution notes generation skill includes the inputs that identify the table and fields that are used when the resolution notes are generated for a service problem case.

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

Inputs for the resolution notes generation skill

Input	Description
Input table	Service Problem Case [sn_sprb_mgmt_case]
Input fields	• Description • Short description • Work notes • Additional comments

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Test summarization skill

The test summarization skill includes the inputs that identify the table and fields that are used when a test summary is generated.

The following table lists the inputs that you can configure for the test summarization skill.

Inputs for test summarization skill

Input	Description
Input table	Test Run [sn_st_mgmt_test]
Input field	Name

Related input for test summarization skill

Input	Description
Input table	Test Measure [sn_st_mgmt_test_measure]
Input field	• Metric name • Metric description • Value • Rule violation

Knowledge article generation skill

The knowledge article generation skill includes the inputs that identify the table and fields that are used when the knowledge article draft is generated for a case.

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

The following table lists the inputs for the knowledge article generation skill.

Related inputs for the knowledge article generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	• Short description • Description • Resolution notes • Work notes • Comments

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Account onboarding case summarization skill

The account onboarding case summarization skill includes the inputs that identify the table and fields that are used when an account onboarding summary is generated. You can configure the input in the following account onboarding case stages:

- Form details
- Data capture
- Development
- Training
- Testing

Inputs for the account onboarding case summarization skill

Input	Description
Input table	Account Onboarding Case [sn_acct_lc_onb_case]
Input fields	• Service Exchange integration • Short description • Description • Go live date • Days remaining • Work notes • Additional comments
Stage - Data Capture	

Related input for account onboarding skill

Input	Description
Input table	Account Lifecycle Import Task [?]
Input field	• State • Days remaining • Published records • Work notes • Additional comments • Target table • Total records updated

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Related input for account onboarding skill

Input	Description
Input table	Account Lifecycle Task [?]
Input field	• Short description • State • Days remaining • Type • Work notes • Additional comments

Related input for account onboarding skill

Input	Description
Input table	Account Lifecycle Import Task [?]
Input field	• State • Days remaining • Published records • Work notes • Additional comments • Target table • Total records updated

Engagement summarization skill

The engagement summarization skill includes the inputs that identify the table and fields that are used when an engagement summary is generated.

Inputs for the engagement summarization skill

Input	Description
Input table	Engagement [sn_acct_lc_engagement]
Input fields	• State • Stage • Renewal date • Initial go-live date • Perceived health

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Related input for engagement summarization skill

Input	Description
Input table	Risk and issue
Input fields	• State • Due date • Probability

Related input for engagement summarization skill

Input	Description
Input table	Internal play
Input fields	• Due date • Progress

Related input for engagement summarization skill

Input	Description
Input table	Success case
Input fields	• Due date • Progress

Related input for engagement summarization skill

Input	Description
Input table	Success initiative
Input fields	• Due date • Progress

Related input for engagement summarization skill

Input	Description
Input table	Success outcome
Input fields	• Progress • Base value

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Related input for engagement summarization skill (continued)

Input	Description
	• Current value • Target value

Touchpoint summarization skill

The touchpoint summarization skill includes the inputs that identify the table and fields that are used when a touchpoint summary is generated.

Inputs for the touchpoint summarization skill

Input	Description
Input table	Engagement [sn_acct_lc_touchpoint]
Input fields	• Squad • Progress

Related input for touchpoint summarization skill

Input	Description
Input table	Meeting details
Input fields	• Conference details • Meeting type • Meeting start time • Meeting end time • Customer notes • Meeting notes • State

Customer play summarization skill

The customer play summarization skill includes the inputs that identify the table and fields that are used when a customer play summary is generated.

Inputs for the customer play summarization skill

Input	Description
Input table	Customer play
Input fields	• Engagement • Account

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Inputs for the customer play summarization skill (continued)

Input	Description
	• Progress • Days remaining • Squad • Contact • Short description • Description • Product

Related input for customer play summarization skill

Input	Description
Input table	Success task
Input fields	• State • Short description • Description • Due date

Related input for customer play summarization skill

Input	Description
Input table	Meeting details
Input fields	• State • Name • Meeting start time • Meeting end time

Internal play summarization skill

The internal play summarization skill includes the inputs that identify the table and fields that are used when an internal play summary is generated.

Inputs for the internal play summarization skill

Input	Description
Input table	Internal play

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Inputs for the internal play summarization skill (continued)

Input	Description
Input fields	• Engagement • Account • Progress • Squad • Contract • Short description • Description • Product • Days remaining

Related input for internal play summarization skill

Input	Description
Input table	Internal play task
Input fields	• State • Short description • Description • Due date • Days remaining

Success initiative summarization skill

The success initiative summarization skill includes the inputs that identify the table and fields that are used when a success initiative summary is generated.

Inputs for the success initiative summarization skill

Input	Description
Input table	Success initiative
Input fields	• Primary success outcome • Account • Sold product name • Sold product number • Squad • Short description • Description • State

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Inputs for the success initiative summarization skill (continued)

Input	Description
	• Contact • Days remaining

Related input for success initiative summarization skill

Input	Description
Input table	Success task
Input fields	• State • Short description • Description • Due date • Days remaining

Banners in Now Assist for Telecommunications, Media and Technology (TMT)

Banners display information about generative AI skills and the form fields that are generated or predicted by those skills.

Overview of banners in Now Assist for TMT

The generative AI banner displays information about the fields on a form that are generated or predicted by the skills available with Now Assist for TMT. The messages that appear in the banner do the following:

- Alert agents when fields are being generated or predicted and when the process is complete.
- Remind agents to review the information in these fields.
- Inform agents if fields cannot be generated or predicted.

Messages also include links to the fields that are generated or predicted by Now Assist for TMT.

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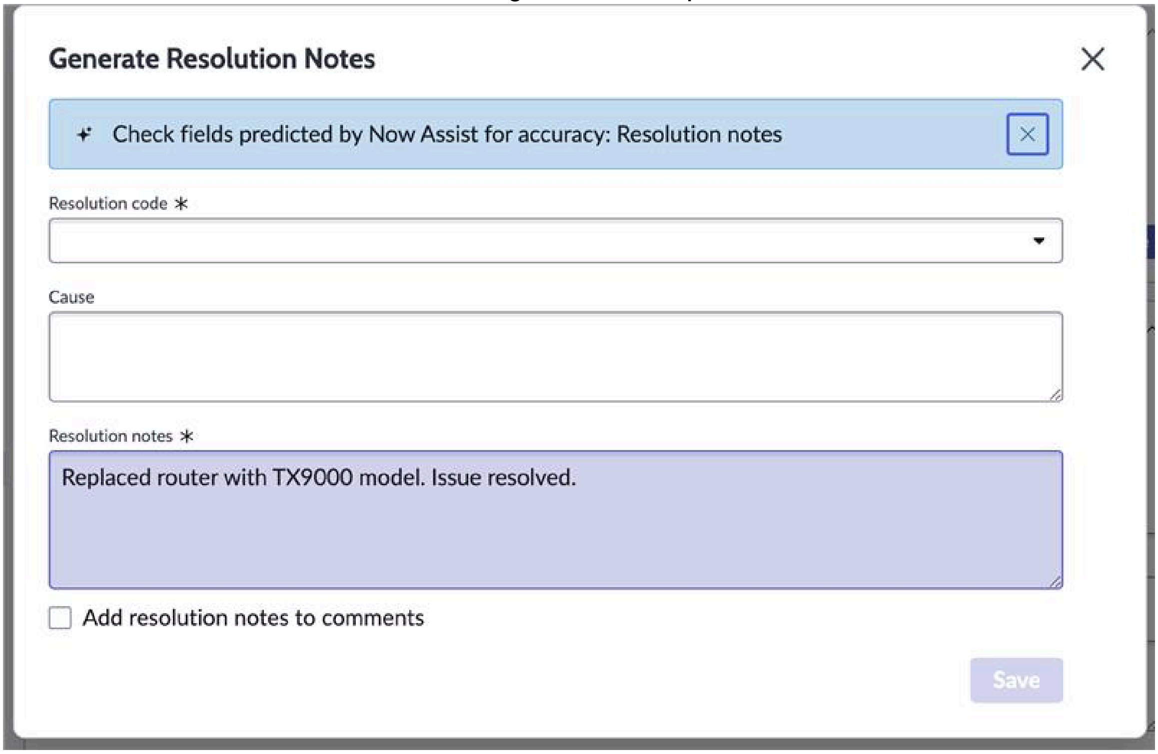
Generative AI banner in CSM/FSM Configurable Workspace.



Customize a skill in Now Assist for TMT

If you have the admin role, you can customize a Now Assist for Telecommunications, Media and Technology (TMT) skill so that agents can use the generative AI skills in CSM Configurable Workspace and in Core UI.

Before you begin

Role required: admin

About this task

From the Now Assist Admin console, you can select the input table, related records, and fields for each input template of the account onboarding and service problem management, and then configure the prompt headers to include them in the general summary.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
2. In the **Customer** workflow group, select **TMT** to view the skills for the Now Assist for TMT features.
3. Activate and copy the Now Assist for TMT feature case summarization skill for customization.

   a. On the feature card that is associated with the skill that you would like to activate, select **View details**.

   b. In the All available skills section, locate the skill you would like to activate and select **Activate skill**.

      You can choose to make a copy of the skill before activating it.

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servicenow.

c. Select the More actions icon for the skill in the Active skills section, and create a copy that you can customize by selecting **Make a copy**.

   The copy that you make is listed in the Active skills section.

d. Select the copied skill from the Active skills section to open it.
   A guided setup leads you through the configuration of the general details, input, prompt, availability, display, review, and activation of the customized skill. If you complete the entire walk-through, the case summarization skill is activated.

4. In the General details step, fill in the fields.
   For information about the inputs and triggers for each skill, see Skill inputs for Now Assist for Telecommunications, Media and Technology (TMT).

   a. Enter a name and description for the skill.

   b. Select **Save and continue** to go to the next step.

5. View the input data for each skill, such as the base input fields and related lists for the different input templates.

   Configure the base input table fields and related lists for the different input templates for the skill.

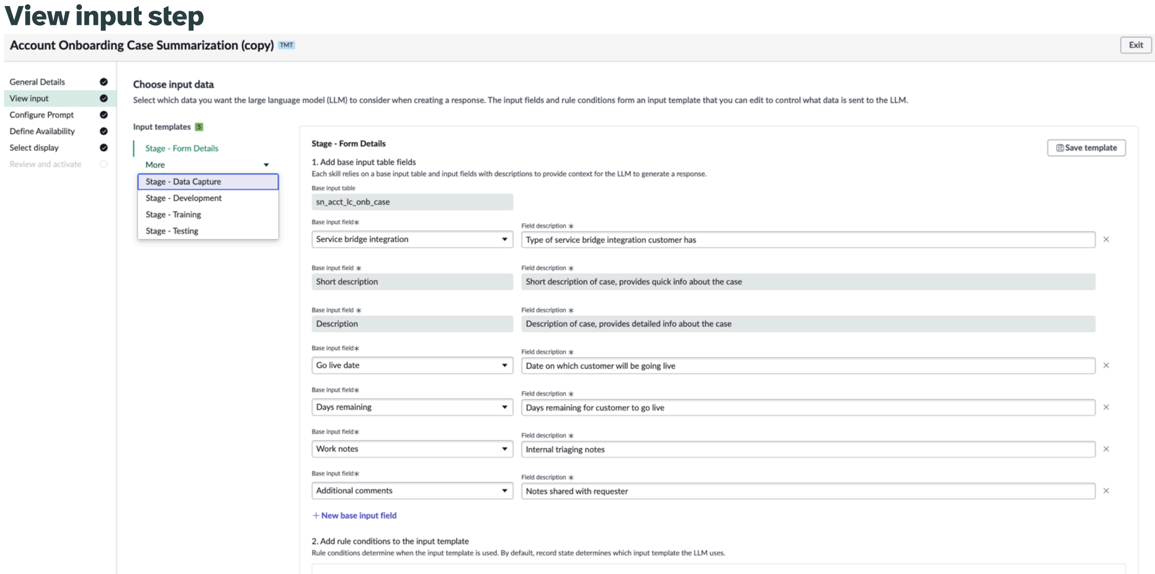
   Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

   Select only those related tables that are offered as the base system, as part of the input data.

   a. For each input template, select **+New base input field** and configure the base input table fields.

      Add multiple base input fields, as necessary.

View input step



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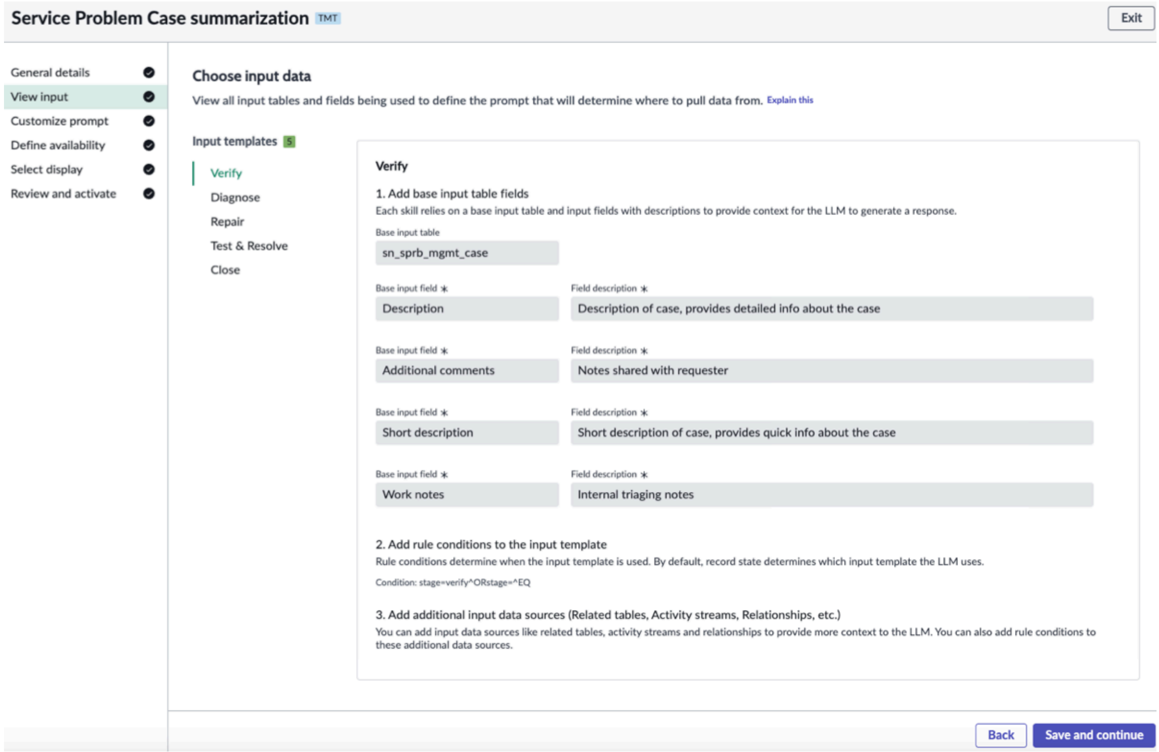
View input step



The following table lists the base input table fields and descriptions, including a relevant example.

Base input fields

Field	Description
Base input field	Field in the case table whose value this skill uses in its response. For example, `Short description`.
Field description	Description of the base input field value. For example, `Short description of case, provides quick info about the issue.`

b. For each input template, configure the rule conditions by using the condition builder to filter the data.

The rule conditions determine when the input template is used. By default, the record state determines the input template that the Now LLM Service uses.

You can build the condition out further by selecting **+New condition set** and configuring additional parameters.

c. For each input template, select **+New data source** to configure the additional related table and activity stream data, as needed.

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Adding input data sources, like the related tables and activity streams, provide more context to the Now LLM Service in a related list.

You can also add the rule conditions to these additional data sources.

d. Select **Save and continue** to go to the next step.

6. Customize the prompt.

Review and test the prompt for each input template configuration. You can edit the prompt by adding new predefined sections and reordering them, as needed.

a. For each input template, select the prompt sections from the list of available sections to include in the generated summary.

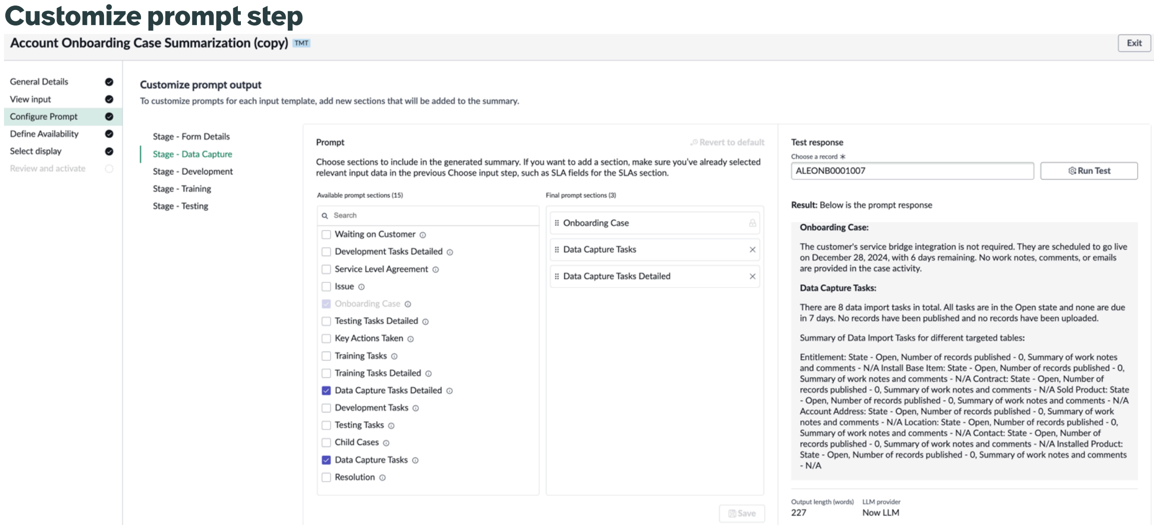
To add a section, you must configure the relevant input data prior to this step.

You can add the **Waiting on customer** prompt to cases only if the case has an **Awaiting info** state. Otherwise, adding this header to other states could cause the Now LLM Service to generate inaccurate or unreliable results.

b. Select **Save** to continue to the test response.

c. Select a case record in the Test response section, and test the prompt response output format by selecting **Run Test**.

Customize prompt step



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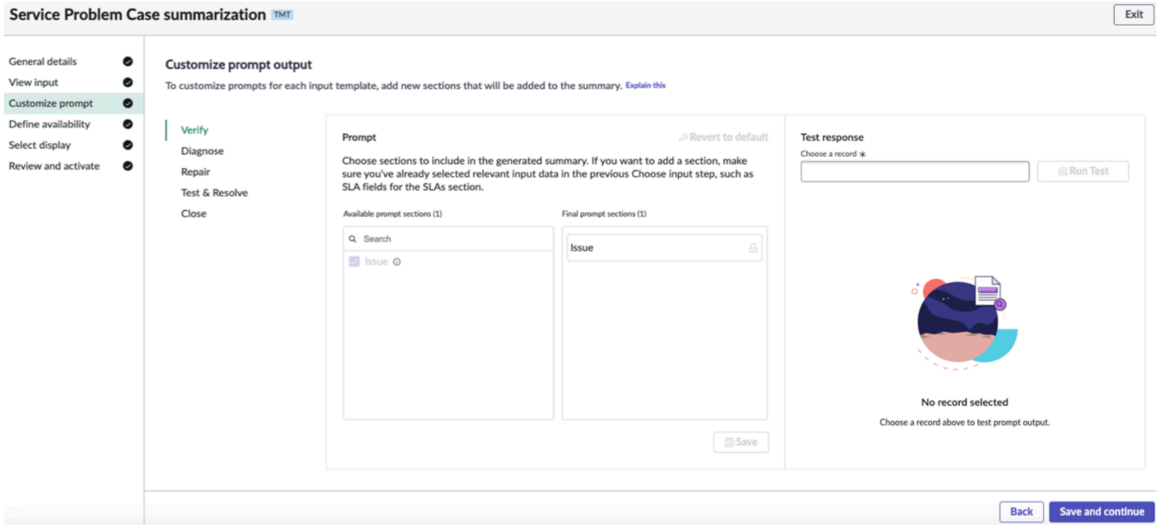
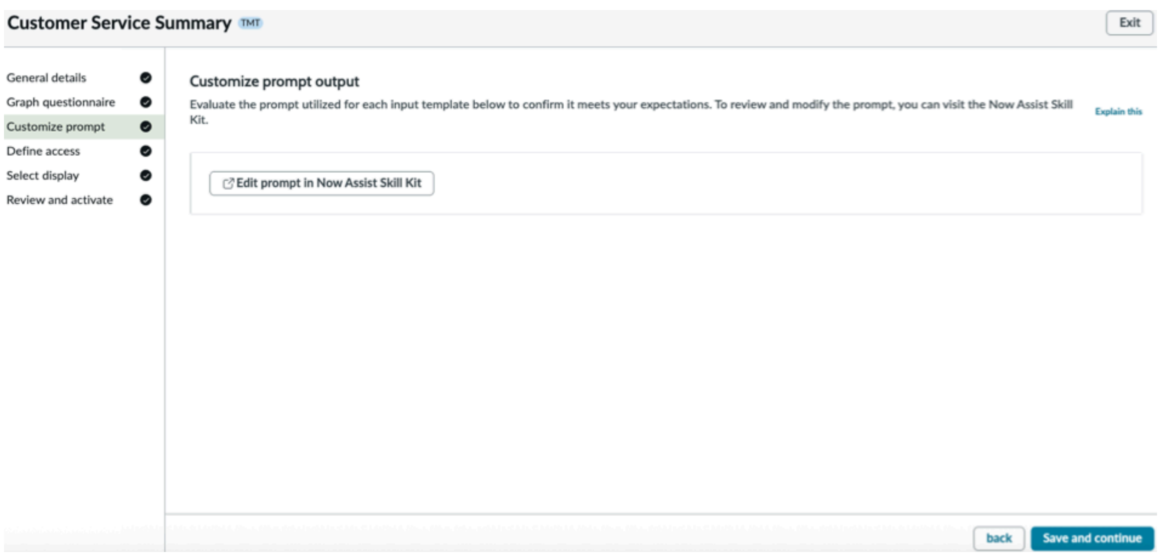
Customize prompt step



d. Select **Save and continue** to go to the next step.

7. Customize the prompt for customer service summary skill.

Review the prompt for each input template.



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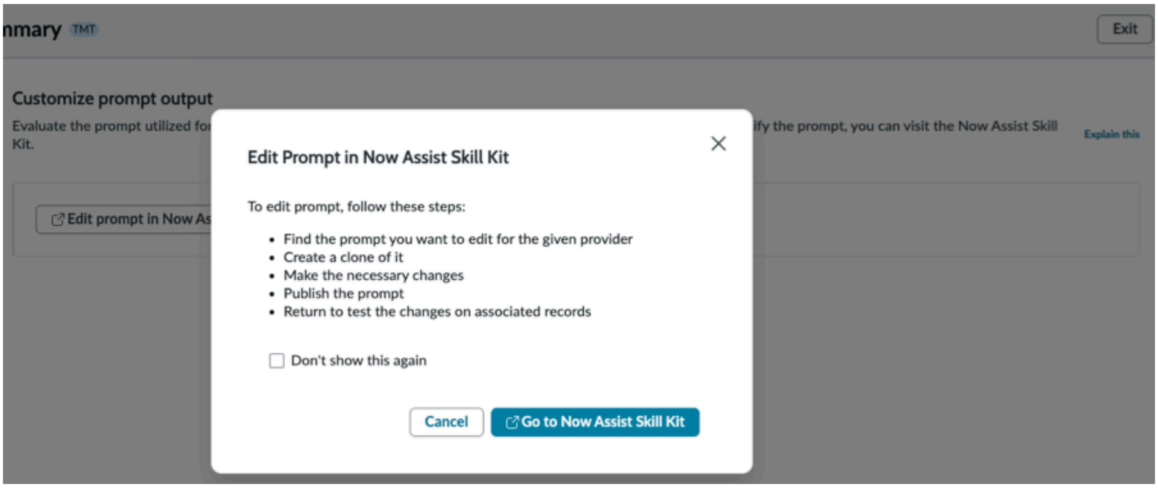
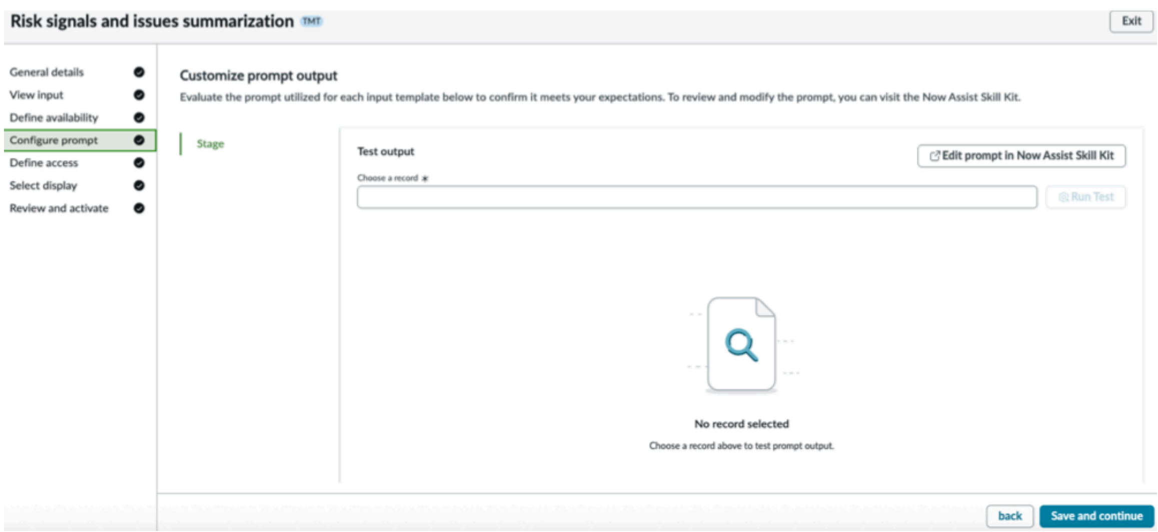
a. Select **Edit prompt in Now Assist Skill Kit** to visit Now Assist Skill Kit.



b. Select **Go to Now Assist Skill Kit** to review and modify the prompt.

8. Customize the prompt for risk signal and issues summary skill.

Review the prompt for each input template.



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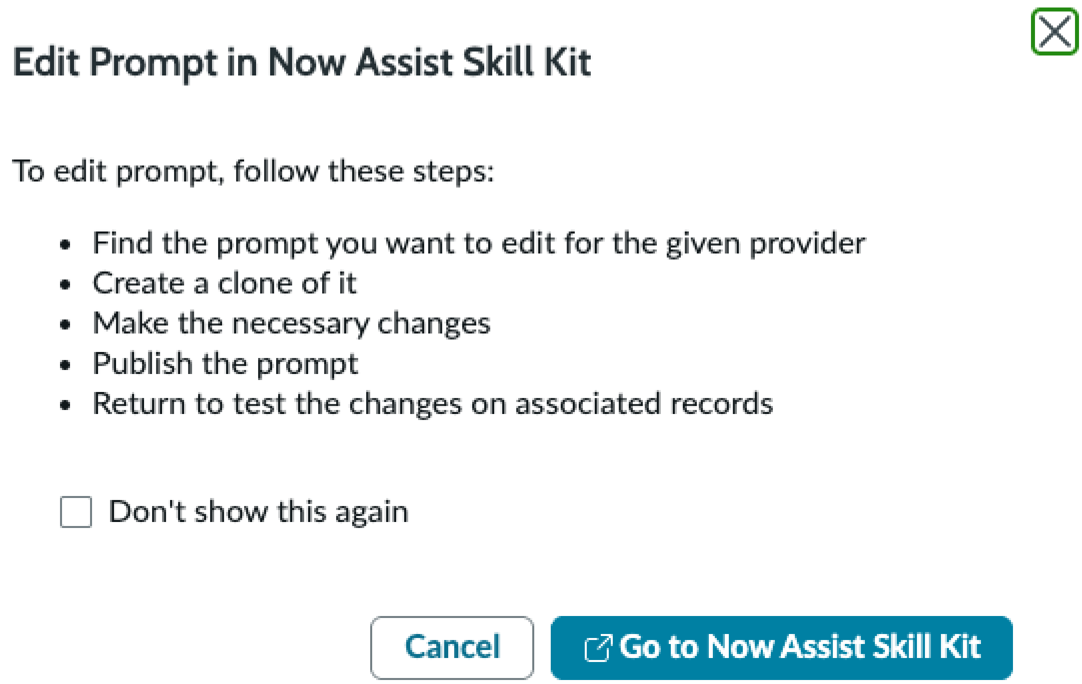
a. Select **Edit prompt in Now Assist Skill Kit** to visit Now Assist Skill Kit.



b. Select **Go to Now Assist Skill Kit** to review and modify the prompt.

