Yokohama Customer Service Management

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Table of Contents

Customer Service Management 6

Exploring Customer Service Management 7

Focus and purpose of CSM and ITSM 9

Data management for Customer Service Management 12

Self-service for Customer Service Management 14

Omnichannels for communicating with customers 16

Agent experience 20

Case management for Customer Service Management 21

Intelligence 23

Analytics and insights 25

Optimization 26

Customer Contracts and Entitlements 28

Contracts and Entitlement Workflows 29

Configuring Customer Service Management 30

Set up your environment 31

Organize agent workspaces 291

Enable communication channels 825

Implement Intelligence 915

Set up self-service 1103

Extend capabilities 1203

Administer Customer Service Management 1226

Anonymous chat 1227

Customer Service Management Workflow Studio actions 1231

Domain separation and Customer Service Management 1232

Extension points in Customer Service Management 1236

Knowledge product entitlements 1238

Limit knowledge base access to internal users 1239

Quick start tests for Customer Service Management 1240

Routing and assigning customer service cases 1253

Assignment workbench overview 1255

Special handling notes 1261

Case and account escalation 1265

Administering case action status 1273

Major issue management overview 1279

Automatically close customer service cases 1289

Administer Customer Contracts and Entitlements 1290

Integrating Customer Service Management with other applications 1292

Integrating with IT Service Management 1293

Integrating with Service Portfolio Management 1318

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Integrating with Continual Improvement Management....1322
Integrating with Field Service Management....1323
Integrating with IT Operations Management....1324
Integrating with Customer Project Management....1324
Integrating with Financial Management....1342
Integrating with Adobe Experience Manager....1345
Integrating with Computer Telephony Integration (CTI)....1364
Integrating with Microsoft Outlook....1376
Integrating with Safe Workplace applications....1378
Integrating with consumer messaging apps....1380
Integrating with Process Mining....1386
Integrating with contact centers....1387
Using Customer Service Management....1396
Manage cases....1397
Manage schedules and sites....1461
Automate and optimize....1490
Agent management....1533
Customer management....1550
Customer communication....1584
Analytics and reporting for Customer Service Management....1703
Customer Service Platform Analytics Solutions....1703
Platform Analytics Solutions for Self-Service Analytics for Customer Service....1722
Customer Service Management reference....1729
Configurable Portal widgets instance options....1730
Customer Service Cases list....1748
Engagement Messenger reference....1749
Chat Setup configuration form....1769
Configurable Portal widget library....1770
Script parameters for the search option in the Portal Banner widget....1771
Portal Banner widget JSON parameters....1771
Portal Data List widget JSON parameters....1772
Portal Footer widget JSON parameters....1775
Default highlight color for different case states....1776
Customer Service forms....1776
CSM Query Rules....1816
Components installed with Customer Service Management....1817
Components installed with CSM workspaces....1857
Components installed with additional plugins for Customer Service Management....1859
Components installed with Engagement Messenger....1870
Contact form for Email Interaction for CSM....1873
Email interaction sections....1873
Feature context parameters supported in Engagement Messenger....1876

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Engagement Messenger translation tables....1879
Customer Contracts and Entitlements reference....1880
Native Voice Control Taxonomy....1888
Roles required for B2B2C data models....1888
Roles for Outsourced Customer Service....1889
Customer Service Management roles....1890
Rate limit rule form for guest user access to catalog items....1899
Data classification for Install Base Management....1900
Workforce Optimization for Customer Service....1902
Exploring Workforce Optimization for Customer Service....1903
Configuring Workforce Optimization for Customer Service....1929
Using Workforce Optimization for Customer Service....2003
Now Assist for Customer Service Management (CSM)....2057
Explore....2058
Configure....2070
Use....2125
Agentic AI workflows in CSM....2153
Communities....2162
Activate Communities plugins....2163
Properties installed with Communities....2164
Communities roles....2176
Community setup guide for admins....2177
Domain separation and Communities....2179
Quick start tests for Communities....2179
Configure a community....2181
Moderate a community....2220
Use a community....2227
Gamification....2265

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Customer Service Management

The ServiceNow® Customer Service Management product enables you to provide the service and support that your external customers need. For example, your customers can communicate and receive support through the web, email, chat, telephone, and social media.

Explore

Learn how Customer Service Management can help you with its key features and benefits.

Configure

Plan and customize Customer Service Management to meet your specific needs.

Administer

Manage and customize your Customer Service Management applications.

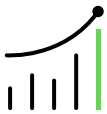
Integrate

Extend Customer Service Management capabilities by integrating with other applications.

Use

See how agents and managers can use Customer Service Management to create, route, and manage cases.

Analyze



Access preconfigured dashboards with actionable data visualizations to monitor and improve your service.

Reference

Get additional information about Customer Service Management cases, including the lists, forms, rules, components, parameters, roles, and personas.

Allocate

Use workforce optimization to efficiently route work to your team, manage your team's skills and schedules, and monitor their performance.

Automate

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

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Additional resources

- Learn more about what's new and changed, see the Customer Service Management release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Customer Service 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 Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Customer Service Management

Learn how the Customer Service Management (CSM) application can help your organization resolve customer issues and requests for your customers. By adopting a proactive customer service approach, you can increase your customer satisfaction and retention.

Overview of Customer Service Management

With the Customer Service Management application, you can automate your processes and give your service agents visibility into the customer systems and tools that they need to deliver proactive services to your customers. Key benefits of the Customer Service Management application include:

Connecting your teams to boost efficiency

You can bring your front, middle, and back offices together so that you can proactively address customer issues and enable more self-service through automation.

Establishing real-time visibility into your customers' products and services

Proactively detect and prevent issues by sending preemptive alerts to your affected customers. You can identify and predict trends to drive the actionable improvements and automate the resolutions for the most often recurring problems.

Identifying and assigning your issues directly

You can connect your teams to track issues to a resolution by directly contacting the customer's department and quickly resolving these issues. You can also maintain a record of the known issues so that future customers don't have to experience the same problems.

Whether starting or expanding your implementation of Customer Service Management, learn more about the available features that you can use to improve your customer service experience and to track your cases from start to finish.

Customer Service Management workflow

The following infographic shows a sample Customer Service Management workflow that describes the different stages handled by an agent, from creating a new case to the case completed.

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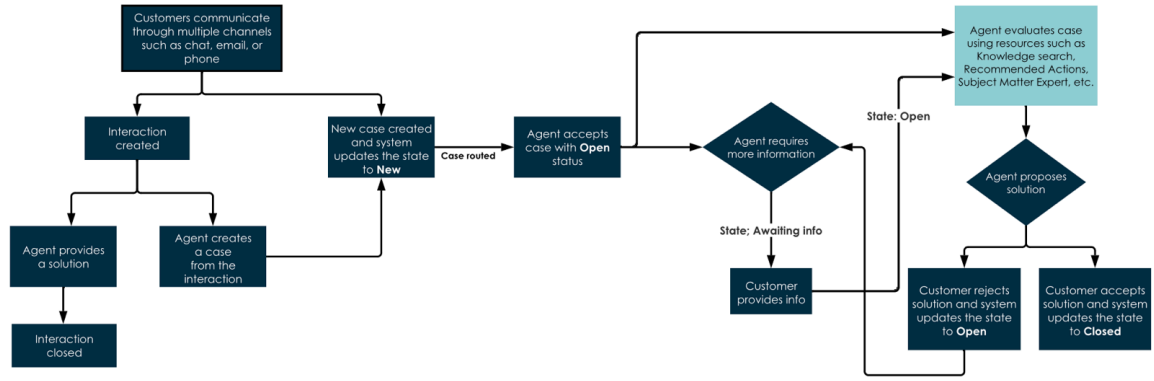
Visual representation of the CSM workflow



Benefits

By utilizing CSM, you can streamline operations throughout the front, middle, and back office, resulting in improved efficiency. Additionally, you can implement self-service features across multiple channels and automate issue resolution. Furthermore, CSM empowers agents with real-time information and intelligent guidance, ultimately enhancing their performance.

Benefits of CSM features

Benefits	Key Features	Role
Learn how to collect, organize, update, and analyze data about your customers.	Customer Data Management	Manager
Drive self-service from a portal that is integrated with knowledge articles, service catalogs, communities, and chatbots.	Self- Service	Administrator
Support your customers across phone, messaging, chat, web, email, in person, and social media.	Omnichannel	Agent
Improve your agent efficiency for faster resolution and a better customer experience.	Agent experience	Manager
Manage the interactions and service level agreements (SLAs), model account relationships, and outsourced service.	Case management	Administrator
Quickly identify the support that a customer needs as well as the opportunities for adoption and selling other add-ons.	Install Base management	Agent
Increase your productivity with automated task creation, triage, and investigation	Intelligence	Manager

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Benefits of CSM features (continued)

Benefits	Key Features	Role
so customers get answers fast. Also, learn how to route issues, recommend solutions, and identify trends.		
Get at-a-glance visibility and a deep understanding of the data and identify areas that impact your processes.	Analytics and Insights	Manager
Instantly monitor and analyze your processes, teams, and performance. Also check your conformance to standards, and learn how you can constantly optimize and improve your processes.	Optimization	Manager
Embed a messenger-like pop up inside any website to interact with ServiceNow features, such as browsing knowledge, creating a case, and interacting with Virtual Agent and manage how your customers use your web applications and services from one central location. You can also configure the behavior and styling of the messenger and deploy the configuration on the websites or mobile sites of your choice.	Engagement Messenger for Customer Service Management	Administrator

Focus and purpose of CSM and ITSM

Customer Service Management (CSM) focuses on enhancing customer satisfaction, while IT Service Management optimizes IT services for internal users. Use this topic to explore the distinct roles, the benefits of integration for improved collaboration and communication, and how leveraging both CSM and ITSM can drive success in your organization and elevate your customer experience.

Overview of CSM and ITSM

Customer Service Management (CSM) is centered around external customers, spanning both business-to-business (B2B) and business-to-consumer (B2C). For instance, consider Sarah, a customer service agent at a software company that provides cloud-based solutions. Sarah's primary goal with CSM is to ensure customer satisfaction by resolving technical issues, managing subscription inquiries, and guiding customers through product updates. Ultimately, these efforts help retain clients and enhance the customer experience. See Customer Service Management for more information.

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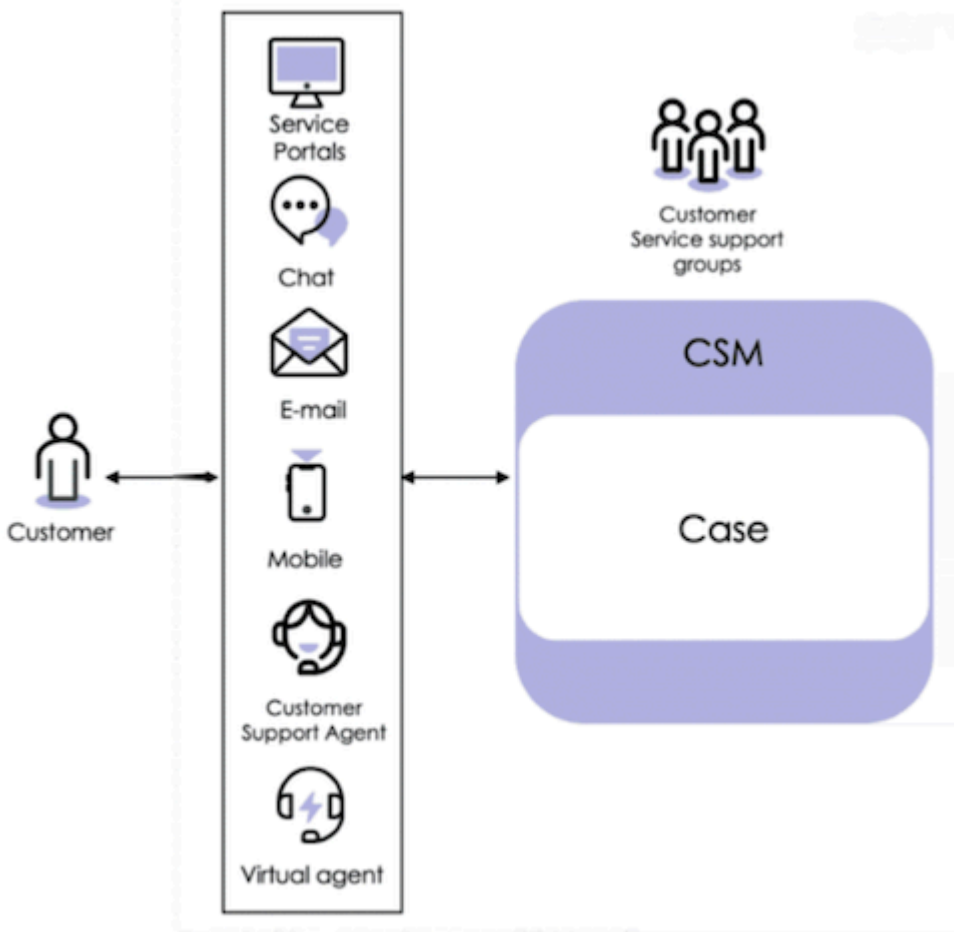
IT Service Management (ITSM) aims to support internal users of IT services within an organization while empowering teams that depend on these services to deliver value to external customers. Meet Alex, an IT administrator dedicated to maintaining network infrastructure. Alex's role in ITSM entails implementing and managing IT services aligned with the organization's business needs, aiming to support and enable business outcomes through efficient IT operations. See IT Service Management for more information.

Key stakeholders

With CSM, key stakeholders include business professionals such as customer service agents, managers, and executives. Their efforts aim to ensure seamless customer experiences and foster long-term relationships.

Customer interaction flow in CSM



ITSM engages IT professionals ranging from leadership and management to administrators, technical experts, developers, and support teams orchestrating IT services to meet organizational objectives and drive operational excellence.

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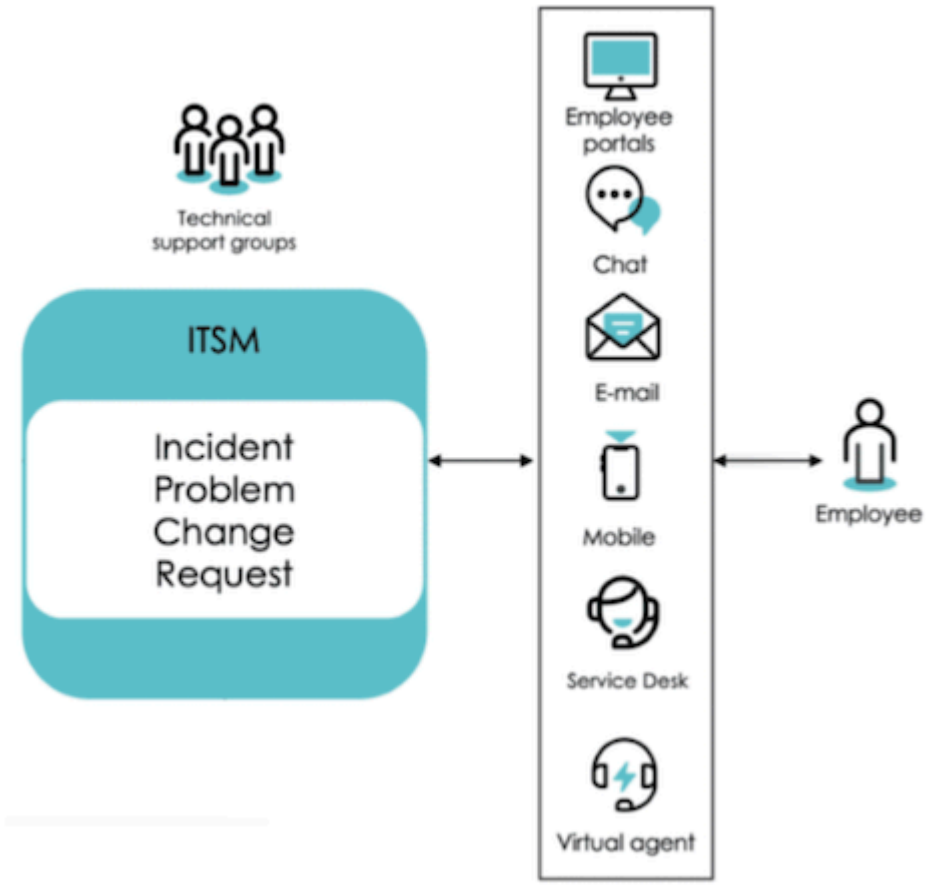
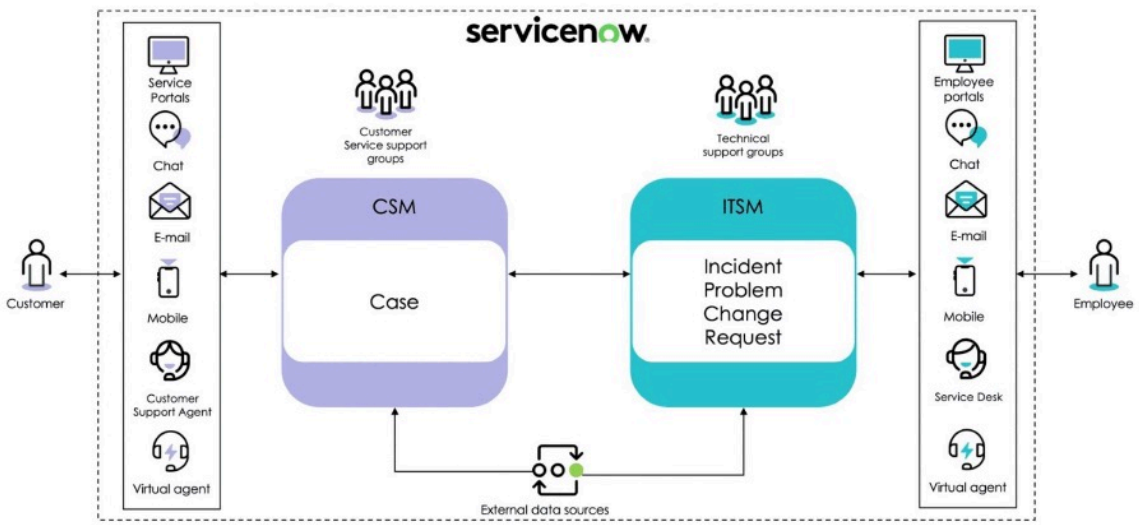
Customer interaction flow in ITSM



Integrating CSM and ITSM

CSM and ITSM don't need to operate independently; they can be integrated to streamline service delivery across the organization. For example, imagine a scenario where Sarah, working at the software company, encounters a technical issue while assisting a client. By integrating CSM with ITSM, Sarah can seamlessly raise an incident ticket within the same workflow, which triggers an ITSM process managed by Alex. This integration enables Sarah and Alex to collaborate efficiently, reducing resolution time and enhancing the overall customer experience.

CSM and ITSM integration



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Benefits of integrating CSM and ITSM

The key benefits include:

- **Efficient Collaboration**: Agents can seamlessly create incident, problem, change, and request records directly from open cases, facilitating collaboration across different parts of the organization to resolve customer issues promptly.
- **Enhanced Customer Communication**: Updates to records associated with a case are automatically reflected in case work notes, enabling agents to provide timely updates to customers and fostering transparency and trust in customer interactions.
- **Unified Service Experience**: Customers can submit requests directly from the customer service portal, where a case is created for each request. A unified experience ensuring consistency and ease of access for customers seeking assistance.
- **Insightful Dashboards**: Agents and managers can gain comprehensive insights by viewing cases with Service Management-related indicators on the Customer Service dashboards. This broad-based view enables informed decision-making and proactive management of customer interactions.

Which one is right for your business

To deliver efficient service and enhance customer satisfaction, it's important to understand the distinct roles of CSM and ITSM. Each module addresses specific needs—CSM focuses on managing customer relationships, while ITSM is centered around optimizing IT service delivery. Knowing when to use each one, and how to integrate them effectively can help organizations streamline operations, improve customer experiences, and achieve better business outcomes.

So, whether you're Sarah, managing customer interactions at the software company, or Alex, focusing on IT processes, leveraging the strengths of both CSM and ITSM is key to driving success in today's evolving business environment.

Data management for Customer Service Management

Organize and manage the data for both your internal users and external customers by using the Customer Service Management application. You can provide your managers and agents with a view of the customer data, including the account and contact or consumer information, products and services, assets, contracts, and entitlements.

Customer service business model

Different business models are available to support your goals and business needs in the Customer Service Management application. The business models vary depending on the products, services, and support that you provide to your customers. With the right model for your business, you can answer queries, solve issues, and provide consistent and high-quality service that focuses on increasing your customer satisfaction.

To learn more about the customer service business model, see Customer service business models.