9. Select **Save and continue** to go to the next step.
10. Define how the skill is available to your users.

    a. Configure the skill to be always available to users, or select conditions that must be met before the skill is available.
    Selecting **Customize skill availability** displays a condition builder to filter the data further.

    b. Select **Save and continue** to go to the next step.

11. Configure where to display the case summarization.

    a. Select either **In-product**, or **Now Assist panel**.

    - **In-product**: When selected, the Now Assist skills are displayed on the forms and workspaces.

      For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

    - **Now Assist panel**: When selected, the Now Assist skills are available in the Now Assist panel.

      If you don't see this option, you must activate the Now Assist panel. For more information, see Activate the Now Assist panel standard chat.

      For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.

    b. Select **Save and continue** to go to the next step.

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12. Review and activate the skill.
    Review your choices and select **Activate** to complete the skill customization.
    You can now select **Summarize** in a case to generate the case summary.

Configure Service Exchange Now Assist for Telecommunications, Media and Technology (TMT)

Configure the Now Assist for Telecommunications, Media and Technology (TMT) application so that enterprise providers can use the Service Exchange Mapping Assist feature in the Core UI.

Before you begin

Role required: admin

Procedure

1. Install the Now Assist for Telecommunications, Media and Technology (TMT) plugin (sn_tmt_gen_ai).
    - For information about the plugin dependencies and plugin activation order, see Application information.
    - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Features** and access the **Features** tab of the Now Assist Admin console.
   If you're already in the Now Assist Admin console, you can select the **Now Assist Features** tab on the screen.
3. Select **Customer** and select **TMT** in the Select product drop down list.
4. On the Service Exchange feature card, select **View details**.
5. In the All available Service Exchange skills section, select **Turn on**.
   Your skill is configured and activated. Agents can now automatically generate transform mapping between the provider and consumer fields.

Configure the graph questionnaire Now Assist for Telecommunications, Media and Technology (TMT)

Configure the graph questionnaire to add or modify the new queries to retrieve the knowledge graph data.

Before you begin

Role required: Admin

Procedure

1. Type `sn_nowassist_skill_config_var.LIST` in the **All** search filter.
2. Press enter.
3. Search for `Queries` in the **Column name**.
4. Open the record.
5. Select **here** if you see the notice that says:

   This record is in the Now Assist for Telecommunications, Media and Technology (TMT) application, but Global is the current application. To edit this record, click **here**.

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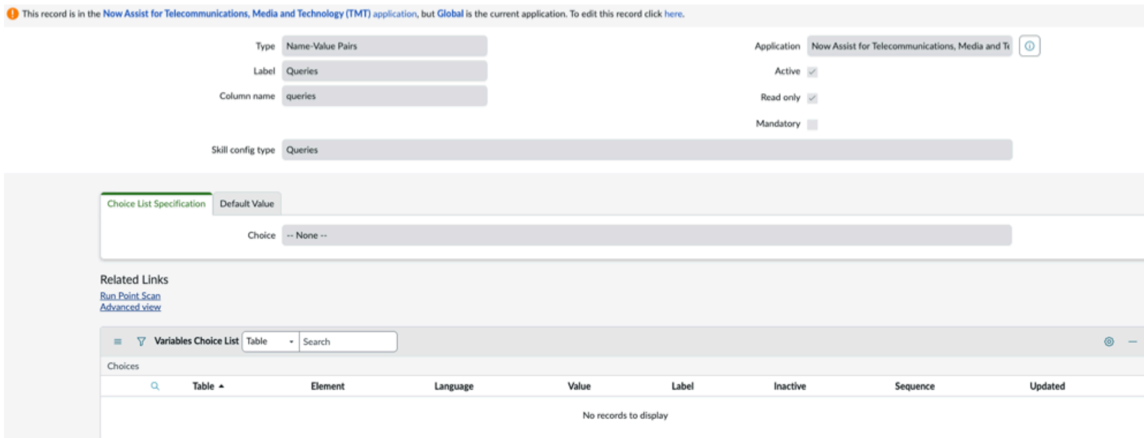
6. Clear the **Read only** field.



Using agentic workflows in Now Assist for Telecommunications, Media and Technology (TMT)

Use the Now Assist for TMT agentic workflows to complete tasks autonomously.

Available agentic workflows for Now Assist for TMT AI agent collection

Agentic workflow name	Description	Available AI agents
Test and repair telecom service issues	The agentic workflow gets triggered when the service problem case is assigned to the case agent and the state of the case is Open or New. The customer raises a case on the service disruption. The service problem case (SPC) starts with the SPC number. This AI agent is designed to handle the service problem case requests that require troubleshooting, diagnostics, analysis, or resolution for a task (case), when an identifier or description for the task is given. It's also capable of retrieving relevant context and details related to the task given to them. AI agents perform their tasks to resolve the customer issue.	• Service problem manager AI agent • Customer payment status AI agent • Preliminary troubleshooter AI agent • On-demand service tester AI agent • Service repairer AI agent

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Available agentic workflows for Now Assist for TMT AI agent collection (continued)

Agentic workflow name	Description	Available AI agents
Help remediate bill issues	The agentic workflow is designed to handle billing inquiry requests by analyzing current invoice usage, providing insights into high bill usage, and suggesting alternative plans based on customer usage patterns. For example, if a customer with a domestic mobile connection uses it internationally, they may incur extra charges; our bill analysis can identify such international usage and provide optimal plan to help manage costs.	• Billing account information collector AI agent • Recommended plans AI agent • Billing invoice data collector AI agent
Analyze network incidents	Assists customer agents in resolving a given incident. It helps customer agents to resolve network tickets by tracking it and creating an actionable task.	• Network ticket resolution AI agent • Ticket readiness AI agent • Network correlation monitor AI agent • Network ticket actionable steps generation AI agent • Network remediation generation AI agent
Analyze risks and recommend solutions	Retrieves applicable risks and proactively suggests solutions with minimal user intervention.	Success risk manager AI agent
Monitor engagement health	Monitors the health score trends for all active engagements and triggers risk signals when declined.	• Success trend AI agent • Success health monitor AI agent
Support renewals and expansion	Assesses engagements due for renewal, analyzes trends, and recommends renewal strategies.	• Renewal analysis AI agent • Value realization assessor AI agent • Success insight AI agent
Trigger risk mitigation touchpoint	Automates the creating and scheduling of meetings for a specific user.	• Meeting draft creator AI agent • Draft meeting scheduler AI agent

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Available agentic workflows for Now Assist for TMT AI agent collection (continued)

Agentic workflow name	Description	Available AI agents
Service Exchange onboarding	Assists the provider with the consumer registration process, including step-by-step guidance, error checks during registration, and support for resolving any errors.	• Registration Initiator AI agent • Registration Error Monitor AI agent
Customer voice quality issue resolution	Assists customer service representatives in resolving customer voice quality issues.	• Ticket creation AI agent • Customer interaction context gatherer AI agent • RADCOM ticket handling agent customer profile (External agent)

Enable security implementation to execute AI agents and agentic workflows through access control lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see Implement access control in Now Assist AI agents.

Important: By default, all agentic workflows and AI agent records are read only.

To run the AI agents autonomously, you must first duplicate the agentic workflow, and then proceed with the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

Once you duplicate the agentic workflow, adjust the settings according to your requirements. Next, you activate the duplicated agentic workflow. You can also test the agentic workflow to analyze its performance in the AI Agent Studio, while it executes the instructions that you defined.

Looking for an AI agent?

- There might 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 might not be installed on your instance, visit the AI Agent Marketplace on the ServiceNow Store.

Customer Service Problem Management agentic workflows

The Customer Service Problem Management agentic workflows are used to resolve broadband, internet issues, and incidents, helping customer agents to resolve network tickets by tracking them and creating an actionable task, and handle the billing inquiry case requests.

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Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection test and repair telecom service issues agentic workflow

Use the Test and repair telecom service issues agentic workflow to resolve broadband and internet issues.

Test and repair telecom service issues overview

Resolve the customer issues using a team of AI agents in the Test and repair telecom service issues agentic workflow. It can handle task requests that require troubleshooting, diagnostics, analysis, or resolution for a task (case), whether an identifier or description for the task is given.

The Test and repair telecom service issues agentic workflow supports these tables:

- Incident
- Change request
- Domain order
- Order task
- Service problem case

Role required: sn_tmt_agentic_ai.test_and_repair_telecom_service_ai_agent

To modify the Test and repair telecom service issues agentic workflow Duplicate an agentic workflow, and adjust the settings according to your requirements.

> **Important:** In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Role masking

Required role: sn_tmt_agentic_ai.test_and_repair_telecom_service_ai_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Test and repair telecom service issues agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Test and repair telecom service issues**.

To create a new agentic workflow, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

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AI agents used in the Test and repair telecom service issues agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agent	AI agent role
Service problem manager AI agent	An AI agent is responsible for planning, orchestrating, and delegating work to other agents. Checks the customer inventory status. Shows the Knowledge articles.
Payment status checker AI agent	Checks for outstanding bill payments.
Preliminary troubleshooter AI agent	AI agent designed to ask questions that are fetched from the structured question generator. Activate the structured question generator skill to generate the questions from the skill. Check for similar cases for the resolution plan and asks questions from Knowledge Base articles to determine the resolution.
On-demand service tester AI agent	Create a diagnostic task based on the inventory specifications for a Service problem case and execute a test definition.
Service repairer AI agent	Create the repair task for the test runs.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection Help remediate bill issues agentic workflow

Use the Help remediate bill issues agentic workflow to handle the billing inquiry case requests and recommend better plans based on the customer usage.

Help remediate bill issues agentic workflow overview

The Help remediate bill issue agentic workflow uses a team of AI agents that support the resolution of customer issues. It can handle task requests to retrieve the account details, current invoices, and past invoices. It analyzes the data to identify reasons for high bill usage and recommends better plans based on customer usage patterns.

Role required: sn_tmt_agentic_ai.telco_billing_inquiry_case_agent

To modify the Help remediate bill issues agentic workflow, Duplicate an agentic workflow, and adjust the settings according to your requirements.

> **Important:** In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

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Role masking
Required role: sn_tmt_agentic_ai.telco_billing_inquiry_case_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Help remediate bill issues agentic workflow

To access the use case:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Help remediate bill issues**.

To create a new use case, see Create an agentic workflow.

Application dependency

The Help remediate bill issues agentic workflow has the following dependencies:

- Case Management for Invoice operations (com.sn_csm_invoice)
- Product offering recommendations

To configure the spoke selector, see Configure the spoke selector for external systems.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the agentic workflow, see Manually test the execution of an agentic workflow.

AI agents used in the Help remediate bill issues agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agent	AI agent role
Billing account information collector AI agent	This AI agent is designed to handle billing inquiries by following a structured approach. It retrieves the billing inquiry case details and obtains the billing account details using the account number. The agent is intended for use by ServiceNow agents for getting the billing account number.

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AI agent	AI agent role
Recommended plans AI agent	This AI agent is designed to facilitate the generation and confirmation of service plan recommendations through a structured approach. It follows these instructions: **1.** Generates a recommended plan. **2.** Shows the recommended plan to the user for confirmation. **3.** Verifies whether an email is associated with the customer account. **4.** Triggers the email notification agent to send the recommended plan details to the user.
Billing invoice data collector AI agent	This AI agent collects the billing invoice data like account details, invoice history, and invoice details.

Configure the spoke selector for external systems

Configure the spoke selector for Aria to enable the configuration and execution of billing requests.

Before you begin

Role required: admin

About this task

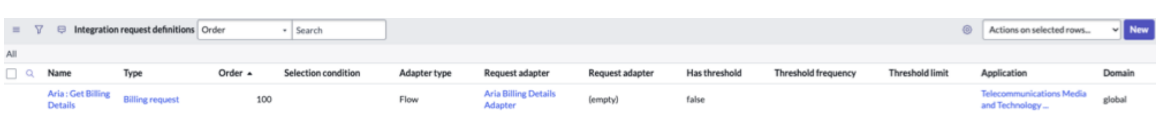
The spoke selector application provides a common framework that enables the configuration and execution of integration requests. It operates by selecting the matching implementations based on the configured input parameters for each request.

Procedure

1. Navigate to **All** > **Spoke selector** > **Request type**.
2. Select **Billing request**.

   The billing request is configured with a request definition that invokes Aria APIs. This demo implementation serves as a reference for configuring a new request definition that retrieves billing-related data from a third-party system for billing requests.
3. Create the Integration request definitions.

   By giving an appropriate value for **Order** or by defining the **Selection condition** the new request definition that fetches the billing-related data is triggered.
4. To create Integration request definitions, navigate to **All** > **Spoke selector** > **Request definition**.
5. In the Integration request definitions screen, select **New** in the header section.



6. On the form, fill in the fields.

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Integration request type form

Field	Description
Name	Name of the integration request type.
Type	Billing request selection is made as the integration request type.
Description	Brief description of the request definition.
Order	Request definition is executed in the least order value.
Adapter type	Flow
Request adapter	Name of the Flow configured to fetch the records for the respective configuration type. **Note:** The sys_hub_flow record with the correct flow inputs, flow outputs, and flow snapshots.
Application	Store application details.
Domain	Global
Condition	Condition to trigger the request adapter.

The following parameters must be included in the request for the Get Account Details Request for Aria API request adapter:


```
{"api_name":"get_acct_details","request_body":{"client_acct_id"
:"FT0010001"}}
```


The following parameters must be included in the response for the Get Account Details Response for Aria API request adapter:


```
{"status_code":"1","status_reason":"","response_body":{"master_
plan_info_list":{"48477095":"Business Internet +
           Cellphone PI0001061"},"company_name":"Flash
 Telecom","acct_no":"27045400"}}
```


The following parameters must be included in the request for the Get Invoice History Request for Aria API request adapter:


```
{"api_name":"get_invoice_history","request_body":{"acct_no":"27
045400"}}
```


The following parameters must be included in the response for the Get Invoice History Response for Aria API request adapter:


```
{"status_code":"1","status_reason":"","response_body":{"invoice
s":
[{"amount":135.7,"invoice_no":254547358,"due_date":"2024-11-
30","outstanding_amount":135.7,"usage_bill_from":"2024-10-01","
usage_bill_thru":"2024-10-31"},
{"amount":190.26,"invoice_no":254547359,"due_date":"2024-12-
```


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```
31","outstanding_amount":190.26,"usage_bill_from":"2024-11-01",
"usage_bill_thru":"2024-11-30"},
{"amount":172.95,"invoice_no":254547360,"due_date":"2025-01-
31","outstanding_amount":172.95,"usage_bill_from":"2024-12-01",
"usage_bill_thru":"2024-12-31"},
{"amount":437.07,"invoice_no":254547361,"due_date":"2025-02-
28","outstanding_amount":0,"usage_bill_from":"2025-01-01","usag
e_bill_thru":"2025-01-31"}]}}
```


The following parameters must be included in the request for the Get Invoice Details Request for Aria API request adapter:


```
{"api_name":"get_invoice_details","request_body":{"acct_no":"27
045400","invoice_no":"254547361"}}
```


The following parameters must be included in the response for the Get Invoice Details Response for Aria API request adapter:


```
{"status_code":"1","status_reason":"","response_body":{"line_it
ems":
[{"usage_type_no":10058138,"amount":0,"service_name":"Mobile
 Data
GB","sold_product_number":"PI0001065","service_no":11196572,"de
scription":"Mobile Data GB (10 gigabytes @
$0)"},{"usage_type_no":10058138,"amount":14.35,"service_name":"
Mobile Data
GB","sold_product_number":"PI0001065","service_no":11196572,"de
scription":"Mobile Data GB (18.847 gigabytes
@
 $1)"},{"usage_type_no":10058140,"amount":255.73,"service_name"
:"International Roaming Calls from
EU","sold_product_number":"PI0001065","service_no":11197966,"de
scription":"International Roaming Calls from
EU (93 minutes @
 $2.75)"},{"usage_type_no":10058144,"amount":0.5,"service_name"
:"Domestic
Minutes","sold_product_number":"PI0001065","service_no":1119656
8,"description":"Domestic Minutes (9.91
minutes @
 $.05)"},{"usage_type_no":10058146,"amount":11.75,"service_name
":"International Calls to
Asia","sold_product_number":"PI0001065","service_no":11196570,"
description":"International Calls to Asia (6.56
minutes @ $1.79)"}]}}
```


7. Select **Save**.

Result

Once the condition is set and the request condition matched, the defined flow executes and the records for the configuration are fetched from the external provider that you selected, into your ServiceNow instance.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection analyze network incidents agentic workflow

Use the Analyze network incidents agentic workflow to resolve incidents, helping customer agents to resolve network tickets by tracking them and creating an actionable task.

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Analyze network incidents agentic workflow overview

Resolve the customer issues using a team of AI agents in the Analyze network incidents agentic workflow. It assists the customer agents in resolving a given incident.

Role required: sn_tmt_agentic_ai.sn_noc_incident_user

To modify the Analyze network incidents agentic workflow, Duplicate an agentic workflow, and adjust the settings according to your requirements.

Note: You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Role masking

Required role: sn_tmt_agentic_ai.sn_noc_incident_user

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Application dependency

The Analyze network incidents agentic workflow has the following plugin dependencies:

- Customer service with service management (sn_cs_sm)
- Customer service (sn_customerservice)
- Customer service problem management
- Telecommunications alarm management open API (sn_ind_tmf642)
- Field service management for telecommunications (sn_fsmt)
- Major issue management

Analyze network incidents agentic workflow

To access the use case:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Analyze network incidents**.

To create a new use case, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

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To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Analyze network incidents agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agent	AI agent role
Network ticket resolution AI agent	AI agent capable of providing overall incident and alert summary. It's also capable of searching the knowledge base for relevant articles to provide resolutions if available.
Ticket readiness AI agent	AI agent capable of predicting the incident fields like category, subcategory, priority, description, short description, and estimated time to resolve the incident using GAF on historic incident data. To activate the GAF, see Activate Group Action Framework for Now Assist for Telecommunications, Media and Technology (TMT).
Network correlation monitor AI agent	AI agent capable of identifying the impacted accounts and services and correlating cases opened in the last 15 minutes that could be impacted because of the incident, provide the list to the customers for review, and associate it to the incident. It's also capable of notifying customers about the outages based on human confirmation by creating service problem cases and linking child cases if any.
Network ticket actionable steps generation AI agent	AI agent capable of generating actionable resolution steps for incoming incident using the Group Action Framework (GAF) and modifies the steps according to the human feedback. To activate the GAF, see Activate Group Action Framework for Now Assist for Telecommunications, Media and Technology (TMT).
Network remediation generation AI agent	AI agent capable of consuming resolution steps for an incident and converting them to one of the following task types:

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AI agent	AI agent role
	• Incident Task • Work Order • Change Request

Activate Group Action Framework for Now Assist for Telecommunications, Media and Technology (TMT)

Activate Group Action Framework (GAF) to enable Now Assist AI agents to collect information about the related records across your instance.

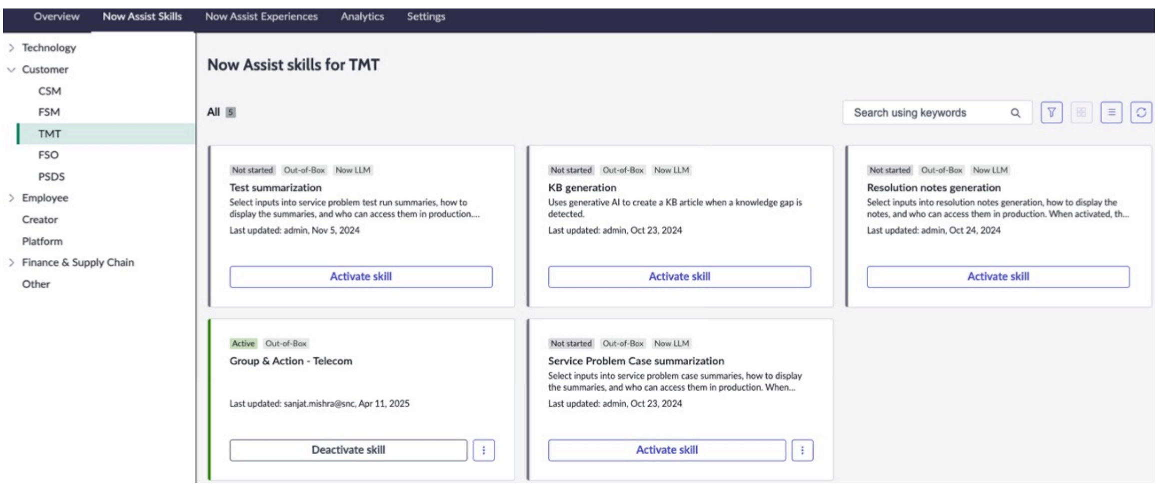
Before you begin

The scope must be a Telecommunications, Media, and Technology AI agent collection.

Role required: admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills** > **Customer** > **TMT**.
2. In Group & Action - Telecom, select **Activate skill**.



3. **Optional:** On the form, select **Edit** to change the values.
4. Select **Save and continue**.
5. On the **Review and activate** tab, select **Done**.

Result

GAF is activated on your instance for the Now Assist application and can be used by AI agents to find related records.

Now Assist for Telecommunications, Media and Technology (TMT) Customer voice quality issue resolution agentic workflow

Use this agentic workflow to resolve customer voice quality issues.

Customer voice quality issue resolution agentic workflow overview

This agentic workflow gathers customer information, collects the subscriber experience profile from RADCOM, and creates a service problem case. By integrating RADCOM's AI agents

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with ServiceNow AI agents, wireless providers can link subscriber details with key service performance metrics. This integration enables swift resolution of service issues and reduces churn rates.

This agentic workflow is triggered when a new interaction is created in the CSM Interaction record under the following conditions:

- Type: Phone or Chat
- Category: Network

Note: The Customer voice quality issue resolution agentic workflow is available in read-only mode. Before using the workflow, you must make a copy and adjust the settings according to your requirements. See Duplicate an agentic workflow for details.

Role masking

Required role: sn_sprb_mgmt.agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Application dependency

The Customer voice quality issue resolution agentic workflow has the following dependencies:

- Customer Service (sn_customerservice)
- Customer Service Problem Management z(sn_sprb_mgmt)

Configure the Customer voice quality issue resolution agentic workflow

This agentic workflow requires a third-party agent, the RADCOM ticket handling agent, to retrieve the customer experience profile. To use the third-party agent, you must create an external agent by following the steps listed in the Create an external AI agent section.

Test the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Customer voice quality issue resolution**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Customer voice quality issue resolution agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

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AI agents and their role in the Customer voice quality issue resolution agentic workflow

AI agent	AI agent role
Customer interaction context gatherer AI agent	• Retrieves and analyzes customer interaction data. • Provides detailed contextual information regarding customer communication patterns, product usage history, and relevant troubleshooting information.
RADCOM ticket handling AI agent (external agent)	Retrieves subscriber profile including network usage patterns, service quality metrics, and customer behavior insights.
Ticket creation AI agent	• Identifies duplicate records, determines case type, and verifies documents. • Checks existing cases and creates a new case.

Customer Success Management agentic workflows

The Customer Success agentic workflows are used to collect health data, monitor the engagement health score, analyze risks, support renewals, and schedule touchpoint meetings.

The customer success health and risk agentic workflows do the following:

- Collect health metric information for engagements.
- Analyze the metric data and identify trends (improving, declining, or flat).
- Create risk signals or risk occurrences if a declining trend is identified.
- Retrieve potential solutions and notify customer success manager of any unaddressed risk signals.
- Summarize results based on inputs provided by the customer success manager.

- For more details on collecting health metrics and identifying trends, see Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow.
- For more details on analyzing risks and recommending solutions, see Now Assist for Telecommunications, Media and Technology (TMT) Recommend risk signal solutions agentic workflow.

Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow

Use the Monitor engagement health agentic workflow to monitor the health score of engagements and their associated metric data trends, and generate risk signals when a decline is detected.

Important: Before you run this agentic workflow, you must activate the Analyze metric data trend skill to collect the metric data that is to be evaluated.

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Monitor engagement health agentic workflow overview

Customer success managers can monitor the health score of up to 10 active engagements and summarize the health trend for the past 6 weeks. Each metric used to calculate the health score is monitored, and if a declining pattern is detected, a risk signal or a risk occurrence (for an existing risk signal) is generated. A summary indicating the number of risk signals created and the health score range is generated. The Monitor engagement health agentic workflow is triggered weekly based on a predefined schedule and the results are displayed in the Now Assist panel.

You can view the risk signals and occurrences that have been created by navigating to the Risk signals page. For risks created using the agentic workflow, the following field values are displayed:

- Category: Health declined
- Creation method: AI generated

Role masking

Required role: sn_acct_lc.customer_success_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select *Users with specific roles* for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Configure the monitor engagement health agentic workflow

- To run the agentic workflow as a scheduled job, you must activate the Monitor engagement health flow. See Activate a flow for details.
- The agentic workflow monitors only the engagements for which **AI Health Monitor** flag has been enabled. Each customer success manager can enable a maximum of 10 engagements. For instructions on enabling this flag, see Create an engagement.
- By default, the health score of each individual metric is monitored. If you want to monitor only the overall health score across all engagements, you need to update the *sn_cust_succ_ai_agent_enable_health_monitor_metrics* system property by following these steps:
  - Navigate to **All** and enter *sys_properties.LIST* in the search field.
  - Select the *sn_cust_succ_ai_agent_enable_health_monitor_metrics* property.
  - Set the Value field to **false**. When this property is disabled, the agentic workflow will monitor the overall health score instead of the individual metrics.
- For any new or existing health definitions, you must specify the **Context** for the **Data source** to indicate how the color banding range will be applied. Based on the **Context**, you can define different color banding ranges that can be used for the health score. For example, you can configure different values for the same **Data source** as follows:
  - **Data source 1**
    - Data source: Daily collection of NPS
    - Context: Health Metric Configuration: Daily collection of NPS (Global)
    - Min: 80

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        - Max: 100
        - Color: Green
        - Category: Good
    - **Data source 2**
        - Data source: Daily collection of NPS
        - Context: Daily collection of NPS for (Customer X)
        - Min: 0
        - Max: 60
        - Color: Red
        - Category: Poor

    For more details on configuring the color banding table, see Setup the color banding table.

AI agents used in the Monitor engagement health agentic workflow

The Monitor engagement health agentic workflow uses specific AI agents to monitor the engagements, analyze the health trend, and generate a health score.

AI agents and their role in the Monitor engagement health agentic workflow

AI agent	AI agent role
Success health monitor AI agent	Retrieves data for all active engagements, identifies trends, and creates a risk signal if a declining pattern is detected.

Now Assist for Telecommunications, Media and Technology (TMT) Recommend risk signal solutions agentic workflow

Use the Recommend risk signal solutions agentic workflow to monitor and mitigate risks in customer engagements with minimal user intervention.

Recommend risk signal solutions agentic workflow overview

Use the Recommend risk signal solutions agentic workflow to:

- Monitor engagements and retrieve all applicable risks.
- Provide real-time risk analysis and generate detailed reports.
- Identify common solutions and provide proactive recommendations.

Customer success managers can collaborate with customer success squad members to monitor risks, perform real-time risk analysis, generate detailed reports with proactive recommendations. This helps prevent escalations, improve customer retention, and enhance service quality. The Recommend risk signal solutions agentic workflow can be used to assess and offer solutions for both individual and multiple risks. It is triggered daily based on a predefined schedule and the results are displayed in the Now Assist panel.

For information on how risks are generated, see Create a risk definition.

Role masking

Required role: sn_acct_lc.customer_success_agent

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Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Configure the Recommend risk signal solutions agentic workflow

Before you use the agentic workflow, do the following:

- Activate the Recommend risk signal solutions subflow to trigger the agentic workflow to run as a daily scheduled job. See Activate a flow for details.
- Configure the risk category and other conditions as required in the Engagement risk solutions decision table. See Using decision tables.
- Ensure that the solution subflows contain the following mandatory inputs:
  - Risk system ID: Type is string and default name is risk_system_id.
  - Solution table: Type is table.
  - Solution ID: Type is sys_id.

Optionally, you can define additional non-mandatory inputs. These can be used in subflow steps or to override default values.

Note: To enable the display of the Recommend risk signal solutions agentic workflow, you must activate the AI Agents for Customer Success Management plugin (com.sn_cust_succ_ai_agent).

AI agents used in the Recommend risk signal solutions agentic workflow

The Recommend risk signal solutions agentic workflow uses specific AI agents to retrieve all unaddressed risks and recommend solutions.

AI agents and their role in the Recommend risk signal solutions agentic workflow

AI agent	AI agent role
Success risk solution AI agent	Retrieves unaddressed risks for the current user, groups them, and provides solutions for each risk or group of risks.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection trigger risk mitigation touchpoint

Use the Trigger risk mitigation touchpoint agentic workflow to schedule and edit a touchpoint meeting for a specific user.

Trigger risk mitigation touchpoint agentic workflow overview

The agentic workflow enables customer success agents to optimize meeting schedules within the customer success workflow by creating and managing meetings. It create and manage meetings based on key details such as invitees, agenda, meeting type, and scheduling preferences. With this agentic workflow, customer success managers can:

- Take timely and contextual action.
- Create a meeting with all required details.
- Schedule draft meetings without manual coordination.

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In the Trigger risk mitigation touchpoint agentic workflow, when the risk record's probability is very high or occurred, the customer success agent is assigned to that risk receives a Now Assist panel notification. From the risk record, the agentic workflow automates the creation of meeting and schedules the meeting.

To modify the Trigger risk mitigation touchpoint agentic workflow Duplicate an agentic workflow, and adjust the settings according to your requirements.

Note: You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Role masking

Required role: sn_acct_lc.customer_success_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Trigger risk mitigation touchpoint agentic workflow

This workflow does the following:

Note: Before running the workflow, you must configure the generic prompt as follows:

1. Navigate to the OneExtend Capability (sys_one_extend_capability) table by entering `sys_one_extend_capability.list` in the navigator.
2. Search for `generic prompt` and open the record.
3. In OneExtend Capability Attributes related list, set the **Default** to **True** for any of these definitions:
   - Generic Prompt (Azure OpenAI Chat)
   - Generic Prompt (Now LLM Service)
   - Generic Prompt Vertex AI (Google Cloud Chat Completion)
   - Generic Prompt (Amazon Bedrock Chat Completions)

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Trigger risk mitigation touchpoint**.

To create an agentic workflow, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test AI reasoning**.

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To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Trigger risk mitigation touchpoint agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agents and their role in the Trigger risk mitigation touchpoint agentic workflow

AI agent	AI agent role
Meeting draft creator AI agent	AI agent automates draft creation of meetings using context and history of the risk record. **Note:** The AI agent creates meeting inside a touchpoint.
Draft meeting scheduler AI agent	AI agent automates virtual meeting scheduling by collecting invite and details provided from the customer success agent.

Now Assist for Telecommunications, Media and Technology (TMT) Support renewals and expansion

Assess contracts due for renewal, analyze trends, and recommend renewal strategies.

Support renewals and expansion agentic workflow overview

The Support renewals and expansion agentic workflow enables customer success agents to assess the health, value, and product adoption of a contract. It provides data driven insights and renewal play recommendations and enables customer success agents to manage multiple customer engagements efficiently. Customer success managers can use the Support renewals and expansion agentic workflow to:

- Track how much value has been delivered since onboarding.
- Measure progress against goals and service delivery metrics.
- Retrieve and calculate health and adoption scores.
- Analyze trends to support informed adoption decisions.

Note: The Support renewals and expansion agentic workflow is available in read-only mode. Before using the workflow, you must make a copy and adjust the settings according to your requirements. See Duplicate an agentic workflow for details.

Role masking

Required role: sn_acct_lc.customer_success_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

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Configure the Support renewals and expansion agentic workflow

Before you use the agentic workflow, you must configure the following fields in the Renewal analysis AI agent:

- Engagement adoption source sysID
- Contract adoption source sysID
- Health source sysID
- Time period (in days)
- Metric aggregation type

Note: The source sysIDs must be configured correctly in the Data Context Engine as follows:

- Health: Source and context table must be set to Engagement.
- Engagement: Source table must be set to Sold Products and the context table must be set to Engagement.
- Contract: Source table must be set to Sold Products and the context table must be set to Contract.

For more details on configuring the data sources, see Set up the Data Context Engine.

Support renewals and expansion agentic workflow

Note: Before running the workflow, you must configure the generic prompt as follows:

1. Navigate to the OneExtend Capability (sys_one_extend_capability) table by entering `sys_one_extend_capability.list` in the navigator.
2. Search for `generic prompt` and open the record.
3. In OneExtend Capability Attributes related list, set the **Default** to **True** for any of these definitions:
   - Generic Prompt (Azure OpenAI Chat)
   - Generic Prompt (Now LLM)
   - Generic Prompt Vertex AI (Google Cloud Chat Completion)
   - Generic Prompt (Amazon Bedrock Chat Completions)

When a contract is due to expire in 90 days, the customer success manager receives a notification and the Support renewals and expansion workflow is automatically triggered. The contract health, value, and usage scans are initiated and the customer success manager can monitor the progress in the Now Assist panel.

When the workflow is completed, two reports are generated for the engagement and the associated contract (that is due to expire in 90 days) with the following details:

- Renewal likelihood
- Expansion potential
- Recommended actions
- Adoption trend
- Health trend (this is available only for engagements)
- Value score

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You can then select the appropriate renewal play based on the report.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. Follow the instructions in the Manually test the execution of an agentic workflow section to test the agentic workflow.

Example of Support renewals and expansion agentic workflow output in the *ServiceNow*

AI agents used in the Support renewals and expansion agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

AI agents and their role in the Support renewals and expansion agentic workflow

AI agent	AI agent role
Renewal analysis AI agent	Analyzes renewal possibilities and triggers appropriate renewal flows based on assessment results.
Value realization assessor AI agent	Analyzes value realized by tracking service metrics and customer goal achievement over time.
Success insight AI agent	Populates score data and delivers trend analysis to support informed decisions.

Service Exchange onboarding agentic workflows

Use the Service Exchange onboarding agentic workflow to register your consumers in Service Exchange.

Service Exchange onboarding agentic workflow overview

The Service Exchange onboarding agentic workflow helps providers register a consumer user in Service Exchange. It also helps identify any issues during consumer registration and helps you resolve those problems.

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To modify the Service Exchange onboarding agentic workflow, you must duplicate the workflow and adjust the settings according to your requirements. For more information, see Duplicate an agentic workflow.

You can initiate the onboarding workflow from the Now Assist panel by entering the prompt `start onboarding`. For more information on the Now Assist panel, see Now Assist panel.

Access the Service Exchange onboarding agentic workflow

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select *Service Exchange* **Onboarding**.

To create an agentic workflow, see Create an agentic workflow.

Test the Service Exchange onboarding agentic workflow

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test AI reasoning**.
3. Select the agentic workflow and version, and select **Start test**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents and their role in the Service Exchange onboarding agentic workflow

The following AI agents are used to execute the instructions for the Service Exchange onboarding agentic workflow.

To create an AI agent, see Create an AI agent.

AI agents and their role in Service Exchange onboarding agentic workflow

AI agent	AI agent role
Registration Initiator	This AI agent assists in initiating the registration process and managing the early stages of the process.
Registration Error Monitor	This AI agent assists users with a summary of the Service Exchange errors, enabling them to make informed decisions and take the appropriate actions.

Using Now Assist for Telecommunications, Media and Technology (TMT)

If you have an agent role, you can summarize service problem cases, technology product support cases, product inventory, account onboarding cases, touchpoints, engagements, internal plays, customer plays, success initiatives, and automate transforms with the Now Assist for TMT application.

Summarize a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields that you selected on the service problem case record. Quickly understand the case context by using the service problem case summarization skill in the Now Assist for TMT application.

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Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

The service problem case summarization skill provides you with a concise summary of a service problem case, including the issue, actions taken, and resolution details. With this skill, you can do the following tasks:

- Generate an initial summary of a service problem case so that you can understand the service problem case context.
- Summarize all the work that has been done on a service problem case.

The service problem case summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Service Problem Case summary by Now Assist component to generate a summary. This component appears below the Case highlights card.
- In Core UI, you select the **Summarize** button on the service problem case record to generate a summary.

The service problem case summarization skill checks the service problem case record to determine if there is enough information available to create a summary:

- When an agent opens the service problem case record
- When an agent refreshes the service problem case record page

If there is enough data, the Service Problem Case summary component displays the **Summarize** button. If there is not enough data, the component displays a message in place of the button.

Note: The service problem case summarization skill requires a minimum 50 words in the case record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. In the Service Problem Case summary by Now Assist component, select **Summarize**.
   The Service Problem Case summary by Now Assist component appears below the Case highlights card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing a service problem case, manage the results.

Option	Procedure
View more or less summary details	◦ To see more details summary details, select the View more icon ( ). ◦ To see fewer summary details, select the View less icon ( ).

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Option	Procedure
Provide feedback for the summary	○ If you think that the service problem case summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn’t help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the case summary	Select the copy to clipboard icon ( ) to use the service problem case summary informa tion for another purpose, such as pasting into an email.
View the information about the case summa ry	To check some details about the summary, se lect the more info icon ( ).

Generate resolution notes for a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the resolution notes for a service problem case by using the resolution notes generation skill in the Now Assist for TMT application.

Before you begin

Role required: sn_customerservice_agent and sn_customerservice.consumer_agent

About this task

You can also propose the resolution to the customer, and then add the resolution information to the service problem case record. Generating resolution notes may help you wrap up cases faster and provide information about the service problem case resolution to other agents who might encounter similar issues.

You can also generate resolution information on demand from the Now Assist panel.

Note: The resolution notes generation skill requires a minimum of 50 words in the service problem case record to generate the resolution notes.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. Select **Test & Resolve** > **Resolve**.
4. Navigate to the Resolution notes field in the resolve activity.

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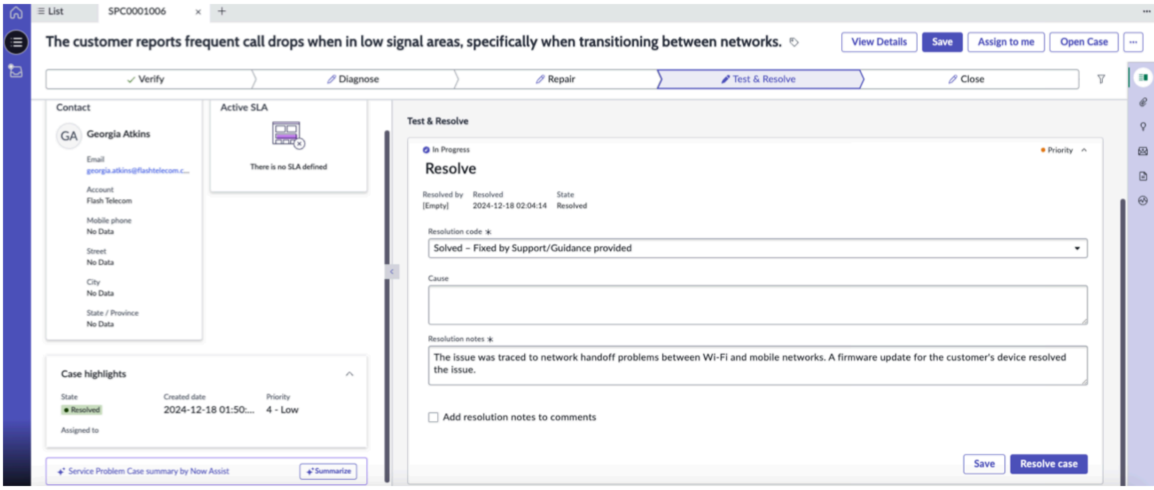

5. Select the Now Assist icon ✦.
   Now Assist icon ✦ generates a recommended text that is based on the context of the case.
6. Select **Insert** to add the generated content into the resolution notes field.
7. **Optional:** Review the generated content and select **Refine** to modify the content.
   You get the option to either elaborate or shorten the content as needed.
8. **Optional:** If you want to add the resolution information to the service problem case activity stream, select the **Add resolution notes to comments** check box.
   Selecting this check box makes the resolution notes available to anyone who can view the service problem case activity stream.
9. Select **Save**.

Result

- The system populates the fields in the Closure Information section of the case record with the information from the Generate Resolution Notes modal.
- The case moves to the Resolved state.
- The resolution is proposed to the customer.

Generate a knowledge article for a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the knowledge articles for resolved and closed cases within the CSM Configurable Workspace and classic environment with Now Assist.

Before you begin

To generate a knowledge article for a case, the case must be in the resolved and closed state, and must not already have a knowledge article linked to it.

Install the Knowledge Management Advanced plugin to use the Knowledge Centered Service (KCS) template when you're generating knowledge articles. For more information, see Activate the Knowledge Management Advanced plugin.

Make sure that your administrator enables Now Assist experience on the Create Article page to ensure that the following knowledge base generation criteria is configured:

- The knowledge skills are installed.
- In the Now Assist Admin console, ensure that the following criteria are in place:

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  - Specify the table record and input fields.
  - Specify the conditions for the skill availability from the list of attributes.
  - Display the knowledge base generation feature In-product and specify the Now Assist panel.

- Configure **Create Article** to apply the supported template; For example, Standard and KCS article HTML.
- Currently, only the Create Article experience is available.

Role required: agent

About this task

In CSM Configurable Workspace and classic environment, you can generate the knowledge article information for a case by selecting **Create Knowledge** on the case record. This UI action displays the Use AI to draft this article modal. By using this modal, you can choose to write the article yourself or draft an article with Now Assist and review and edit the knowledge article text.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Open a case that is assigned to you.
   The case record status should be either resolved or closed.
3. Create the article by selecting **Create Knowledge** from the UI actions for the case record.

   Note:

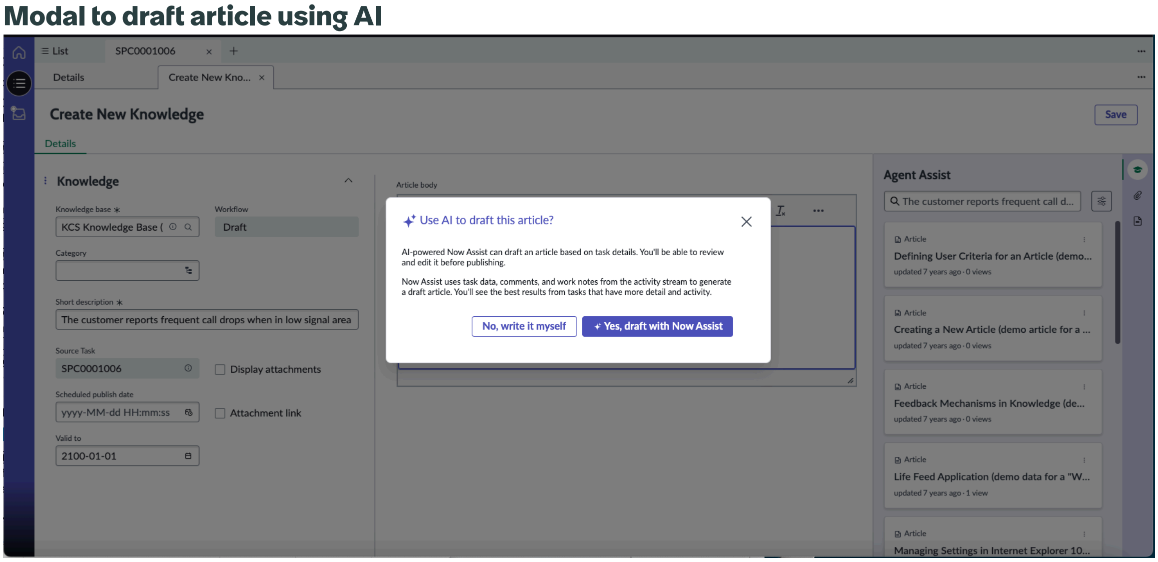
   The **Create Knowledge** UI action is only visible when a case doesn't have an existing knowledge article that is associated with it.

4. In the Create article modal, select a knowledge base and an Article template, if displayed.

   Note: If no options are displayed, the default template selected by your administrator in the Now Assist Admin console is used.

5. Select **Create article**.
6. In the Use AI to draft this article modal, select **Yes, draft with Now Assist**.

Modal to draft article using AI



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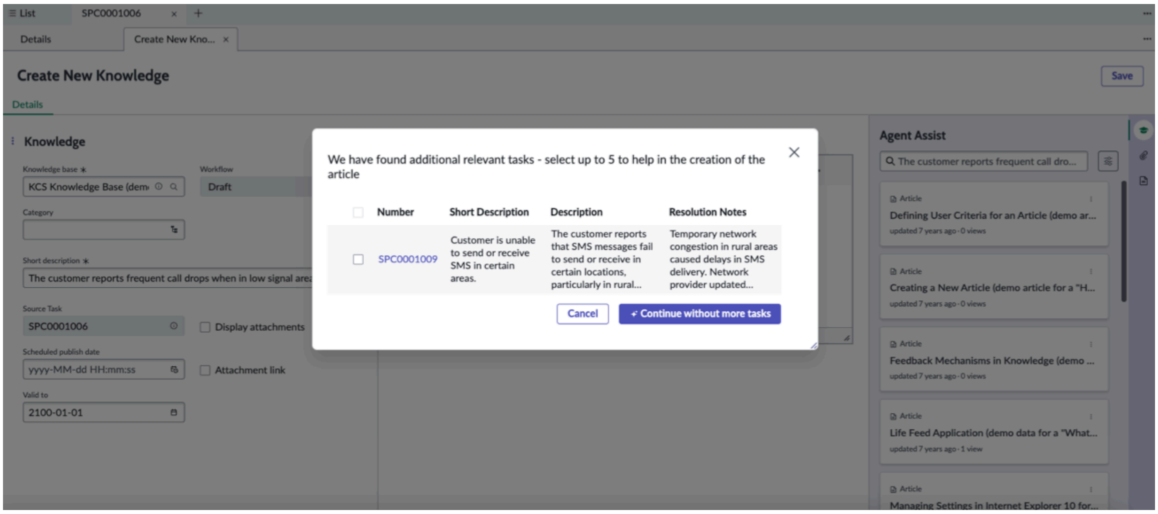
7. **Optional:** In the new modal, search for similar cases that can be used to generate the article; otherwise, select **Cancel**.

Additional relevant tasks



The completed article is displayed in the chosen template with a success message "This article was drafted by Now Assist. Be sure to review it for accuracy before saving."

Note:

- If no similar cases exist, this modal doesn't appear, and the article is created. The generated article, based on the chosen relevant records, is linked to both the account case and all the relevant cases selected.
- You can select up to five additional relevant cases in the new modal to generate the article.
- You can modify the draft before saving it. The article appears in a new tab with a unique ID number for the knowledge article and is attached to the parent record.
- If Now LLM Service fails to generate a result, an error message is displayed.
- When creating an article by using Now Assist, after the process is triggered, it can't be stopped. Now Assist continues to generate the article even if you close the modal.

8. Select the **Knowledge Base** and the **Language** in the pop-up window **What language should** `Now Assist` **draft this article in**.
9. Select **Continue**.
   The article is generated in the selected knowledge base and language, and the content is displayed in that same language.
10. Select **Insert** to paste the generated response.
11. Review the Now Assist generated article and select **Save** or **Publish**.
    The Now Assist success message disappears which means that it's no longer a Now LLM Service generated article.

Related topics

Now Assist in Knowledge Management

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Summarize test for a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the test run summary for a service problem case record to quickly understand the context of test outcomes and the root cause of the problem.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

The test summarization skill provides you with a concise summary of the test executed for a service problem case, including the test outcome, test interpretation, and other parameters configured for the specific test definition. With this skill, you can generate the test summary of a service problem case so that you can analyze the root cause of the problem.

The test summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Test Run summary by Now Assist component to generate a summary. This component appears in the test results record.
- In Core UI, you select the **Summarize** button on the test result record to generate a summary.

The test summarization skill checks the test results record to determine if there's enough information available to create a summary. If there's enough data, the Test summary component displays the **Summarize** button. If there isn't enough data to generate a summary, the system displays a message in the Test summary component field.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. In the **Diagnose** tab, select **Test results**.
4. Identify the test result that you want to open and select the View Details icon ( )
5. In the Test Run summary by Now Assist component, select **Summarize**.
   The Test Run summary by Now Assist component appears in the test result record. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

6. **Optional:** After you're finished summarizing the test for the service problem case, manage the results.

Option	Procedure
Expand or collapse the summary	◦ See more summary details by selecting the expand card icon ( ). ◦ See fewer summary details by selecting the collapse card icon ( ).

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Option	Procedure
Provide feedback for the summary	◦ If you think that the summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the test summary	Select the copy to clipboard icon ( ) to use the case summary information for another pur pose, such as pasting into an email.
Refresh the test summary	Fetch the latest test run summary by select ing the refresh icon ( ).

7. **Optional:** Set the test result to either fail or pass by selecting the **Set result**.

   (Optional) If the test summarization skill isn't active, the test result is auto-populated.

   To create test groups, see Create a test group.

8. If the test summarization skill is active, clear the **wait for completion** check box in the Automated test run creation tool.
9. Save or cancel the results.
   - To set the results, select **Save**.
   - To go back to the test results list, select **Cancel**.

Summarize test for a technology product support case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the test run summary for a technology product support case record to understand the context of test outcomes and the root cause of the problem.

Before you begin

Role required: sn_customerservice_agent and sn_customerservice.consumer_agent

About this task

The test summarization skill provides you with a concise summary of the test executed for a technology product support case, including the test outcome, test interpretation, and other parameters configured for the specific test definition. With this skill, you can generate the test summary of a technology product support case so that you can analyze the root cause of the problem.

The test summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Test Run summary by Now Assist component to generate a summary. This component appears in the test results record.
- In Core UI, you select the **Summarize** button on the test result record to generate a summary.

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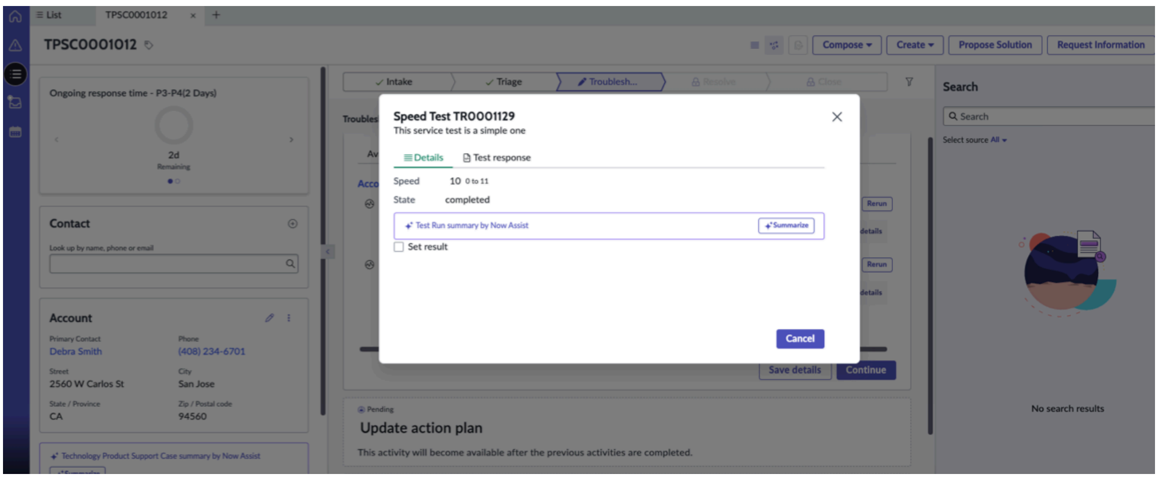
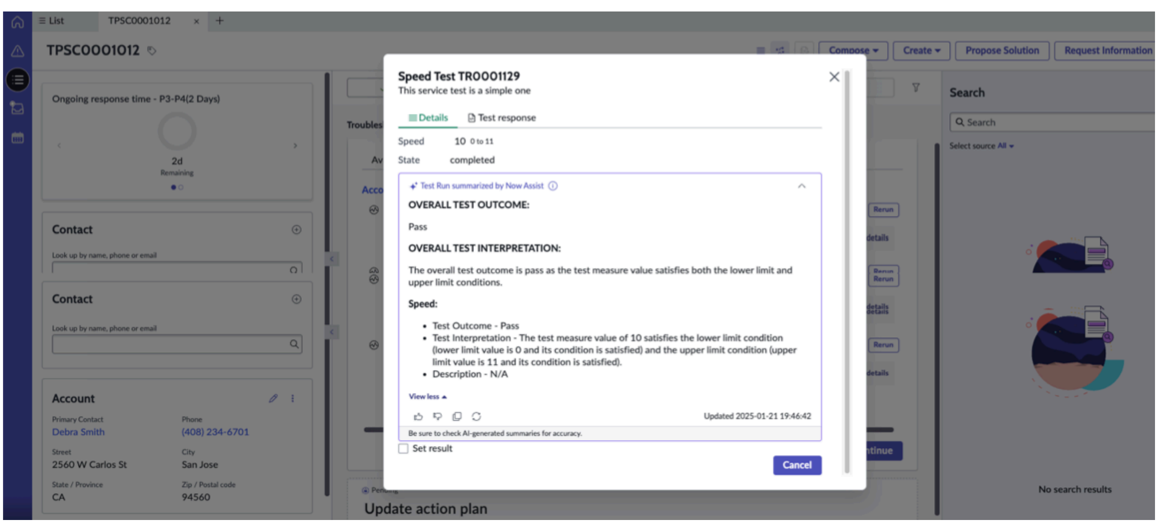
The test summarization skill checks the test results record to determine if there's enough information available to create a summary. If there's enough data, the Test summary component displays the **Summarize** button. If there isn't enough data to generate a summary, the system displays a message in the Test summary component field.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Technology Product Support Case**.
2. Open a technology product support case.
   If there are no test results available, run the tests to get test results.
3. In the **Troubleshoot** tab, select **Test results**.



4. Identify the test result that you want to open and select the View Details icon ( )
5. In the Test Run summary by Now Assist component, select **Summarize**.



   The Test Run summary by Now Assist component appears in the test result record. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

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6. **Optional:** After you're finished summarizing the test for the technology product support case, manage the results.

Option	Procedure
Expand or collapse the summary	◦ See more summary details by selecting the expand card icon ( ). ◦ See fewer summary details by selecting the collapse card icon ( ).
Provide feedback for the summary	◦ If you think that the summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the test summary	Select the copy to clipboard icon ( ) to use the case summary information for another pur pose, such as pasting into an email.
Refresh the test summary	Fetch the latest test run summary by select ing the refresh icon ( ).

7. **Optional:** Set the test result to either fail or pass by selecting the **Set result**.
8. Save or cancel the results.
   - To set the results, select **Save**.
   - To go back to the test results list, select **Cancel**.

Generate service summary for a product inventory using Now Assist for Telecommunications, Media and Technology (TMT)

Summarize the service details mentioning the current situation, any critical actions to be taken and find the root cause indicators using the knowledge graph and service summary skill.

Before you begin

Role required: admin

About this task

The customer service summary skill provides you with a concise summary of a sold product, including the current situation, root cause indicators, critical actions, resolution tasks, and resolution details.

The customer service summary skill is available in CSM/FSM Configurable Workspace, you use the Service Problem Case service summary skill by Now Assist component to generate a summary.

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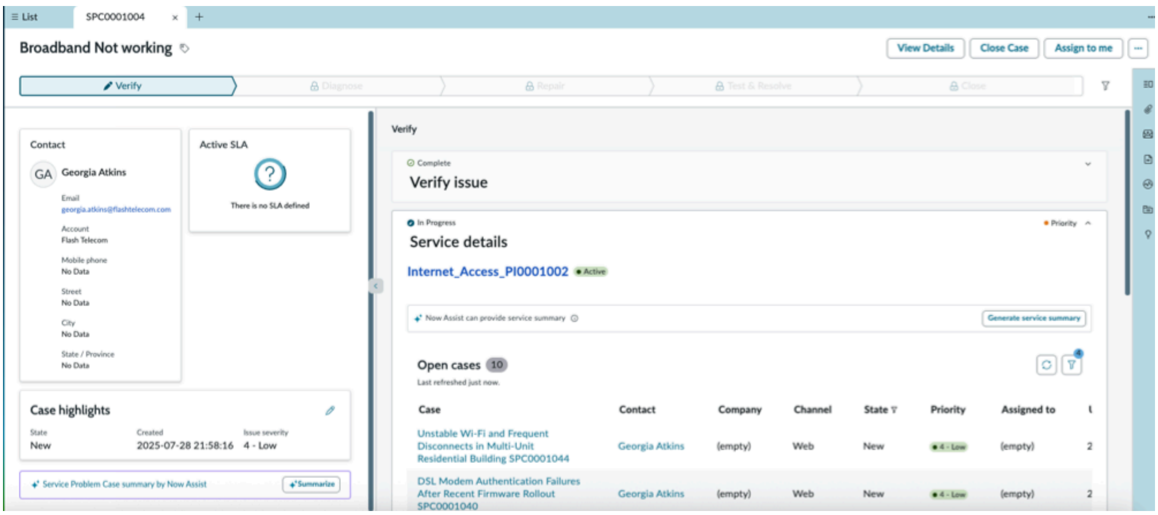
Install the Customer Service with Service Management (com.sn_cs_sm) plugin to display the activate button for customer service summary skills.

If there's enough data, the customer service summary component displays the **Generate service summary** button.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. In the Verify tab, select **Service details**.
4. In the Service details, select **Generate service summary**.



Note: Generating and displaying the summary may take several seconds.

5. **Optional:** After you're finished summarizing the service, manage the results.

Option	Procedure
View more or less summary details	○ To see more details summary details, select the View more icon ( ). ○ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	○ If you think that the service summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).

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Option	Procedure
Copy the service summary	Select the copy to clipboard icon ( ) to use the service summary information for another purpose, such as pasting into an email.
View the information about the case summa ry	To check some details about the service sum mary, select the more info icon ( ).

Create a knowledge graph schema

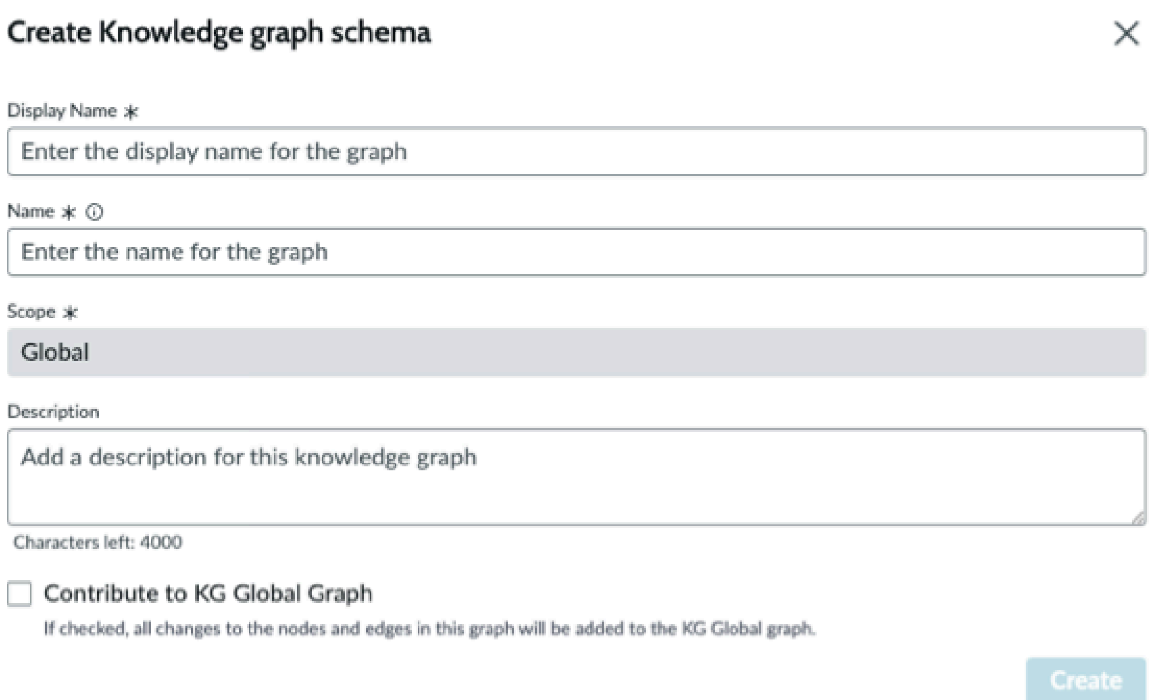
Use the Knowledge Graph (KG) to create Knowledge Graph schema.

Before you begin

Role required: sn_sprb_mgmt_admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer**.
   The UI displays a list of all the Knowledge Graph schema on the landing page.
2. Start creating a Knowledge Graph schema by selecting **Create New**.
   This is an out of the box.
3. On the form, fill in the fields.



Edit Knowledge Graph Schema details form

Field	Description
Display Name	Display name for the Knowledge Graph schema.
Name	Optional name for the Knowledge Graph schema.

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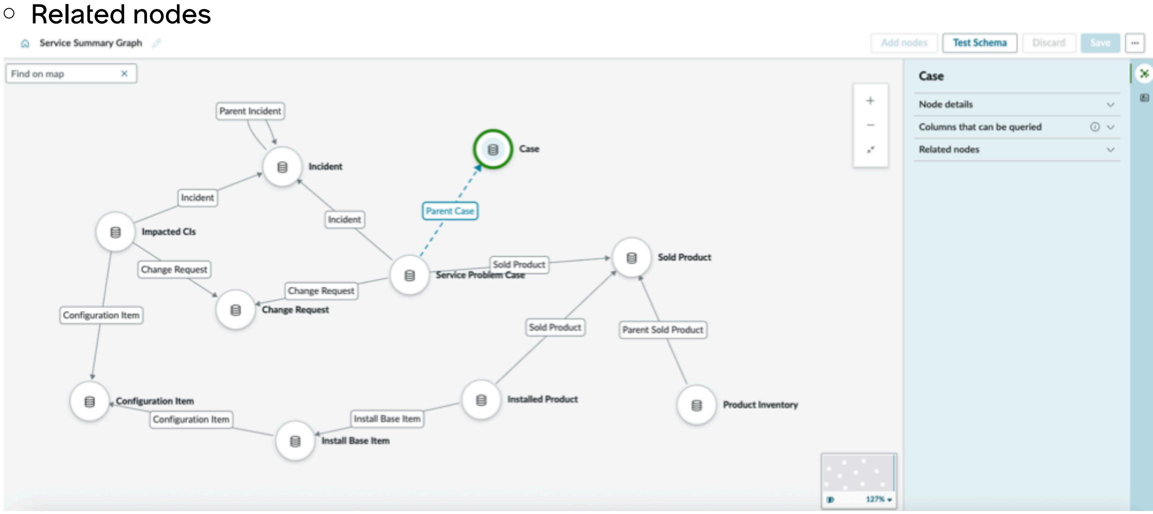
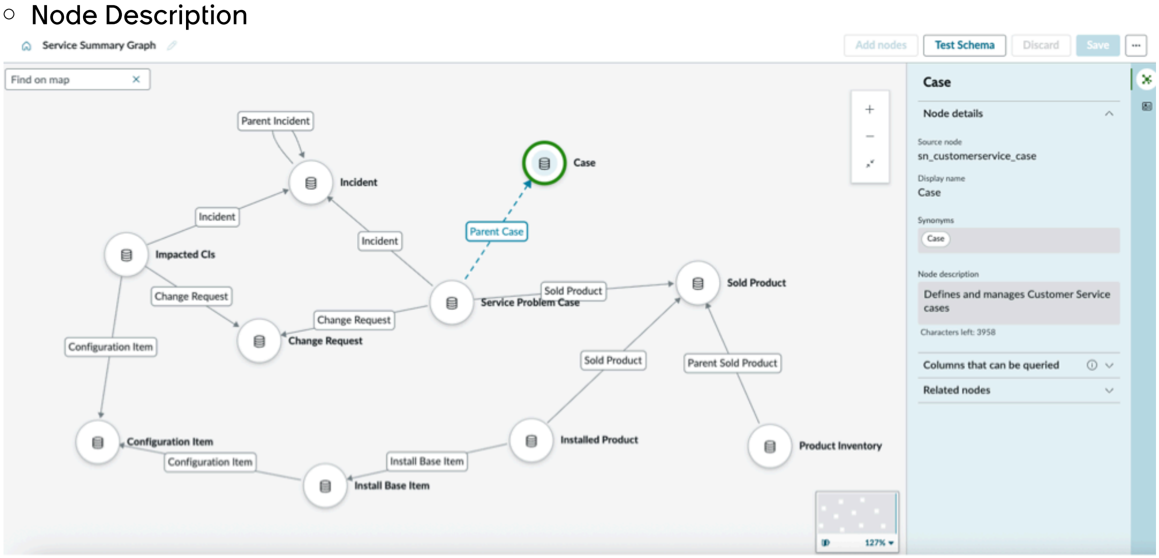
Field	Description
Scope	Scope used when creating the Knowledge Graph schema. This field is a read only.
Description	Knowledge Graph schema overview to provide additional information to users.
Contribute to KG Global Graph	All the changes to the nodes and edges in the graph are added to the KG Global graph.

4. Select **Create**.
   The Add nodes to the Knowledge graph schema window is displayed.
5. Enter or search for the nodes that you want to add to the Knowledge Graph schema and select **Add**.
   The Knowledge Graph schema is created and displayed on the Knowledge Graph canvas.
6. In the navigation pane, add the following details:
   - Node details
   - Columns that can be queried
   - Related nodes



7. In the Node details section, you can edit the following fields.
   - Node type
   - Node Description



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To manage the nodes in the Knowledge Graph schema, see Manage nodes in a Knowledge Graph schema.

8. In the Columns that can be queried section, search for and select the desired columns and select **Save**.
9. Add, delete, or edit edges in the Related nodes section and select **Save**.

   To edit the Knowledge Graph, you must copy the Knowledge Graph and adjust the settings according to your requirements.

   To edit the Knowledge Graph schema, see Edit a Knowledge Graph schema.

Customize a summary card for service summary

Customize the summary card of the service summary and UI actions according to your needs.

Before you begin

Role required: Admin

Procedure

1. Navigate to **All** > **Quick Actions** > **Now Assist context menu Actions**.
2. In the Quick Actions list, select **Generate Service Summary** record.
3. Select **here** if you see the notice that says:

   This record is in the Now Assist for Telecommunications, Media and Technology (TMT) application, but Global is the current application. To edit this record, click **here**.