Customer data

Customer data includes information about the customers who are external to your organization, such as names and addresses, telephone numbers, and email addresses. In the business-to-business (B2B) business model, customer data includes details about accounts and contacts. In the business-to-consumer (B2C) business model, it includes details about consumers and households. Maintaining accurate customer data enables your agents to communicate with customers quickly and easily.

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To learn more about the customer data, see Customer data.

Product data

Product data includes information about the products and services that an organization provides to its customers. This data can include information about products and product models, assets, sold products, install base items, and installed products. When assisting customers, your agents can quickly select the correct product data, add the details to case records, and view information related to the product data such as knowledge articles and resolved cases.

To learn more about the product data, see Product data.

Contributor users

Contributor users enable you to engage both internal and external users to assist in resolving customer issues and requests.

To learn more about the contributor users, see Contributor users.

Service Model Foundation

Service Model Foundation refers to a set of pre-designed business and technical data frameworks that meet the business needs of a particular industry. Service Model Foundation provides the core framework, security, and guidance to the model entities in the customer service value chain across the industry verticals. By using these models, you can provide positive experiences for your customers, agents, and middle office workers as they execute the customer service processes.

To learn more about the Service Model Foundation, see Service Model Foundation overview.

Internal user data

Internal user data includes the information about the people within your organization, such as managers, agents, and other employees. Internal users can belong to different user groups and can be assigned roles as customer and consumer service agents and managers.

To learn more about the internal user data, see Internal user data.

Business stakeholders for Customer Service Management

Business stakeholders are users who are directly involved in your customer service processes. They can create, view, and approve cases and requests across your organization.

To learn more about the business stakeholders, see Business Stakeholder for Customer Service Management.

Customer Access Management

Customer access management supports multiple related parties (contacts, consumers, and internal users) in handling cases, sold products, and install bases by providing them with varying levels of access. Additionally, it facilitates tracking and collaboration on specific cases and products for related parties, allowing for the naming of relationships. Related parties associated with a product can not only view the product but also track all of its cases.

To learn more about customer access management, see Configuring customer access management and Using customer access management.

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Install Base Management

Use install base management to capture a customer's use or purchase of a product across any industry with the Customer Service Management application. You can track the products and services that are installed at the different customer locations. For example, you could learn how many products are at a location, who has the product, and how it's being used.

Install base supports all the industry verticals across tangible and intangible goods, providing expansion opportunities into post-sales support for any industry vertical. For example, in the banking industry, the install base could be an automated teller machine (ATM). Let's say that an ATM inside a grocery store isn't working. That means, a repair request would have to be created to fix it.

The key benefits of using install base management include:

- Tracking the products and services that have been purchased by a customer.
- Upselling and cross-selling other products from your product catalog. By knowing which products the customer already has installed makes it easier to upsell and cross-sell other products.
- Knowing how the product is being used makes it easier for the field technician to service the product.
- Fixing issues more quickly leads to a great customer experience.
- Keeping a record of the installed base items enables you to maintain and replace the items more quickly.

Self-service for Customer Service Management

With the Customer Service Management application, you can provide service for your customers through self-service portals that are integrated with knowledge articles, community forums, service catalogs, and chatbots.

Customer and consumer self-service portals

By using the Service Portal application, you can create portals that empower your customers to resolve issues and submit cases and requests for themselves. To help direct customers to the right portal resources, you can also activate the Virtual Agent application for Customer Service Management.

Portal types

You can configure three types of portals to support your customers and consumers:

- Customer Service Portal: Supports your business-to-business (B2B) customers
- Business Portal: Supports your business-to-business (B2B) customers and is built using configurable widgets
- Consumer Service Portal: Supports your business-to-consumer (B2C) customers

Both portals offer the same self-service and Virtual Agent assistance features.

Self-service on portals

You can configure your Customer Service Portal or Consumer Service Portal with the following self-service features:

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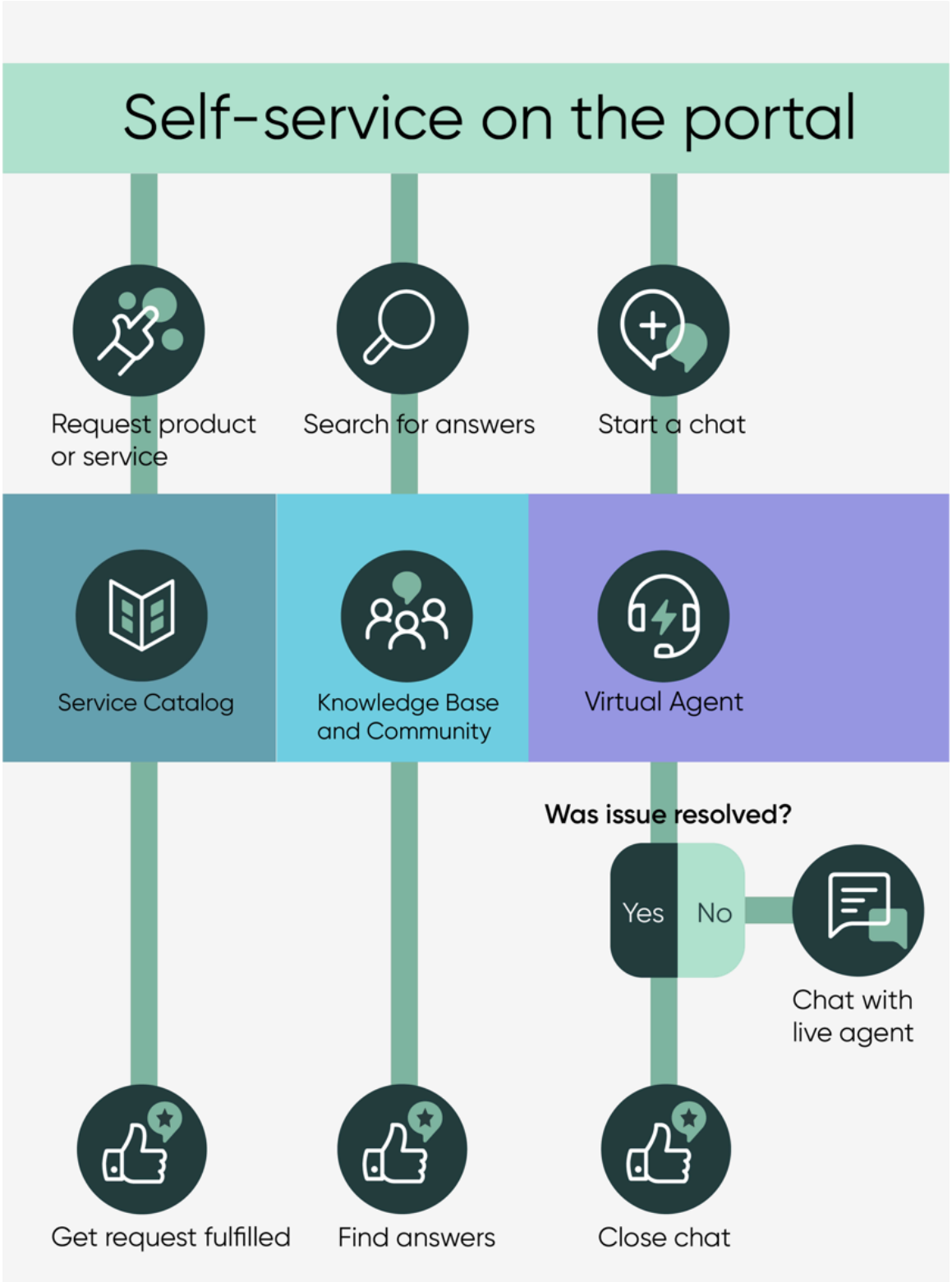
Self-service portal



Service catalog

With the Service Catalog application, you can create service catalogs where customers can request items, such as service and product offerings. You can enable customers to request items from the portal by associating one or more service catalogs with the portal. Customers can also track the status of open requests from the portal.

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To learn more about Service catalog, see Service catalog integration with the Customer and Consumer Service Portals.

Knowledge base

With the Knowledge Management application, you can create knowledge bases with articles to share information with customers on the portal. Customers can search the knowledge bases for information, such as troubleshooting or task resolutions, to resolve issues and answer questions.

To learn more about searching the Knowledge base, see Search the knowledge base.

Community

With the Communities application, you can create forums for agents and customers to connect, engage, and collaborate with each other. On the portal, customers can search for community content that could provide the solutions and answers that they need.

To learn more about communities, see Communities.

Chat

With the Virtual Agent platform, you can design and build automated conversations that help your customers get the help that they need.

As customers answer questions and select options presented by Virtual Agent, they're directed to a self-service resource.

If customers want to chat with an agent, Virtual Agent hands them off to a live agent. To provide this resource, use the Connect Support feature.

To learn more about chat, see Configuring the chat channel.

Engagement Messenger

With the Engagement Messenger, your customers can easily access the information or services they need from your third-party web applications, even if they're located outside of the ServiceNow environment.

To learn more about Engagement Messenger, see Set up Engagement Messenger.

To get started with the portals, see Configure the Customer and Consumer Service Portals and Configure Business Portal.

Omnichannels for communicating with customers

Meet customers where they feel most comfortable by providing omnichannel support. Customers can use chat on the Customer Service Management portal, chat via consumer messaging apps, use email, or place a phone call.

Provides an overview of omnichannel support capabilities within the ServiceNow AI Platform.

Customers can use the following consumer messaging apps to message you.

- WhatsApp
- LINE
- Facebook Messenger
- Apple Messages for Business

To learn more, see Integrating with consumer messaging apps.

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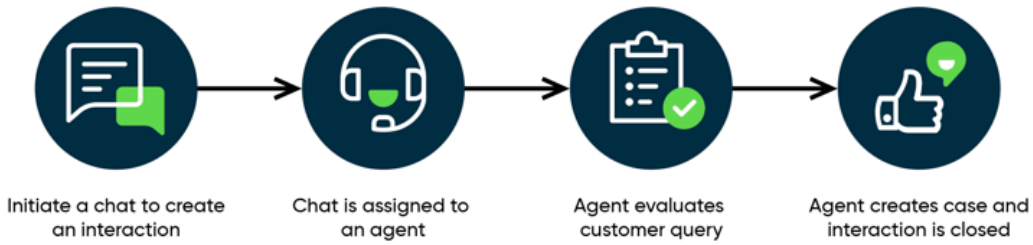
Chat channel

From the Customer Service Portal and Consumer Service Portal, customers can start a chat with a virtual or live agent for help.

Chatting with an agent



The chat communication channel uses the ServiceNow® Connect Support feature to provide chat capability. You can also enable the ServiceNow® Virtual Agent application to create or use predefined chatbot topics (conversations) for your users.

The chat request from the customer is either routed to a virtual agent or to an available agent with the required skill set. The agent can respond to the customer and, if necessary, create a new case or link the discussion to an existing case.

An agent can also initiate a Zoom meeting from a chat to resolve issues faster. For more information, see Chat Zoom Connector.

If a case is created as the result of a chat, the customer can later find and view the case from the portal for updates. The customer service agent can also link a chat discussion to an existing case. Details from the chat discussion are copied to the case form.

For more information, see Connect Support and Configuring the chat channel.

When a support agent of the assignment group associated with the chat queue ends a chat with a user, a survey is available in the chat window for the users. Users can take the survey to give feedback about the interaction with an agent. The survey is not captured in the transcript in the agent's interactions page.

Email channel

Email queries from customers can be managed either as interactions or cases. Interactions handle simple queries that can be resolved promptly, while cases are for more complex issues requiring investigation. Use interactions for simple questions and as a staging object for case categorization. Use cases for complex issues requiring investigation by the back office to facilitate proper resolution.

Email Interaction

Enables you to create interactions to manage email engagement with customers. Agents can review these interactions and take appropriate actions. The customer query can be

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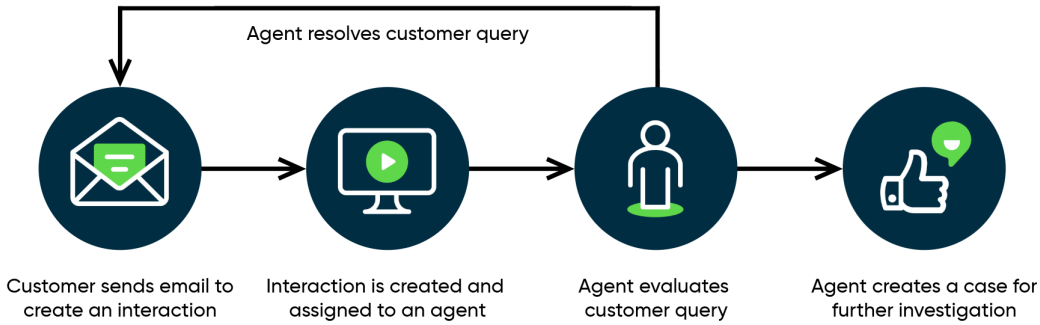
resolved by an email response over the interaction, or a case can be created for further



investigation.

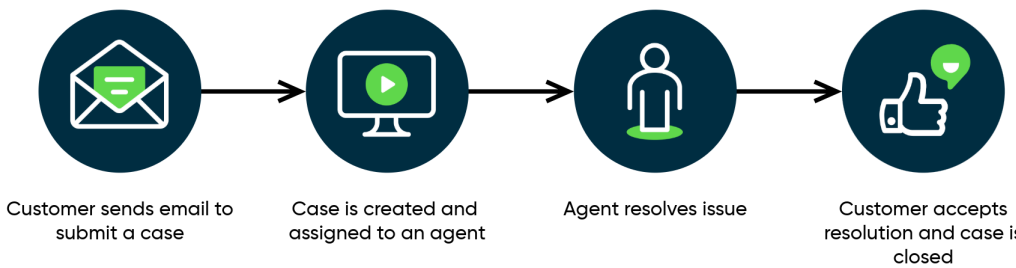
Streamlining case management from intake to resolution

When a customer sends an email, it's automatically created as an interaction in the system. This interaction captures all email communication between agent and customer, providing agents with context for the query. The agent reviews the interaction to determine whether the issue requires further investigation. If the customer's request is clear and needs resolution, a case is created based on the interaction.

Once the case is created, the interaction is marked as closed. This helps prevent unnecessary duplication and keeps the system organized. When the agent replies to the customer's email through the case, an outbound interaction is automatically created. This confirms that all communication is tracked, maintaining a complete record of the conversation.

Email to case

With email to case, customers can send emails to create cases and update current cases. They can also receive email updates from customer service agents as cases progress.



Creating, viewing, and updating cases

Customers can create a new case by sending an email to a designated address. They can also create a case for a specific product by sending an email to a designated address and including the product name in the subject line. Or, if a channel configuration has been created, customers can send an email to a designated address regardless of the information included in the subject line.

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After submitting a case, the customer receives a confirmation email with the assigned case number and a link to the Case form. When an agent updates a case, the customer receives an email with the details.

Customers can update an existing case in the following ways:

- By replying directly to an email from a customer service agent.
- By creating an email and including the Case: prefix followed by the case number in the subject line. For example, `Case: CS0000011`.

Accepting and rejecting solutions

When an agent proposes a solution to a case, the customer receives an email with instructions for accepting or rejecting the solution. The customer can reply and include **Accept** or **Reject** in the first line of the email, or the customer can select the **Accept** or **Reject** link in the email.

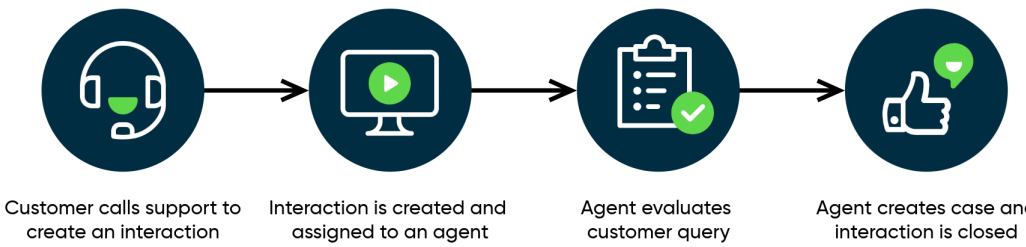
When an agent closes a case, two emails are sent to the customer. The first email states that the case has been closed. The second email provides a link to a customer satisfaction survey.

Note:
If a customer accepts a solution or closes a case from the Customer Service Portal, they're automatically routed to the survey. They don't receive the survey email.

To get started with the email channel, see Configuring the email channel.

Phone channel

External customers can reach out to customer service agents by phone. The Customer Service Management application uses both Computer Telephony Integration (CTI) and OpenFrame to provide phone support for customers.



Computer Telephony Integration (CTI)

CTI provides a way to integrate the ServiceNow AI Platform with telephony providers to support inbound and outbound calls. With this integration, customer service agents can place and accept calls from customers, quickly identify customers and account information, and capture case-related information.

Note:
The CTI integration with the Twilio Voice product requires activation of the Notify plugin.

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OpenFrame

OpenFrame is a tool that enables CTI capability with telephony service providers. OpenFrame provides a communication frame that agents use to place and receive customer calls.

Interaction Controls Component (ICC)

Integrate ICC with contact centers to embed a native call control interface within the Agent Workspace. This streamlines the management of all inbound and outbound phone interactions by providing contextual assistance in a single interface.

> **Note:**
> The Interaction Controls Component (ICC) is a framework that includes voice call features. However, these features will not function unless they are implemented by a CCaaS (Contact Center as a Service) solution.
>
> For more information, see: Integrating contact centers with Interaction Controls Component (ICC) for voice calls

To get started with the phone channel, see Configuring the phone channel.

Agent experience

Your agents can assist customers through various interaction channels to resolve their issues and manage their cases, delivering high-quality and efficient customer service with the Customer Service Management application.

CSM Configurable Workspace

Your agents have one desktop for any interaction–phone, chat, messaging, web forms, and so on. Multiple tabs enable agents to efficiently manage several cases at once. Agents have ongoing visibility into the status of issues assigned to middle and back-office teams for resolution. The workspace dynamically displays related contextual information based on the current state. Agents can also set compact mode and dark mode to optimize their experience and productivity.

To learn more about CSM Configurable Workspace, see Explore CSM Configurable Workspace.

Advanced Work Assignment

Define criteria and routing conditions to automatically assign work items (such as chats or cases) to agents based on their availability, capacity, skills, work history, related tasks, or account team.

To learn more about Advanced Work Assignment, see Set up an Advanced Work Assignment service channel for assigning case tasks.

Customer Central

Your agents get a ready-to-use centralized view of customer-specific information. Customer Central combines historical activity from self-service (such as knowledge base article views and Virtual Agent interactions) as well as live interactions (such as chat and SMS). It can be further customized to incorporate data from different sources and use custom components to include customer health scores, churn risk, recent transactions, and so on.

To learn more about Customer Central, see Customer Central.

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Agent Assist

With agent assist, your agents can handle cases in the workspace, perform an automatic search that shows possible solutions in other cases, knowledge base articles, and additional information sources.

Playbooks

Your agents can use playbooks to provide your customers with the step-by-step guidance that they need for resolving specific types of customer service cases. For example, your agents can use these playbooks to help your customers resolve onboarding, complaint, and product support issues.

A playbook enables your agents to manage the life cycle of a case. The workflows that are associated with a specific type of case and the activities that must be completed to resolve cases of this type are detailed in the playbook. Playbooks also help your agents to visualize the entire life cycle of a workflow.

To learn more about playbooks, see Playbooks for Customer Service Management.

Mobile

Your agents can manage their customer service cases from a mobile device with the Customer Service Management mobile application. Your agents can stay connected and access information in real time to complete their tasks quickly.

Both your customer service agents and managers can use the Customer Service Management mobile application to review the case details quickly so that they can complete their case tasks. By using a mobile phone with the Customer Service Management application, your agents and customer service managers can perform routine actions and approvals anytime and from anywhere.

To learn more about the Customer Service Management mobile application, see Mobile experience for Customer Service Management.

Case management for Customer Service Management

Manage customer requests and issues by creating cases, routing cases to agents and groups, and working toward resolution. With case management, you can provide your agents with the tools they need to evaluate cases, communicate with customers, answer questions, and resolve issues.

Getting to know the case management process

Case management refers to the business processes and activities designed to evaluate and address customer issues and requests while managing the overall customer experience through effective communication. Case management enables you to engage with customers, categorize and route cases, assign work to agents, and manage cases through resolution and reporting. Case management starts with case creation as customers reach out through a number of communication channels including email, phone, and chat.

The following diagram shows the case management process.