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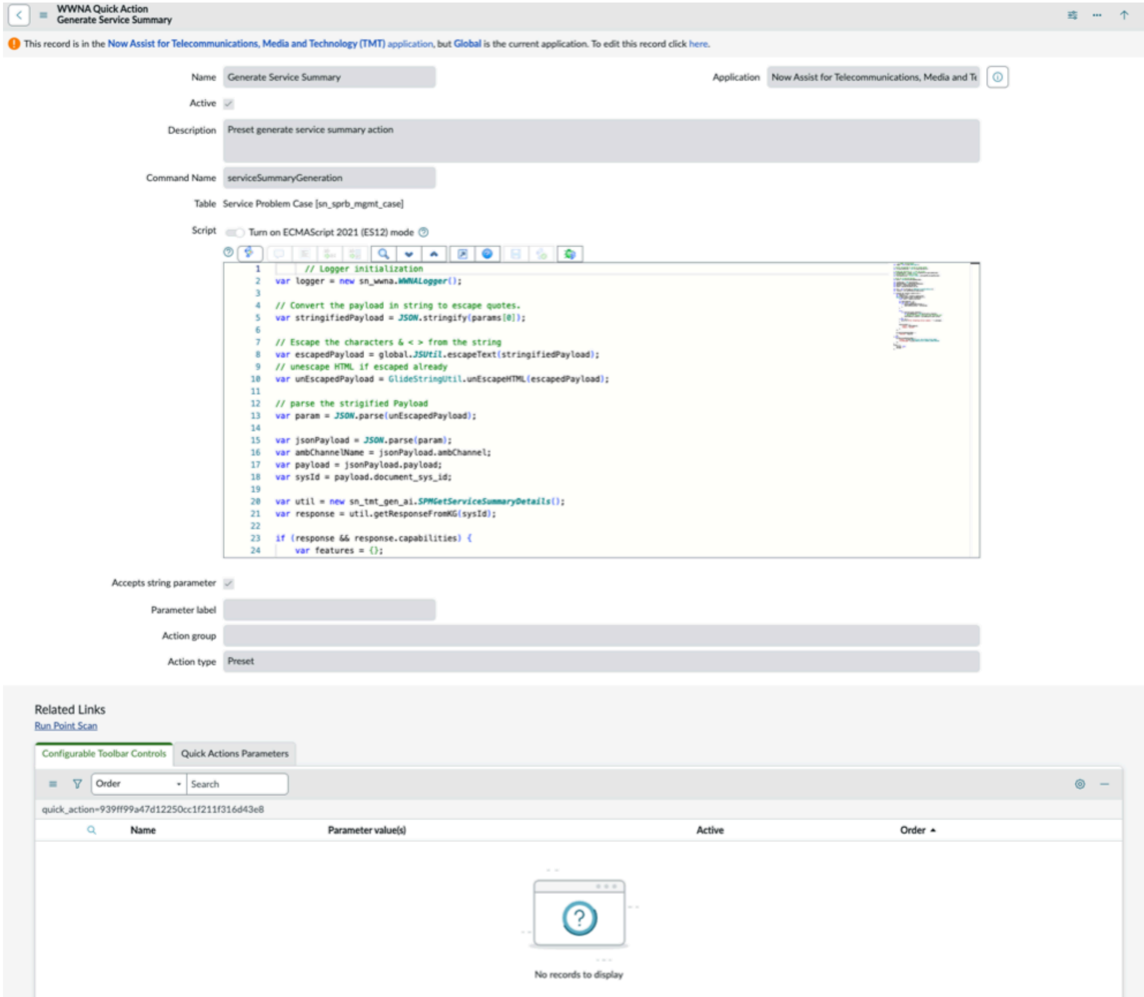

4. On the record, update the fields.

To customize the UI Builder pages, see Customize UI Builder pages using components.

To configure the UIB Now Assist context menu component, see Now Assist context menu UIB Setup.

5. Select **Update**.

Request generative AI capabilities in TMT using the Now Assist panel

Request the contextual generative AI capabilities by using the conversational interface in the Now Assist panel. These capabilities include service problem case summary or resolution notes in the TMT application.

Before you begin

Make sure that Next Experience is enabled in the instance. For more information, see Next Experience UI.

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

You can use the Now Assist panel in CSM/FSM Configurable Workspace to request a service problem case summary and generate service problem case resolution notes.

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For more information about the Now Assist panel, see Now Assist panel. For information about activating the Now Assist panel, see Activate the Now Assist panel standard chat.

Procedure

1. Log in to an instance where the Now Assist for TMT application is installed.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case** > **All**.
3. Open a service problem case.
4. From the header menu, select the Now Assist icon (✦) and request the generative AI capabilities in TMT for a service problem case.
5. Select the relevant generative AI capability from the Now Assist panel.
   - To summarize the service problem case, select **Summarize a record**.
   - To generate the service problem case resolution notes, select **Generate resolution notes**.

Summarize an account onboarding case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields that you selected on the account onboarding case record. Quickly understand the case context by using the account onboarding case summarization skill in the Now Assist for TMT application.

Before you begin

Role required: sn_acct_lc.agent

About this task

The account onboarding case summarization skill provides you with a concise summary including details about each stage in the account boarding lifecycle. With this skill, you can do the following tasks:

- Generate an initial summary of an account onboarding case so that you can understand the onboarding case context.
- Summarize all the work that has been done on an account onboarding case.

The account onboarding case summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Account Onboarding Case summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the account onboarding case record to generate a summary.

Note: The account onboarding case summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The account onboarding case summarization skill checks the record to determine if there's enough information available to create a summary:

- When an agent opens the account onboarding case record.
- When an agent refreshes the account onboarding case record page.

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If there's enough data, the Account Onboarding Case summary component displays the **Summarize** button. If there isn't enough data, the component displays a message in place of the button.

Note: The account onboarding case summarization skill requires a minimum 50 words in the case record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Account Onboarding Case**.
2. Open an account onboarding case.
3. In the Account Onboarding Case summary by Now Assist component, select **Summarize**. The Account Onboarding Case summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing an account onboarding case, manage the results.

Option	Procedure
View more or less summary details	◦ To see more details summary details, select the View more icon ( ). ◦ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	◦ If you think that the summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Summarize an engagement using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields you select on the engagement record. Get up to speed on success initiatives, outcomes, risks, and internal plays associated with an engagement.

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Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

The engagement summary skill provides you with a concise summary of all activities and key points of information associated with an engagement. With this skill, you can do the following tasks:

- Generate an initial summary of the engagement so that you can understand the context.
- Summarize all the work associated with an engagement.

The engagement summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Engagement summary by Now Assist component to generate a summary. This component appears above the Account details card.
- In Core UI, you select the **Summarize** button on the engagement record to generate a summary.

The engagement summarization skill checks the engagement record to determine if there is enough information available to create a summary:

- When an agent opens the engagement record
- When an agent refreshes the engagement record page

If there is enough data, the Engagement summary component displays the **Summarize** button. If there is not enough data, the component displays a message in place of the button.

Note: The engagement summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Engagements**.
2. Open an engagement.
3. In the Engagement summary by Now Assist component, select **Summarize**.
   The Engagement summary by Now Assist component appears above the Account details card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing an engagement, manage the results.

Option	Procedure
View more or less summary details	○ To see more details summary details, select the View more icon ( ). ○ To see fewer summary details, select the View less icon ( ).

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Option	Procedure
Provide feedback for the summary	○ If you think that the summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Summarize a touchpoint using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields you select on the touchpoint record. Get a quick summary of all the meetings and emails exchanged between different stakeholders and any follow up activities.

Before you begin

Role required: sn_acct_lc.agent

About this task

The touchpoint summary skill provides you with a concise summary of the different touchpoints in the engagement lifecycle. With this skill you can do the following tasks:

- Generate an initial summary of the touchpoint so that you can understand the context.
- Summarize all the work associated with a touchpoint.

The touchpoint summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Touchpoint summary by Now Assist component to generate a summary. This component appears above the Account details card.
- In Core UI, you select the **Summarize** button on the touchpoint record to generate a summary.

Note: The touchpoint summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The engagement summarization skill checks the touchpoint record to determine if there is enough information available to create a summary:

- When an agent opens the touchpoint record
- When an agent refreshes the touchpoint record page

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If there is enough data, the Touchpoint summary component displays the **Summarize** button. If there is not enough data, the component displays a message in place of the button.

Note: The touchpoint summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Touchpoints**.
2. Open an touchpoint.
3. In the Touchpoint summary by Now Assist component, select **Summarize**.
   The Touchpoint summary by Now Assist component appears above the Account details card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing an engagement, manage the results.

Option	Procedure
View more or less summary details	◦ To see more details summary details, select the View more icon ( ). ◦ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	◦ If you think that the summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Summarize an internal play using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from a internal play record and all associated internal play tasks.

Before you begin

Role required: sn_acct_lc.customer_success_agent

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About this task

The internal play summary skill provides you with a summary of the internal play record and associated internal play tasks. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Internal play summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the internal play record to generate a summary.

The internal play summarization skill checks the record to determine if there is enough information available to create a summary:

- When an agent opens the internal play record.
- When an agent refreshes the internal play record page.

Note: The internal play summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Internal plays**.
2. Open an internal play and select **Summarize**.
   The Internal play summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:
   - Overview: Summarizes primary goal (subject, description), engagement, account, product, progress, due date, squad, and details of any contracts under consideration.
   - Progress updates: Summarizes current status (work notes, recent emails), total number of internal play tasks, number of open and closed tasks.
   - Next steps: Shows a summary list of all open internal play tasks, required agent actions, and tasks that are due in the next 7 days.

   Note: Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

3. **Optional:** After you're finished summarizing the internal play, manage the results.

Option	Procedure
View more or less summary details	○ To see more details summary details, select the View more icon ( ). ○ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	○ If you think that the summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn’t help ful, select the not helpful icon ( ).

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Option	Procedure
	This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another purpose, such as pasting into an email.
View the information about the summary	To check some details about the summary, select the more info icon ( ).

Summarize a customer play using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from a customer play record and all associated customer play tasks.

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

The customer play summary skill provides you with a summary of the customer play record and associated customer play tasks. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Customer play summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the customer play record to generate a summary.

Note: The customer play summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The customer play summarization skill checks the record to determine if there is enough information available to create a summary:

- When an agent opens the customer play record.
- When an agent refreshes the customer play record page.

Note: The customer play summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Customer plays**.
2. Open a customer play and select **Summarize**.
   The Customer play summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:

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- Overview: Summarizes the primary goal (subject, description), engagement, account, product, progress, due date, squad, and customer contact details.
- Progress updates: Summarizes current status (work notes, recent emails), details of meetings associated with the customer play, total number of customer play tasks, number of open and closed tasks.
- Next steps: Shows a summary list of all open customer play tasks, required agent actions, scheduled meetings, and tasks that are due in the next 7 days.

Note: Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

3. **Optional:** After you're finished summarizing the customer play, manage the results.

Option	Procedure
View more or less summary details	○ To see more details summary details, select the View more icon ( ). ○ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	○ If you think that the summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Summarize a success initiative using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from a success initiative record and all associated success tasks.

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

The success initiative summary skill provides you with a summary of the success initiative record and associated success initiative tasks. This skill available in CSM/FSM Configurable Workspace and in Core UI.

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- In CSM/FSM Configurable Workspace, you use the Success initiative summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the success initiative record to generate a summary.

Note: The success initiative summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The success initiative summarization skill checks the record to determine if there is enough information available to create a summary:

- When an agent opens the success initiative record.
- When an agent refreshes the success initiative record page.

Note: The success initiative summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Success initiatives**.
2. Open a success initiative and select **Summarize**.
   The Success initiative summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:
   - Overview: Summarizes the primary goal (subject, description), engagement, account, product, progress, due date, squad, and customer contact details.
   - Progress updates: Summarizes current status (work notes, recent emails), total number of tasks, number of open and closed tasks, and any related tables.
   - Next steps: Shows a summary list of all open tasks, required agent actions, and tasks that are due in the next 7 days.

   Note: Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.
3. **Optional:** After you're finished summarizing the success initiative, manage the results.

Option	Procedure
View more or less summary details	○ To see more details summary details, select the View more icon ( ). ○ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	○ If you think that the summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn't help ful, select the not helpful icon ( ).

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Option	Procedure
	This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Summarize a risk signal and issues using Now Assist for Telecommunications, Media and Technology (TMT)

Generates a summary from a risk signal and issues summarization record and all associated tasks.

Before you begin

Role required: sn_acct_lc.agent

About this task

The risk signal and issues summary skill provides you with a summary of the risk signal and issues record and associated risk occurrences and solutions. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Risk signal and issues summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the risk signal and issues record to generate a summary.

The risk signal and issues summarization skill checks the record to determine if there's enough information available to create a summary:

- When an agent opens the risk signal and issues record
- When an agent refreshes the risk signal and issues record page

Note: The risk signal and issues summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Risk Signal and Issues**.
2. Open a risk and select **Summarize**.
   The Risk signal and issues summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:

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- Overview: Summarizes the primary goal (subject, description), engagement, account, product, progress, and customer contact details.
- Progress updates: Summarizes status of work notes, activities, and recent emails.
- Next steps: Provides recommendations and next steps according to the open Risk Solution records.. If no records are open, the agent generates a summary based on the Risk Category.

Note: Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

3. **Optional:** After you're finished summarizing the risk signal and issues, manage the results.

Option	Procedure
View more or less summary details	○ To see more details summary details, select the View more icon ( ). ○ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	○ If you think that the summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Create touchpoints and meeting records using Now Assist for Telecommunications, Media and Technology (TMT)

Send the email to instance to create the touchpoint and meeting records directly from the inbound email using Now Assist for Telecommunications, Media and Technology (TMT).

Before you begin

Role required: Success agent

To enable the email sending, see Outbound email configuration.

To enable the email receiving, see Inbound email configuration.

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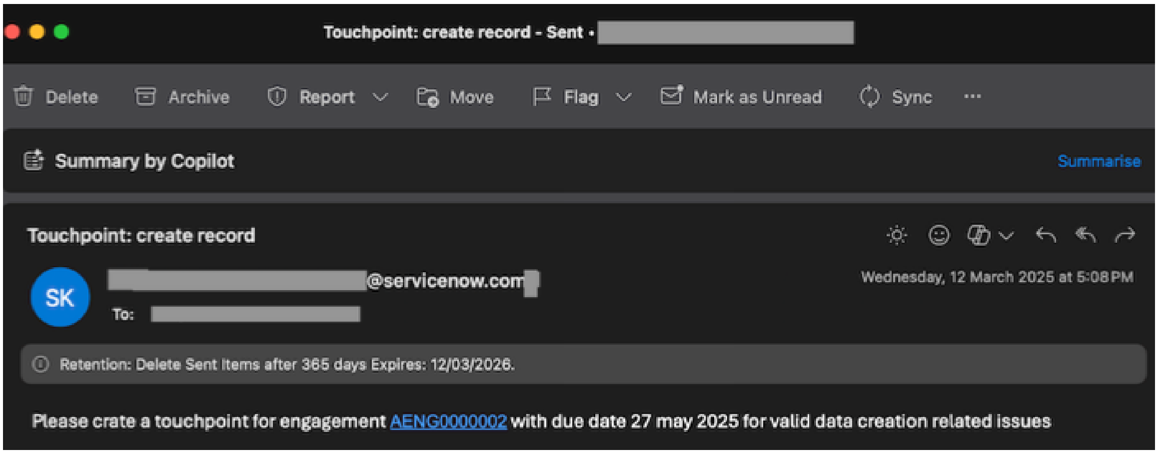
Procedure

1. Launch the email application.
2. Select **New Email**.
   The new Email must contain the following information:



Field	Descriptions
From	Email id of the sender.
To	Email id of the instance that is instancename@service-now.com. For example: devgen@service-now.com
Subject	The subject of the email must start with the prefix Touchpoint: For example: Touchpoint: Create a touchpoint for test.
Email message	For Touchpoints, the Email message must contain the required fields: ○ Engagement number ○ Due date ○ Subject ○ Description For Meetings, the Email message must contain the required fields: ○ Source ○ Start date and time ○ End date and time ○ Meeting subject

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3. Select **Send**.

> **Note:** The instance may take several seconds to receive the email.

Result

- In the instance, the Inbound Email Actions validates the email.
- If the validation fails, you receive the email with the validation error and template description.
- If the validation passes, a record is created in the touchpoint and you receive a success email with the link to the created record.
- The emails are prepared and pushed to the outbound queue where they're scheduled to be sent.

Analyze metric data trend

Retrieves and analyzes health metric data for an engagement.

Before you begin

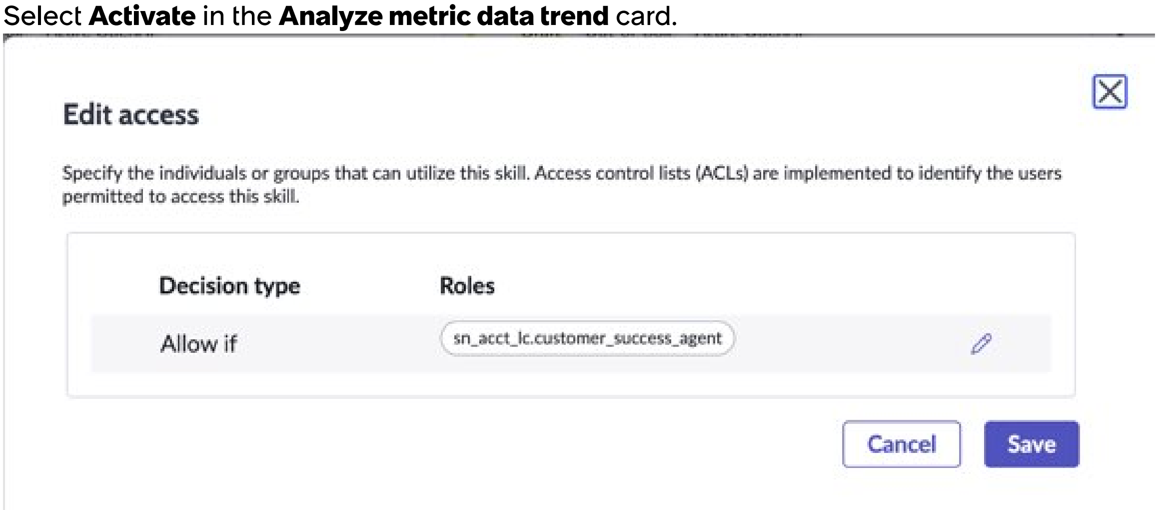
Role required: sn_acct_lc.customer_success_agent

About this task

Collects and analyzes metric data for an engagement and determines if a risk signal is to be created. The Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow uses the metric data to monitor the health score and generates risk signals when the Poor and Neutral range thresholds defined in the Color Banding table are exceeded. You can view the status of the metric collection in the Now Assist panel.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
2. Select **Activate** in the **Analyze metric data trend** card.



3. Select the user role that can utilize this skill and select **Save** to activate the skill.
   The collected metric data is used by the Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow.

Automate transforms with Now Assist for TMT

Use the Now Assist for TMT Transform Mapping Assist feature to automatically transform inbound and outbound data between provider and consumer tables.

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Before you begin
Role required: admin

About this task
The Transform Mapping Assist skill is designed to do the following:

- Automatically generate choice mappings between provider and consumer tables.
- Provide meaningful error messages if the inbound or outbound data cannot be transformed.
- Help save time and reduce manual effort by automating the transformation mapping process.
- Help reduce errors and enhance the quality of integrations through automatic mapping.

Procedure

1. Navigate to **All** > `Service Exchange` **Provider** > **Administration** > **Transforms**.
2. Click **New** and create a simple transform.
   See Create a transform in Service Exchange for instructions. The Now Assist for TMT Transform Assist Mapping can be used only with simple transforms.
3. Select the provider and consumer tables and the related fields.
4. Click **Mapping Assist**.
   Transform mappings are generated and inserted into the Transform lines related list.

   Note:
   - The Transform Mapping Assist feature can be used only if you select choice list fields in the Provider and Consumer fields.
   - You can delete all the generated transform lines to rerun the mapping if needed.
   - If you try to create a transformation mapping between different types of fields, you will see the following warning message:

     ```
     The selected fields are different. Are you sure you want
     to map these fields? This action may lead to unintended
     results.
     ```

     Click **OK** to continue with the mapping. If no mappings are found, an error message is displayed. You can either review the configuration settings and modify as required or create the mappings manually.

Now Assist for Telecommunications, Media and Technology (TMT) reference

Reference topics provide additional information about Now Assist for Telecommunications, Media and Technology (TMT).

Components installed with Now Assist for Telecommunications, Media and Technology (TMT)

Several types of components are installed with activation of the Now Assist for Telecommunications, Media and Technology (TMT) application, including tables, user roles, and business rules.

Roles

Now Assist for Telecommunications, Media and Technology (TMT) adds the following roles:

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Roles installed with Now Assist for Telecommunications, Media and Technology (TMT)

Role	Description
Application admin sn_tmt_agentic_ai.app_admin	Granular admin role for the Telecommunications, Media and Technology (TMT) AI agent collection

Proactive Service Experience Workflows

ServiceNow® Proactive Service Experience Workflows provide a way for telecommunications, media, and technology (TMT) service providers to deliver end-to-end support, while understanding customer impact, and offering transparent communication to all parties involved in the support process.

Watch this short video for an introduction to the Proactive Service Experience Workflows application.

https://player.vimeo.com/video/981575621?h=19878717a5

Explore	Configure
Learn about how service providers and customers use Proactive Service Experience Workflows.	Plan and configure your implementation.
Use	**Reference**
Using Proactive Service Experience Workflows.	Get details about domain separation for Proactive Service Experience Workflows.

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Additional resources

- Learn more about what's new and changed, see the Proactive Service Experience Workflows release notes.
- Review the multiple TM Forum (TMF) Open APIs supported for the product, see TMF APIs for TMT.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Proactive Service Experience Workflows features at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the ServiceNow Impact.
- Connect with other Proactive Service Experience Workflows users at Now Community.

Sales Customer Relationship Management for Telecommunications

The ServiceNow® Sales CRM for Telecommunications enables to unify your sales, fulfillment, and service operations on one platform.

Explore	Configure
Learn more about Sales CRM for Telecommunications	Plan and configure your implementation

Additional resources

- Log in to your ServiceNow® account and find additional information about implementing and deploying Sales CRM for Telecommunications features at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the ServiceNow Impact.
- Connect with other Sales CRM for Telecommunications users at Now Community.

Exploring Sales CRM for Telecommunications

Learn how the ServiceNow® Sales CRM for Telecommunications application can help your organization manage the sales-to-fulfillment cycle for your customers. By adopting an integrated approach to quoting, ordering, and service delivery, you can increase operational efficiency and improve your customer experience.

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Sales CRM for Telecommunications overview

With the Sales CRM for Telecommunications application, you can unify your sales, fulfillment, and service operations on one platform. You can streamline quoting and pricing, orchestrate orders from sale to activation, and provide your teams with visibility into customer systems and tools that they need to deliver services. You can unify your sales, fulfillment, and service operations on one AI-powered platform and streamline quoting and pricing, configure complex bundles with guided workflows, and orchestrate orders seamlessly from sale to activation. Your teams can track orders with real-time visibility, proactively monitor issues, identify expansion and renewal opportunities, and prevent revenue loss while driving customer loyalty.

Key benefits

With Sales CRM for Telecommunications, you can:

- Scale sales productivity: Automate configuration, pricing, and approvals with AI-powered workflows, freeing agents to focus on customer relationships and closing deals.
- Reduce revenue leakage: Track orders from quote to activation on one platform, while AI agents detect and resolve issues before they impact service delivery.
- Maximize customer lifetime value: Proactively flag renewals and surface upsell opportunities at the right time with a complete customer view.
- Accelerate sales cycles: Configure accurate bundles quickly with guided workflows and unified catalogs while maintaining compliant pricing.
- Streamline order fulfillment: Coordinate across systems with complete visibility, eliminating manual handoffs and costly rework.
- Improve lead management: Score and prioritize leads with AI while speeding up quoting to help teams achieve targets.
- Accelerate implementation: Deploy faster using industry-aligned data models and built-in APIs without replacing existing systems.

Key Sales CRM for Telecommunications capabilities

The Sales CRM for Telecommunications application includes the following capabilities:

Capability	Description
Lead and opportunity management	Tracks leads and opportunities from first contact through to quote with AI-powered lead scoring and needs analysis. Agents qualify leads faster and track opportunities without switching systems, increasing sales productivity.
Configure, price, and quote (CPQ)	Guides agents to build service combinations with catalogs that support complex product bundles, subscriptions, and usage-based pricing. Shortens sales cycles and increases win rates while protecting margins.
Order management	Automates order fulfillment from sale to service activation with intelligent workflows that coordinate across systems. Activates services faster while eliminating revenue loss from failed orders.
Renewal workflows	Provides a complete view of services and subscriptions with automated renewal workflows for proactive outreach.

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Capability	Description
	Protects recurring revenue by identifying renewal risks early and surfacing expansion opportunities.
Industry aligned (TMF APIs)	

Sales CRM for Telecommunications workflow

The Sales CRM for Telecommunications workflow shows the end-to-end process for managing sales orders, from initial prospect identification through order closure.

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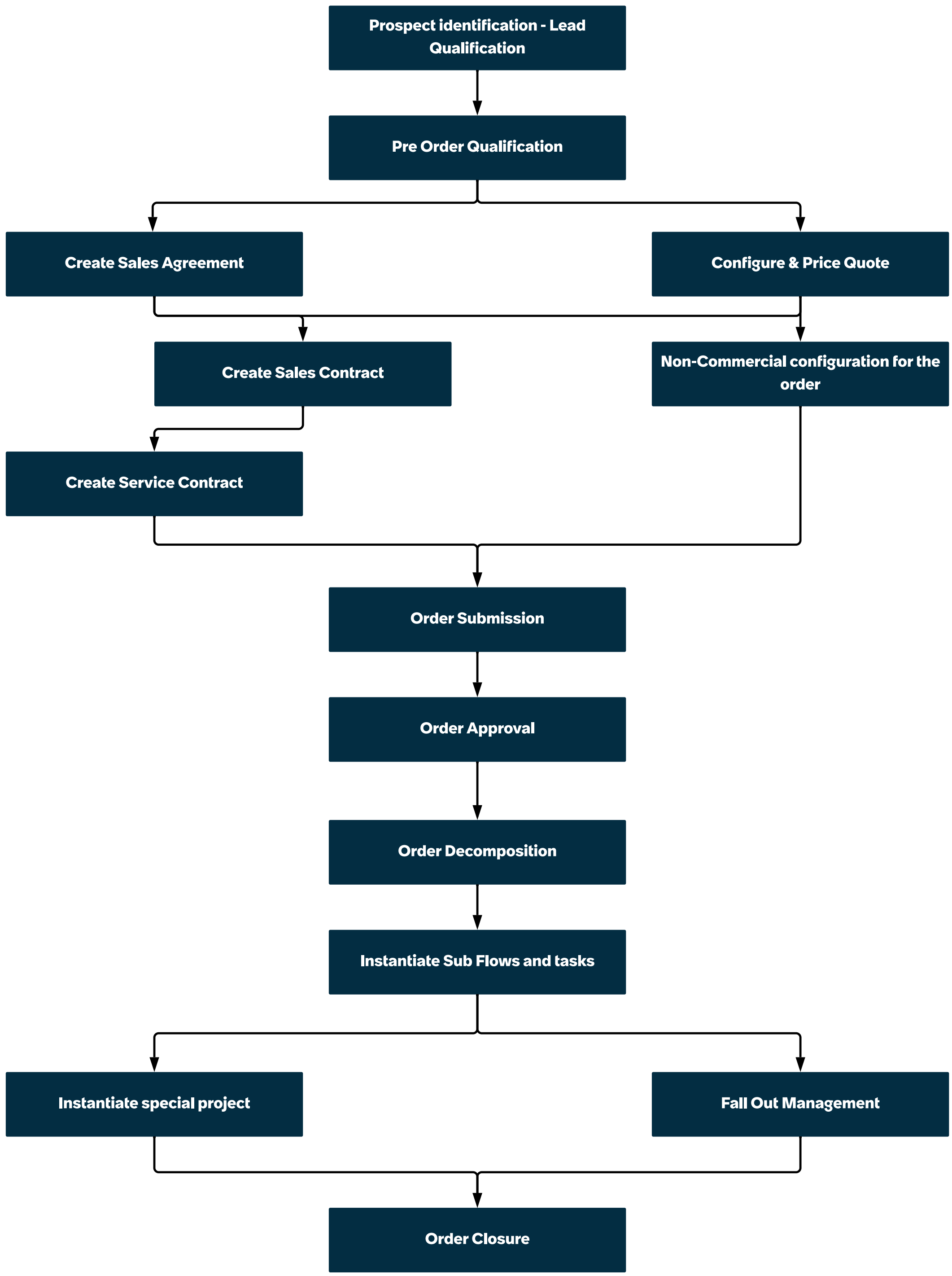

Sales CRM for Telecommunications lifecycle stages

This diagram showcases the following key stages in the lifecycle including lead qualification, contract creation, order processing, and fulfillment activities:

1. **Prospect identification - Lead qualification**: This is the initial stage where potential customers are identified and qualified as leads. At this stage, account information isn't mandatory, allowing sales teams to capture leads without requiring complete customer details. The product catalog is optional at this point, though lead line items can reference catalog items to provide early product visibility and aid in qualification efforts.

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2. **Pre-order qualification**: The lead is converted to an opportunity, establishing a formal sales pursuit linked to a specific customer. An opportunity record is created with product line items tailored to the customer's needs and context. At this stage, the opportunity must be linked to a customer account. The product catalog remains optional but, when used, enables reference to specific catalog items and preliminary pricing estimates. This establishes the product configuration framework that supports detailed pricing and configuration in later stages.
3. **Create sales agreement / Configure, price, and quote**: This stage represents a critical juncture where two parallel paths work through a bidirectional relationship, allowing continuous interaction and alignment between commercial terms and detailed pricing. The bidirectional arrows between these two paths indicate continuous interaction, allowing updates to commercial terms in the agreement to flow to pricing in the quote, and vice versa.
    - **Configure, price, and quote**: Handles the detailed commercial configuration, pricing, and feasibility validation to ensure the proposed solution can be delivered. Feasibility results determine offer eligibility, compatibility, and pricing. The account is mandatory with a complete structure and hierarchy, and location information for all accounts must be provided. Site-level product configuration occurs at each child account, and global SLAs from the sales agreement apply automatically. The offer is configured with confirmed pricing, and approvals or repricing activities are completed. Quote versions accommodate iterative refinement. Quote confirmation produces a summary document and requires legal signature before proceeding to contract creation.
    - **Create sales agreement**: Establishes the commercial framework and negotiates terms and conditions that govern all subsequent quotes and the entire customer relationship. Agreement is the reference for future quotes. Customer account is mandatory at the legal level, product catalog is also mandatory. Global level service-agnostic SLAs are negotiated that cascade to all service contracts. Terms and conditions for partner services are also negotiated at this level.

      Note: This is applicable if an existing customer wants to create a new quote. In this case, the existing contract is used as a reference and a quote is immediately generated.
4. **Contract managementCreate sales contract**: Contracts can be sales contract or service contracts.
    - Sales contract: Following quote confirmation, the sales contract represents the legally binding commercial agreement between a customer and service provider. Quote confirmation is mandatory before proceeding, and accounts with contacts at the child level must be established. The sales contract directly reflects quote line items, capturing the confirmed commercial configuration, pricing, and terms.
    - Service contract: Represents a post-confirmation contractual agreement that handles non-commercial configuration with entitlements and service level commitments. Entitlements are mandatory, modeled as Product Offering (PO) types, and must follow the global SLAs established in the sales agreement. Service contracts are created at the child account or site level based on specific quote Line Item configurations including routing type, access type, and POP redundancy requirements.
5. **Order submission**: The order consolidates all commercial and non-commercial configurations into a validated, ready-to-fulfill package. Account information including billing profile is mandatory. Order header and line items directly reflect the quote, maintaining traceability. Commercial modifications require reopening the quote, while non-commercial modifications occur directly in the order. The order is validated before approval.
6. **Order approval**: Upon submission, the order undergoes financial and operational validation before fulfillment begins. Product inventory is created but remains inactive, awaiting successful completion before activation. This ensures inventory records exist but don't affect availability until services are confirmed as deliverable.

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7. **Order decomposition**: Order decomposition breaks down the order into executable components for orchestrated fulfillment. Order line items are created for product offerings and product specifications. Domain orders are created for each product specification to enable domain-specific orchestration. Order decomposition generates child orders for order line items and domain orders, creating a hierarchical structure that supports both parallel and sequential fulfillment.
8. **Instantiate sub flows and tasks:** Sub flows are instantiated for every domain order, creating work streams for fulfillment. Tasks are triggered based on flow and decomposition rules. Tasks may be manual, API-driven, Field Service Management for Telecommunications (FSMT) for on-site work, or Strategic Portfolio Management for Telecommunications (SPMT) for complex projects. Processing occurs in parallel with dependencies for proper sequencing, or staggered to optimize resources.

   The workflow branches into two parallel paths for specialized handling of complex scenarios and exceptions.

   - **Instantiate special project**: This path provides specialized handling for orders requiring project management discipline. A project is created with tasks designed for complex fulfillment scenarios, such as large enterprise deployments, multi-site installations, or any orders that require coordinated planning, resource management, and formal project tracking.
   - **Fall out management**: This path handles exception management and resolution. When orders encounter issues, errors, or require special intervention, this path ensures proper tracking, escalation, and resolution without blocking the main fulfillment flow. Problematic orders are managed separately while successful orders continue processing normally.
9. **Order closure**: The final stage consolidates fulfillment by progressively closing tasks at each level, from sub flows to domain orders to the complete order. Once all tasks are complete, the order closes and services are activated. Integration with the Configuration Management Database (CMDB) is established, enabling lifecycle management including monitoring, change control, and incident management.

The Sales CRM for Telecommunications workflow, upon completion, results in activated services ready for customer use, a fulfilled order completing the transaction, CMDB integration for lifecycle management and monitoring, service contracts with defined entitlements, a complete audit trail ensuring compliance, and integrated systems providing end-to-end visibility.

Sales CRM for Telecommunications functional architecture

Sales CRM for Telecommunications is a comprehensive order management solution designed specifically for telecommunications service providers. Sales CRM for Telecommunications serves as a critical orchestration layer within the larger telecommunications ecosystem, integrating with key systems to manage the complete journey from prospect identification to service activation.

Sales CRM for Telecommunications in the Telecommunications ecosystem

Sales CRM for Telecommunications is a critical application in the telecommunications industry, serving as the central orchestration layer for order management. It acts as a central hub connecting various systems across the telecom operator's landscape:

- Customer-facing channels: Mobile apps, web portals, and sales representatives.
- Supporting systems: Product catalogs, inventory systems, and service qualification platforms.
- Fulfillment systems: Field service management and network activation platforms.

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Sales CRM for Telecommunications leverages TeleManagement Forum (TMF) industry standards to manage telecommunications orders across both selling and fulfillment phases while integrating with multiple upstream and downstream systems.

Foundation components

Sales CRM for Telecommunications is built on the following core data entities that underpin the entire order management process:

- Account: Customer account information and organizational hierarchy.
- Contact: Customer contact details and relationships.
- Location/Site: Service delivery locations and site information.
- Product Model: Product specifications and definitions created using the Product-Service-Resource (PSR) framework.
- Sold Product: Customer's purchased products and entitlements
- Install base item: Customer's product configuration.
- Entitlements: Entitlements associated with the sold products.
- Contracts: Customer contract including account details and specific assets covered.

These foundational elements provide the essential data structures that support all operations, from lead management through service activation. The Sales CRM for Telecommunications functional architecture operates across two distinct phases: the Selling Phase and the Fulfillment Phase.

Selling phase

This phase covers the customer acquisition and order capture process:

- Lead Management: Initial prospect identification
- Opportunity Management: Sales opportunity qualification
- Product Catalog: Product offerings and configurations
- Sales Agreement: Pre-sales contractual arrangements
- Shopping Cart: Customer selection management
- Quote: Pricing and proposal generation (CPQ)
- Contract: Post-sales contractual obligations
- Order Capture: Final order submission

During this phase, Sales CRM for Telecommunications integrates with digital apps, self-care portals, account managers, product catalogs, and service feasibility systems.

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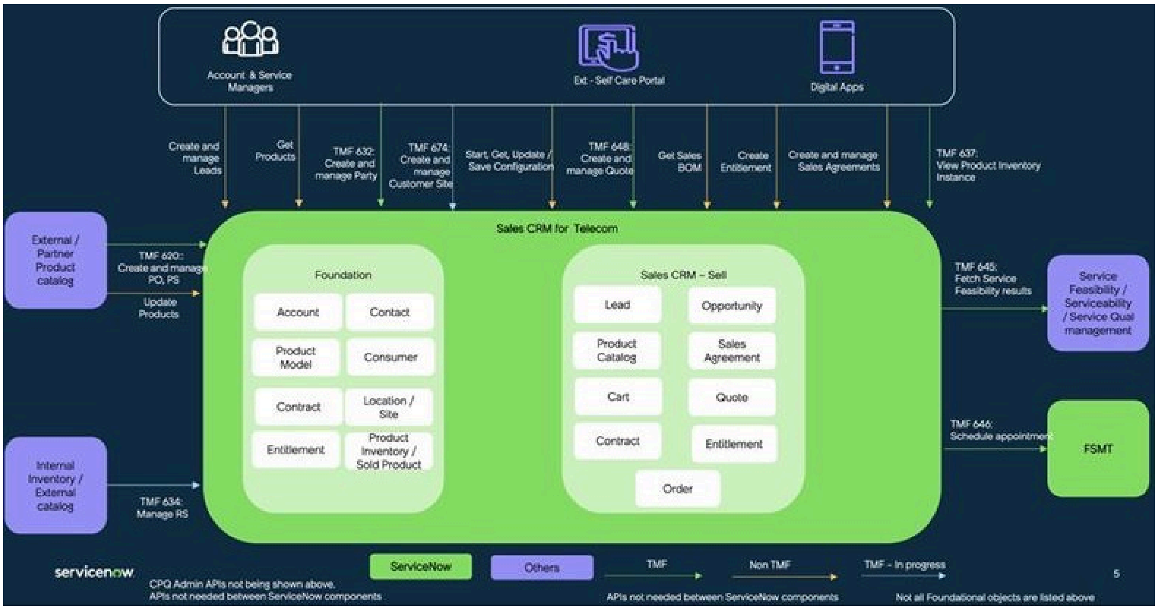
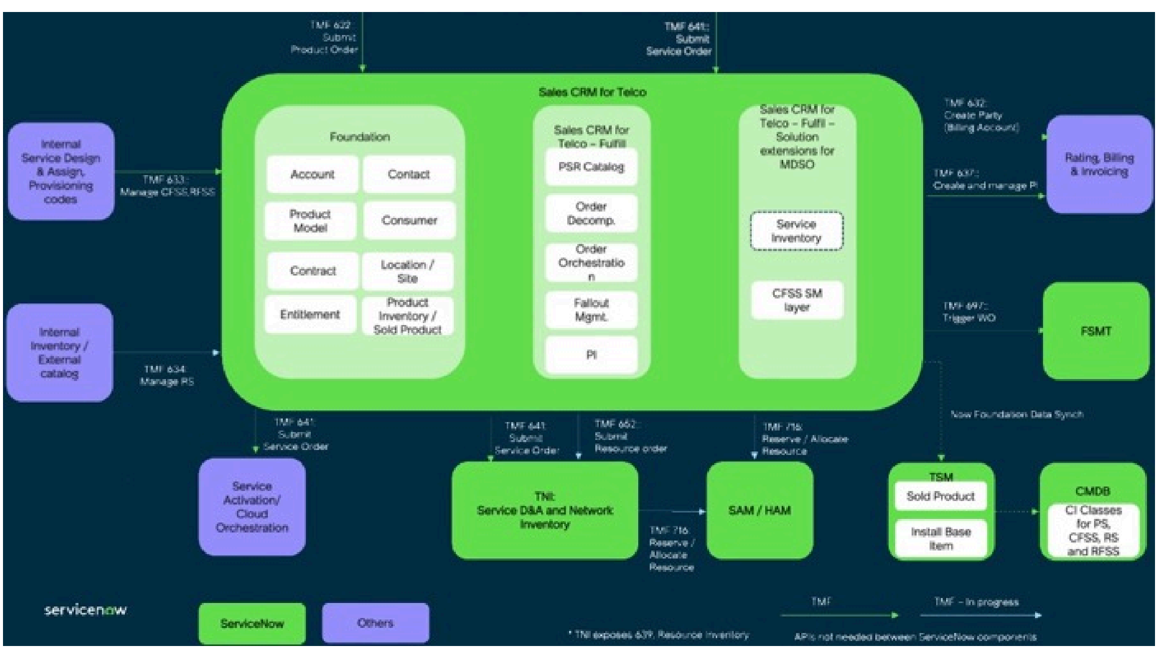


Fulfillment phase

After order submission, the next phase is the fulfillment process:

- Order Distribution: Decomposition into service orders and work orders.
- Service Order Management: Tracking through activation lifecycle.
- Activation Handoff: Submission to provisioning systems.

During this phase, Sales CRM for Telecommunications coordinates with Field Service Management for Telecommunication, external inventory systems, and network activation platforms.



Note: Sales CRM for Telecommunications orchestrates the order management process and submits service orders to downstream activation systems but does not perform network activation or provisioning.

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TeleManagement Forum (TMF) Open APIs

The Sales CRM for Telecommunications leverages TeleManagement Forum (TMF) Open APIs throughout its architecture, ensuring standards-based integration with third-party systems. Key API integrations include:

- Product catalog management API: Manage product catalog information from external systems. See Product Catalog Open API.
- Product inventory API: For ServiceNow applications or external CRM / CPQ submitting orders. See Product Inventory Open API.
- Service catalog API: For synchronizing technical specifications with other network domain specific provisioning catalogs. See Service Catalog Open API.
- Service order API: Service Order API: Customer order is handled by another application and Sales CRM for Telecommunications acts as a service order manager or when the decomposition and orchestration is handled by the marketplace owner and sends order to Sales CRM for Telecommunications for fulfillment. See Service Order Open API.
- Technical service qualification API: Checks availability of resources and services before an order is submitted for fulfillment. See Technical Service Qualification Open API.
- Quote management API: Based on the TMF 648 API. See Quote Management API.

Non-TMF APIs

- Entitlement API: Create and fetch entitlements. See Entitlement API.
- Lead management API: Mapping and certification as per TMF 699. See lead API.
- Order API: See Order API.
- Sales agreement API: See Sales Agreement API.

Sales CRM for Telecommunications PSR catalog

The Sales CRM for Telecommunications Product, Service, and Resource (PSR) catalog is a unified catalog that defines all required entities in a single location, based on the TM Forum (TMF) Shared Information and Data (SID) model.

The Sales CRM for Telecommunications PSR catalog consolidates product, service, and resource definitions into a single catalog structure, eliminating the need for product data synchronization between separate sales and fulfillment catalogs. It provides a consistent framework for managing telecom product offerings across multiple domains like B2C Retail Mobile, B2C Retail Wireline, B2B Enterprise Connectivity, and Beyond Connectivity. The following table contains examples of Mobile, Broadband and Dedicated leased lines.

Because the catalog defines and maps all necessary entities in one place, you don't need explicit entity-to-entity API mapping or separate product data harmonization across sales and service catalogs.

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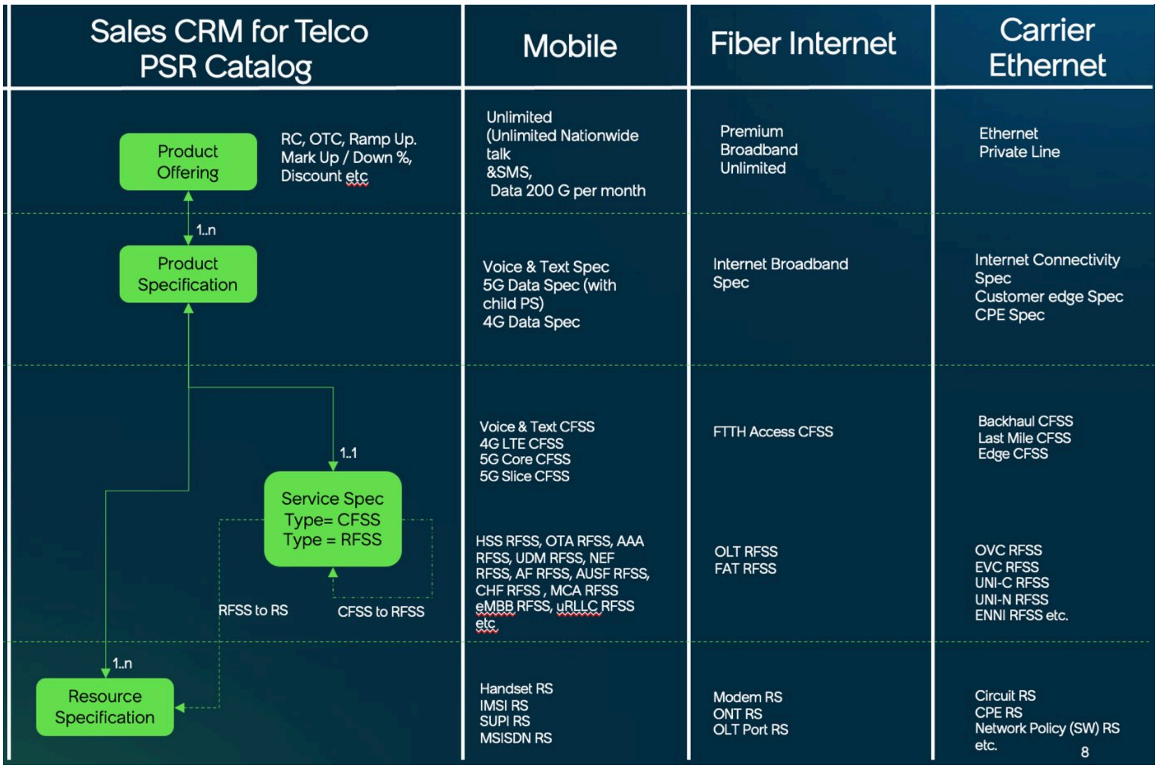

PSR catalog hierarchy

Each level in the catalog maps to a specific layer of the product-service-resource model:

- Product offering: Defines the item to be sold to a customer. Pricing attributes include recurring charges (RC), one-time charges (OTC), ramp-up pricing, mark-up and mark-down percentages, and discounts. A product offering references a product specification which in turn can have child product specifications.
- Product specification: The structured definition of a product. One product specification maps to exactly one service specification and can reference one or more resource specifications.
- Service specification: Defines the service layer. Service specifications are of two types:
  - CFSS: Represents the service provided to the customer, for example, Voice and Text CFSS or home fiber FTTH Access CFSS.
  - RFSS: Represents the underlying network resource services that are used to deliver service to the customer, for example, Home Subscriber Server (HSS), RFSS or Optical Line Terminal (OLT) RFSS.
- Resource specification: Defines the physical or logical network resources that fulfill the service, for example, IMSI or Modem RS.

Commercial features

The PSR catalog supports the following commercial capabilities:

- Product bundling and hierarchy: Supports product offer grouping, product offer-to-product specification definitions, and product specification hierarchies with relationships between specifications.
- Product offer pricing rules: Supports multiple pricing rule types, including recurring charges, one-time charges, ramp-up pricing, mark-up pricing, mark-down pricing, contract-based pricing, and characteristic value-based pricing.

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- Multidimensional rules and relationships: Supports product offer-to-product offer relationships, product offer-to-product specification relationships, specification-level relationships, characteristic value-based rules, and context-based rules such as location and customer type.

Fulfillment features

The PSR catalog supports the following order fulfillment capabilities:

- Catalog-based decomposition: Decomposes a customer order into order line items based on product offerings and product specifications. Order line items are further decomposed into child or domain orders, such as product orders, service orders, and resource orders.
- Quote data carry-over into orchestration: Maps attributes from the quote through to order tasks, making the correct data available to southbound APIs during service order orchestration.
- Orchestration dependencies: Supports staggered decomposition based on catalog characteristic values and decomposition rules. This eliminates complex workflow rules when order line items have dependencies on each other.

Mapping of Sales CRM for Telecommunications PSR catalog to TMF SID

The Sales CRM for Telecommunications PSR catalog entities, product offering, product specification, customer facing service specification, resource facing service specification, and resource specification map directly to the corresponding entities in the TM Forum (TMF) shared information and data (SID) model.

TMF SID model

The TMF SID model is an industry-agreed framework by TM Forum that provides a common language and data model for communications service providers (CSPs). It defines business entities such as customer, product, service, and resource and their relationships across enterprise systems. The Sales CRM for Telecommunications PSR catalog maps its core entities to the product, service, and resource layers of the TMF SID model. The TMF APIs that the catalog supports, including TMF 620 and TMF 633, are also based on the SID model.

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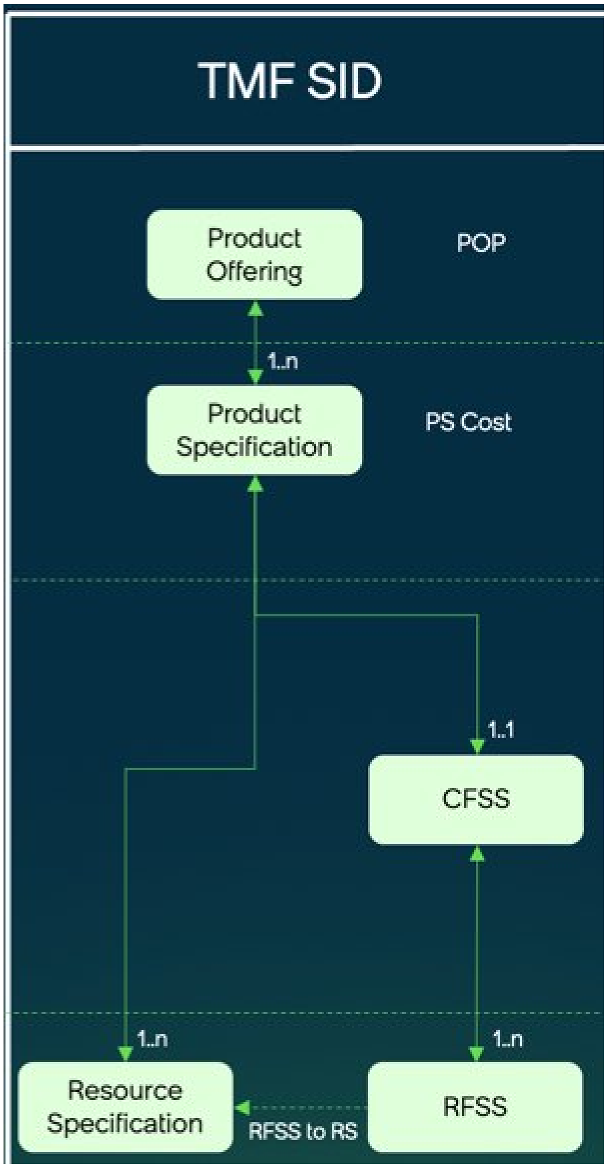

Product offering

A product offering defines how a product specification is made available to the market, including its pricing, terms, and conditions.

- Market view: Represents the commercial view of a product that customers see in a catalog and agree to contractually.
- Relationship to product specification: References a product specification to define what is being sold. One product specification can have multiple product offerings, for example, the same product can be offered with different price points for different time periods.
- Components: Can be structured as a simple item or a bundle of other product offerings.
- Commercial parameters: Includes price, market segments, valid dates, and allowed actions such as subscription or upgrade.
- Catalog management: Categorized in a catalog and can be constrained so that it is sold only within a bundle.

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Bundle product offering

A bundle product offering is a type of product offering that groups two or more product offerings into a single package. Unlike a simple product offering which represents a single, atomic item such as a mobile handset, a bundle product offering represents a combination of offerings, such as a triple play package (internet, TV, and voice).

- Inheritance: Inherits all attributes of a standard product offering.
- Composition: Can contain other bundle product offerings or simple product offerings, supporting hierarchical, multi-level bundling.
- Reusability: References simple product offerings rather than embedding them, so the same component can appear across different bundles.
- Pricing and marketing: Supports bundle-specific pricing, price adjustments, and rules such as eligibility, compatibility, and commitment terms.
- Containment: Indicates whether a product offering represents a single item or a collection.

Product specification

A product specification is a detailed description of a tangible or intangible object that serves as the template from which customer products and subscriptions are instantiated.

- Commercial focus: Represents the product as perceived by business users, not as technical network components.
- Structure: Can be simple (atomic) or a composition of other product specifications.
- Attributes: Includes characteristics such as color, relationships with other specifications, and characteristic values.
- Realization: Realized through customer-facing service specifications (CFSS) and resource-facing service specifications (RFSS).
- Lifecycle: Manages the product lifecycle status.

Resource specification

A resource specification defines the characteristics, behaviors, and relationships of a managed or unmanaged resource, and serves as the template for instantiating specific resource instances of the same type.

- Template functionality: Defines the resource type. The resource class defines a specific instance based on that specification.
- Definition scope: Captures common attributes such as name, version, and lifecycle status, along with physical or logical parameters that apply to all instances of a resource type.
- Resource types: Can describe physical components such as a router or SIM card, or logical components such as software or virtual network functions.
- Service realization: Defines the technical components that RFSS requires to deliver a service.

Customer-facing service specification

A customer-facing service specification (CFSS) defines technology-agnostic service characteristics that a customer directly purchases. It connects product specifications to resource-facing service specifications, focusing on service parameters, service level agreements (SLAs), and features.

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- Customer-centric view: Describes services from the customer's perspective, for example, internet access rather than a specific DSL or fiber profile.
- Product realization: Represents the realization of a product specification.
- Service components: Includes service characteristics such as service name and service rate, parameters that customers can configure during ordering, and links to related product offerings.
- Structure: Can be atomic (single) or composite (a grouping of services).
- Product offering support: A single CFSS can support multiple similar product offerings.

Resource-facing service specification

A resource-facing service specification (RFSS) defines the technical characteristics, attributes, and requirements of a service that maps to underlying resources. Unlike a CFSS, an RFSS is domain-specific or technology-specific.

- Definition and purpose: Defines the technical implementation of a service and serves as the blueprint for managing the lifecycle of resource-facing service instances.
- Relationship to resource-facing service: Serves as the specification used to instantiate actual resource-facing service instances.
- Technology specific: Represents reusable, technology specific components such as DSL, VPN, or MPLS connections to network infrastructure.
- Structure: Can be atomic or composite (containing other RFSSs) and defines relationships with physical or logical resources such as routers and IP addresses.
- Mapping: Maps a logical service requirement from the CFSS layer to the network resources needed to deliver it.

Product definition in the Sales CRM for Telecommunications catalog

The following example shows how the SASE Custom Solution Bundle is defined in the Sales CRM for Telecommunications catalog. The bundle product offering contains three child product offerings, internet connectivity, SD WAN GW, and SD WAN Controller each of which is linked to its own product specification. The product specifications are mapped to service specifications. For example, Site Connectivity PS is mapped to SD WAN Edge and Connectivity service specifications, which in turn require resource specifications such as Edge Router, VNF, OLT Port, and ONT.

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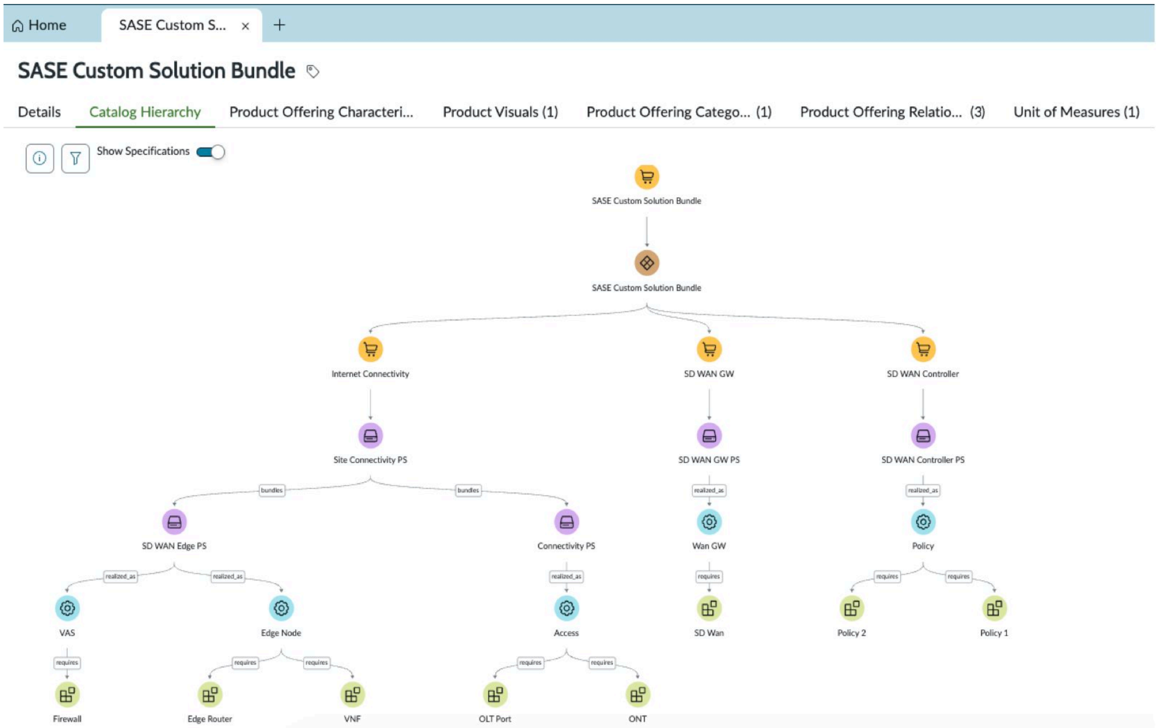

Configuring Sales CRM for Telecommunications

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

To learn about how to install and configure a set of Sales CRM for Telecommunications applications, see the following:

Applications	Description
Activate Sales CRM for Telecommunications	Activate the Sales CRM for Telecommunications plugin for Sales CRM for Telecommunications if you have the admin role. The application includes demo data and activate related ServiceNow® Store applications and plugins if they aren't already installed.
Install and configure Lead Management	It enables sales agents and sales development representatives to create leads and provide pre-sales product recommendations based on customer needs.
Install and configure Opportunity Management	It enables sales agents and account executives to get pre-sales product recommendations based on customer needs. You then assign the user roles and configure related features, such as needs analysis, used in Opportunity Management.
Configure Sales Forecasting	Use the Sales Forecasting application to project your future sales volumes and revenue

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Applications	Description
	based data from opportunities and pipeline analysis.
Configuring product offerings and catalogs	Create product offerings and the associated product catalogs that can be used by Sales Customer Relationship Management agents for pre-sales activities, order capture, and post-sales engagement.
Configuring product pricing	Use the Pricing Management application to create the price lists and price list lines, define pricing adjustments, and manage other features that control pricing for product offerings.
Configuring CPQ Configurator	Plan and configure your implementation of the CPQ Configurator. Product catalog admins and agents run CPQ Configurator in the CSM Configurable Workspace, while customers using self-service features use it in the Business Portal.
Configuring Quote Management	Learn how to set up Quote Management so that your sales agents can create and manage customer quotes.
Configure Sales Agreement Management	Use the Sales Agreement Management application to create sales agreements between a buyer and a seller for future transactions.
Install and configure Lead to Cash Core	It enables you to compose and build workflows that your organization maintains for the life cycle of a sold product.
Configuring Customer Engagement Sequences	Plan and configure your implementation of Customer Engagement Sequences.
Configuring order fulfillment	Order fulfillment is the process for fulfilling customer orders by using Workflow Studio. Order fulfillment, also referred as order orchestration, defines how to coordinate the fulfillment of orders.
Configure order enrichment flows using Decision Tables	Associate enrichment subflows with the product or service specifications by using the Order Enrichment Flow Policy in Decision Tables.
Configuring Jeopardy Management	You can configure Jeopardy Management to monitor tasks in a fulfillment plan and alert managers about the jeopardy levels.
Configuring Fallout Management	As a provider, you can use Fallout Management to identify, investigate, and resolve order processing issues so that orders can continue processing through to completion.

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Applications	Description
Configuring Order Management for customers using Service Bridge	As a customer, you must complete some configuration tasks so that you can set up the Order Management application.
Managing post-fulfillment order changes	Efficiently handle a variety of post-fulfillment changes to maintain service quality and operational accuracy after initial order fulfillment. These changes include canceling, suspending, resuming, disconnecting, and modifying orders. Each change type has distinct workflows, dependencies, and impacts on inventory and service states.
Asynchronous order processing for large customer and consumer orders	Asynchronous order processing handles high-volume enterprise and consumer orders without waiting for immediate processing, improving system performance for communications service providers (CSP) using Order Management.
Configuring order priority and routing	As a provider, you can configure various parameters to prioritize and route orders to ensure that they are fulfilled on time.
Integrating Order Management with southbound external systems	If you have a Telecommunications Service Management subscription, you can submit outbound service order requests to various external systems by integrating the Order Management application with the external southbound systems.

Activate Sales CRM for Telecommunications

Activate the Sales CRM for Telecommunications plugin for Sales CRM for Telecommunications if you have the admin role. The application includes demo data and activate related ServiceNow® Store applications and plugins if they aren't already installed.

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

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Sales CRM for Telecommunications application and child applications 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 may have to request it from the ServiceNow Store.

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

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

   All dependent plugins and applications that are included, or must be installed are listed in the dialog box.

4. **Optional:** If demo data is available and you want to install it, select **Load demo data**.

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

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

5. Select **Install**.

Configuring product offerings and catalogs

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

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

Overview of product offering and catalog configuration

You can use the CSM Configurable Workspace to configure product offering catalogs, product offerings, and product offering relationships.

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

Product offering and catalog management configuration tasks

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

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Product offering and catalog management configuration tasks (continued)

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

Create and publish resource specifications

Create and publish a base version of a resource specification to define all the resource options for a customer-facing product that you sell and to designate how to fulfill these options.

Before you begin

Create characteristics, characteristic options, and specification categories. To learn more about characteristics, characteristic options, and specification categories, see:

- Create product characteristics and characteristic options
-

Role required: sn_prd_pm.product_catalog_manager

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About this task

You create a resource specification to define the technical information for a resource, which includes the following:

- All the specification characteristic options that are available for a resource, and how they should be fulfilled.
- Various categories of information, such as the manufacture, model, and brand-related information about a resource, including the resource visuals and activation guides. Resource specifications are not customer-facing.
- Its relationship to other product, service, and resource specifications. You can enable the product and service delivery by using the required resource.

Note: To learn how to create a version of a specification when you want to offer an improved or updated offering in your product catalog, see:

-
-

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Specifications** > **Resource specifications**.
3. Select **New**.
4. On the Details tab, fill in the fields.

Create New Resource Specification

Field	Description
Number	Auto-generated ID for the resource specification.
Name	Name of the resource specification.
Version	Version number that is assigned to a specification: ◦ When you create the initial version, 1 appears in this field, and can't be changed. ◦ When you create subsequent versions of the specification, the next incremental number appears in this field after you select Create New Version. For example, 4 appears in this field if 3 was the previous version number.
Display name	Name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect. ◦ When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. ◦ When you create versions of the specification, a system-assigned

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Field	Description
	concatenation of the specification name and its current version number appears but can be overwritten. For example, SD-WAN Edge Device v2 appears in this field when: **a.** SD-WAN Edge Device is the name of the specification. **b.** Version 2 is the current version of the specification.
Category	Specification category that the resource specification belongs to.
Type	Type of resource specification. Select a type: ○ Physical:Physical item, such as a router or a handset. ○ Logical: Logical item, such as an IP address.
Start date	Date that the specification is valid from. You can use this field when you create a version to indicate when it takes effect. However, it is informational only and isn't used for actual processing.
End date	Date through which the specification is valid. You can use this field when you create a version to indicate when it is no longer in effect. However, it is informational only and isn't used for actual processing.
Owner	Name of the person who is responsible for maintaining this specification. Select the search icon to choose the person.
Description	Description for this resource specification.
State	State of the resource specification. ○ Draft: Unpublished draft resource specification that is assigned when you first create the specification record. ○ Published: Published resource specification that is assigned when you formally publish it for use in a product offering. ○ Retired: Resource specification that is retired and can no longer be used to create another specification version. ○ Archived: Resource specification that is no longer used in the ordering or fulfillment process.
External code	Product code of the specification.
Line	Product line of the specification.

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Field	Description
Cost to company	Cost to the company for this resource specification. This field is for profit-calculation purposes only.
Composite	Option indicating that the resource specification is a parent that contains multiple child specifications.
Installation required	Option indicating that someone must install the product on site.
Location specific	Option indicating that this resource specification requires the location details for fulfillment and installation.
Transient	Option that indicates the product for this resource specification is for one-time use. **Note:** If you select this option, the sold product or product inventory record for the transient product is set to an Inactive state when the order is completed. Move, Add, Change, Disconnect (MACD) actions can't be performed on the sold product or product inventory records of a transient product.
Initial version	Name of the base version of the specification that appears but can't be changed.
Previous version	Name of the previous version of the specification. For example: ◦ When you create the initial version of the specification (for example, version 1), this field is empty. ◦ When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. ◦ When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here You can't change this field.

5. Select **Save**.
The resource specification is created. The following tabs open for defining and viewing related information for the specification:

Resource specification tabs

Tab	Description
Catalog Hierarchy	View the complete hierarchy of a product offering and any associated specifications.

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Tab	Description
	Use the **Show specification** toggle to view the hierarchy of specifications.
Specification Characteristics	Associate the characteristics and characteristic options with your specification.
Specification Relationships	Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications
Versions	Create another version of the specification

6. When you are finished creating the specification version, do one of the following actions.

Action	Description
Publish	Publish the draft specification so that you can use it in a product offering. ◦ When you publish it, its state changes from Draft to Published. ◦ After you publish a specification, you can't change or delete it, unless you create a ver sion for it.
Update	Update the specification with the new data that you added, but do not publish it for use in a product offering.
Copy	Copy the data in this specification so that you can create a specification from it.

Create and publish service specifications

Create and publish a base version of a service specification. A service specification defines all the service options that apply to a customer-facing product you sell, and designates how to fulfill these options.

Before you begin

- Create the characteristics and characteristic options for your product offerings
-

Role required: sn_prd_pm.product_catalog_manager

Role required: admin

About this task

You create a service specification to define a service and the technical information for that service, which includes:

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- All the specification characteristic options that are available for a service, and how they should be fulfilled.
- Various categories of information, including the cost, terms and conditions, and service-related materials. These resources include the service-related visuals and implementation guides. Service specifications can be customer-facing or resource-facing.
- Its relationship to other product, service, and resource specifications.

Procedure

1. Navigate to **Specifications** > **Service Specifications**.
2. Select **New**.
3. On the Details tab, fill in the fields.

Service Specification

Field	Description
Number	Auto-generated ID for the service specification.
Name	Name of the service specification.
Version	Version number that is assigned to a specification: ◦ When you create the initial version, 1 appears in this field, and can't be changed. ◦ When you create subsequent versions of the specification, the next incremental number appears in this field after you select **Create New Version**. For example, 4 appears in this field if 3 was the previous version number.
Display name	Display name that appears for the specification when this version of the specification is in effect. ◦ When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. ◦ When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten. For example, SD-WAN Edge Device v2 appears in this field when: ▪ SD-WAN Edge Device is the name of the specification. ▪ Version 2 is the current version of the specification.

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<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Category</td><td>Specification category that the service specification belongs to.

If the selected category that belongs to 5G services doesn't have any matching slice templates, the system checks for existing templates.
If the selected category has multiple templates mapped to it, the systems chooses the latest published template to the specification.
</td></tr>
<tr><td>Type</td><td>Type of service specification:
<dl>
<dt>Customer Facing</dt>
<dd>Customers can create a ticket or a case for the service. When you select this type, the Distribution channel field is displayed to specify how the service is provided, for example web.</dd>
<dt>Resource Facing</dt>
<dd>Services are required for a resource to function properly.</dd>
<dt>Not Applicable</dt>
<dd>Service specification is not customer facing or resource facing.</dd>
</dl></td></tr>
<tr><td>Sub type</td><td>Sub-type of the specification. Choose Slice to define 5G network service specifications.
Note:

When you select Slice as the sub type, the templates are automatically selected based on the mapping of templates with the specification categories of service specifications in the decision table.
If you select None as the sub type, you can manually specify a template.
</td></tr>
<tr><td>Start date</td><td>Date that the specification is valid from. Use this field when you create a version to indicate when it takes effect. It’s informational only and isn't used for actual processing.</td></tr>
<tr><td>End date</td><td>Date up until which the specification is valid. Use this field when you create a version to indicate when it’s no longer in effect. It is informational only and isn't used for actual processing.</td></tr>
</table>

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Field	Description
Template	Templates that you have defined if you're using 5G services. **Note:** When you change a template, it deletes all the specification characteristics that are marked as true and are associated with the old template and re-associates the specification characteristics according to the new template that you have selected.
Description	Description for the service specification.
State	State of the service specification. **Draft** Unpublished draft service specification that is assigned when you first create the specification record. **Published** Published service specification that is assigned when you formally publish it for use in a product offering. **Retired** Service specification that is retired and can no longer be used to create another specification version. **Archived** Service specification is no longer used in the ordering or fulfillment process.
Distribution channel	Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels. **Note:** If you're using the Service Exchange Order Management for Providers application, enter Service Exchange as distribution channel.
External code	Service code of the specification.
Line	Service line of the specification.
Cost to company	Cost to the company for this service specification. This field is for profit-calculation purposes only.

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Field	Description
Composite	Option indicating that the service specification is a parent specification composed of multiple child specifications.
Installation required	Option indicating that someone must install the service on site.
Location specific	Option indicating that this service specification requires the location details for fulfillment and installation.
Transient	Option that indicates the product for this service specification is for one-time use. **Note:** If you select this option, the sold product and or product inventory record for the transient product is set to an Inactive state when the order is completed. Move, Add, Change, Delete (MACD) actions can’t be performed on the sold product or product inventory records of transient products.
Initial version	Name of the base version of the specification that appears but can't be changed.
Previous version	Name of the previous version of the specification. For example: ◦ When you create the initial version of the specification (for example, version 1), this field is empty. ◦ When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. ◦ When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here. You can't change this field.

4. Select **Save**.
The service specification is created. The following tabs open for defining related information:

Service specification tabs

Tab	Description
Catalog Hierarchy	View the complete hierarchy of a product offering and any associated specifications. Use the **Show specification** toggle to view the hierarchy of specifications.

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Tab	Description
Specification Characteristics	Associate the characteristics and characteristic options with your specification.
Specification Relationships	Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications.
Versions	Create another version of the specification.

5. When you are finished creating the specification version, do one of the following actions.

Action	Description
Publish	Publish the draft specification so that you can use it in a product offering. ◦ When you publish it, its state changes from Draft to Published. ◦ After you publish a specification, you can't change or delete it, unless you create a ver sion for it.
Update	Update the specification with the new data that you added, but do not publish it for use in a product offering.
Copy	Copy the data in this specification so that you can create a specification from it.

Create and publish product specifications

Create and publish a base version of a product specification. A product specification defines all the product options that apply to a customer-facing product you sell, and designates how to fulfill these options. It contains information such as the product description, pricing, eligibility, and product options.

Before you begin

- Create the product characteristics and characteristic options for your product offerings
-

Role required: sn_prd_pm.product_catalog_manager

About this task

A product specification defines a product that you sell to your customers. It captures the various characteristics of a product, and includes:

- All the specification characteristic options that are available for a product, and how they should be fulfilled.
- Various categories of information, such as the brand, cost, terms and conditions, and product-related materials, which include product visuals. Product specifications are customer-facing and are added to product offerings.
- Its relationship to other product, service, and resource specifications, and how a customer order of a product offering is delivered.

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For example, suppose you define a product specification for an SD-WAN service package and you designate it as a composite product specification for a complex enterprise product specification. A composite product is typically composed of a parent or umbrella specification, and multiple child specifications, each with their own characteristics. When bundled together, they form a single complex product. The SD-WAN service package consists of three bundled product specifications, two of which are designated as mandatory items that the user must select. The third specification is for an optional security package. The SD-WAN service package is a container or wrapper for the three other products.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Specifications** > **Product Specifications** and select **New**.
3. On the Details tab, fill in the fields.

Create New Product Specification

Field	Description
Number	Auto-generated ID for the product specification.
Name	Name of the product specification.
Version	Version number that is assigned to a specification: ◦ When you create the initial version, 1 appears in this field, and can't be changed. ◦ When you create subsequent versions of the specification, the next incremental number appears in this field after you select Create New Version. For example, 4 appears in this field if 3 was the previous version number.
Display name	Name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect. ◦ When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. ◦ When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears but can be overwritten. For example, SD-WAN Edge Device v2 appears in this field when: **a.** SD-WAN Edge Device is the name of the specification. **b.** Version 2 is the current version of the specification.

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Field	Description
Category	Specification category that the product specification belongs to.
Type	Type of product specification. Select a type: ◦ Goods:Product specification for the type of goods that you sell. ◦ Network: Product specification of a network. ◦ Service: Product specification of a service that you sell or provide to your customer.
Start date	Date that the specification is valid from. You can use this field when you create a version to indicate when it takes effect. However, it is informational only and isn’t used for actual processing.
End date	Date through which the specification is valid. You can use this field when you create a version to indicate when it is no longer in effect. However, it is informational only and isn’t used for actual processing.
Owner	Name of the person who is responsible for maintaining this specification. Select the search icon to choose the person.
Description	Description for this product specification.
State	State of the product specification. ◦ Draft: Unpublished draft product specification that is assigned when you first create the specification record. ◦ Published: Published product specification that is assigned when you formally publish it for use in a product offering. ◦ Retired: Product specification that is retired and can no longer be used to create another specification version. ◦ Archived: Product specification that is no longer used in the ordering or fulfillment process.
External code	Product code of the specification.
Line	Product line of the specification.
Cost to company	Cost to the company for this product specification. This field is for profit-calculation purposes only.
Composite	Option indicating that the product specification is a complex enterprise product specification. A composite product is typically comprised of a parent or umbrella specification, and multiple

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Field	Description
	child specifications, each with their own characteristics. When bundled together, they constitute a single complex product.
Installation required	Option indicating that someone must install the product on site.
Location specific	Option indicating that this product specification requires that you enter the location details into a customer order for fulfillment and installation.
Transient	Option that indicates the product for this product specification is for one-time use. **Note:** If you select this option, the sold product or product inventory record for the transient product is set to an Inactive state when the order is completed. Move, Add, Change, Disconnect (MACD) actions can't be performed on the sold product or product inventory records of a transient product.
Initial version	Name of the base version of the specification that appears but can't be changed.
Previous version	Name of the previous version of the specification. For example: ◦ When you create the initial version of the specification (for example, version 1), this field is empty. ◦ When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. ◦ When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here You can't change this field.

4. Select **Save**.
The product specification is created. The following tabs open for viewing or defining information related to your product specification.

Product specification tabs

Tab	Description
Catalog Hierarchy	View the complete hierarchy of a product offering and any associated specifications. Use the **Show specification** toggle to view the hierarchy of specifications.

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Tab	Description
Specification Characteristics	Associate the characteristics and characteristic options with your specification.
Specification Relationships	Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications
Product Offerings	Create a product offering from the specification. For details, see Create product offerings.
Attribute Mappings	.
Versions	Create another version of the specification.
Compatibility Rules	Configure compatibility rules for horizontal relationships between the specifications of multiple products, services, or resources.

5. When you are finished creating the specification version, do one of the following actions.

Action	Description
Publish	Publish the draft specification so that you can use it in a product offering. ◦ When you publish it, its state changes from Draft to Published. ◦ After you publish a specification, you can't change or delete it, unless you create a ver sion for it.
Update	Update the specification with the new data that you added, but do not publish it for use in a product offering.
Copy	Copy the data in this specification so that you can create a specification from it.

Defining mappings for attribute value propagation to domain orders

By defining attribute-mapping rules between two specifications in the product catalog, your fulfillment agents can access all relevant characteristic values in your product, service, and resource orders.

Attribute mapping overview

Orders, for example telecommunications orders, contain many characteristics and characteristic values that are populated at different stages of the order life cycle. Order Management automatically propagates and transforms the characteristics and characteristic values throughout the order fulfillment process. This automatic propagation of attributes across the product, service, or resource orders help to improve your operational efficiency and eliminate errors in the fulfillment process.

Note: Attribute values are another name for order characteristic values.

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When value attribute values are assigned and how they're used

Orders contain many characteristics and characteristic values that are populated at different stages of the order life cycle. Multi-site enterprise orders contain various attributes that are related to customer, product, service, and resource information. The ServiceNow AI Platform populates these attributes with the corresponding values at the different stages of the order life cycle.

The ServiceNow AI Platform decomposes orders and order line items into various suborders (product, service, and resource orders) and assigns them to different user groups and users. Different user groups then work with the various suborders to complete the required fulfillment tasks for a given order.

Catalog-driven attribute mapping and value propagation

The order fulfillment flow needs prior information on how specification characteristics are mapped and associated so that the characteristics are propagated from one domain order to another domain order. If you're a product catalog manager, you can define rules-driven attribute mappings between and among selected product, service, and resource specifications. When you define attribute mappings, validations run to verify that they're unique, don't conflict with each other, or conflict with defined specification relationships and decomposition rules.

To learn more about specification relationships, see Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications.

The Order Management application executes attribute mappings during the order fulfillment process and sets and propagates order characteristic values across the various suborders.

The order fulfillment process evaluates the attribute-mapping rules that you define. The attribute values are propagated from the domain orders that are associated with the source specification to the domain orders that are associated with the target specification.

With catalog driven rule-based attribute propagation, your fulfillment agents have all the relevant and correct information that they require to work effectively on order tasks. The attribute-mapping functionality reduces errors and improves efficiency in the order fulfillment process as follows:

- Without rules-driven attribute mapping, your users have to assign the attribute values manually, which can be error-prone and time-consuming.
- These values propagate to lower domain orders and are used for inventory creation, service activation, and account and billing updates. Fixing an error takes a significant amount of effort and time for your users when these values are manually assigned.
- Attribute mappings promote the proper flow of crucial data through the associated domain orders. This mapping makes consistent data available to users with different roles when they're processing an order.

Define domain order attribute mappings

Create rules-driven attribute mappings to define the relationships and associations between and among product, service, and resource specifications, and how attribute values propagate between these mappings.

Before you begin

Role required: sn_prd_pm.product_catalog_manager

About this task

Attribute propagation enables you to define attribute mappings by setting mapping rules to do the following actions:

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- Set target and source mapping rules using conditions based on selected characteristics and characteristic options, including complex characteristics.
- Define the attribute mapping from any specification to any other specification that is available in the product and service hierarchy. These selections include siblings and horizontal relationships.
- Designate the same characteristic and characteristic options in both the source and target specifications, including complex characteristic hierarchies.
- Select different characteristics and characteristic options in the source and target specifications, including complex characteristics.
- Select a higher-level specification and lower-level specification, or a lower-level specification and a higher-level specification, in a product offering.

Note: If you create specification relationships and accompanying decomposition rules, the ServiceNow AI Platform performs the required validations when you attempt to create attribute mappings. These validations ensure that your attribute mappings are unique and don't adversely impact existing decomposition rules. To learn more about specification relationships and decomposition rules, see Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications.

If a decomposition rule depends on an attribute-mapping rule, the order decomposition process isn't able to decompose the order because it's waiting for the attribute-mapping rule to provide the characteristic value that is required for order decomposition. The following warning appears when you save a decomposition or an attribute-mapping rule that would cause a dependent relationship with an adverse impact:`Attribute mapping rule impacts decomposition rule in {0} specification for {1} characteristic. Update this record to eliminate this rule dependency.`

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Specifications** and select a specification type.
   - Product Specifications
   - Service Specifications
   - Resource Specifications

   A list of specification records is displayed.
3. Select a record you want to modify.
4. Navigate to the **Attribute Mappings** tab.
5. Select **New**.
6. On the form, fill in the fields.

Create New Attribute Mapping form

Field	Description
Number	System-generated attribute mapping number.
Target specification	Target specification that you are associating with the selected source specification and related source characteristics, and source characteristic options.

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Field	Description
Target rule	Name of the target rule, displayed after you create the mapping rules.
Source rule	Name of the source rule, displayed after you create the mapping rules.
Source specification	Source specification that contains the source characteristics and characteristic options to associate with the selected target specification, characteristics, and characteristic options. Based on your selection, this field auto populates the **Available columns** section with the characteristics of your selected product, service, or resource specification.
Available columns	Displays one or more source characteristic options from the source specification, if available. Select the characteristics to be propagated. The characteristics display in the **Selected columns** section.

7. In the Conditions section, use the condition builder to specify one or more conditions using the characteristics and characteristic options selected in the Available columns for the source rule.
8. Select **Save**.
9. In the Available columns section, choose the target characteristics to be used as action variables in your target rule.
10. In the Actions section, select **New**.
    Fill in the dialog box to define the Configuration Rule Action.

Configuration Rule Action

Field	Description
Rule	Target rule for the attribute mapping, identified by a system-defined alpahnumeric number for the mapping.
Action variable	The target characteristic to be used in the rule action. In the field, select a characteristic.
Action type	Rule action to be performed. Select the type applicable to attribute mapping: ◦ Defaulting: Preselects a characteristic, option, or value, based on conditions that you specified for the target rule. ◦ Exclusion: Excludes certain characteristics from the configuration because they're not applicable or invalid depending on other selections made. ◦ Inclusion: Enforces the selection of certain characteristic options in a given product configuration.

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Field	Description
	○ Set value: Set the quantity on a characteristic value on a non-choice characteristic in the product configuration. ○ Validation: Checks one or more conditions
Action	The action to be performed for a particular characteristic. Select the field to list the available actions for the elements, such as characteristics. For example, you can: ○ Copy characteristic from source ○ Select s characteristic option ○ Deselect a characteristic ○ Enable or disable a characteristic or characteristic option
Variables	Source characteristic that you select.

11. Select **Save**.

Result

The order fulfillment process evaluates the attribute-mapping rules that you define. The attribute values are propagated from the domain orders that are associated with the source specification to the domain orders that are associated with the target specification.

What to do next

Create and publish your offerings to a product catalog.

Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications

Create the specification relationships and optional decomposition rules that define the associations between the product, service, and resource specifications for a product that you offer. These relationships impact how an order is fulfilled for a customer.

Before you begin

Role required: sn_prd_pm.product_catalog_manager

About this task