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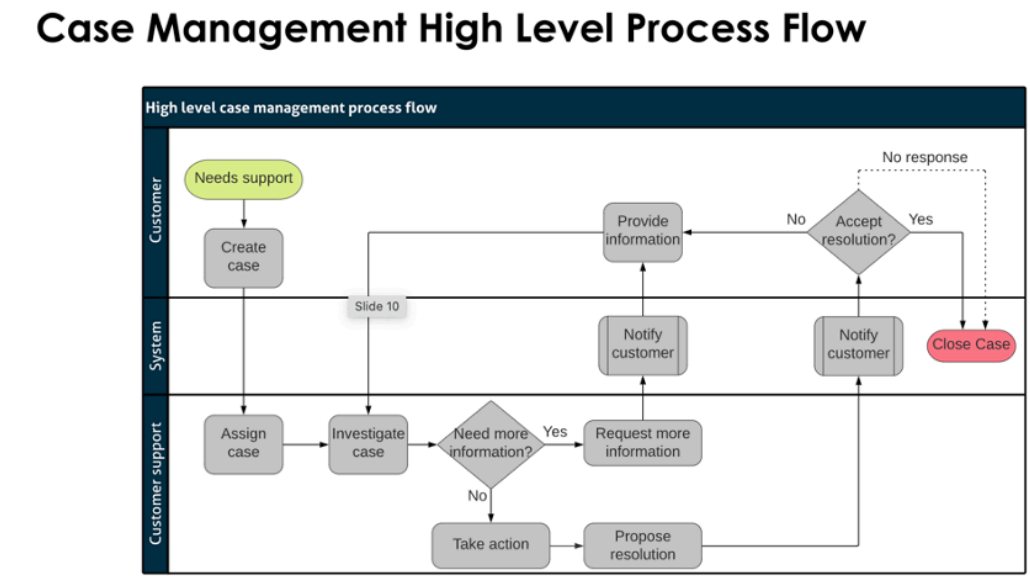
High-level process flow for the case management process



Use the following features with the Customer Service Management application to manage the cases for your customers:

- Case workflows
- Case types
- Service definitions
- Playbooks
- Major issue management
- Customer project management

Case workflows

A case workflow is a series of steps and tasks that are involved in closing a case. By using a case workflow, you can automate systems to simplify your processes, track task completion, and accelerate case resolution.

To learn more about case workflows, see Configure proactive case flows.

Case types

A case type is a collection of data and processes that are needed to resolve a specific type of issue. For example, case types are needed when a company has different processes for supporting customers across multiple departments, business units, or products. By using a case type, you can separate these processes through case applications that support each process.

To learn more about case types, see Customer Service Case Types.

Service definitions

A service definition refers to a specific type of service request that your agents can offer to customers for a case type. Service definitions establish a connection between the products, services, and case types so agents and customers can quickly access the relevant case types by the customer or product.

To learn more about the service definitions, see Service definitions.

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Playbooks

Playbooks provide agents with a visual guide, including step-by-step guidance for the various tasks that the agents can use to resolve the specific type of customer service cases. A playbook helps to improve agent productivity and your customer experience by digitizing and automating complex customer service processes.

To learn more about playbooks, see Playbooks for Customer Service Management.

Major issue management

With major issue management, you can efficiently manage your customer communication and resolution process for a major issue that impacts multiple customers. By identifying other affected customers who haven't reported the issue, you can proactively create cases, notify the affected customers, and manage all the issues until resolution.

To learn more about major issue management, see Major issue management overview.

Customer project management

With customer project management, your company can track and manage long-term complex projects, resolve issues, and track the cost of serving customers on complex projects. Customer project management helps your company to improve the customer experience, reduce inbound calls, and lower costs.

To learn more about customer project management, see Integrate with Customer Project Management.

Intelligence

Use the Intelligence solutions for the Customer Service Management application to access machine learning frameworks, search and automation functions, and natural language processing to automate and enhance your agent and customer experience.

Intelligence solutions

Intelligence solutions use artificial intelligence (AI) to support machine learning and natural language understanding (NLU) capabilities.

Artificial intelligence

Several Customer Service Management applications use an artificial intelligence layer as a framework for machine learning models to interpret language and predict the best resolution for cases. Examples include Predictive Intelligence, Task Intelligence, and Document Intelligence. Artificial intelligence is the foundation of machine learning and natural language understanding frameworks.

Machine learning

Machine learning solutions for Customer Service Management help with case creation, case assignment, and case resolution.

Natural Language Understanding

Natural Language Understanding helps with features such as sentiment analysis, which analyzes customer interactions for positive, negative, or neutral tone. NLU can also interpret customer intent when interacting with a virtual agent to automatically fulfill requests. For example: a customer asks "I need access to the XYZ environment", and NLU interprets "Grant access" as the intent and "XYZ environment" as the entity.

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Task Intelligence for Customer Service

The Task Intelligence for Customer Service application offers you several AI capabilities. You can use language detection, record categorization, Sentiment Analysis, and Document Intelligence to automate your routine tasks across a case's life cycle. These capabilities also enable your agents to focus on resolving complex cases.

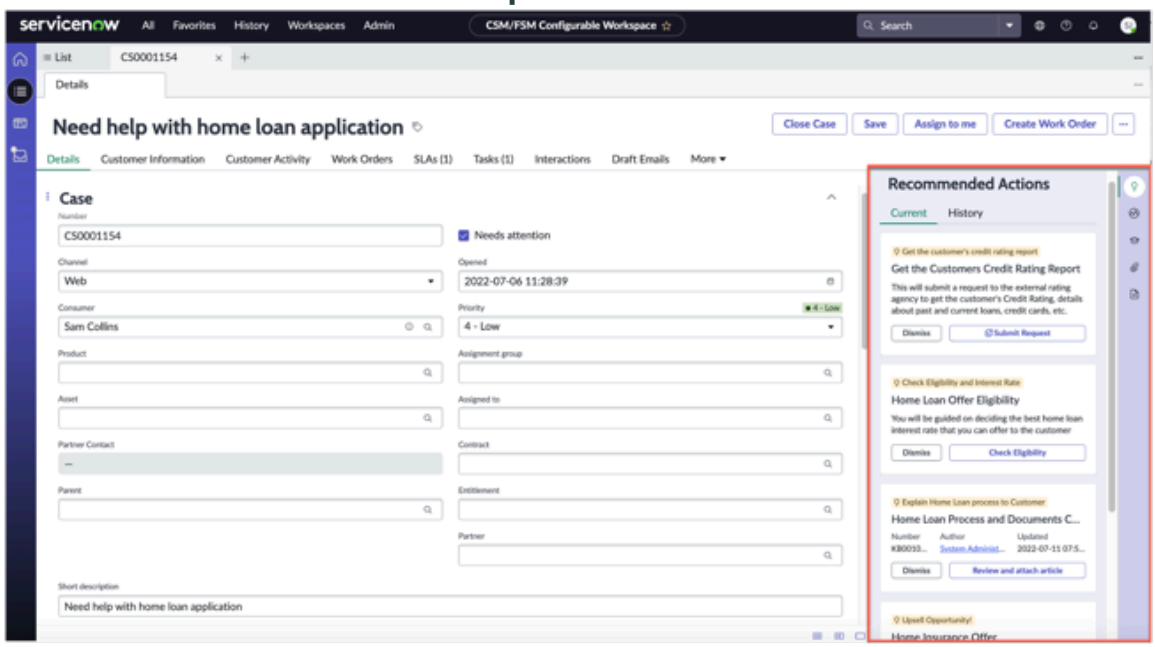
To learn more about Task Intelligence, see Task Intelligence for Customer Service.

Recommended Actions application for Customer Service Management

By using the Recommended Actions application for Customer Service Management, you can configure and display the relevant, recommended actions for your agents. These actions are based on the context of the record. Your agents can quickly follow these recommended actions to assist customers and to resolve issues.

The following example shows the recommended actions on the case record. The panel offers the agent options to assist with a home loan application, such as getting a credit report, determining eligibility, and gathering documents.

Recommended Actions contextual side panel



To learn more about Recommended Actions, see Recommended Actions application.

Predictive Intelligence for case management

You can assist your agents when they are creating cases by limiting the amount of information that they have to enter. For example, an agent only has to enter a short description of the case. Based on the agent's input in the short description field, Predictive Intelligence predicts the category, priority, and assignment group, routing the case to the correct queue.

To learn more about Predictive Intelligence, see Predictive Intelligence for case management.

Guided Decisions for Customer Service Management

You can resolve complex cases faster and more efficiently by guiding your agents through a structured troubleshooting process.

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Guided Decisions is a decision tree authoring and#execution capability in the Customer Service Management application. Use Guided Decisions to guide agents through troubleshooting processes that are based on case context. These processes ask a series of questions and agents provide answers. Based on those answers, agents receive guidance on the next steps to take in the resolution process.

Guided Decisions can help customer service agents by offering step-by-step dynamic guidance as they work to resolve customer issues. This assistance with case resolution can improve agent productivity and customer satisfaction and can help companies in meeting business outcomes. The key benefits include:

- Reduce manual errors by setting up standard processes as decision trees.
- Improve agent productivity by embedding decision trees in recommended actions and playbooks and surfacing relevant actions based on a customer's situation.
- Increase customer satisfaction with consistent agent processes and responses.
- Improve first contact resolution by guiding agents along the optimal path to resolve complex cases.

To learn more about Guided Decisions, see Configuring Guided Decisions.

Analytics and insights

Use the Performance Analytics applications for Customer Service Management to report your customer service performance and effectiveness. You can use the predefined key performance indicators (KPIs) and preconfigured role-based dashboards for monitoring your customer service processes. These analytics enable you to align your organizational goals across all roles, from executive to manager to agent.

Performance Analytics dashboards

By using the preconfigured Performance Analytics dashboards, you can provide your customer service managers with deep insights into how they can visualize the data over time, analyze the business processes, and identify areas of improvement.

The following example shows a Performance Analytics dashboard with profitability and support trends for the month.

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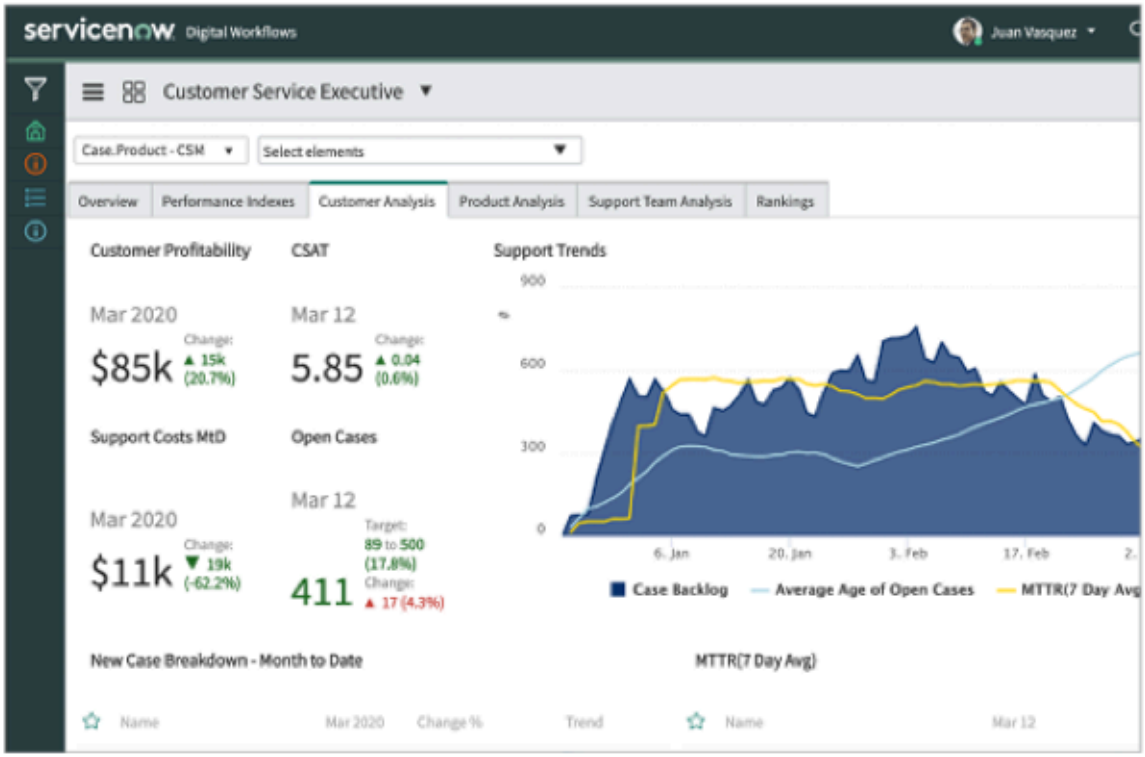
Customer Service Executive dashboard



To learn more about the Performance Analytics solutions, see Customer Service Platform Analytics Solutions.

To learn more about the different Performance Analytics plugins and what they provide, see Additional plugins for Customer Service Management.

Optimization

Optimize your processes by using the Customer Service Management application. You can analyze which processes are relevant to your key performance indicators (KPIs), identify the bottlenecks for your customer service cases, learn how to optimize your workforce, and manage your teams more efficiently.

Process mining

By mining your processes, you can quickly analyze and improve the root cause of the inefficiencies. A process mining content pack has been built exclusively for the Customer Service Management application. This content pack helps you to analyze your cases and create process maps. With a process map, you can review the case records and find the performance issues. After finding some improvement opportunities, you can create initiatives to track the progress to ensure that an issue doesn't happen again in the future. You can also analyze your process maps by using variables like Location, Product, Priority, Category, Resolution code, and Assignment group.

Process mining enables you to do these tasks:

- Visualize your process execution and resolve underlying issues.
- Automatically discover and create process maps for your KPIs and conduct a root cause analysis.

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- Use process maps that were built by using audit log data to identify your bottlenecks, redundancies, and opportunities for automation.
- Replace time-consuming manual analysis and costly consultants with automated data-driven process maps.

The following diagram shows the benefits of Process Mining, including creating process maps, analyzing bottlenecks, and finding new areas of improvement and automation.

Key Features of process mining include:

Dashboard and insights

You can drill down into the process KPIs that are most important to your business. You can get the insights into the process inefficiencies that are discovered by the process model. The top identified case inefficiencies across all organizations are:

- Idling time: The time that it takes for assigned cases to move to Work in progress.
- Resolution rejected: Cases where a solution has been proposed by the agent but for some reason is rejected by the customer.
- Reassignments: Cases where the assignment group change happens at least twice.
- Resolution efficiency: Cases where there's a significant time gap between the Work In Progress and Resolved cases.
- Assignment efficiency: Cases where the time to assign a case is longer than usual.
- Undesirable transition: Cases that go from Work in progress to Work in progress-awaiting info.

Automated root cause analysis and clustering

You can investigate where and why inefficiencies happen in the process. You can get insights on the leading influencers for the analyzed process steps and discover the hidden connections and influencing factors in the process data.

Multi-dimensional mining

You can link the different related processes to visualize in one graph.

Business process flow creation

You can use the case data in audit trails to perform an in-depth analysis and discover the process insights that can improve your business outcomes.

For more information about enabling the Process Mining content pack, see the following topics:

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- Activate Process Mining Content Packs.
- Integrating with Process Mining.

Workforce Optimization

The Workforce Optimization for Customer Service application manages and maintains the productivity of your workforce. With the Workforce Optimization for Customer Service application, you can efficiently route work to your team, manage your team's skills and schedules, and monitor your team's performance.

The Workforce Optimization for Customer Service application is configurable and can be customized to fit your service objectives.

The advantages of Workforce Optimization for Customer Service include:

- Improve the quality, efficiency, and satisfaction of your teams.
- Support skill growth and smart scheduling for your team.
- Get real-time and historical snapshots of your team's performance.
- Onboard, coach, and train workflows to develop and grow your team members.
- Focus on all engagement channels and provide real-time help to your team members so that they can provide a better customer experience.
- Capture all the relevant data and apply these insights and guidance to your team.

To learn more about the Workforce Optimization for Customer Service application, see Workforce Optimization for Customer Service.

Customer Contracts and Entitlements

The Customer Contracts and Entitlements application for Customer Service Management (CSM) provides solution to standardize, organize, manage, and use service contracts and entitlements.

You can use the Customer Contracts and Entitlements application to manage contracts from the initial offer to contract finalization, directly within the CSM Configurable Workspace. You can also manage service contracts and entitlements life cycle changes, scope modifications, and cancellations. The application enables tracking of entitlements and improve contract compliance.

A service contract acts as an agreement between the customer and the organization. A contract includes the consumer or account details, the products covered, and the period for contract activation. Service contract lines store information related to a service or contract offer that is purchased or owned.

Within each contract, entitlements can be defined to detail the specific commitments related to the contract. You can also create independent entitlements that define the type and level of support that a customer receives after a product is purchased. Sold Products eligible to be serviced under a service contract or entitlement can be added as covered products.

Key features of Customer Contracts and Entitlements

Customer Contracts and Entitlements is built on these key features that helps maintain the after-sales services provided to customers.

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- View, utilize, and manage contracts and entitlements in the Agent Workspace.
- Manage the life cycle of customer service contracts and entitlements from offer creation to contract generation.
- Establish relationships with existing customer data, such as sold products and install base items, by adding the contract and entitlement data to the common data model.
- Support customer needs by implementing capabilities ranging from account-based support entitlements to contracts that include service plans with complex entitlement coverage.

Contracts and Entitlement Workflows

Manage the life cycle of customer service contracts and entitlements from offer creation to contract generation.

Contracts and entitlement workflows help in efficiently managing the complete life cycle of customer service contracts and entitlements from offer creation to contract generation. After the customer has specified their catalog items for service contracts and entitlements, these workflows facilitate the creation of orders for those items through order orchestration and the generation of transactional customer contracts.

The workflows in this application enable you to modify contracts, contract lines, and entitlements. Contract offers are subscription plans or service plans detailing the precise services that a customer is entitled to as specified in a contract. These offers include details like scope of services, time lines, pricing, and other special terms. Contract offers can be offered independently or combined with other services or products. Entitlement offers are specific terms and service levels that customers are entitled to under a contract.

Key features

- Generating new customer contracts and entitlements: Enables the complete end-to-end sales and order management process to generate new customer contracts and entitlements.
- Create and manage subscription contracts: Customers can create contracts to manage subscription, support, and maintenance contracts. Customers can create these contracts from product inventory records and also manage these contracts by modifying, renewing, or canceling them.
- Integration with Customer Service Management modules: Integrates product catalog management, order management, and contract management to deliver a seamless capability to support selling of service contracts and entitlements.
- Customizable workflows: Provides the flexibility to accommodate changes in the data model, such as the addition of custom fields.
- Modifying Contracts and Entitlements: Manage changes in contracts and entitlements. If the customer wants to modify service contracts such as changes in coverage or other specific terms, these changes can be managed using order management. You can also suspend, resume, and cancel them based on your requirement.
- Renewing services: You can renew sold product service contracts and other entities based on your requirement.
- Covered products: Covered products are specific sold products or order line items that are included in a service contract. Covered products can be directly tracked through the contract records, facilitating changes and visibility of what is covered.

What to explore next

To learn more about configuring and using Customer Contracts and Entitlements, see:

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- Configuring Contracts and Entitlement Workflows
- Using Contracts and Entitlements Workflows

Configuring Customer Service Management

Set up the features, components, and integrations that you need to provide service and support to your customers.

Set up your environment Plan and configure your CSM environment, import foundational data, and set up access management.	**Organize agent workspaces** Configure intuitive workspaces with advanced routing and management features and case management capabilities.	**Enable communication channels** Set up customer communication channels, including voice, email, web, and messaging.
Implement intelligence Set up Intelligence features to automate routine tasks and provide recommended content to agents.	**Set up self-service** Create self-service portals for customers that are integrated with knowledge, communities, service catalogs, and chatbots.	**Extend capabilities** Add additional features to further extend the capabilities of your Customer Service Management environment.

Set up your environment

Begin your customer journey by setting up your Customer Service Management environment. This setup involves planning and configuring your system with essential components such as data models, customer data, product data, and user management tools. Additionally, import your foundation data, set up access controls, and configure case management tools to go live.

Organize agent workspaces

Configuring your agent workspaces is crucial for improving the efficiency and effectiveness of your customer service team. To get started, set up and optimize your agent workspaces by configuring interfaces, landing pages, and record pages. This process involves setting up case routing, implementing advanced case management features. It also includes integrating agent tools for smooth case handling and streamlined workflow management.

Enable communication channels

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To facilitate seamless customer interactions across various platforms, it's essential to set up and configure multiple communication channels. This approach ensures that customers can reach your service through their preferred methods, enhancing their overall experience. Set up and configure a variety of communication channels to facilitate customer interactions. Such methods include voice, email, chat, web, messaging, phone, engagement messenger, and omnichannels.

Implement Intelligence

Implementing intelligence features in Customer Service Management helps you achieve a quicker and more personalized customer experience. Set up these features to automate routine tasks and deliver relevant content to you, helping you to focus on more complex case resolutions.

Set Up Self-Service

Creating and enabling a self-service portal equips you to resolve issues independently and access information. Set up self-service portals by integrating features such as knowledge bases, communities, service catalogs, chatbots, walk-up experiences, and appointment booking.

Extend Capabilities

To extend your Customer Service Management environment, integrate additional applications and features. This expansion broadens your system's functionality, enhances process management, and improves support tasks. As a result, you experience more efficient interactions and better overall support.

Set up your environment

Begin your customer journey by preparing your Customer Service Management environment with data models, customer data, product data, user management, and case management tools to go live.

Getting started	Customer data	User management
Activate Customer Service Management, and import your foundation data.	Configure customer data, such as accounts, contacts, and consumers.	Create and manage data for internal users, such as managers, agents, and support groups.

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Product data	Data models	
Configure product data including product models, sold products, install base items, and installed products.	Create and manage data models for Customer Service Management.	

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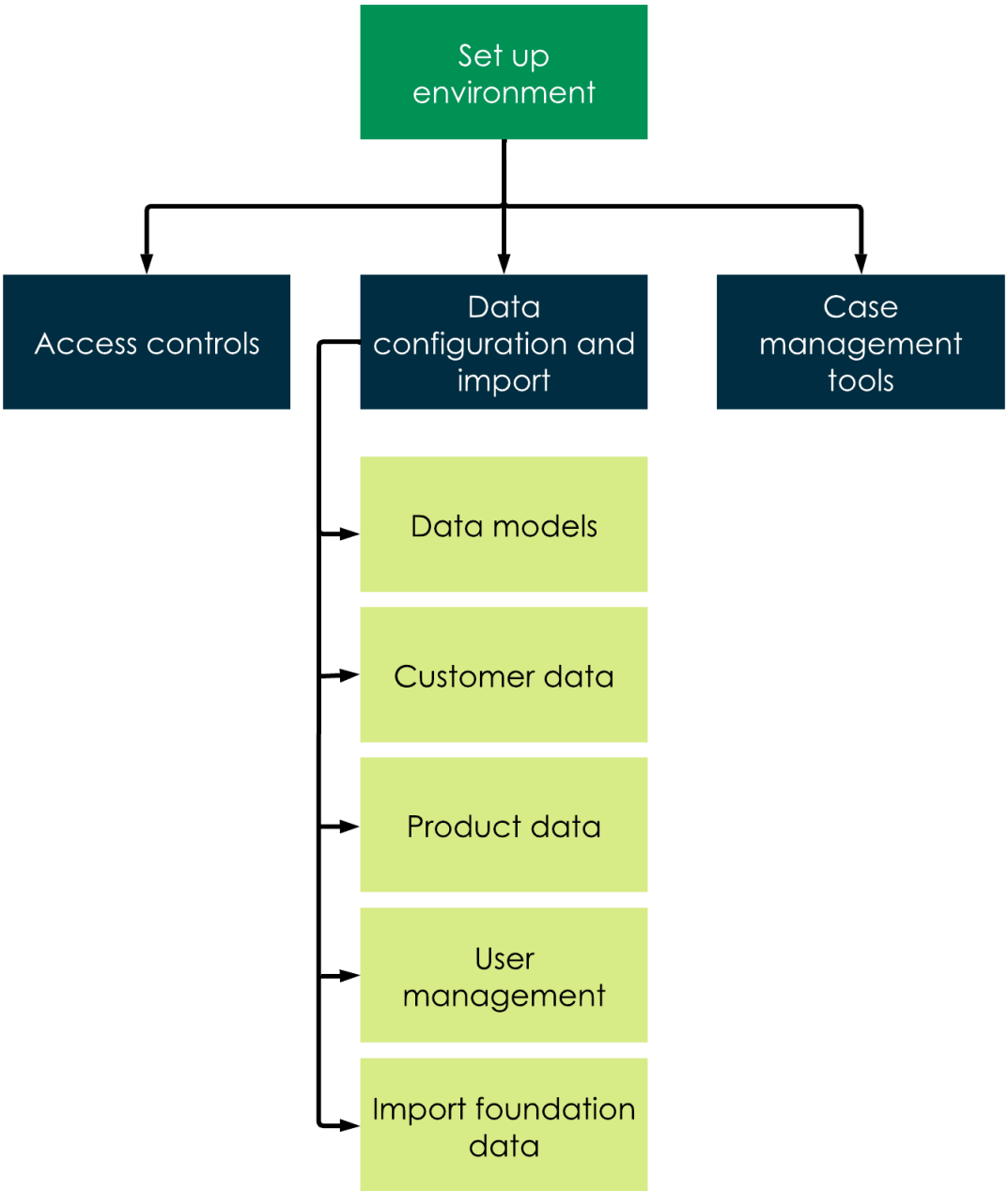
Set up your environment overview



Getting started

Start by activating the Customer Service Management plugin and importing your foundation data to establish a solid framework. This approach helps you to plan and install any additional plugins you need, securing a well-integrated and effective system for optimal performance. Activate the CSM plugin and foundation data to establish a robust framework. This facilitates efficient plugin planning and installation, promoting a well-integrated system.

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Customer data

Configure customer data in Customer Service Management, including details about accounts, contacts, and consumers to promote comprehensive information capture. This setup confirms that all the relevant customer and account information is captured.

User management

Create and manage user data for internal users such as managers, agents, and support groups, as well as external users. Configure their access to features, capabilities, and case data in Customer Service Management features and case data. This setup helps establish relationships that streamline case management and enhance support roles for accounts, leading to better efficiency and effectiveness in handling customer interactions.

Product data

Configure product data to streamline Customer Service Management including product models, sold products, install base items, and installed products. This setup helps you quickly access relevant details, resolve issues more effectively, and improve overall service by providing a clear view of product status and history.

Data models

Create and manage structured and flexible data models in Customer Service Management to meet industry needs, with organized data, accurate interactions, and seamless adaptability.

Getting started with Customer Service Management

Activate the Customer Service plugin and plan your Customer Service Management implementation by installing additional plugins.

Activating plugins and foundation data

Task	Description
Activate Customer Service Management	As an admin, activate the Customer Service plugin (com.sn_customerservice). This plugin includes demo data and activates related plugins.
Plugins activated with Customer Service Management	Refer the list of related CSM plugins that are activated after activating the Customer Service plugin.
Additional plugins for Customer Service Management	Refer the list of additional CSM plugins that you can activate after activating the Customer Service plugin.
Customer Service properties	Customize settings for several different features, including email communication, asset contact relationships, and the Consumer Service Portal.
Configure foundation data	Import customer information including names, addresses, and phone numbers; accounts, contacts, consumers, users, groups, group members, product models and assets.

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Activating plugins and foundation data (continued)

Task	Description
	Assign roles to groups or to individual users. Create service contracts and entitlements. Create customer relationships, asset relationships, and account teams.

Activate Customer Service Management

You can activate the Customer Service plugin (com.sn_customerservice) if you have the admin role. This plugin includes demo data and activates related plugins if they aren't already active.

Before you begin

Role required: admin

About this task

The Customer Service Management plugin activates several related plugins if they aren't already active. For more information, see Plugins activated with Customer Service Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

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

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

What to do next

You can activate several related plugins after activating the Customer Service Management plugin (com.sn_customerservice). For details, see Additional plugins for Customer Service Management.

Plugins activated with Customer Service Management

The Customer Service plugin activates several related plugins if they are not already active.

Plugins automatically activated with Customer Service

Plugin	Description
Assessment [com.snc_assessment_core]	Enables you to create surveys, send surveys, collect responses, and analyze and share survey results.

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Plugins automatically activated with Customer Service (continued)

Plugin	Description
Asset Management [com.snc.asset_management]	Manage your assets, consumables, and software licenses.
Assignment Workbench [com.snc.assignment_workbench]	Customer service managers can use the workbench to evaluate agents based on configurable criteria, such as skills and availability, and then assign tasks to the desired agents.
CSM Workspace [com.snc.agent_workspace.csm]	Supports various functions required by customer service agents in the workspace user interface.
Customer Service Base Entities [com.snc.cs_base]	Provides granular access control through relationships, user profile attributes, and roles.
Customer Service Portal Classic [com.glide.service-portal.customer-portal]	This plugin enables the Customer Service Portal, a version of the web portal based on the Service Portal application.
Customer Service Social Integration [com.sn_cs_social]	Adds the appropriate data schema changes for social integration scenarios.
Customer Service Spoke [com.snc.customer_service.spoke]	Provides actions for flow designers to use when creating Customer Service Management business processes.
Glide Conversation Server [com.glide.cs]	Enables the Virtual Agent web clients, Connect Support, conversation branding settings, and Live Agent conversation settings.
Many to many task relations [com.snc.task_relations]	Enables the definition of relationships between different tasks.
OpenFrame [com.sn_openframe]	An interface used to integrate external communication systems with the ServiceNow AI Platform. This plugin provides a UI frame that is accessible and available anywhere within ServiceNow application screens. The Customer Service Management application uses a combination of Computer Telephony Integration (CTI) and OpenFrame to provide phone support for customers.
Process Flow Formatter [com.snc.process_flow_formatter]	Displays a diagram of the process flow for a form.
Resolution Shaper [com.sn_resolutionshaper]	Provides a visual display of activities and state changes of any task based entity, such as a customer service case, at the top of the form view.

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Plugins automatically activated with Customer Service (continued)

Plugin	Description
Resource Matching Engine [com.snc.matching_rule]	A general rule-based matching engine to match an input record to an output record using a condition builder and/or a script for advanced users.
Skills Management [com.snc.skills_management]	Enables you to organize skills data of service agents and employees in a centralized location. You can use this data to assign tasks based on skills, analyze skill gaps to identify coaching and training needs, optimize your workforce, create career growth plans, and perform skill-based hiring.
Special Handling Notes [com.sn_shn]	Activates the Special Handling Notes application, which enables users to quickly view brief messages about records. These notes can be displayed in an embedded list or related list on a record form or in a pop-up window.
State Flows [com.snc.state_flows]	Customize transitions from one state to another in tables derived from the Task [task] table and configure the system to perform work during transitions to specific states.
Subscriptions and Activity Feed Framework [com.snc.activity_subscriptions]	Provides a generic set of artifacts to handle subscriptions for any defined subscribable object. Any entity can be defined as a subscribable object and a set of subscribers can subscribe to the objects. When an event occurs related to the subscribable object, activities can be tracked and subscribers can be notified.
Task Activities [com.snc.task_activity]	Enables support for activities on task tables.
Virtual Agent Service Portal Widgets [com.glide.va.sp_widgets]	Activates the Service Portal for use as a Virtual Agent web client.

Additional plugins for Customer Service Management

After Customer Service Management is activated, you can activate additional plugins that provide demo data and enable various features.

You must have the admin role to activate these additional plugins. For details, see Activate a plugin.

Customer Service Management plugins and descriptions

Plugin	Description
Agent Schedule [com.snc.agent_schedule]	Enables customer service agents and field service technicians to see work schedules and assignments and also add personal events such as meetings or appointments.

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Customer Service Management plugins and descriptions (continued)

Plugin	Description
Case Assignment Workbench Demo [com.snc.case_assignment_workbench_demo]	Provides demo data, such as sample cases and users, so that the Assignment Workbench product features can be demonstrated on a non-production instance.
Case Digests [com.sn_csm_case_digest]	Enables users to send case status updates and root cause analysis to customers and key internal stakeholders.
Consumer Service Portal [com.glide.service-portal.consumer-portal]	This plugin enables the Consumer Service Portal, a web-based portal based on the Service Portal application that you can use to provide information and support to consumers.
CSM Configurable Workspace [sn_csm_wrkspc]	Enables CSM Configurable Workspace, the UI Builder version of the configurable service desk application, that provides agents with an integrated and intuitive user experience.
CSM Contributor User [com.snc.csm_contributor_user]	With the CSM Contributor User plugin, you can enable contributors to report and collaborate on cases created for customers, service organizations, or themselves.
CSM Extension for Proxy Contacts [com.snc.csm_proxy_contacts]	Enables users who are internal to an organization to be the proxy case contact on behalf of customers.
CTI Softphone [com.snc.cti]	This plugin is a demo application that enables Twilio integration using the Notify application and OpenFrame to provide soft phone functions and call center capabilities. The application includes the capabilities to make, receive, transfer, hold, and mute calls. The Customer Service Management and Incident Management applications provide Computer Telephony Integration (CTI) demo workflows. Activate the respective applications to run the workflows. The CTI Softphone plugin activates these related plugins if they are not already active: • **Resource Matching Engine (com.snc.matching_rule):** Provides a tool for rule-based task-to-resource matching. • **Notify (com.snc.notify)**: Provides platform features for workflow-driven voice calls, conference calls, and SMS messages. • **Notify - Twilio Driver (com.snc.notify.twilio)**: Provides Notify support for the Twilio product. Requires a separate contract with Twilio for SMS/ Voice capabilities.

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Customer Service Management plugins and descriptions (continued)

Plugin	Description
	• **Openframe (com.sn_openframe)**: Provides an interface that can be used to integrate external communication systems with the ServiceNow AI Platform.
Customer Central [com.sn_csm_customer_central]	Enables customer service agents to access all customer information and activity in a single, centralized view on Agent Workspace.
Customer Communities [com.sn_customer_communities]	Enables users to connect, engage, and collaborate with employees, customers, partners, and prospects. Available to customers who are licensed for Customer Service Management.
Customer Project Management [com.snc.csm_ppm]	Provides the ability to create and manage projects for a customer account and gives end users visibility into their projects via the portal. This plugin requires the Customer Service plugin and the PPM Standard plugin.
Customer Service Case Action Status [com.snc.csm_action_status]	Provides a Customer Service-specific application of the Action Status Automation feature. Use this plugin to display and track blocking tasks for customer service cases.
Customer Service Case Types [com.snc.csm_case_types]	Enables customers to manage complex case processes by defining new case types. A case type represents an individual business process and is a collection of diverse inputs and tasks that an agent performs to resolve customer requests.
Customer Service CTI Demo Data [com.snc.customerservice_cti_demo]	Provides demo data for the CTI Softphone application. **Note:** Starting with the Yokohama release, Customer Service CTI Demo Data is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. ServiceNow Voice with Amazon Connect provides the latest experience for this functionality. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.
Customer Service Document Template [com.sn_csm_doc_template]	Enables you to configure the fields from a table record that are included in an output document.
Customer Service Household [com.snc.household]	Enables managing customer service for consumers belonging to the same household. Provides the ability

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Customer Service Management plugins and descriptions (continued)

Plugin	Description
	to define the members of a household and relationships between them.
Customer Service Install Base Management [com.snc.install_base]	Enables customers to capture the current state of a customer's install base and establish the relationship to any downstream entities that might impact their functioning.
Customer Service Management Demo Data [com.snc.customerservice.demo]	Provides demo data for the Customer Service Management application.
Customer Service Mobile [com.sn_csm_mobile]	Enables the mobile user interface for Customer Service Management.
Customer Service NLU Model for Virtual Agent Conversations [com.sn_csm.nlu]	This plugin contains NLU models used in the VA topics for Customer Service related use cases.
Customer Service Virtual Agent Conversations [com.sn_csm.virtualagent]	This plugin contains prebuilt template conversation topics for CSM related use cases. They are intended to be copied and configured.
Customer Service with Field Service Management [com.snc.csm_fsm_integration]	This plugin provides an integration between the Customer Service Management and Field Service Management applications. Customers and consumers can view case-related work orders from the Customer Service and Consumer Service Portals. In the Field Service Management application, users can view account and contact information on work orders and work order tasks.
Customer Service with Request Management [com.sn_cs_sm_request]	Provides an integration between Customer Service Management and the Request Management application. Enables users to create request records from a Customer Service case.
Customer Service with Service Management [com.sn_cs_sm]	Provides an integration between Customer Service Management and the Incident, Problem and Change Management applications. Enables users to create incident, problem, and change records from a Customer Service case.
Customer Service with Service Portfolio Management [sn_csm_spm]	Provides an integration between the Customer Service Management and the Service Portfolio Management (SPM) application. This integration gives customer service managers, customer service agents, and service owners visibility into sold products and their service offerings.
Incident Assignment Workbench Demo	Intelligent agent recommendation through dynamic matching rules/criteria.

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Customer Service Management plugins and descriptions (continued)

Plugin	Description
(com.snc.incident_assignment_workbench_demo)	
Guided Decisions [com.snc.guided_decisions]	Enables the framework and execution engine for creating guided decisions.
Guided Decisions - Guidance [com.snc.guided_decisions_guidance]	Enables the framework for creating a guidance for guided decisions.
Guided Decisions for Playbook in Workspace [com.snc.guided_decisions_playbook_experience]	Enables activity types, definitions, and UI components for the display of guided decisions in a playbook on Workspace.
Knowledge Product Entitlements [com.snc.kb_product_entitlements]	This plugin enables customer service administrators to restrict customer access to designated knowledge bases and knowledge articles on the customer self-service portal. This plugin adds the Knowledge Product Entitlements menu to the application navigator.
Major Issue Management [com.sn_majorissue_mgt]	A set of capabilities used to manage customer-facing communications and resolution processes for common issues.
Outsourced Customer Service (com.snc.csm_ocs)	Enables organizations to outsource customer service to external service providers.
Performance Analytics - Content Pack - Customer Service [com.snc.pa.customer_service]	Performance Analytics content pack that includes Customer Service base system KPIs.
Performance Analytics - Content Pack - Customer Service Management - Advanced [com.snc.pa.customer_service_advanced]	Updates the Customer Service dashboard and incorporates indicators for the following plugins: • Major Issue Management • Customer Service Case Action Status • Customer Service with Request Management • Customer Service with Service Management • Agent Chat • Advanced Work Assignment for CSM • Performance Analytics - Content Pack - Advanced Work Assignment Activate these plugins to view the related indicators. Without these plugins, indicators may not display correctly.

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Customer Service Management plugins and descriptions (continued)

Plugin	Description
Performance Analytics - Context Sensitive Analytics for Customer Service [com.snc.pa.cs.context_sensitive_anal	This plugin enables you to open context-sensitive dashboards in customer service forms based on UI actions. **Note:** You can activate Performance Analytics solutions on instances that do not have Performance Analytics to evaluate the functionality. However, to collect scores for indicators you must license Performance Analytics.
Performance Analytics Premium for Customer Service [com.snc.pa.premium.cs]	Installing this plugin removes the limitations of the out of box Performance Analytics.
Playbooks for Customer Service Management [sn_csm_playbook]	Provides step-by-step guidance for customer service cases.
Predictive Intelligence for Customer Service Management [com.snc.csm_ml]	Enables customers to leverage machine learning algorithms for searching related cases in Customer Service Management. Activation of this plugin on production instances may require a separate license. Contact ServiceNow for details. The Predictive Intelligence for Customer Service Management plugin activates these related plugins if they are not already active: • Customer Service plugin (com.sn_customerservice) • Predictive Intelligence for Contextual Search plugin (com.snc.contextual_search_ml) • Email Notification Script for Contextual Search Results plugin (com.snc.adv_cxs_results_email_script)
Self-Service Analytics for Customer Service [com.snc.pa.self_service_analytics_csm]	Tracks case reduction (deflection) metrics and self-service KPIs using performance analytics dashboards. Activation of this plugin on production instances may require a separate Performance Analytics license. Contact ServiceNow for details. The Self-Service Analytics for Customer Service plugin activates these related plugins if they are not already active:

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Customer Service Management plugins and descriptions (continued)

Plugin	Description
	• Customer Service plugin (com.sn_customerservice) • Self-Service Analytics Core plugin (com.snc.self_service_analytics_core) • Self-Service Analytics PA plugin (com.snc.pa.self_service_analytics)
Self Service Password Reset [com.snc.password_reset]	This plugin enables locally authenticated users to request a temporary password if they forget their current one. Customer contacts can request a new password from the customer self-service portal. The Self Service Password Reset plugin activates the Password Reset plugin (com.glideapp.password_reset) if it is not already active.
Special Handling Notes Demo Data [com.snc.shn_demo]	Provides demo data for the Special Handling Notes application.
Targeted Communications [com.sn_publications]	Provides a tool for publishing and distributing content and articles to both internal and external customers.
Targeted Communications Demo Data [com.snc.publications_demo]	Provides demo data for the Targeted Communications application.
Time Recording for Customer Service [com.snc.csm_time_recording]	Extends the functionality of the Time Card Management and Cost Management applications to Customer Service Management.
Walk-Up for CSM [com.snc.walkup_for_csm]	Walk-up experience for Customer Service enables in-store support to assist onsite check-ins, managing queues, and customer interactions.
UI Components for Customer Portals [sn_ciwf_ui_cmpnt]	This plugin enables you to configure the behavior, content, and layout of a portal using a Configurable Portal Widgets.