Specification relationships define the relationships and associations between the product, service, and resource specifications. They designate how an order that contains the source specification is decomposed, fulfilled, and delivered to the customer. For example, if you have a product that you deliver through a service specification, you can designate that it is composed of three unique service specifications (product, service, or resource).

> **Note:** The target product, service, or resource specification you select in the **Target Specification** field can be in any state, including a Draft state. The selected specification does not have to be published before selecting it in this field.

You can also select the characteristic options of the quantity characteristic for the specification relationship to provide the quantity of the target specifications. The order decomposition process refers to the mapped quantity to decompose the order for the source specification and creates the required number of domain orders for the target specification.

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Optionally, you can create decomposition rules for the selected source and target specification relationships. The specification relationships can have product, service, or resource specifications as the source specifications.

Note: To learn more, see Order decomposition.

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **List** > **Specifications** and select a specification type.
   - Product Specifications
   - Service Specifications
   - Resource Specifications

   A list of specification records is displayed.
3. Select a record you want to modify.
4. Navigate to the **Specification Relationships** tab.
5. Select **New**.
6. On the form, fill in the fields.

Specification Relationship form

Field	Description
Source specification	Product, service, or resource specification that you create the relationship from.
Target type	Type of specification: ◦ Product Specification ◦ Service Specification ◦ Resource Specification
Target specification	The target product, service, or resource specification you select can be in any state, including a Draft state. The selected specification does not have to be published before selecting it in this field.
Mandatory	Option that designates if the relationship between the selected source and target specifications is mandatory and should always exist when a customer orders the product. ◦ If selected, the target specification is always included with the source specification. During the ordering process,you must select the characteristics and characteristic values for the target specification. ◦ If cleared, it is an optional target specification and is only included with the product if the customer selected it during the ordering process.

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Field	Description
Relationship type	Type of relationship that designates how an order that contains the source specification decomposes for fulfillment after you receive and approve it. ◦ **Composed of** is applicable for following specification: ▪ If the source specification is product specification and selected target is product specification. An order that contains the source specification and characteristics decompose into a single service order. ▪ If the source specification is service specification and selected target is service specification. ▪ If the resource specification is source specification and selected target is also resource specification. ◦ **Realized as** is applicable for following specification: ▪ If the source specification is product specification and selected target is service specification. ▪ If the source specification is service specification and selected target is service specification. ◦ **Bundles** is applicable for following specification: ▪ If the source specification is product specification and selected target is product specification. An order that contains the source specification and characteristics decompose into unique order line items for each of the target specifications bundled from that parent product specification. ▪ If the source specification is service specification and selected target is service specification. ▪ If the resource specification is source specification and selected target is also resource specification. ◦ **Requires** is applicable for following specification:

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Field	Description
	▪ If the product specification is product specification and selected target is resource specification. To enable the delivery of the promised services in the specification, an order that contains the source specification and characteristics also requires the target resource specification. ▪ If the service specification is service specification and selected target is resource specification.
Order	Enter a numeric value that represents the order in which this relationship is applied, if there is more than one relationship.
Minimum quantity	Required minimum number of specifications for an order.
Default quantity	Default quantity if there is no selected amount.
Maximum quantity	Maximum quantity of specifications.
Quantity characteristic	Source specification characteristic that is used for quantity mapping. The quantity characteristic is supported only for a specification relationship in a product specification.

7. Select **Save**.

What to do next

Optionally, create decomposition rules for selected specification relationships that have a product, service, or resource specification as the source specification. For more information, see:
.

Configuring compatibility rules for horizontal relationships

As a provider, you can use compatibility rules to establish horizontal relationships between the specifications of multiple products, services, or resources.

You use a compatibility rule to define a source specification and a target specification and to establish a relationship between them.

The ServiceNow AI Platform provides two types of relationships that you can use to define a compatibility rule:

1. Requires: The source specification requires the defined target specification.
2. Excludes: The source specification excludes the defined target specification.

While you're creating a compatibility rule, you can establish the horizontal relationship either by defining the specifications or by defining the details for the specification characteristics. You can also define the maximum and minimum quantity of the specifications to support and fulfill your customer orders according to the defined decomposition rules.

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Before you can capture a new customer order that has a horizontal relationship, you must configure the compatibility rules by defining the source and target specifications. To learn more, see:

-
- Define the source specifications in the compatibility rules
-

Create a compatibility rule

Create a compatibility rule in the product catalog to define the horizontal relationships between your product, service, and resource specifications.

Before you begin

Role required: sn_prd_pm.product_catalog_manager, sn_prd_pm_adv.catalog_creator

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Rules** > **Compatibility Rule**.
3. Select **New**, and then fill in the fields.

Create New Compatibility Rule form

Field	Description
Number	System-assigned number for the compatibility rule.
Name	Name of the compatibility rule.
Description	Description of the compatibility rule.
State	State of the compatibility rule: **Draft (Default)** Unpublished draft compatibility rule that is created when you fill in the fields and submit the compatibility rule. **Published** Published compatibility rule that is created when you formally publish it after defining the source and target specifications for a product, service, or resource. **Note:** Only published compatibility rules are considered for the order capture and fulfillment process. **Archived**

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Field	Description
	Compatibility rule that is no longer used in the product catalog.
Rule	Name of the compatibility rule based on the source configuration. Displays when the rule is saved.

4. In the Source Configuration section, select the product specification to be the source of the compatibility rule.
5. In the Available columns section, select the characteristics.
   The selected characteristics are displayed in the Selected columns section.
6. Select **Save**.
7. In the Conditions section, use the condition builder to create one or more conditions to specify the characteristic options used in the compatibility rule.
8. Select **Save**.

What to do next

.

Define the source specifications in the compatibility rules

Define a source specification in a compatibility rule so that you can create a horizontal relationship in your product catalog.

Before you begin

Ensure that you have created a compatibility rule. To learn more, see Create a compatibility rule.

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm_adv.catalog_creator

About this task

A source specification record includes the details of a source product inventory item in the compatibility rule. After you create a compatibility rule, you can configure the characteristics of your source specification.

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Compatibility Rule**.
2. In the Compatibility Rules list, select the compatibility rule that you want to define the source specification for.
3. On the form, select the Source Configuration related list.
4. Select **New** and fill in the fields.

Specification Configuration form

Field	Description
Specification	Based on the specification that you selected when you created the compatibility rule, this field auto-populates with your product, service, or resource specification.
Characteristic	Characteristic to define the source specification in the compatibility rule.

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Field	Description
	Select the characteristic that is associated with the product, service, or resource specification.
Characteristic Option	Characteristic option to define the source specification in the compatibility rule. Select the characteristic options that are associated with the product, service, or resource specification.

5. Select **Submit**.

What to do next

.

Create and publish your product offerings to a catalog

Create and publish versioned product offerings to a product catalog so that you can define how you sell your products to your customers.

Before you begin

Role required: sn_prd_pm.product_catalog_manager

About this task

A versioned product offering is the customer-facing entity of a product. It contains the product description, pricing, eligibility, and product options. A versioned product offering is always associated with a product specification. Only published product offerings can be added to customer contracts.

Procedure

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

   For information about the field descriptions, see the Product offerings form fields section in .
4. Select **Submit**.
5. In the Product Offerings list, select the versioned product offering that you created.
   The versioned product offerings record appears, with the Product Offering Characteristics and Product Visuals related lists.
6. Add additional characteristics to your versioned product offering, if required.
7. **Optional:** Add product visuals to your versioned product offering.

   a. In the Product Visuals related list, select **New**.

   b. Enter a name for the visual.

   c. To select an image file to upload, select **Click to add**.

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d. To set your image as the primary image for the product, select **Set Primary**

Note: You can add multiple images for products, but the service catalog only supports one image per product when it is published to the service catalog.

8. When you finish creating the product offering version, do one of the following actions.

Action	Description
Publish	Publish the draft product offering so that you can use it in a product catalog: ◦ When you publish it, its state changes from Draft to Published. ◦ After you publish a product offering, you can't change or delete it, unless you create a version for it.
Update	Update the product offering with the new data that you added, but don't publish it for use in a product catalog.
Copy	Copy the data in this product offering so that you can create a product offering from it. For example, you can use the Copy function if you want to create a base version product offering that is similar to Premium SD-WAN Of fering v3, but with a separate version track. When you use the Copy function, it creates a base version product offering and sets the val ues in these fields: ◦ **Version**: 1 (base version) ◦ **Initial Version**: Premium SD-WAN Offering v3 ◦ **Previous Version**: blank

What to do next

Add versioned product offerings to your product catalog.

Create a product catalog

Create a product catalog to add your product offerings. As a provider, you can use the product catalog to define how you want to sell products to your customers.

Before you begin

Role required: sn_prd_pm.product_catalog_manager

About this task

The product catalog that the product offering is associated with appears in the form of a category in the service catalog on the customer's self-service portal. It groups similar product offerings that are targeted for a market or customer segment. A product offering is set to a catalog item in this category.

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Procedure

1. Navigate to **All** > **Product Catalog** > **Offerings** > **Product Offering Catalogs**.
2. Select **New**.
3. On the form, fill in the fields.

   Product catalog form

Field	Description
Number	ID of the product catalog.
Name	Name of the product catalog.
Description	Description of the product catalog.

4. Select **Submit**.

Creating and publishing specification versions

As a product catalog manager, you can create and publish the specification versions that list the improved products and services that you can offer to your customers in a technical product catalog.

Your product catalogs define the products, services, and resources available to your customers so they can decide what to purchase from you. Your catalog items will continue to evolve over time to accommodate the changes that are related to how your items are sold, configured, and delivered to your customers. Typically, these changes are related to engineering improvements that make the products, services, and resources more marketable and appealing to your customers. The changes usually are to the fit, form and function, characteristics, and characteristic options, and specification relationships of your catalog items. For example, a home internet product may evolve over multiple revisions to support changes that are related to pricing and increased internet speeds.

By creating new specification and product offering versions for your products, you enable your agents to work with the latest versions of your product and service offerings when they sell more expensive, complementary, upgraded, or related products to your customers.

Creating specification versions for use in product offerings

As a product catalog manager, you do the following actions when you create a version of a specification for use in a product offering:

1. Create and assign a version number in each of the product, service, or resource specifications or product offering records that are affected by the changes.
2. Create the required specification relationships, decomposition rules, and attribute mappings for each specification in the new version. As a product catalog manager, you update the following information to reflect the engineering changes that were made to the associated specifications:

   - Characteristics
   - Characteristic options
   - Specification relationships
   - Decomposition rules

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- Quantity mappings
- Attribute propagation rules

Note: To learn more, see Create and publish a specification version.

3. Create a product offering, and then publish it when you update your product catalog. To learn more, see Create and publish a product offering version.
4. Retire or archive old or unused specifications, and product offerings. To learn more, see Retiring or archiving versioned specifications and product offerings.

Updates and validations that are performed when you create and publish a specification version

When you create a version for a currently published specification, the system copies the following data into, or populates, the new specification record as follows:

1. Copies the following fields with these basic specification details:
   - **Category**
   - **Type**
   - **Start** and **End** date
   - **Description**
   - **External ID**
   - **Product code** and **Product line**
   - **Cost to Company**
   - **Composite**
   - **Installation Required**
   - **Location-specific**
2. Blanks out the **External Version** field.

   Note: The **External ID** and **External Version** fields don't appear on the specification forms by default but can be added by changing the form layouts.

3. Populates the following fields with the detailed information that you enter for the new specification version:
   - **Version**. The next incremental number appears.
   - **Display Name**. The display name is the system-assigned concatenation of the specification name and its current version number. You can overwrite this field.
   - **Initial Version**. The name of the base version of the specification appears but can't be changed.
   - **Previous Version**. The name of the specification is as it was in the previous version.
4. Copies the associated characteristic and characteristic options. To learn more, see Create the characteristics and characteristic options for your product offerings.
5. Copies the associated specification relationships, attribute mapping, decomposition rules, and quantity mappings when you use extension point scripts. When copied, the source specifications in the associated specification relationship and decomposition rule records are automatically updated to the current versions of the source specifications.

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Note: To learn more about these rules, see Create specification relationships, quantity mapping, and decomposition rules for Order Management.

6. Copies the associated quantity mappings and attribute propagation rules. The source specifications in the quantity mappings and attribute propagation rules are also updated to the current versions. To learn more about these rules, see .

When you publish the updated specification version, the ServiceNow AI Platform® performs validations on your edits. These validations ensure that all rules are valid with the characteristic and characteristic options that are available for the new specification version. An error might occur if you inadvertently remove or change the characteristics or characteristic options that are referenced by the other rules that are associated with the new specification version. If an error occurs, a message similar to this example appears.

Copied rules validation errors

You can publish a new specification version only after you resolve all errors. This table contains some possible validation errors that you may see and the actions you can take to resolve the issue.

Copied rules validation errors and resolution actions

Error	Resolution actions
Invalid specification version in the specification relationship.	Update the source specification version to the current version: 1. Select **Specification Characteristics**. 2. Update the **Source Specification** field in the Specification Relationships form.
Invalid specification versions in the decomposition rule.	Update the source specification version to the current version: 1. Select **Specification Relationships**. 2. Update the **Source Specification** field in the Specification Relationships form.
Invalid characteristic in the decomposition rule.	Update or remove the invalid characteristic in the Decomposition Rules form: 1. Select **Specification Characteristics**. 2. Update or remove any invalid characteristics.
Invalid characteristic options in the decomposition rule.	Update or remove the invalid characteristic options in the Decomposition Rules form: 1. Select **Specification Characteristics**. 2. Update or remove any invalid characteristic options.

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Copied rules validation errors and resolution actions (continued)

Error	Resolution actions
Invalid characteristic options in the quantity rule.	Update or remove the invalid characteristic options in the Attribute Mappings form: 1. Select **Attribute Mappings**. 2. Update or remove any invalid characteristic options.
Invalid specification version in the attribute propagation rule.	Update the **Source Specification** field in the Attribute Propagation form to the current version.
Invalid characteristic in the attribute mapping rule.	Update or remove the invalid characteristics in the Attribute Mappings form: 1. Select **Attribute Mappings**. 2. Update or remove any invalid characteristics.

Create and publish a specification version

Create and publish a version of an existing specification in a Published state so that you can offer an improved version of it to your customers in your product catalog.

Before you begin

Before you can create a version of a specification, an initial base version of the specification must exist and already be published. The information that you supply for a new version is the same as what you entered for an initial base version, but with some important differences. To learn more, see .

Role required: sn_prd_pm.product-catalog_manager

About this task

You create versions of service and resource specifications in the same manner as you do a resource specification.

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Product Specifications**.
2. In the Product Specifications list, select the product specification that you want to create a version for.
3. On the form, select **Create New Version** and then fill in the fields.
   The manner in which you create a version of a specification is similar to how you created its initial version, with the differences that are explained in the following table.

Product specification form

Field	Description
Name	Name of the new product specification. If the name of the item for the new version differs from the previous version, you can enter a new name.

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<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Version</td><td>Version number that is assigned to a specification:
When you create the initial version, 1 appears in this field, and can't be changed.
When you create subsequent versions of the specification, the next incremental number appears in this field after you click Create New Version. For example, 4 appears in this field if 3 was the previous version number.</td></tr>
<tr><td>Display Name</td><td>Displayed name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect.
When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field.
When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten.</td></tr>
<tr><td>Initial Version</td><td>Name of the base version of the specification that appears but can't be changed.</td></tr>
<tr><td>Previous Version</td><td>Name of the previous version of the specification. For example:
When you create the initial version of the specification (for example, version 1), this field is empty.
When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here.
When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here.
You can't change this field.</td></tr>
</table>

Note: For information about the remaining field descriptions, see Field descriptions for product catalog forms in Order Management for Telecommunications, Media, and Technology.

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4. To reflect the engineering changes that were made to the physical product, update the specification relationships, decomposition rules, quantity mappings, and attribute propagation rules as follows:
   a. To update the characteristics and characteristic options that are associated with your specification, use the Specification Characteristics related list. To learn more, see Create specification relationships, quantity mapping, and decomposition rules for Order Management.
   b. To update the specification relationships and accompanying decomposition rules, use the Specification Relationships related list. To learn more, see Create specification relationships, quantity mapping, and decomposition rules for Order Management.
   c. To update attribute mappings, use the Attribute Mappings related list. To learn more, see .
   d. To create a product offering from the specification, navigate to the Product Offerings related
5. When you finish creating the specification version, do one of the following actions.

Action	Description
Publish	Publish the draft specification so that you can use it in a product catalog as follows: ◦ When you publish it, its state changes from Draft to Published. ◦ After you publish a specification, you can't change or delete it, unless you create a ver sion for it.
Update	Update the specification with the new data that you added, but do not publish it for use in a product catalog.
Copy	Copy the data in this specification so that you can create a specification from it. When you use the Copy function, it creates a base version specification, and sets the val ues in these fields: ◦ **Version**: 1 (base version) ◦ **Initial Version**: ◦ **Previous Version**: blank

Note: To learn more about the validations that are performed when you publish a new specification version, and how to resolve any reported errors, see the section about validations in Create and publish a specification version.

Related topics

Create and publish product specifications

Create and publish service specifications

Creating and publishing product offering versions

As a product catalog manager, you can create and publish the product offering versions that list the improved products and services that you can offer to your customers in a product catalog.

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Overview of product offering versions

You create product offering versions for an existing product that you're improving. You typically create versions of product offerings by combining new versions of product, service, and resource specifications. Proper versioning enables your customer service agents to know what the latest versions of your product and service offerings are when they sell more expensive, complementary, upgraded, or related products to your customers.

Creating versions of product offerings

When you create a version of a product offering, do the following actions:

1. Create and assign a version number in each of the product, service, or resource specifications or product offering records that are affected by the changes. To reflect the engineering changes that were made to the physical product, edit the following data that is associated with the product offering version:
    - Characteristics
    - Characteristic options
    - Product specifications
2. Create the required specification relationships, decomposition rules, and attribute mappings for each specification in the new version. To learn more, see .
3. Create the product offering, and then publish it when you update your product catalog.
4. Retire or archive old or unused specifications, and product offerings. To learn more, see Retiring or archiving versioned specifications and product offerings.

Updates and validations that are performed when you create and publish a product offering version

When you create a version for a currently published product offering, the ServiceNow AI Platform® copies the following data into, or populates, the new product offering record with the following data:

1. Copies the following fields with these basic product offering details:
    - **Product Specification**
    - **Contract Term**
    - **Monthly Recurring Charges**
    - **Non Recurring Charges**
    - **Description**
    - **Offering Catalog**
    - **Distribution Channel**
    - **Start** and **End** date
    - **Product code** and **Product line**
    - **Cost to Company**
    - **Composite**, **Installation Required**, and **Location-specific** indicators
2. Populates the following fields with the detailed information that you enter for the new product offering version:

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- **Version**. The next incremental number appears.
- **Display Name**. The display name is the system-assigned concatenation of the product offering name and its current version number. You can overwrite this field.
- **Initial Version**. The name of the base version of the product offering appears but can't be changed.
- **Previous Version**: The name of the product offering is as it was in the previous version.

When you publish the updated product version, additional validations are performed on your edits. To learn more, see the Updating and validating copied rules for a new specification version section in Create and publish a specification version.

Create and publish a product offering version

Create and publish a version of an existing product offering in a Published state so that you can offer an improved version of it in your product catalog.

Before you begin

Before you can create a version of a product offering, an initial base version of the product offering must exist and already be published. The type of information that you supply for a new version is the same as what you entered for an initial base version, but with certain differences. To learn more, see Create and publish your product offerings to a catalog.

Role required: sn_prd_pm.product-catalog_manager

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Product Offering**.
2. In the Product Offerings list, select the product offering that you want to create a version for.
3. On the form, select **Create New Version**, and then fill in the fields.
   The manner in which you create a version of a product offering is similar to how you created its initial version with the following exceptions.

   Note: For information about the remaining field descriptions, see

4. To reflect the engineering changes that were made to the physical product, update the product offering version:
   a. To update the characteristics that are associated with your product offering, use the Product Offering Characteristics related list.
   b. To update the product visuals for your versioned product offering, use the Product Visuals related lists.
   c. **Note:** To learn more, see .
5. When you finish creating the product offering version, do one of the following actions.

Action	Description
Publish	Publish the draft product offering so that you can use it in a product catalog:

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Action	Description
	○ When you publish it, its state changes from Draft to Published. ○ After you publish a product offering, you can't change or delete it, unless you create a version for it.
Update	Update the product offering with the new data that you added, but don't publish it for use in a product catalog.
Copy	Copy the data in this product offering so that you can create a product offering from it. For example, you can use the Copy function if you want to create a base version product offering that is similar to Premium SD-WAN Of fering v3, but with a separate version track. When you use the Copy function, it creates a base version product offering and sets the val ues in these fields: ○ **Version**: 1 (base version) ○ **Initial Version**: Premium SD-WAN Offering v3 ○ **Previous Version**: blank

Retiring or archiving versioned specifications and product offerings

As a product catalog manager, you can move a published specification or a product offering to a Retired or Archived state when they are no longer in use or are being sold. When you retire a specification version, you can't use it in a product offering or create specification versions.

Retire or archive a specification version

Move a published specification version to a Retired or Archived state when the version is no longer in use or being sold to your customers. When you retire a specification version, you can't use it in a product offering or create a specification version.

Before you begin

Role required: admin

About this task

You can maintain only one active version of the specification. When you retire or archive a specification version, you can't do the following actions:

- Update the specification version.
- Use it to create other catalog entities or rules such as product offerings, specification relationships, attribute mappings, or decomposition rules.

You retire or archive service and resource specification versions in the same manner.

Note: To archive a specification version, you must first retire it.

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Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **List** > **Specifications** > **Product Specifications**.
3. Select a record you want to modify.
4. Navigate to the **Versions (n)** tab to view the previous versions that are related to this specification.
   Here, n represents the number of base and previous versions for this specification. For detailed information about the field descriptions, see .
5. Retire or archive one or more specification versions.

   a. To retire a previous specification version, select the checkbox next to the Number column, and then select **Retire**.
      Validations ensure that the specification version is not being used in other active specifications or product offerings. If it's being used in a published specification or product offering, the following message appears:

      ```
      Selected specification(s) will be changed from
       Published to Retired state. This could affect published
       specifications/product offerings.Are you sure you want to
       archive the selected specification(s).
      ```

      To retire this specification, select **Retire**.

   b. To archive a previous specification version, select the checkbox next to the Number column, and then select **Archive**.

   When you retire a specification, its state changes to Retired. After you retire a specification, you can't make any changes to it, use it in a product offering, or create specification versions for it.

Retire or archive a product offering version

Move a published product offering version to a Retired or Archived state when it is no longer in use or being sold to your customers. When you retire a product offering version, you can't use it in a product catalog.

Before you begin
Role required: admin

About this task
You can maintain only one active version of the product offering. After a product offering is retired or archived, you can't do the following actions:

- Update the product offering version.
- Use it in a product catalog.

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **List** > **Offerings** > **Product Offerings**.
   A list of product offering records is displayed.
3. Select a record you want to modify.

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4. To view the previous versions that are related to this product offering, select **More** > **Versions (n)**, where n represents the number of base and previous product offering versions.

   For detailed information about the field descriptions .

5. From the Versions (n) tab, you can select one or more product offering versions to retire or archive.
   - To retire a previous product offering version, select the check box next to the Number column, and then select **Retire**.
   - To archive a previous product offering version, select the check box next to the Number column, and then select **Archive**.

Create and publish a template

Create and publish a template so that you can define the 5G network services for your organization.

Before you begin

Role required:

- sn_prd_pm.product_catalog_admin
- sn_prd_pm.product_catalog_manager (Read-only access)

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **List** > **Templates** > **All**.
3. Select **New**.
4. On the form, fill in the fields.

Template form

Fields	Descriptions
Number	System-generated number of the template.
Name	Name of the template.
Description	Description of the template.
State	State of the template. **Draft** The template is created, but not yet published in the catalog to be used in the product or service specifications. **Published** The template is published in the catalog and in use in the product or service specifications. **Retired** The template is retired and you can't make any changes to the retired template.

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Fields	Descriptions
	Archived The template is archived. You can archive only a retired template.

5. Select **Save**.
6. Navigate to the **Template Characteristics** tab, select **New**, and fill in the fields on the form.

Template Characteristics form

Fields	Descriptions
Number	Number of the automatically filled-in template.
Characteristic	Characteristic of the network service that you're defining.
Template	Template name that is automatically selected.
Mandatory	Mandatory characteristics that are confirmed by the system when this option is selected.

7. Select **Save**.
8. Select the **Template Characteristic Options** tab, select **New**, and fill in the fields on the form.

Template Characteristic Options form

Fields	Descriptions
Number	Number of the automatically filled-in template characteristic.
Template characteristic	Template characteristic that you have defined.
Characteristic option	List of the characteristic options defined in the Template Characteristic table.

9. Publish, save, or copy the draft template.

Action	Description
Publish	Publish the draft template so that you can use it in a service specification.

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Action	Description
	Note: A dialog box appears with the following message: Changes to templates are not allowed once published. Are you sure you want to publish? Do one of the following actions: ◦ To skip publishing this template, se lect **Cancel**. ◦ To publish this template, select **OK**. When you publish it, its state changes from Draft to Published.
Save	Update the template with the new data that you added.
Copy	Copy the data in this template so that you can create a template from it.

What to do next

Create and publish the service specifications and associate them with the templates. For more information, see Create and publish service specifications.

Retire or archive a template

Move a published slice template to a Retired or Archived state when the template is no longer in use. When you retire a template, you can't use it in a service specification.

Before you begin

Role required: sn_prd_pm.product_catalog_admin

About this task

After you retire or archive a template, you can't do the following actions:

- Update the template
- Use it to create other template entities such as template characteristics and template characteristics options

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **List** > **Templates** > **All**.
   A list of templates is displayed.
3. Open the template that you want to retire and select **Retire**.
4. Open the template and select **Retire**.
   A dialog box appears with the following message: `Are you sure you want to retire this template? Once you retire it, you can't make changes to it.`

   If the template is being used in a published specification, the following message appears: `Are you sure you want to retire this template? It's used in one or more published specification.`

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Do one of the following actions:

- To skip the retirement of this template, select **Cancel**.
- To retire this template, select **Retire**.

5. Archive this template by selecting **Archive**.
   A dialog box appears with the following message: `Are you sure you want to archive this template?`

   Do one of the following actions:

   - To skip archiving this template, select **No**.
   - To archive this template, select **Yes**.

   Note: You can only archive a retired template.

Configuring Order Management for customers using Service Bridge

As a customer, you must complete some configuration tasks so that you can set up the Order Management application.

Order Management configuration tasks for customers

Task	Description
Install and set up Service Bridge customers	Install and set up the application so that you can integrate your instance with the instance of your provider. This integration enables synchronous publishing of product and service catalogs so that your employees can submit product or service requests. **Note:** For more information, see Installing and configuring Service Exchange for Consumers.
Assign catalog_admin role	Assign the catalog_admin role to the users who manage the service catalogs. Users with this role can publish product offerings from providers to their service catalog.
Review and publish product offering catalogs	Review and publish product offering catalogs that you received from your service providers.
Configure specification version updates so that product specification versions can be updated to reflect changes and updates.	To configure update specification versions, see Configure update specification versions.

Review and publish to service catalogs

Review and publish a product offering to your service catalog so that your employees can request the products and services that they require.

Before you begin

Role required: catalog_admin

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Procedure

1. Navigate to **All** > **Service Bridge** > **Customer** > **Provider Product Offerings**.
2. Select the product offering to review.
3. Select **Publish**.
   The product offering is published to the service catalog in your self-service portal.

   Note: To remove a product offering or catalog item, open the Catalog Item record and set the user criteria in the Not Available For related list to **Everyone**.

What to do next

Your employees can submit requests for products and services from the IT Service Catalog in the self-service portal. Service Bridge integration enables your providers to synchronously receive and fulfill these product or service requests.

Configuring order priority and routing

As a provider, you can configure various parameters to prioritize and route orders to ensure that they are fulfilled on time.

Use order prioritization to:

- Define prioritization rules using various customer, products, service, and order attributes.
- Assign order priority while creating orders based on the pre-defined rules.
- Identify urgent orders that need to be fulfilled immediately.
- Automatically route high priority orders to a specific fulfiller group.
- Ensure that orders are fulfilled in a committed date.
- Recalculate order priority when any changes occur.

In Order Management, the order priority is calculated using pre-defined rules based on the following categories of data.

Category	Input
Customer	Customer account
Specification	• Product specification • Service specification • Product offering
Order type	Order line item
Urgency	Order line item

Note: The inputs used in these decision tables and the rank can be modified according to your business requirements.

These rules are defined in the following decision tables:

- Order Priority Policy by Customer Attributes
- Order Priority Policy by Order Type

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- Order Priority Policy by Specification Attributes
- Order Priority Policy by Urgency

Each parameter defined in the decision table has a rank value assigned to it. When an order is created, the decision tables are evaluated and a weightage is assigned to each table to calculate the order priority. See Calculating the order priority on how the priority is calculated.

Note: You can add new inputs, conditions, or modify the existing conditions in the decision tables. For more details on updating decision tables, see Using decision tables.

Calculating the order priority

Order priority is calculated based on the rank defined in the decision table and the weightage assigned to each table.

The rank and weightage can be a number between 0 to 100 and priority levels are defined as follows:

- Critical: 80 - 100
- High: 60 - 80
- Medium: 40 - 60
- Low: <40

Note: Depending on your business requirements, you can modify the order priority by editing the rank and weightage in the *sn_ind_tmt_orm.PriorityManagement* extension script. This extension point script is used to manage priority ranks from decision tables for order line items. Any changes made in the script will override the rank and rank and weightage defined in the decision tables.

Priority is calculated as follows:

```
sum of (rank * weight)/sum of weight
```

For example, if the rank and weight for each decision table is defined as follows:

Decision table	Rank	Weight
Customer	100	10
Specification	80	25
Order type	80	35
Urgency	60	30

In this example, priority is calculated as:

```
Priority = (100 * 10 + 80 * 25 + 80 * 35 + 60 * 30) / (10 + 25 +
35 + 30) = (7600)/100 = 76
```

The order priority is set to **high** in the customer order and in the order line items.

Note: The highest priority specified for the order line items is used to set the priority for the customer order. The order line item priority is then propagated to the corresponding domain orders and order tasks.

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Adding a new priority rule

Apart from the rules defined in the decision tables provided with the base system (see Configuring order priority and routing), you can create additional decision tables and a new extension point implementation to add new priority rules. To create a new priority rule, follow these steps:

1. Navigate to**All** > **Decision tables**.
2. Click **New** and select **Decision table**.
3. Enter a name for the decision table, select the application and application scope for the decision table and click **Build decision table**.
4. Define the inputs and conditions for the decision table.
5. Add the Rank in the Result column and click **Save**.
6. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
7. Click the *sn_ind_tmt_orm.PriorityManagement* script.
8. Click **Create implementation** in the Related Links section.
9. Enter a name for the new script (implementation) and edit the getRank() and getWeightage() methods in the script to return the rank and weightage values and click **Update**. A sample implementation script is shown below:

```
var PriorityManagement = Class.create();
PriorityManagement.prototype = {
    initialize: function() {},
    getRank: function(customerOrderItemGr) {
        /*
            get rank from decision policy or scripting
            return rank;
        */
        return getRankFromNewDecisionTable(customerOrderItemGr);
    },
    getWeightage: function(){
        /*
            get weightage to calculate priority
            weight should be an integer value, and range is from
 0 to 100.
            return weight;
        */
        return weight_value_for_this_decision_policy;
    },
    type: 'PriorityManagement'
};
```

Calculating the priority for external orders

Orders created by external order capture systems can also be processed by Order Management for Telecommunications. In this case, for

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- Order line items:
    - If a valid priority value has been defined for the external order, this value is used to calculate the priority.
    - If a priority value has not been defined or is invalid, the order priority is calculated by the Order Management for Telecommunications system.
- Customer orders: The priority value is calculated based on the categories defined in the decision tables and this value overrides the value specified in the external order.

Recalculating the order priority

Manually update the priority field on customer order, order line items, domain orders, and order task forms.

Before you begin

Role required: admin

About this task

When a customer order is updated, all child order line items will be recalculated. If you modify the priority of one or more child order line items, the highest priority level is used to recalculate the customer order priority. You can manually modify the priority value for orders, order line items, domain orders, or order tasks and recalculate the order priority. This option recalculates the priority of the order and order line item by re-evaluating the decision tables and extension point script.

Procedure

1. Navigate to **All** > **Customer Order Management** > **Customer Orders**.
2. Select the order that you want to recalculate.
3. Update the Priority field in the Customer Order form or for the order line items and click **Re-calculate**.
   The decision tables are re-evaluated with the latest order, customer, and urgency data to recalculate the order priority.

Order routing based on priority using Advanced Work Assignment

AWA can be used to automatically route customer orders based on priority to specific agent categories.

Use AWA to automatically assign work items (order tasks) to your agents based on their availability, capacity, and skills. AWA pushes work to qualified agents using work item queues, routing conditions, and assignment criteria. Agents can view their assignments in their Agent Workspace inbox. The following diagram shows how AWA routes different types of orders to different fulfillment agents.

Note: All fulfillment agents must have the AWA agent (awa_agent) role.

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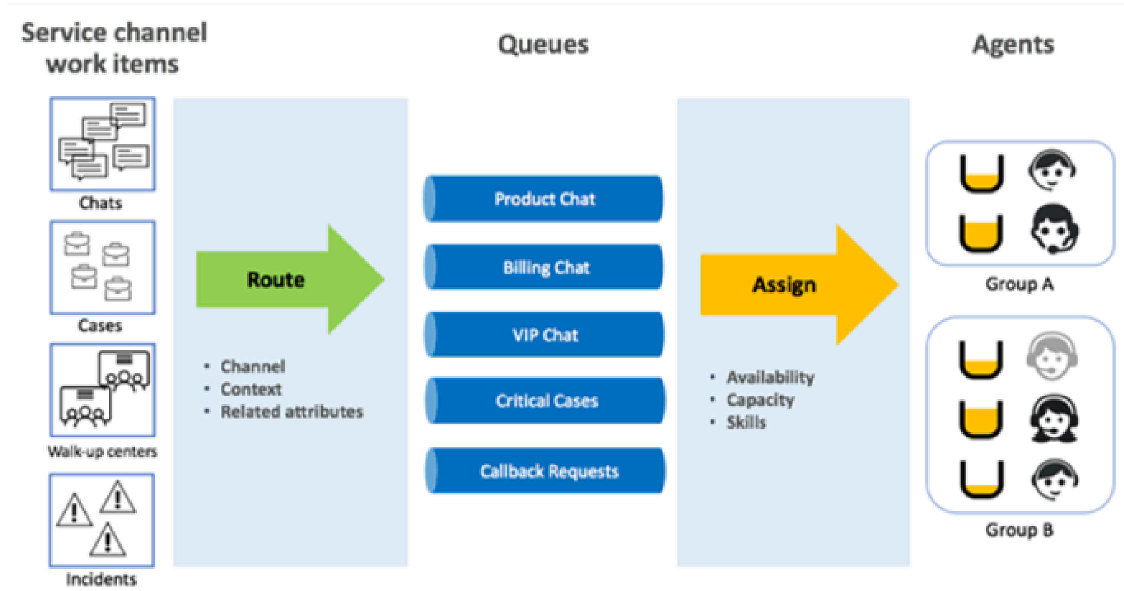

The following configurations are required for AWA:

- Service channel: It is a means of assigning a specific type and scope of work to agents. The Order Service Channel is available with the base system for order tasks. The Order Service Channel is in a disabled state by default and must be manually activated.
- Agent presence state: Availability states that agents use to indicate whether they can receive work or are offline or away. Agents set these states in their Workspace Inbox. The default presence states are Available, Away, and Offline. After the Order Service Channel is enabled, the Available presence state value shows the Order Service channel the customer has to move the order service channel to the selected list to receive the work.
- Queue: A queue stores a specific type of work item for a service channel. AWA admins can create queues that focus on certain types of support in the channel, such as VIP customers or critical cases. AWA routes work items to queues based on specific conditions or requirements that you define, such as customer status, or region. Groups assigned to each queue handle the incoming work items. Once work items are placed in a queue, AWA can then assign items to available agents based on assignment rules and agent availability and capacity. Demo queues that can be used as a reference are available with the base system.
- Assignment rule: Criteria that determines how work items are pushed to the appropriate agent in a qualified assignment group. A demo assignment rule that can be used as a reference is available with the base system.
- Agent capacity: The maximum number of work items on a particular service channel that an agent may actively work on at one time.
- Agent availability: States that indicate agent presence and whether the agent is available for work or is busy or offline. AWA uses the agent availability state to determine if an agent is able to receive work.
- Inbox layout: A configuration tied to a service channel that defines which fields of a record representing a work item are shown in agent inboxes. A layout defines what the agent sees in Agent Workspace. The Default Order Layout is available with the base system and can be used as a reference to create a new layout.

For more details, see Advanced Work Assignment

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Integrating Order Management with southbound external systems

If you have a Telecommunications Service Management subscription, you can submit outbound service order requests to various external systems by integrating the Order Management application with the external southbound systems.

After the decomposition of an order, the Order Management application requires the support from external network activation, network configuration, and resource management systems to manage the fulfillment life cycle of the order.

Using this integration, a Communications Service Provider (CSP) can do the following tasks:

- Trigger outbound requests for one or more domain service orders by using the TeleManagement Forum (TMF) 641 Open POST order API.
- Share updates with the external systems about the inflight changes to the existing domain service orders that have outbound requests.
- Manage the inbound response of the outbound requests for the domain service orders.
- Manage the errors and exceptions for the outbound requests and inbound responses.

How the integration works

The integration process for Order Management with the external technical order management systems is as follows:

1. As the administrator, you activate the Service Order Open API to capture the service order from the customer orders. To learn more, see TMF641 Service Order Open API- POST.
2. The integration now begins:
   a. The order fulfillment manager selects the Create fulfillment request UI action in the domain order table.
   b. The Service Order Outbound Policy decision table checks the domain order attributes, and the order management system generates the payload for the domain service order.
   c. The generated payload is sent to the endpoint of the external fulfillment system. For more information on configuring external system endpoints by creating an integration request, see Workflow Studio flow integrations.

   Note:

   - If the domain order is configured as hierarchical in the decision table, the system sends all the child service domain orders in the hierarchy to the external system that is configured in the application spoke selector.
   - If the domain order is configured as non-hierarchical in the decision table, the systems send only the individual domain order to the external system that is configured in the application spoke selector.

   To learn more about spokes, see Building spokes using Spoke Generator.
3. The service order manager selects the Create Outbound Fulfillment Request UI action on the service order form and the system shares the service order details with the external systems.

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Note: The UI action appears if any of the following conditions is met by the system:

- No successful outbound request exists for the service domain order yet.
- An outbound request exists but the current external fulfillment state of the service domain order is an error.

4. If the fulfillment request is successful, a response is received from the external system and is captured in the Outbound Request table (sn_tmt_core_outbound_request). To learn more, see Create outbound requests for service orders.

Task plan templates driven order fulfillment

Use the task plan template to define tasks and their dependencies that are needed to orchestrate the fulfillment journey for a product to standardize fulfillment processes across products.

A no-code approach in ServiceNow® that allows you to create task orchestration workflows using task plan templates. It as an alternative to flow designer, giving more options for implementing product configurations.

For more information about Flow actions for fulfillment subflow definition, see Flow actions for fulfillment subflow definition.

When the template is configured for a specification, the out of box logic, on domain order creation automatically searches for a matching template, based on the task's specification and action of domain order. When a template match is found, the template is applied to generate the order tasks under the domain order. To learn more about task plan template, see Task plan templates.

Benefits of task plan template

It enables non-technical users to do the following:

- Define fulfillment journeys.
- Manage task dependencies for simple task creation without developer involvement.
- Reduce IT dependency.
- Accelerate deployment of new offerings.

Create a task plan template

You can create a task plan template by following these steps.

Step	Explanation
Create a task plan template.	Create the template and set the conditions as to when the template applies. • The template functions as a container or group of template items. • The template identifies a plan to apply the associated template items.

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Step	Explanation
Configure task plan template	To add conditions to a template item that determines when a template item is applicable.
Create one or more template items.	Create the template items to include in the task plan template. These items can be tasks, child cases, or child case tasks. • Template items are the tasks or records that are to be created when the template is applied. • Template items can be used to define a hierarchy of parent and child entities of any task type.
Create conditions for template items.	Set conditions as needed for each of the template items that identifies when a template item should be created.
Task dependencies for task plan templates	It provides controlled sequencing within the generated records from the template items in the Task Plan Template Dependency table. By defining predecessor and successor relationships, the tasks can start at correct time reducing ambiguity for agents.
Publish the task plan template.	While in the Draft state, you can make changes to the template, template items, and template item conditions. It allows to publish if the same condition template is not available. Publish the task plan template to apply it to cases and case types. To publish a task plan template, select **Publish** on the Task Plan Template form.

Configure the task plan template

Configure the task plan template to add conditions to a template item that determines when a template item is applicable for domain orders.

Before you begin

Before you add filter condition, make sure that the task template target record is domain order.

Role required: admin

Procedure

1. Navigate to **All** > **Task Plan Templates** > **All Task Plan Templates**.
2. Open the record.

   Use this field to add the conditions for the template item. Each condition contains a field, operator, and value(s).

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3. Select **Add Filter Condition**.

- Add these conditions:

Fields	Conditions
Choose Field	Select **Specification**.
oper	is
Value	Select the specification from the list of records for domain order.

- Select **+New condition set** to add a new condition.

  Add these conditions:

Fields	Conditons
Choose Field	Select **Action** from the list.
oper	is
Value	Select one of these values from the drop-down list: ▪ Add ▪ Change ▪ Disconnect ▪ Cancel ▪ Suspend ▪ Resume

- Select **x** to remove a condition.
- Select **Set** to save the conditions and close the pop-up window.

4. Select **Update**.

Service Exchange

ServiceNow® Service Exchange connects multiple ServiceNow instances to provide seamless support and service experiences across the ecosystem, from enterprise customers to suppliers and system integrators. Service Exchange provides a frictionless experience that makes it easy

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to collaborate and process requests while giving users the convenience of working in their own ServiceNow instance.

Get started

Explore Learn about the benefits of Service Exchange and how it is used.	Configure for providers Learn how to install and configure Service Exchange for providers.	Configure for consumers Learn how to install and configure Service Exchange for consumers.
Integrate Extend Service Exchange capabilities by integrating with other applications.	Create remote record producers Offer catalog items to a consumer using remote catalog.	Configure FDS for providers Configure foundation data sync (FDS) settings for provider instances.
Configure FDS for consumers Configure foundation data sync (FDS) settings for consumer instances.	Create remote task definitions Create remote task definitions to define the task types that can be shared across connected instances.	Reference Get additional details about Service Exchange, including data model, error log, and cloning instances.

Additional resources

- Learn more about what's new and changed, see the Service Exchange release notes.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Connect with other Service Exchange users at Now Community.

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- Find useful resources related to your role and explore best practices at the Customer Success Center.
- View KB articles at Service Exchange Knowledge Base.
- Access Service Exchange product page from Service Exchange product.

Strategic Portfolio Management for Telecommunications

The Strategic Portfolio Management for Telecom is a product that inherits all features of Strategic Portfolio Management along with the addition of two templates for Fiber Rollout and 5G Projects.

Strategic Portfolio Management for Telecommunications enables you to define and customize the tasks and requirements for your Fiber Rollout and 5G projects. A project template defines the basic structure of a project and can include project tasks and subtasks, attachments, checklists, and other project information. Because projects often get repeated, templates enable you to create, save, and reuse project structure. You can also modify existing templates, create projects from templates, and apply templates to empty projects.

Fiber Rollout project template

The Fiber Rollout project template can address challenges customer experience due to disjointed planning, delayed service and network delivery due to manual processes, and delayed service impact analysis. Using this template can improve the fiber rollout process by:

- Accelerating the design process
- Defining and tracking the construction and rollout
- Providing timely notifications regarding the service delivery

5G project template

Using the 5G project template can simplify and streamline the project management process by:

- Proactively identifying project tasks
- Ensuring that all critical steps in the planning process are included
- Allocating appropriate resources for target dates
- Identifying key team members and stake holders
- Reducing delays and cost overruns
- Assessing risks early in the project
- Improving cross team and cross project collaboration

Strategic Portfolio Management for Telecommunications Fiber rollout project template

This template describes the various tasks required for a fiber rollout.

The Fiber rollout project template contains the following basic tasks:

- Plan and build the network
- Network design
- Construction and rollout
- Service delivery and activation

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- Customer support
- Service readiness
- Plan for future demand and network build

You can create a project from this template or modify this template according to your requirement. For more details on using project templates, see Project templates.

Telecommunications Service Operations Management

Learn how Telecommunications Service Operations Management (TSOM) empowers communication service providers (CSPs) to proactively monitor, analyze, and resolve network and service issues before they impact customers. Built on the ServiceNow AI Platform, TSOM delivers a unified operations view across distributed, multi-domain telecom environments, helping teams improve service availability, operational efficiency, and customer satisfaction.

Get started

Explore	Configure
Learn about how telecom service providers use Telecommunications Service Operations Management.	Plan and configure your Telecommunications Service Operations Management.
Use	**Reference**
Use Telecommunications Service Operations Management to track comprehensive telecom service operations.	Get Telecommunications Service Operations Management reference information.

Additional resources

Some ServiceNow resources that can provide you with helpful information are:

Release Notes

Learn more about what's new and changed in this release at Telecommunications Service Operations Management (TSOM) release notes

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ServiceNow Community

Connect with other Telecommunications Service Operations Management users at ServiceNow Community

ServiceNow Impact

Find useful resources related to your role and explore best practices at the ServiceNow Impact

ServiceNow University

Access real-time courses, self-paced training, and career resources at ServiceNow University

Support

Contact customer service support at https://support.servicenow.com/now

Telecommunications Network Inventory

With the ServiceNow® Telecommunications Network Inventory application, you can build a digital representation of your physical and logical networks, and the services that are provisioned to your customers. This network inventory contains the assets, services, and the relationships that define the infrastructure of your telecommunications networks.

Watch this short video for an introduction to the Telecommunications Network Inventory application.

https://player.vimeo.com/video/1017254752?badge=0&autopause=0&player_id=0&app_id=58479

Get started

Explore	Configure	Integrate
Learn about how providers use Telecommunications Network Inventory.	Plan and configure your Telecommunications Network Inventory.	Extend Telecommunications Network Inventory capabilities by integrating with other applications.

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Use	Reference	
Use Telecommunications Network Inventory to create and review a comprehensive network inventory model.	Get Telecommunications Network Inventory reference information.	

Additional resources

- Learn more about what's new and changed, see the Telecommunications Network Inventory release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Telecommunications Network Inventory features at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the ServiceNow Impact.
- Connect with other Telecommunications Network Inventory users at Now Community.

TMF APIs for TMT

Get the details of ServiceNow® implementation of TM Forum (TMF) APIs for Telecommunications, Media, and Technology (TMT) products.

ServiceNow® supports multiple TM Forum (TMF) Open APIs through its telecommunications industry solutions, such as Telecommunications Service Management (TSM) and Technology Provider Service Management (TPSM). These APIs enable standardized integrations and help ensure seamless interoperability across Business Support Systems (BSS) and Operations Support Systems (OSS).

TMF APIs

API	Application	Description
Sales CRM for Telecommunications	TMF620 - Product Catalog Open API	The `Product Catalog Open` API provides endpoints to create and retrieve product catalogs, product offerings, and product specifications. Use this API to manage product catalog information between external systems and the ServiceNow AI Platform.
Sales CRM for Telecommunications	TMF622 - Product Order Open API	The `Product Order Open` API provides endpoints that enable a standardized

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TMF APIs (continued)

API	Application	Description
		mechanism for placing product orders. Use this API to receive the Sales/Product Order from external CPQ/CRM.
Sales CRM for Telecommunications	TMF633 - Service Catalog Open API	The *Service Catalog Open* API provides endpoints to create and retrieve service specifications. Use this API to manage service catalog information between external systems and the ServiceNow AI Platform.
Sales CRM for Telecommunications	TMF637 - Product Inventory Open API	The *Product Inventory Open* API provides endpoints to create and retrieve product inventories. Use this API to manage product inventory information between external systems and the ServiceNow AI Platform.
Sales CRM for Telecommunications	TMF641 - Service Order Open API	The *Service Order Open* API provides endpoints that enable a standardized mechanism for placing service orders.
Sales CRM for Telecommunications	TMF645 - Technical Service Qualification Open API	The *Technical Service Qualification Open* API provides endpoints to check the availability of resources and services before submitting orders for fulfillment.
Sales CRM for Telecommunications	TMF648 - Quote Open API	The *Quote Management* API provides endpoints to create, update, and retrieve customer quote data.
Proactive Service Experience Workflows	TMF621 - Trouble Ticket Open API	The *Trouble Ticket Open* API provides endpoints to create, update, and retrieve data from the Case [sn_customerservice_case], Incident [incident], and Service Problem Case [sn_sprb_mgmt_case] tables. Use this API to manage ticket information between external ticketing systems and the ServiceNow AI Platform.

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TMF APIs (continued)

API	Application	Description
Customer foundation	TMF632 - Party Management Open API	The `Party Management Open` API provides endpoints for managing parties with a relationship to the enterprise, like a consumer, account, or contact. Use this API to create, update, and retrieve data from the Consumer [csm_consumer], Account [customer_account], and Contact [customer_contact] tables.
Telecommunications Network Inventory	TMF639 - Resource Inventory Open API	The `Resource Inventory Open` API provides endpoints to create, retrieve, and delete resources. Use this API to manage resources in various network inventory tables.
Telecommunications Service Operations Management	TMF642 - Alarm Management Open API	The `Alarm Management Open` API provides endpoints to create, update, and retrieve data from the Events [em_event] and Alert [em_alert] tables.
Telecommunications Service Operations Management	TMF688 - Event Notification Management Open API	The `Event Notification Management Open` API provides an endpoint to create, update, and delete events from the Events [em_event] table.
Field Service Management for Telecommunication	TMF646 - Appointment Open API	The `Appointment Open` API is a telecommunication API that allows you to interact with the appointment booking application. Use this API to book appointments and search available time slots.
Field Service Management for Telecommunication	TMF697 - Work Order management Open API	The `Work Order Management` API provides endpoints to create, update, and retrieve work orders.This API is exposed by Field Service Management for Telecommunication and used by Sales CRM for Telecommunications and Telecommunications Service Management to trigger a work

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TMF APIs (continued)

API	Application	Description
		order from either an order task or a case task.
Customer Service Problem Management	TMF653 - Service Test Management Open API	The `Service Test Management Open` API provides endpoints to create and retrieve service test definitions and service tests. Use this API to manage service problem management information between external systems and the ServiceNow AI Platform.

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