Customer Service properties

Use system properties to customize the Customer Service Management application.

These properties control settings for several different features, including email communication, asset contact relationships, and the Consumer Service Portal.

To access these properties, navigate to **Customer Service** > **Administration** > **Properties**.

You can also access Customer Service Management properties in the System Property [sys_properties] table by entering **sys_properties.list** in the application navigator and pressing Enter. Then you can filter the list of properties by application.

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Related topics

Properties installed with Customer Service Management

Components installed with additional plugins for Customer Service Management

Configure foundation data

With Customer Service Management, you can import or create customer information including names, addresses, and phone numbers; account details; products and assets; and service contracts. You can also assign roles to users and create customer relationships.

Before you begin

Role required: admin

About this task

Foundation data includes all of the data that you need to configure in order to support your customers. This includes information about:

- Customers (external users)
- Customer relationships
- Users (internal users such as agents and employees)
- Customer and user roles
- Products and assets
- Service contracts and entitlements

You can import and configure most of this foundation data using the Customer Service Management guided setup. This feature takes you through the entire setup and configuration process.

To create new data, such as adding new accounts and contacts, you can use the Customer Service Management application.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.

   The guided setup reopens with a page of different categories of Customer Service Management features that you can configure.

3. In the Foundation Data category, click **Get Started**.

   The Foundation Data page opens with a list of tasks to configure the different types of customer information.

4. To perform a task, click **Configure**.

Foundation Data configuration tasks

Task	Description
Import Accounts	In the business-to-business (B2B) model, an account is a supported external customer. Import and verify existing account data. For more information, see Import accounts and contacts with guided setup.

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Task	Description
	Note: After importing customer account data, you must also set the account code system property.
Import Contacts (B2B)	A contact is a user who is an employee of an account. Import and verify existing contact data. For more information, see Import accounts and contacts with guided setup.
Import Consumers (B2C)	A consumer is a customer in the business-to-consumer (B2C) business model. Import and verify existing consumer data. For more information, see Import consumers with guided setup.
Import Users	A user is an individual who can access your instance. Import and verify existing user data. For more information, see Configure users and groups.
Import Groups	A group is a set of users who share a common purpose. Import and verify existing group data. For more information, see Configure users and groups.
Import Group Members	The users associated with a group are listed as group members. Import and verify existing group member data.
Assign Roles	Roles control access to features and capabilities. The Customer Service Management application provides two types of roles: ○ Internal roles for agents and managers ○ External roles for customers, customer partners, and consumers Assign the necessary roles to internal and external users. For more information, see .
Create Customer Relationships	Create relationships between partners, contacts, and customers to make account and asset management easy and flexible. For more information, see Create customer relationships. You can create the following types of relationships: ○ Bi-directional account relationships ○ Account hierarchy ○ Contact relationships

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Task	Description
Import Product Models	A product is a type of good or service that your company sells and supports. Product models identify different types of products, such as service, hardware, software, or consumables. For more information, see Import product models with guided setup.
Import Sold Products	Sold products are products and components that have been sold to an account or a consumer. Importing sold products provides an overview of the complete product sold to an account or consumer. For more information, see Import sold products with guided setup.
Create product model and catalog items relationships	Enable self-service for customers to request services on products by creating relationships between product models and catalog items. For more information, see Configure product model and catalog item relationships.
Import Install Base Items	Install base items represent the instances that have been configured for a customer. Each install base item references the configuration item record for the customer. For more information, see Import install base items with guided setup.
Import Installed Products	Installed products create an association between sold products and install base items. Installed products also provide information on the sold products and how they are deployed or installed. For more information, see Import installed products with guided setup.
Import Assets	An asset is a specific product or instance that is supported for a customer. There are different types of assets and Information for each type of asset is stored in a different table. For more information, see Import assets with guided setup.
Create Asset Contact Relationships	Assign assets to the customer contacts who are responsible for managing those assets. If desired, enable a property that limits access to asset information to just the assigned contacts. For more information, see Create asset contact relationships.
Create Service Contracts	A service contract contains information about the type of support that is provided to a customer and can include coverage for specific assets. It can also include multiple service entitlements and SLAs. For more information, see Create service contracts.

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Task	Description
Create Entitlements	An entitlement defines the type of support that a customer receives as well as the supported communication channels. Entitlements are counted and tracked using two types of units: cases and hours. For more information, see Configure entitlements.
Create Account Teams	Account teams are made up of employees who fulfill specific jobs or roles for a particular account. Create these roles, or responsibility definitions, and then assign them to employees and contacts. For more information, see Creating an account team.

Customer Service Management and the CSDM guidelines

CSM enables you to provide service and support for your external customers through communication channels such as the web, email, chat, telephone, and social media. The goal of this use case is to understand how CSM key entities work with the core CSDM framework.

CSM use case

CSM provides proactive customer service, decreases cost of service, and provides end-to-end visibility to both customer service and service delivery groups. For more information, see Integrating with Service Portfolio Management.

For information on setting up the data, see Configure foundation data.

Results of the CSM use case

Understand the tables within the CSDM framework that are needed to support the following CSM functionality:

- Service-aware Install Base
- Proactive Customer Service Operations
- Real Time Service Health and Outage Tracking
- Contextual Service Catalog

The following sections include details of the activities needed for the use case.

See Applying CSDM guidelines to your product — product views for more information on Common Service Data Model use cases.

CSM data model

CSM uses the following key entities to resolve complex end-to-end issues.

- A **case** is the primary entity of CSM. CSM uses cases to track and resolve customer questions or issues.
- Customer information is linked to a case using associated entities such as Accounts, Contacts, Consumers, Household, Products, and Service Contracts. This information provides the customer service agent the information necessary to resolve customer issues.
- An **account** can be a customer account, a partner account, or both.

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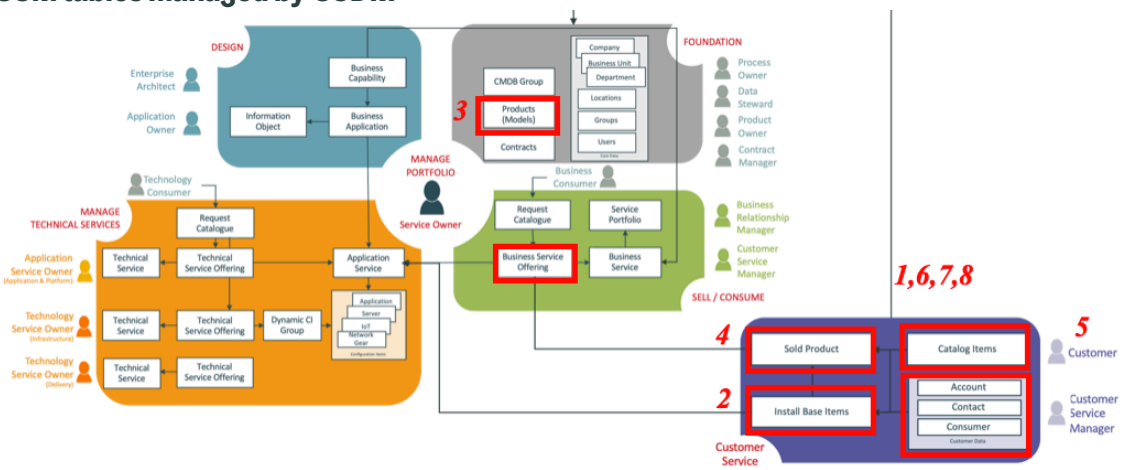
- The **contact** is an employee of an account. A contact record stores information about a contact, such as the name, phone number, and email address. A contact can also have a user ID and can log in to the customer portal.
- A **consumer** is a customer in the business-to-consumer (B2C) business model.
- Household defines the consumers who constitute a household, and the relationships between household members.
- Sold Product tracks the products or services sold to an account or consumer.
- Install Base Items represent the instance of the product that has been configured for a customer.
- Service Contract defines the type of support that customers receive. A contract can include an account and contact or a consumer and the specific assets that are covered. A contract can also include multiple service entitlements and SLAs.
- Entitlement specifies the type of support that a customer receives as well as the supported communication channels.

Customer Service Management and CSDM tables

Customer Service Management manages and uses CSDM tables. Several ServiceNow products benefit from and add value to Customer Service Management.

CSM tables managed by CSDM

CSM tables managed by CSDM



CSM references the following CSDM tables:

1. Sold Product table [sn_install_base_sold_product in CSM

   Represents the product purchased by an Account or Consumer, and references the Product Model table [cmdb_model] or Service Model table [cmdb_service_product_model] for a Customer (Account or Consumer).

2. Install Base Item table [sn_install_base_item] in CSM

   Represents the products installed or in use by an account or consumer. Install Base Items are CIs consumed by the customer and generally reference the Application Services table [cmdb_ci_service_discovered] for SaaS products.

   Multiple sold products can be used on a given Install Base Item by using the Installed Products table [sn_install_base_m2m_installed_product].

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3. A Service Model references the Service Offerings table [service_offering]. Multiple Service Offerings can be associated with a single Service Model.
4. After the product is sold to a customer, the Sold Product table references the Service Offering table [service_offering]. This reference helps to identify the customers subscribed to an offering.
5. Customers can request services related to the products they have purchased by linking the Catalog Items table [sc_cat_item] to the Product Model or Service Model by using the Product-to-Catalog Items Relationships table [sn_prod_cat_rel_m2m_product_catalog_item].
6. Account table [customer_account] in CSM

   Extends the Company table. The Account table can be a customer account, a partner account, or both.

7. Contact table [customer_contact] in CSM

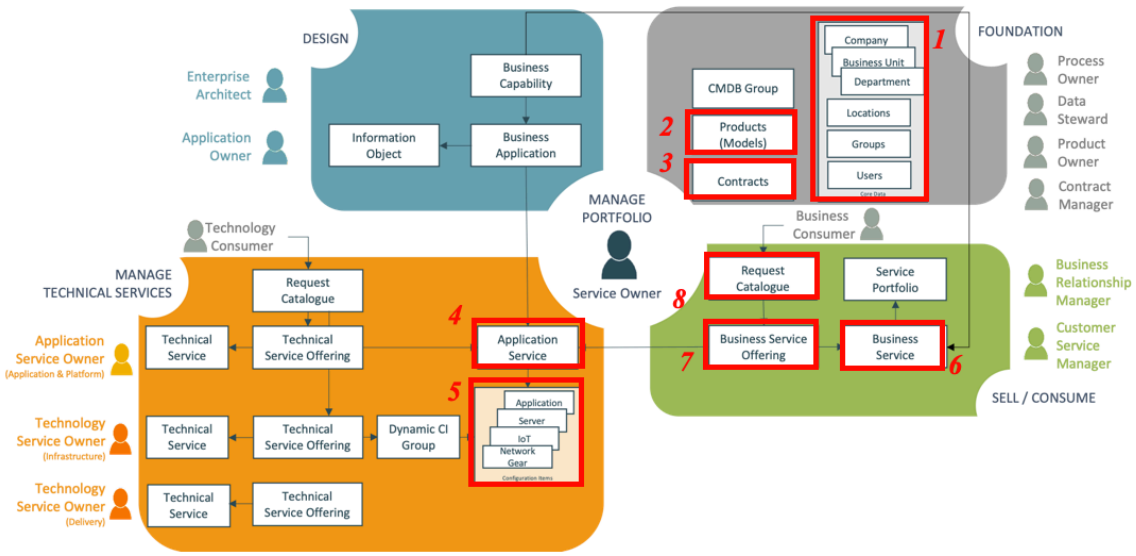
   Extends the User table. A user is an employee of an account. A contact record stores information about a contact, such as the name, phone number, and email address. A contact can also have a user ID and can log in to the customer portal.

8. Consumer table [csm_consumer] in CSM

   A consumer is a customer in the business-to-consumer (B2C) business model.

CSDM tables used by CSM

CSDM tables used by CSM



1. Company [core_company], Business Unit [business_unit], Department [cmn_department], Location [cmn_location], Groups [sys_user_group], Users [sys_user]
2. Product Model tables [cmdb_model], and [cmdb_service_product_model]
3. Contract table [ast_contract]
4. Mapped Application Service table [cmdb_ci_service_discovered]
5. Configuration Item table [cmdb_ci_*]
6. Business Service table [cmdb_ci_service_business]

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7. Business Service Offering table [service_offering]
8. Request Catalog table [sc_cat_item]

Products that add value to CSM

When you use CSM with other ServiceNow products, you increase the value you get from CSM. These other ServiceNow products include:

IT Service Management (ITSM)

Services have the context of the business, applications, information, and technologies layered beneath them.

Event Management

Enables organizations to identify service health-related issues on a single management console. Event Management provides alert aggregation and root cause analysis (RCA) for discovered services, application services, and automated alert groups.

Service Portfolio Management (Service Portfolio Management)

Enables organizations to document and manage services using a standardized, structured format.

Products that benefit from CSM

IT Service Management (ITSM)

Enables organizations to link incidents, problems, changes, and requests to cases, and have the context of the customer (consumer or account) reporting the issue.

IT Operations Management (ITOM)

Enables organizations to identify the Install Base Items and the customers affected by service issues. Helps organizations to provide proactive customer service.

Service Portfolio Management (Service Portfolio Management)

Enables customers that have subscribed to the Service Offering to see who owns the service.

Customer Service Management examples

In this example, the CSDM helps the fictitious ACME technology company use CSM to manage network monitoring services for customers.

Example scenario: Key personas and how they benefit

ACME offers a network monitoring service to its enterprise customers who can purchase either the Platinum, Gold, or Silver offering. A customer, Boxeo, has purchased the network monitoring Platinum offering (Sold Product) and is using it in development and production environments (Install Base Item).

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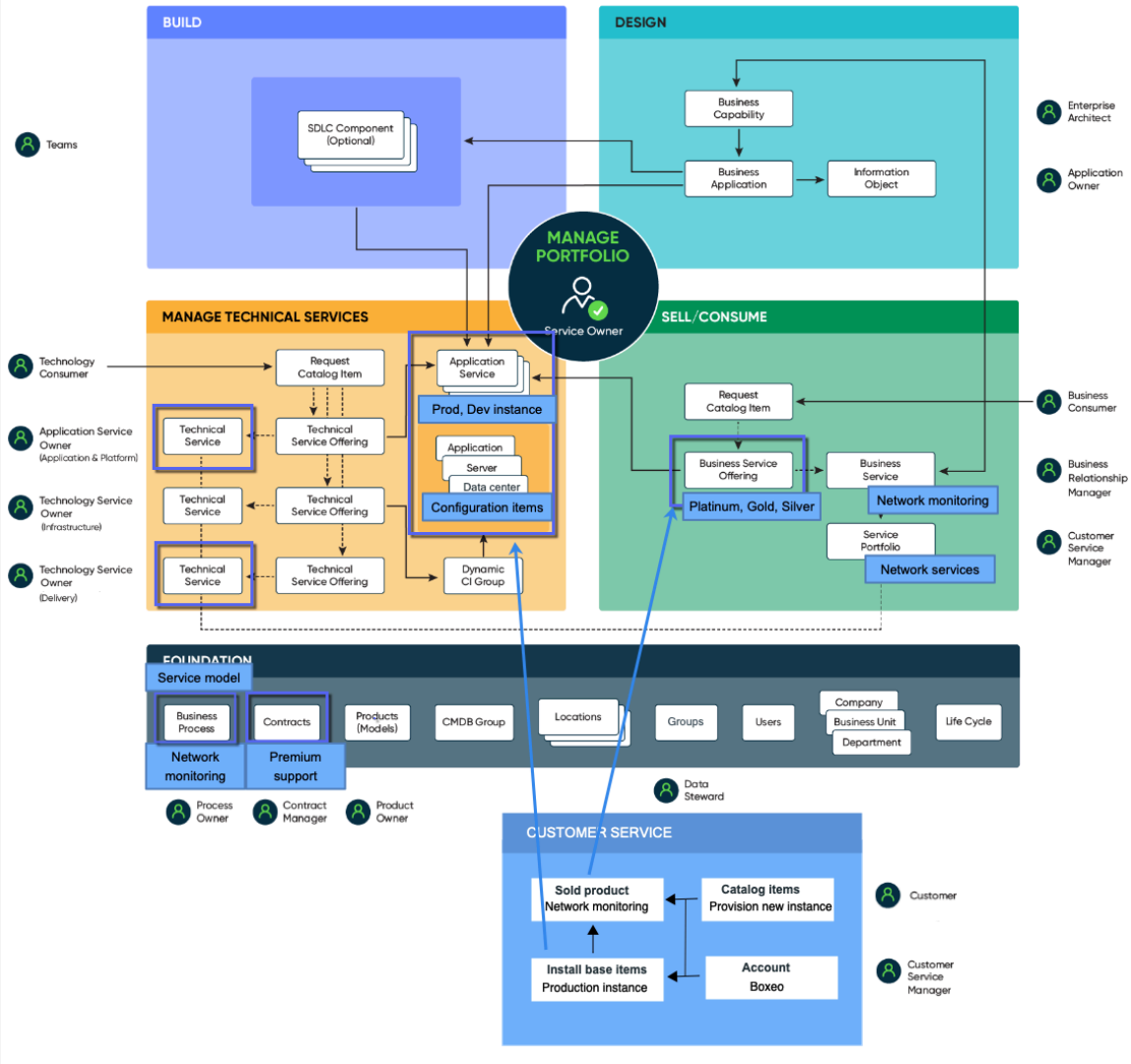
CSM data model example



The key personas (customer service agents, network operations center (NOC) engineers, service owners, and customers) can complete the following tasks:

Customer service agents can:

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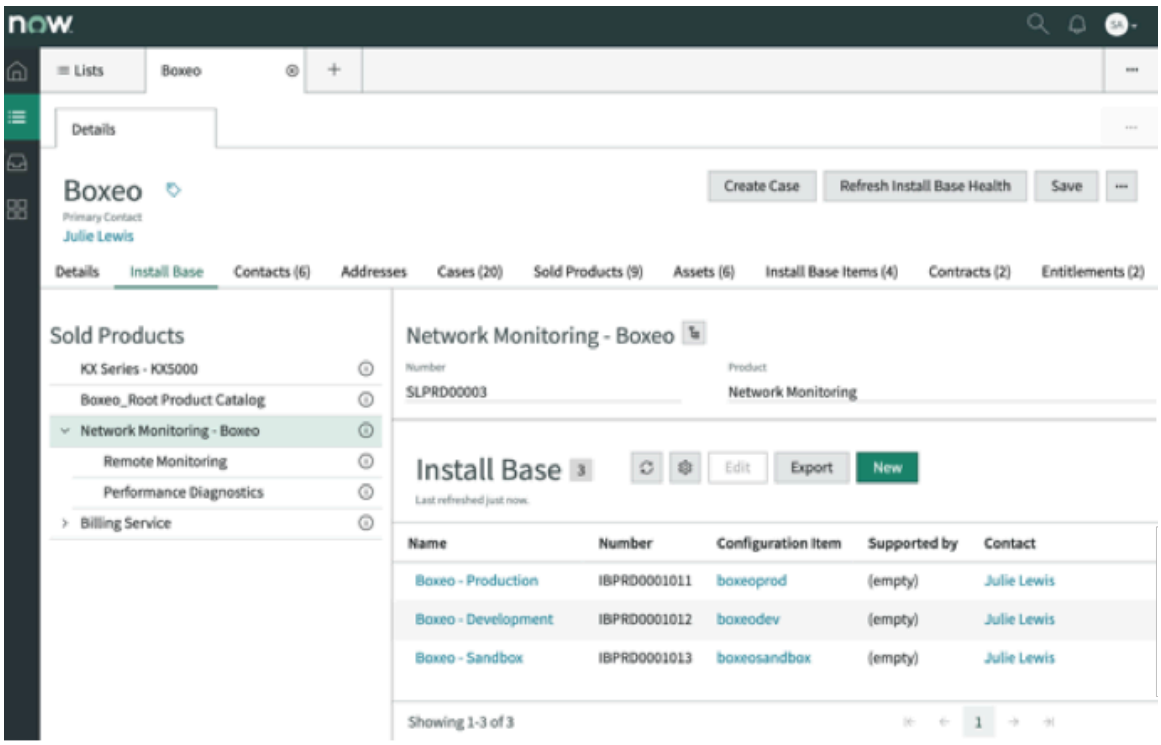
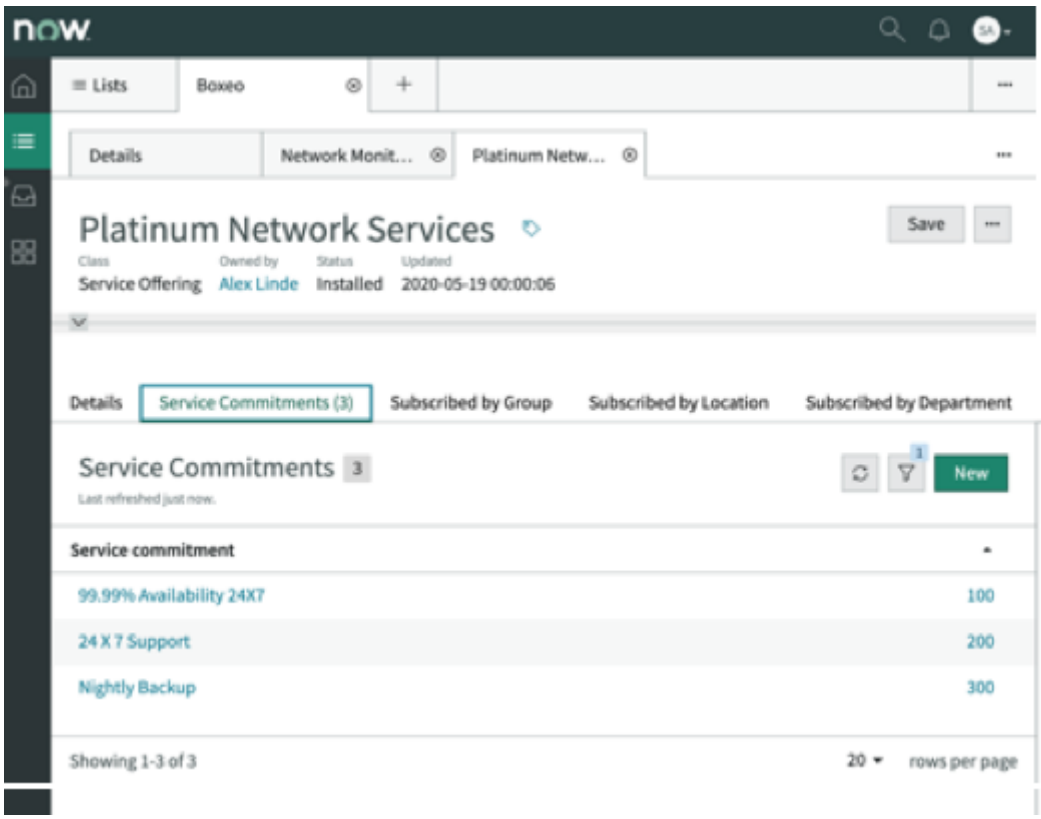
- View the products and services that the customer has purchased (Sold Product) and installed (Install Base).



- View the service offering associated with the sold product. The sold product references the service offering.



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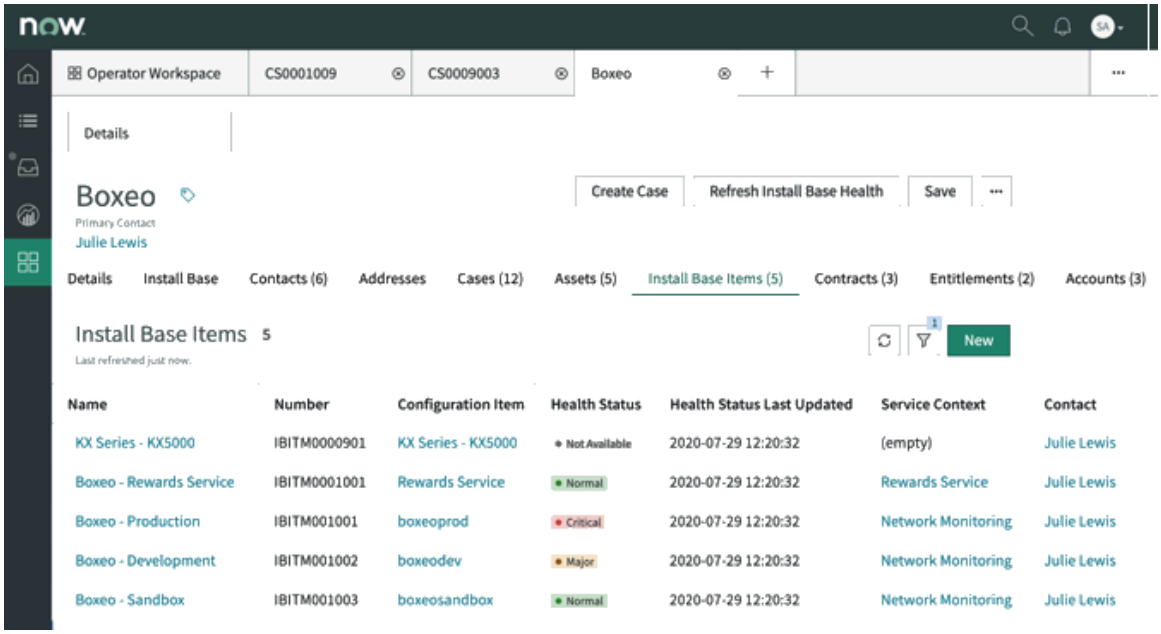
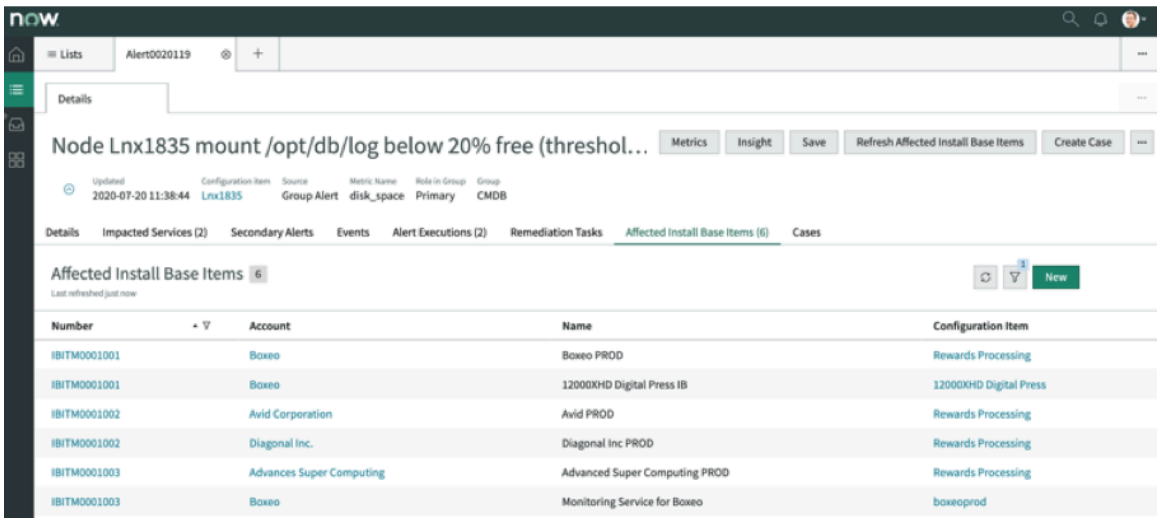
- View the health status of Install Base Items



NOC engineers can: View customers affected by a service issue and inform customer service. Specifically, they can perform the following operations:

- View the affected Install Base Items and add it to or remove it from an Account. The Install Base item references the application service (CI). The CI it depends on should be one of the CIs affected. The CI should also be referenced in the Alert to show that Install Base Item (and therefore the Account or Consumer) as affected.
- Create a proactive case from an alert and inform the customer service team of the service issue or outage.



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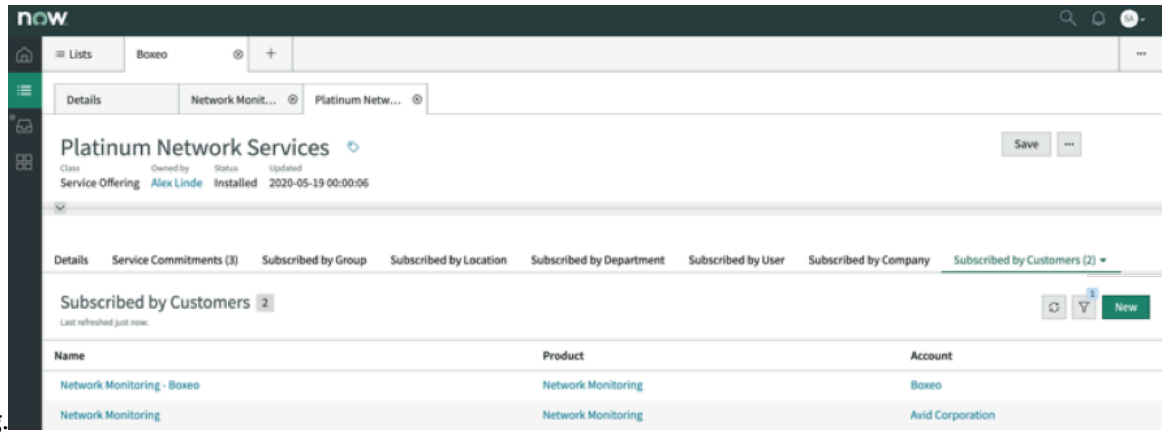
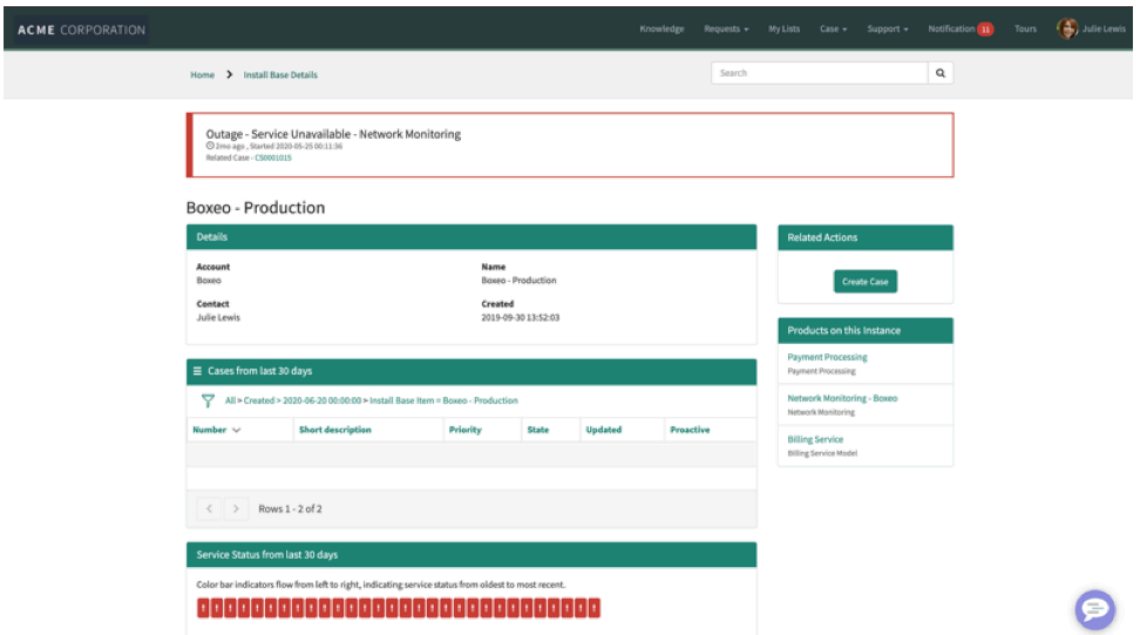
Service owners can: View the customers that are subscribed to a service offering.



Customers can:

- View the install base items and details.
- View outages and service issues.



- View products they have purchased.

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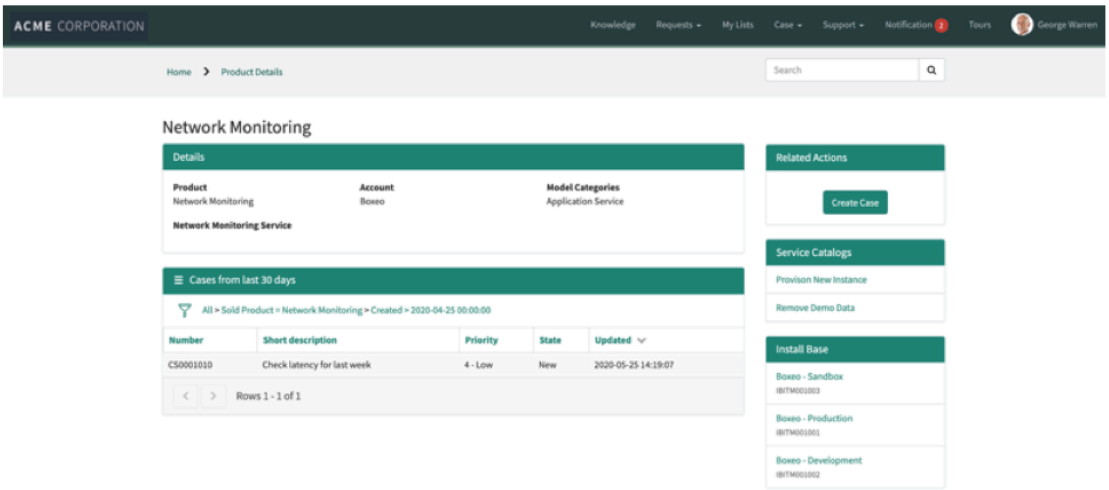
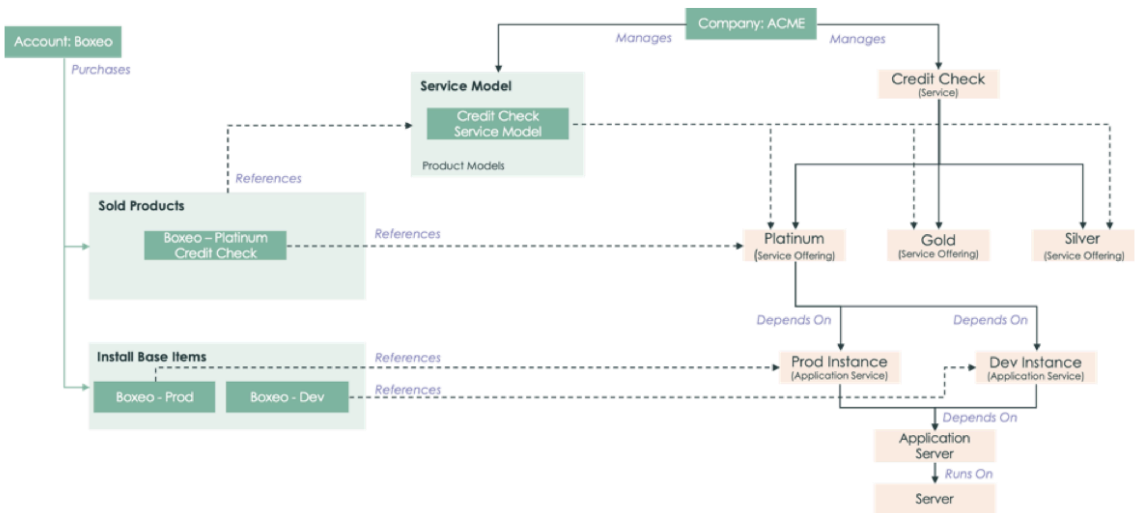
- Request services related to the products they've purchased.



Example CSM and CSDM use cases

Service with multiple packages

ACME offers a Credit Check Service to its enterprise customers. They can purchase the Platinum, Gold, or Silver offering.



Service with optional components

ACME offers a Billing Service to its enterprise customers. They can purchase the bundle or one or more of the component offerings (for example, invoices, payments, or discounts).

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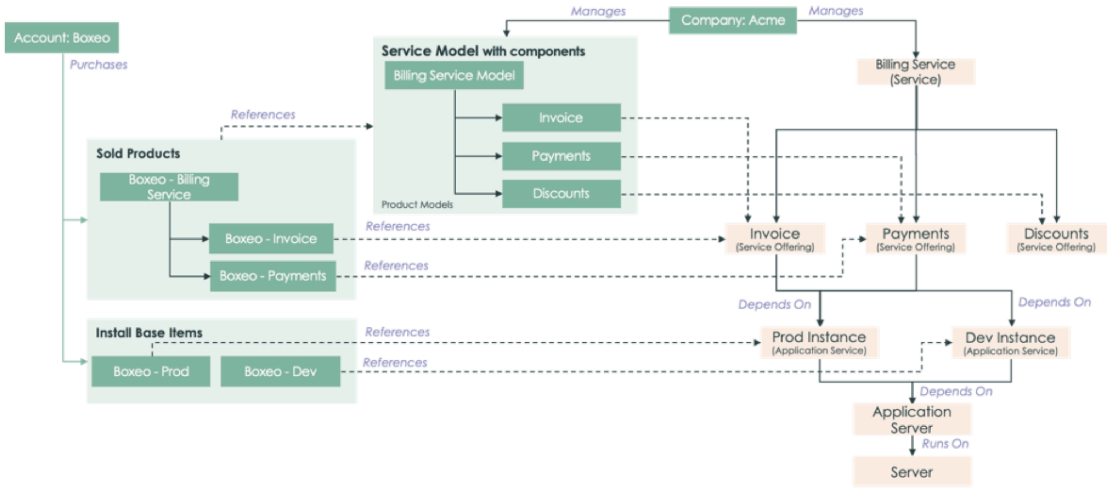
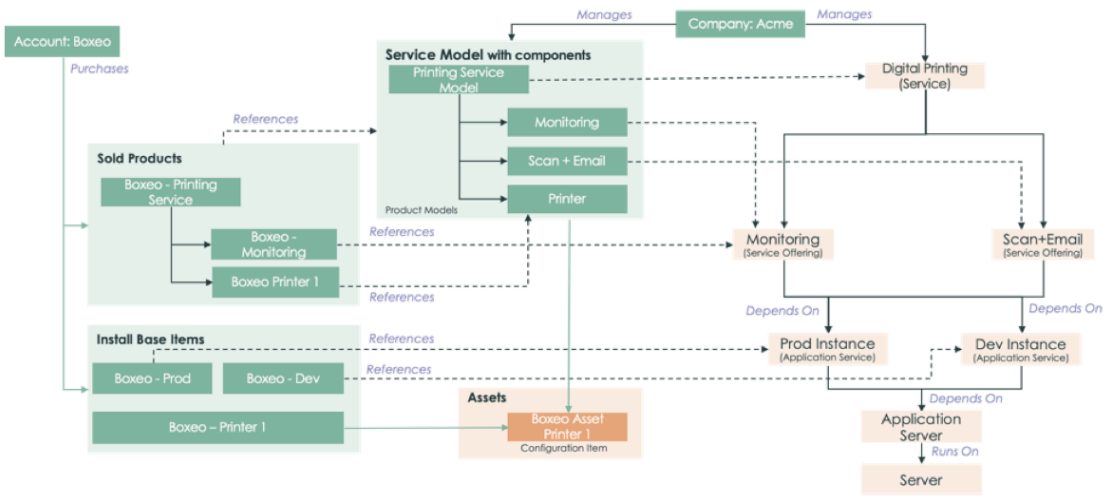


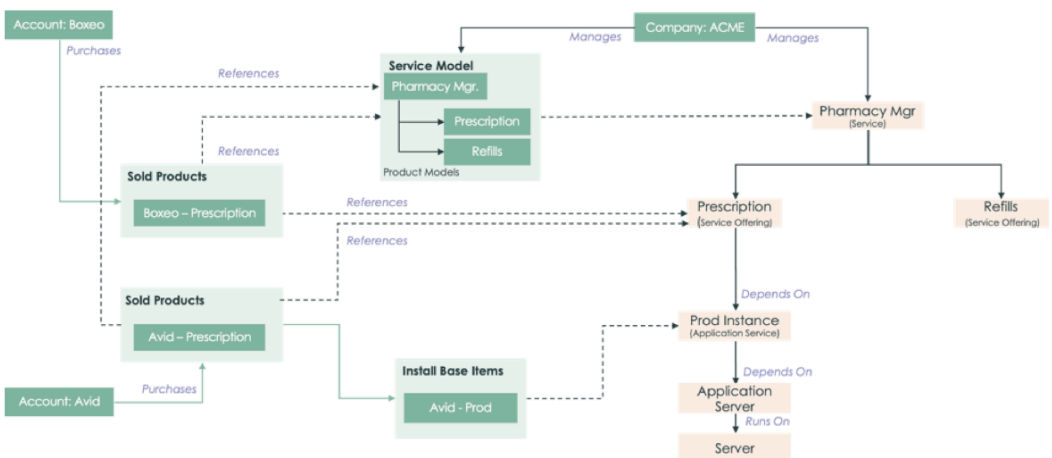
Service with a physical product

ACME offers a Digital Printing Solution. Customers can purchase either the bundle or the printer along with one more service offering (for example, Scan and Email Monitoring).



Service sold to multiple customers

ACME sells a Pharmacy Manager Service to two customers: Boxeo and Avid Inc.



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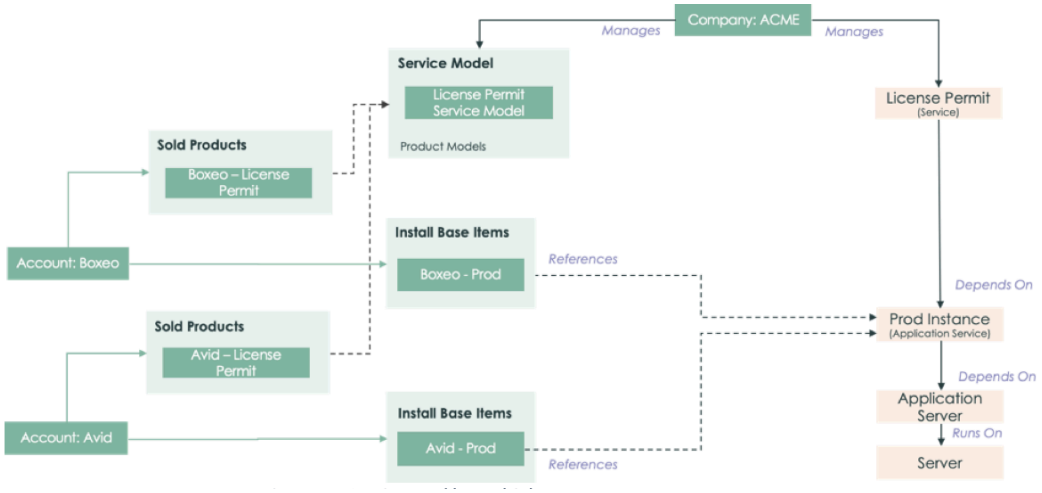
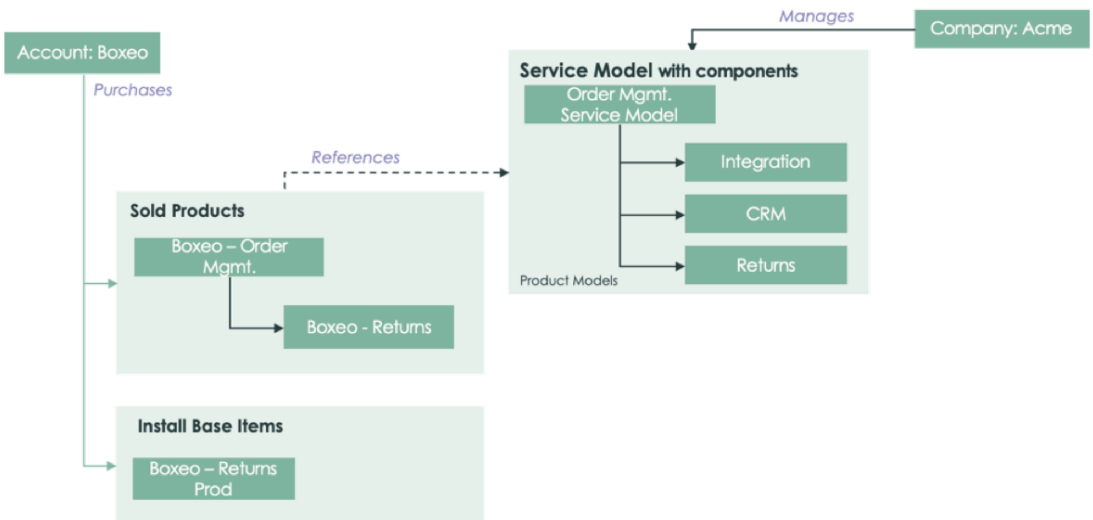
Service used by multiple customers

ACME deploys both Boxeo and Avid on the same production instance (multi-tenant model).



Service used on-premises

ACME offers an Order Management service. This purchase is tracked in the ServiceNow AI Platform but is used on-premises.



Additional information

For more information about the relevant CSM features and tasks, see the following topics:

Configure form views for Service Portfolio Management integration

View product information from the Customer Service Portal

Create a proactive case from an alert

Create a case for install base from the Customer Service homepage

Proactive Customer Service Operations

Service health status for install base

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Configure install base

Outage tracking for install base

View install base information from the Customer Service Portal

View install base information in Agent Workspace

View product information from the Customer Service Portal

View sold product information in Agent Workspace

Customer Service Management considerations

Consider these points while implementing the CSDM framework.

Considerations

- What is a Service-aware Install Base?

  A Service-aware Install Base enables companies to track the digital products and services in use. A Service-aware Install Base also tracks the relationships of the products and services to dependent services and CIs that affect their health.

- What are Proactive Customer Service Operations?

  Proactive Customer Service Operations bring CSM and Event Management together to enable companies to proactively trigger case workflows and notify the affected customers.

- Do I must purchase CSM Professional package to use the Service-aware Install Base?

  No. The Service-aware Install Base is included in the CSM base system.

- Can multiple sold products reference the same service offering?

  Yes. Multiple sold products (that is, Service Models) purchased by different companies can reference the same service offering. For example, multiple customers can purchase the same SaaS offering with the same service commitments.

- Can multiple Install Base Items reference the same application service?

  Yes. Multiple Install Base Items (either for the same account or for different accounts) can reference the same application service. For example, a multi-tenant SaaS offering where multiple customers (each with their own Install Base Item) are used on the same production instance (application service).

- When do I create an incident rather than a proactive case from an alert?

  Typically, some companies create an incident so that their NOC engineers can resolving the issue. After they determine that the issue impacts multiple customers, they also proactively create a major case and related child cases (one for each impacted customer) to notify the affected customers. Thus, the alert, incident, and case are all linked.

  Updates made by the resolving teams to the incident status or additional comments are reflected in the case. The customer service teams use these updates to keep customers informed.

  To meet the customer notification time requirements of the SLAs, companies may also automate creating incidents and cases from the alert. In addition, companies can also create a proactive case from the alert while the issue is being resolved.

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- What is the difference between entitlements managed at the CSDM Service Offering and the CSM Contracts and Entitlements?

  Service Commitments in CSDM define the expected level of a service. A service offering consists of a set of service commitments which uniquely define the service offerings. For example, a service offering may include a service commitment to perform a data backup each night.

  Service contracts in CSM store information about the type of support that is provided to a customer. A contract can include an account or consumer, a contact, and the specific assets that are covered. A contract can also include multiple service entitlements and SLAs. An entitlement defines the type of support that a customer receives, as well as the supported communication channels. For example, a customer may sign a service contract to receive support from 6:00 a.m. to 9:00 p.m. on weekdays.

- How can I request additional services based on the product that I've purchased?

  The relationship between the product model and the catalog items enables you to use the customer portal to request additional services for the products you've purchased. Multiple catalog items can be associated with a product model.

- Do I need elements from all the CSDM domains to set up CSM?

  No. The approach mentioned in this use case is based on the recommended guidelines and assumes you are in the Run or Fly stage of the CSDM implementation. See Implementing the CSDM framework in stages for more information.

  When you're implementing CSM, start with the tables in the CSDM Foundation domain and the CSM Customer Service domain. Using these domains enables you to leverage the capabilities included in CSM.

  To enable the proactive customer service operations, use tables from the CSDM Manage Technical Services domain for monitoring the application services tied to the customers' install base. Using this domain enables you to leverage the CSM and ITOM integration.

  Service-centric organizations can leverage the tables from the CSDM Sell/Consume domain to connect the product model to the service offerings and then to sold product. These connections enable you to track the service portfolio and see a complete view of how customers are consuming services.

Customer data

Customer data for Customer Service Management (CSM) consists of information about people who are not part of your organization, including accounts, contacts, consumers, and households.

Accounts

An account is a customer or a partner who sells to and supports other customers. Accounts can be customer accounts, partner accounts, or both, and their information is stored in the Account [customer_account] table.

There are two types of accounts: customer accounts and partner accounts.

- A partner is a supported external customer that sells to and supports other customers. A partner can report and manage cases on behalf of customers. A partner can also be a customer.
- An account can be a customer account, a partner account, or both. The **Customer** and **Partner** fields on the Account form denote the account type.

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Contacts

A contact is an employee of an account and can be associated with only one account. Contacts can have multiple assets and service contracts and can log in to the Customer Service Portal.

Contact information is stored in the Contact [customer_contact] table.

Consumers

A consumer is a customer in the business-to-consumer (B2C) business model and their information is stored in the Consumer [csm_consumer] table.

Households

A household is a group of consumers who live at the same address and share products and services. A household can have a designated head of household and multiple current members. The head of household has access to all of the cases and information for the other household members.

Household information is stored in the Household [csm_household] table.

Configure accounts and contacts

An account is a supported external customer and a contact is a user who is an employee of an account.

Before you begin

Role required: admin

About this task

There are two types of accounts: customer accounts and partner accounts. The **Customer** and **Partner** fields on the Account form denote the account type. An account can be a customer account, a partner account, or both.

A partner is a supported external customer that sells to and supports other customers. A partner can report and manage cases on behalf of customers. A partner can also be a customer.

Note:
After importing customer account data, you must also set the account code system property.

An account can have multiple contacts but a contact can be associated with only one account. A contact can have one or more associated assets and service contracts. A contact can also have a user ID and can log in to the customer portal.

Note:
A contact is a user in the system. If you create a contact, that person is also added to the User table (sys_user).

Procedure

- You can import existing accounts and contacts using guided setup.
- You can create new accounts and contacts using the Customer Service Management application.

Import accounts and contacts with guided setup

Use Customer Service Management guided setup to import existing accounts and contacts.

Before you begin

Role required: admin

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About this task

After importing customer account data, you must also set the account code system property.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Foundation Data category, click **Get Started**.
3. Click one of the following:
   - **Import Accounts**
   - **Import Contacts**
4. Upload data from an external data source into an import set.
5. Create a transform map.
6. Execute the transform map to transfer the data.
7. Verify that the data records are imported into the target table.

Account codes and account paths

An account code is a unique identifier for an account, while an account path establishes the account hierarchy.

Account codes

An account code is a unique key that identifies an account in a ServiceNow instance. This code is stored in the **Account Code** field on the Account form.

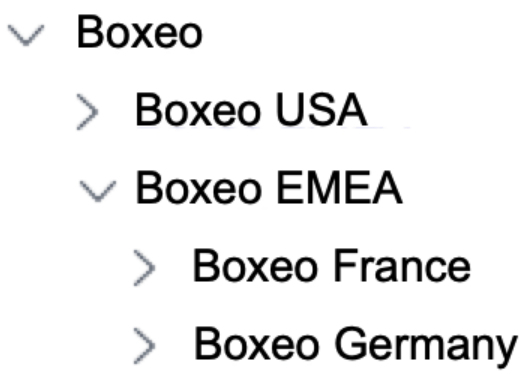
An account code must be unique. Attempting to insert a new record with previously existing account code in the Account [customer_account] table, the value for the code results in the following error:

```
java.sql.BatchUpdateException: Duplicate entry for key
account_path
```

Account paths

An account path establishes the hierarchy among different accounts. This path is stored in the **Account Path** on the Account form.

An account path is a combination of the account codes for each account in the hierarchy. For example, let's use the following accounts to demonstrate account



paths.

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Example of accounts to demonstrate account paths

Account	Account Code	Account Path
Boxeo	~~~~1	~~~~1 Boxeo is the parent company. The account path for Boxeo is the same as the account code, which indicates that it's the first element in the hierarchy.
Boxeo USA	~~~~2	~~~~1/~~~~2 Boxeo USA is a child company of Boxeo. The structure of the account path is interpreted as Boxeo/Boxeo USA.
Boxeo EMEA	~~~~3	~~~~1/~~~~3 Boxeo EMEA is also a child company of Boxeo and the structure of the account path is interpreted as Boxeo/Boxeo EMEA.
Boxeo France	~~~~5	~~~~1/~~~~3/~~~~5 Boxeo France is a child company of Boxeo EMEA. The structure of this account path is interpreted as Boxeo/Boxeo EMEA/Boxeo France.

Importing account records

If you create your account records by importing the data from some source system through a transform map, make sure you execute the business rules. The Account Path is added, updated, and deleted based on the insertion, updating, and deletion of records in the Account [customer_account] table through the business rules. If the business rules are not executed, it can result in empty account paths, which can then result in data access issues.

Note:
If you do not execute the business rules during import, run the script in the **Update account path** business rule for the newly imported records to set the account paths correctly.

Set the account code property

After importing customer account information, update the *com.snc.cs_base.last.generated.code.tree.path* property with the correct account code value.

Before you begin

Role required: admin

About this task

The *com.snc.cs_base.last.generated.code.tree.path* system property stores the **Account Code** value for the most recently created customer account in the Account (customer_account) table.

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When you create a new customer account record, the system uses this property to determine a unique account code value for the account. The property is then updated with this latest assigned value so that the next account code value can be set as a unique value for the next account record insert.

The value of the *com.snc.cs_base.last.generated.code.tree.path* property must match the value of the Account Code field for the last inserted customer account record. When you create customer account records by importing data from other sources or instances, these values can get out of sync. If these values do not match, the system generates an error upon creation of the next new record in the Account table:

```
java.sql.BatchUpdateException: Duplicate entry for key
account_path
```

Use the steps below to fix this error.

Procedure

1. Determine the account code for the last created account.
2. Navigate to the System Property [sys_properties] table.
3. Set the *com.snc.cs_base.last.generated.code.tree.path* property to the value determined in step 1.

Create customer accounts

An account is a supported external customer. Use the Customer Service Management application to create account records.

Before you begin

Role required: sn_customerservice_manager or admin

About this task

There are two types of accounts: customer accounts and partner accounts. The **Customer** and **Partner** fields on the Account form denote the account type. An account can be a customer account, a partner account, or both.

A partner is a supported external customer that sells to and supports other customers. A partner can report and manage cases on behalf of customers. A partner can also be a customer.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** and click one of the following actions:
   - To create a customer account, click **Accounts**.
   - To create a partner account, click **Partners**.
2. Click **New** and fill in the fields on the Account form.
   When a new customer account record is created, the system uses the *com.snc.cs_base.last.generated.code.tree.path* system property to determine a unique account code value for the account. The property is then updated with this latest assigned value so that the next account code value can be set as a unique value for the next account record insert.

   Note:
   If this property is reset to the original value, the system attempts to create new accounts with account codes that are already in use, which can result in an invalid insert.

3. Click **Submit**.

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Create additional account addresses

An account can have multiple addresses, such as a main address as well as shipping and billing addresses.

Before you begin
Role required: sn_customerservice_manager or admin

About this task
The main address for an account is stored in fields on the Account form. Shipping and billing addresses for an account are created and stored in the **Addresses** related list. An account can have multiple shipping and billing addresses.

Procedure
1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts**.
2. Click the number of the desired account.
3. In the **Addresses** related list, click **New**.
4. Fill in the fields on the Location form.
5. Select an address type, either **Billing** or **Shipping**.
6. **Optional:** Enable the **Primary** field.
   If you have multiple billing or shipping addresses, use this field to designate one as the primary address.
7. Click **Submit**.

Create customer contacts

A contact is a user who is an employee of an account. Use the Customer Service Management application to create contact records.

Before you begin
Role required: sn_customerservice_manager or admin

About this task
An account can have multiple contacts but a contact can be associated with only one account. A contact can have one or more associated assets and service contracts. A contact can also have a user ID and can log in to the customer portal.

Note:
A contact is a user in the system. If you create a contact, that person is also added to the User table (sys_user).

Procedure
1. Navigate to **All** > **Customer Service** > **Customer** > **Contacts**.
2. Click **New** and fill in the fields on the Contact form.
3. Enter the contact information, such as the name, email address, and phone number.
4. Enter the name of the contact's company in the **Account** field.
5. Select the **Timezone**.
6. Select a **Language**.
7. Select a **Notification** setting.

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8. Click **Submit**.
   After a registration request is approved, the customer contact receives an email with a user ID and temporary password. When logging in for the first time, the contact is asked to change the password.

Create customer relationships

The Customer Service Management application provides the ability to establish different types of relationships between partners, customers, and contacts.

These relationships make account and asset management easy and flexible. The table below describes the available customer relationships.

Customer relationships

Relationship	Description	Benefit
Bi-directional account relationship	Create a relationship between: • A partner account and a customer account. • Two customer accounts. A bi-directional account relationship is created using a defined account relationship type.	An account relationship allows partner account contacts with the partner role or the partner administrator role to create and manage cases for their partner account.
Account hierarchy	Create a parent-child relationship between accounts.	An account hierarchy allows an account contact with the customer administrator role to manage the child accounts.
Contact relationship	Add a contact from a third account to either of the accounts in an account relationship.	A contact relationship allows a contact with the customer role or customer administrator role to manage the account for which the contact relationship has been established.

Account hierarchy

Use the account hierarchy feature to create a parent-child relationship between accounts.

An account hierarchy represents the legal entity structure of the accounts and their relationships. It also represents an account's customers, assets, and service entitlements.

Customer administrators can do the following for all of the accounts in the hierarchy:

- View and create cases.
- View assets and users.
- View and manage contacts.

The system administrator defines the hierarchy between accounts on the Account form. From the Account form for the child account, select the parent in the **Parent Account** field. If this field is not filled in, the account is a top-level account.

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After the account hierarchy has been defined, it is displayed on the Account form for the parent account. If a parent account is updated or deleted, the hierarchy for any child accounts is also updated.

View the account hierarchy

The account hierarchy uses a tree structure to show the parent, child, and sibling accounts. Two different views of the account hierarchy are available. In both views, the current account is highlighted in the account structure.

- The parent view displays the current account, the parent account (if applicable), and any child or sibling accounts.
- The full view displays the entire structure of the organization from the root account.

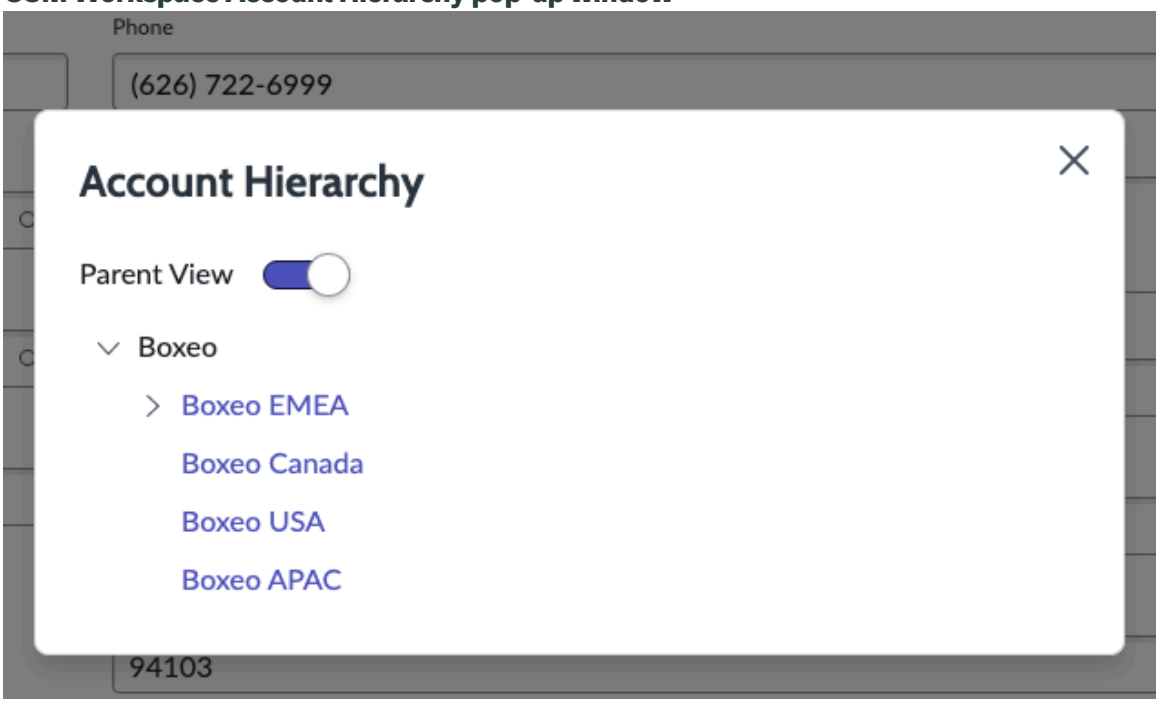
Customer service agents can:

- Expand and collapse the tree structure.
- Switch between the parent view and the full view.
- Click an account to open the related Account form.

Account hierarchy in CSM Agent Workspace

From the Account form, customer service agents can click the open hierarchy icon ( ) in the **Name** field to see the parent-child account relationships in the Account Hierarchy pop-up window. The account hierarchy is available for accounts that have a parent or child account.

CSM Workspace Account Hierarchy pop-up window



Account hierarchy in the platform interface

Customer service agents can view account information in the Account Hierarchy section on the Account form.

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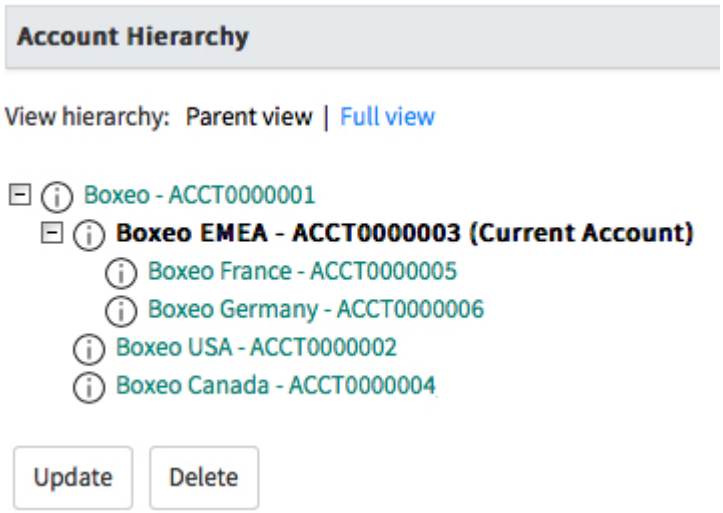
Account hierarchy (platform interface)



Create an account hierarchy

Create a parent-child relationship between two accounts.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts**.
2. Select the desired child account.
3. Select the parent for this account in the **Parent Account** field.
4. Click **Update**.
   The account hierarchy is displayed in a tree map on the Account form for the parent account.

Bi-directional account relationships

A bi-directional account relationship is a relationship that exists between two accounts. You can create account relationships between two customer accounts or between a partner account and a customer account.

A bi-directional account relationship is based on a defined account relationship type. Creating a bi-directional account relationship is a two-step process that involves:

- Defining the types of relationships that exist between your partners and customers.
- Using these relationship types to create relationship records between selected accounts.

You can view relationship records on the Account form for either account in the relationship. These records are stored in the **Account Relationships** related list.

For relationships between a partner account and a customer account, partner account contacts with the partner role or the partner administrator role can create and manage cases for their customer accounts.

Account relationship types

An account relationship type defines a relationship that can exist between accounts. Users with the system administrator role can define the following account relationship types:

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- Account to account
- Partner to account

When creating an account relationship type, you define the following information on the Account Relationship Type form:

- The type of **source** account (account or partner).
- The type of **target** account (account or partner).
- The relationship between the source account and the target account.
- The reverse relationship between the source account and the target account.

Account Relationship Type form

Note:
One default account relationship type is provided for partner accounts.

Account relationship records

Once an account relationship type has been defined, users with the customer service manager role can use it to create relationship between specific accounts or partners. An account relationship record includes the following information:

- A source account, selected in the **Account From** field.
- A target account, selected in the **Account To** field.
- The account relationship type that this relationship record is based on.
- The relationship and the reverse relationship of the selected accounts.

View a relationship record from either account:

- The relationship (**Account From** > **Account To**) appears in the **Account Relationships** related list on the source account record.
- The reverse relationship (**Account To** > **Account From**) appears in the **Account Relationships** related list on the target account record.

Select the account relationship record from either account to see the Account Relationship form.

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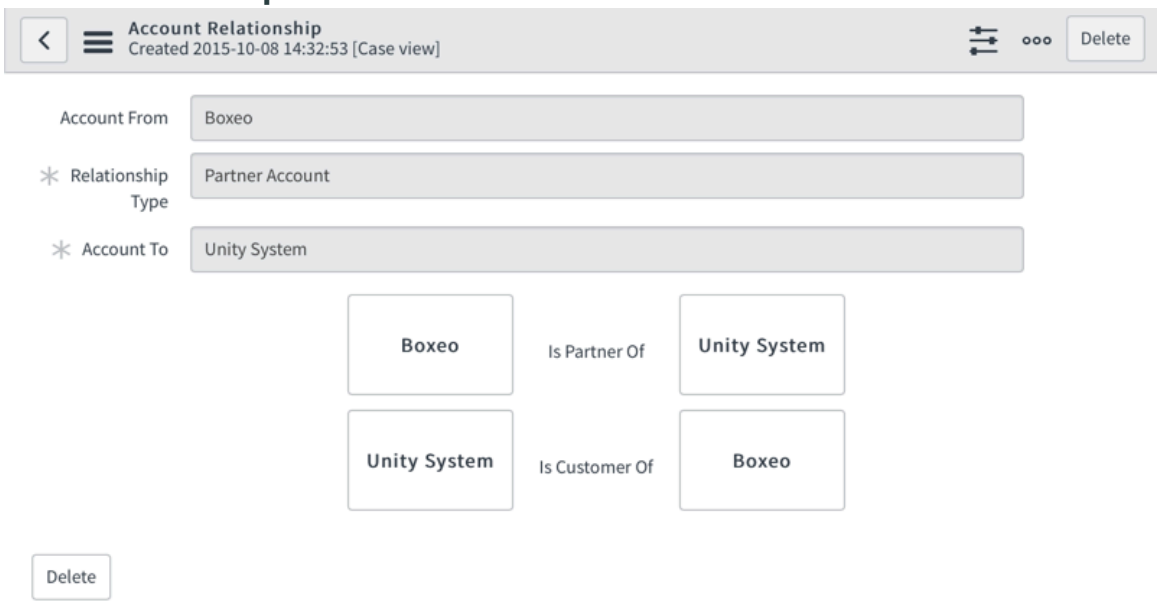
Account Relationship form



You can also view account relationship records that use a specific account relationship type. This information appears as a related list on the Account Relationship Type form. This list shows the source account (**Account From** field) and the target account (**Account To** field) for each account relationship record.

Create an account relationship type

Create an account relationship type by defining the types of source and target accounts and providing a name for the relationship between these accounts.

Before you begin

Role required: admin

About this task

Use the steps below to create an account relationship type.

You can edit an existing account relationship type by changing the types of source and target accounts and the name of the relationship that exists between these accounts. If that account relationship type is currently being used by any account relationship records, the **Relationship** and **Reverse relationship** fields in those records are automatically updated.

You can also delete an existing account relationship type.

- If there are no account relationship records that use the account relationship type, then it is simply deleted.
- If there are active account relationship records that use the account relationship type, an attempt to delete that relationship type results in a warning message. Deleting an account relationship type also deletes the relationship records based on that type.

Account relationship types can be set to inactive at any time.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Account Relationship Types**.
2. Click **New**.
3. Fill in the fields on the Account Relationship Type form.

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Account Relationship Type form fields

Field	Definition
Relationship type	A unique name that identifies the type of relationship. For example, Service Provider.
From	The type of source account for this relationship type; can be either an account or a partner.
Relationship	A text field where you can name the relationship from the source account to the target account. For example, Service provider for.
To	The type of target account for this relationship type; can be either an account or a partner.
Reverse relationship	A text field where you can name the reverse relationship from the target account to the source account. For example, Customer of.
Active	Sets the account relationship type as active or inactive. Active account relationship types can be used to create account relationship records. An account relationship type can be set to inactive at any time.

4. Click **Submit**.
   The new account relationship type appears on the Account Relationship Types list.

Create an account relationship record

Create an account relationship record by selecting the account relationship type and then selecting the accounts involved in the relationship.

Before you begin
Role required: sn_customerservice_manager or admin

About this task
The system administrator can create a relationship record for an account from the **Account Relationships** related list on the Account Relationship Type form.

The customer service manager and the system administrator can create a relationship record for an account from the **Account Relationships** related list on the account or partner record.

Deleting a relationship record for an account also deletes the reverse relationship record.

Note:
Deleting a relationship record does not have any impact on customer service cases that refer to the relationship record.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** or **Partners**.
2. Select an account.
3. From the **Account Relationships** related list, select **New**.
4. Fill in the fields on the Account Relationship form.

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Account Relationship form fields

Field	Definition
Account From	The source account for this relationship. If you are creating the relationship from an account or partner record, this field is automatically filled in; otherwise, make a selection from the Accounts list.
Relationship Type	Select the account relationship type for this record. If you are creating the record from an Account Relationship Type form, this field is automatically filled in. Otherwise, make a selection from the Account Relationship Types list, which shows all active account relationship types.
Account To	The target account for this relationship.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.

   Once a relationship record has been created, it appears in two places:

   - The relationship appears in the **Account Relationships** related list on the source account record.
   - The reverse relationship appears in the **Account Relationships** related list on the target account record.

Contact relationships

You can add a contact from one account to another account by using a contact relationship in the Customer Service Management (CSM) application. By using contact relationships, you can perform actions on behalf of the accounts that you established a contact relationship with.

Overview of contact relationship

A contact is a user who serves as an employee of an account. To associate a contact with additional accounts, contact relationships are used. These contact relationships enable a contact with the customer role or customer administrator role to manage the account that you established a contact relationship with. These contacts can view the information and perform actions on behalf of the accounts, such as creating or updating cases from the customer portal.

Related topics

Configuring a contact relationship

Create a contact relationship for an account

Contact Relationship form

Configuring a contact relationship

You can configure a contact relationship to establish a relationship between an account and a contact in the Customer Service Management (CSM) application.

Configuring the contacts to be associated with an account

When you create a contact relationship, you select a user from the **Contact** field. This field displays the contacts from:

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- All accounts in the account relationship
- All accounts in the account hierarchy
- All accounts, if the *sn_customerservice.contact_relationship.restrict_within_account_hierarchy* system property is set to **false**. However, when the *sn_customerservice.contact_relationship.restrict_within_account_hierarchy* system property is set to **true**, only the contacts within the account hierarchy and account relationship are displayed.

Note:
By default, the *sn_customerservice.contact_relationship.restrict_within_account_hierarch* system property is set to **true**.

If you're a customer service manager (sn_customerservice_manager), you can create, update, delete, and view the list of contact relationships for an account. If you're a customer service manager (sn_customerservice_manager) or a customer service agent (sn_customerservice_agent), you can view a list of the contact relationships for an account.

When you select a responsibility for the contact, the responsibilities that are available are those responsibility definitions that are created with a type of **Contact**.

Note:
A contact can only be assigned with one responsibility per account.

Configuring multiple contact relationships per account for a contact

Before the Vancouver release, configuring multiple contact relationships for a contact with an account wasn't enabled. The database-level unique index `company_contact` can be turned off only by the administrators.

Starting with the Vancouver release, the Customer Service Management (CSM) application replaced the unique index and introduced the **Prevent duplicate for account-contact** business rule. This business rule enables administrators to disable the restriction of a unique index combination in the contact relationship by setting the **Active** flag to **False**. As a result, an administrator can assign multiple responsibilities per account for a contact.

Create a contact relationship for an account

Create a contact relationship for an account by selecting a contact and then assigning a responsibility to that contact in the Customer Service Management (CSM) application. Through this relationship, a contact can effectively manage the accounts and can execute actions on behalf of the associated accounts.

Before you begin
Role required: sn_customerservice_manager or admin

About this task
Starting with the Yokohama release, Customer Service Management (CSM) introduced the `Prevent duplicate for account-contact`business rule. By using this business rule, an administrator can assign multiple responsibilities per account for a contact.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** or **Partners**.
2. Select an account.

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3. In the Contact Relationships related list, select **New**.
4. On the form, fill in the fields.

Contact Relationship form fields

Field	Definition
Account	The account to which the contact is assigned. This field is automatically filled in.
Contact	The customer contact selected to fulfill the role or responsibility. The Contacts list includes contacts from any related partner or account as well as contacts from the account hierarchy.
Type	Defines the label for the relationship with the selected user. You can select the type from the list of related party configurations. **Note:** Starting with the Yokohama release, the **Type** field is added to the Contact Relationship form. For more information on how to populate the **Type** field for existing data, see Populate the Type field in relationship tables using the fix script.
Responsibility	Role or responsibility selected for this customer contact. **Note:** As part of creating a responsibility definition, the admin can specify if the responsibility is unique. If so, the responsibility can only be assigned to one contact per account. For more information, see Create account teams.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   The contact name, account, and responsibility are added to the Contact Relationships related list.

Creating an account team

Create an account team that is made up of both employees and customer contacts who fulfill the jobs or roles for a particular account in the Customer Service Management (CSM) application. By defining the responsibilities or roles for your team and customer contacts, you make sure that your account team has the roles and functions to support your customer accounts.

If you have the admin role, you can create an account team by using a responsibility definition. By defining the responsibilities that you need for this account team, you create the relationships between the different entities like the accounts, contacts, and more.

You can create two types of responsibility definitions. You can create a definition for an employee and a definition for a contact.

Note:
If you have the admin role, you can also delete the definitions that are no longer used. A definition can only be deleted if it has no entries.

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After these definitions or roles, are created, the sn_customerservice_manager can use these roles to do the following tasks:

- Build an account team by selecting an account, selecting a role, and then assigning a role to an employee.
- Add a contact relationship to an account by selecting an account, selecting a role, and then assigning a role to a contact.

The users who have been assigned to this role are displayed in the Account Team Members related list on the Responsibility Definition form. For more information, see the following topics:

- Create a responsibility definition
- Configure access through the responsibility access configuration

Assign a team member to an account

Assign a team member to an account by selecting an employee and their role or responsibility in the Customer Service Management (CSM) application. When you assign a team member to an account with account manager responsibility, they can view the information and perform actions on behalf of the accounts, such as creating or updating cases from the customer portal.

Before you begin

Role required: sn_customerservice_manager or admin

Note:
CSM Contributor User (com.snc.csm_contributor_user) plugin must be installed.

About this task

If you're the system administrator, you can assign a team member to an account from the Account Team Members related list on the Responsibility Definition form.

If you're the customer service manager, you can assign a team member to an account from the Account Team Members related list on the account or partner record.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** or **Partners**.
2. Select an account.
3. From the Account Team Members related list, select **New**.
   The account team member must have sn_customerservice.relationship_contributor role.
4. On the form, fill in the fields.

Account Team Member form fields

Field	Definition
Account	Account that the user is assigned to. If you're assigning a user from an account or partner record, this field is automatically filled in. If not, you can select an account from the Accounts list.
User	Employee selected to fulfill the role or responsibility.

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Field	Definition
	Note: Starting with the Vancouver release, the Service Organization External Staff [sn_csm_service_organization_external_staff] can be added as Account Relationship Managers through Account Team Members (Account Staff Relationships).
Type	Defines the label for the relationship with the selected user. You can select the type from the list of related party configurations. **Note:** Starting with the Yokohama release, the **Type** field is added to the Account Team Member form. For more information on how to populate the **Type** field for existing data, see Populate the Type field in relationship tables using the fix script.
Responsibility	Role or responsibility selected for this employee.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.

Enhanced address data model for accounts

Define addresses once and reuse them within an account hierarchy, or across account hierarchies.

Businesses often must share addresses between accounts, within an account hierarchy, or across hierarchies. An enhanced address data model makes it possible to link a location with multiple accounts without creating multiple location records.

The enhanced address data model maintains the relationship between accounts and addresses in a new table. By default, this feature is enabled for the new customer service management (CSM) customers. However, it is optional for upgrade customers.

Related topics

- Account Address table
- Enable enhanced address model for accounts
- Associate an address to an account
- Reusing addresses between multiple accounts

Account Address table

Avoid duplication of address records by using the Account Address table.

The Account Address [account_address_relationship] table maintains the relationship between an address and the accounts that use that address.

The Account Address table eliminates the need to duplicate address records that need to be reused across multiple accounts. The Account Address table provides details like the name and the location of the account. The table also provides information on the type of account address, and whether the account is primary or not.

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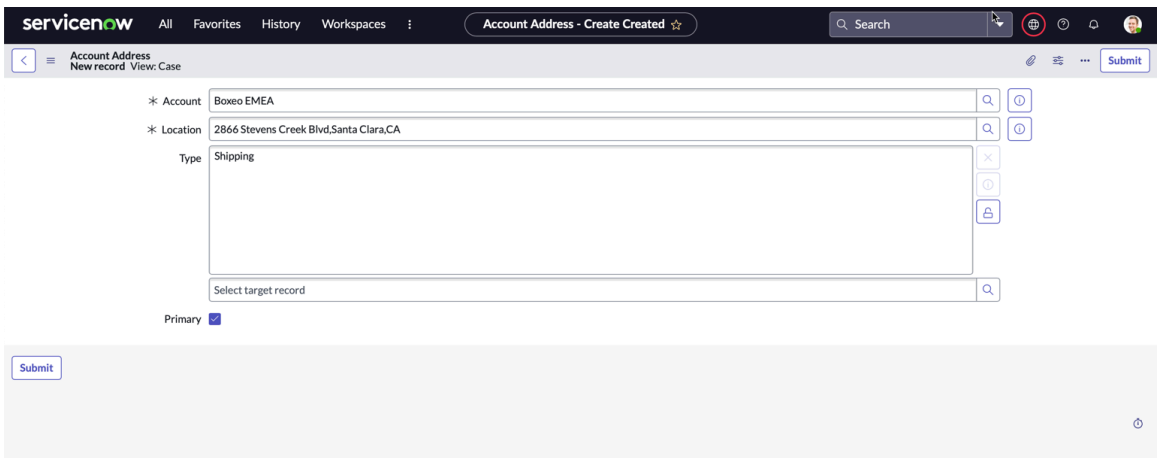
The Account Address table is available for use when the Enhanced address data model for accounts feature is enabled. For more information on enabling the feature and configuring the Account Address table, see Enable enhanced address model for accounts. When address sharing is enabled, Account address related list is visible on the account and location forms.

Account address table

Field	Description
Location	The location or address associated with the account. **Note:** Starting with the Tokyo release, the location form is a two-column layout, as opposed to the single column layout in previous releases.
Account	The name associated with the account.
Primary	An account can only have one primary address.
Type	The type of account address, whether Billing, Shipping or Mailing.

Account Address form



Related topics

Enable enhanced address model for accounts

Associate an address to an account

Enable enhanced address model for accounts

Use the Account Address table in the enhanced address data model feature to link a location with multiple accounts without creating duplicate location records.

Before you begin

Role required: admin

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Procedure

1. Take a backup of the location data associated with accounts from the Location [cmn_location] table.
2. Create the custom relationship fields in the Account Address [account_address_relationship] table if they have already been created in the Location table.
   The newly created fields in the Account Address table must have the same name and type as the fields in the Location table. The base system provides two relationship fields.
   - **Type**
   - **primary**

   These relationship fields are created in the Account Address [account_address_relationship] table. For more information on creating fields within a table, see Add and customize a field in a table.
3. Update the custom code that references the Account Address table.
   The custom code can include elements that fetch the address of accounts in the Account Address table. Such elements can be reference qualifiers, script includes, business rules, and ACLs referencing to the Location table.
4. Move the account-related data from the Location table to the Account Address table.
5. Run the following migration script.

```
var customRelationshipFields = []; //Add custom relationship
 fields (if any).
var account = ""; //You must specify the sys_id of the account
 if you wish to migrate location data for that account (mostly
 to be used during re-run).
var migrateChildAccountLocations = false; // This value must be
 set to true if you wish to migrate the locations of the child
 accounts associated with the specified account (mostly to be
 used during re-run).
new
 sn_cs_base.CSDataFix().migrateLocationDataToAccountAddress(cus
tomRelationshipFields, account, migrateChildAccountLocations);
```

   Performing a rerun of the script if there's a difference between the number of records that must be migrated and the number of records already migrated. In the event of a rerun, already migrated locations won't be migrated again. To rerun migration for already migrated locations, delete the corresponding records in the account address table.
6. Avoid accidental data entry by deactivating the Account and Custom Relationship fields from the Location table.

   Note:
   You must not deactivate Type and Primary attributes.

   This deactivation removes the Account and the Custom Relationship fields from the location-related forms, lists, and related lists.
7. Set the system property *enable_account_address_sharing* to true.
   This property enables the enhanced address data models for accounts. The Account Addresses related list is displayed on the account and location form.

Associate an address to an account

Users can associate addresses to an account using the Account address related list on the account form or the location form.

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Before you begin
Role required: admin

Procedure

1. Associate an address to an account from either the account form or the location form.
   - To associate an address to an account from the account form, navigate to **All** > **Customer Service** > **Accounts**.
   - To associate an address to an account from the location form, select **All** > **Customer Service** > **Locations**.
2. Select an account from the list of existing accounts.
3. Navigate to **Related List** > **Account addresses** and click **New**.
4. Fill the details in account address form and select **Submit**.
   For more information about the table fields, see Account Address table.

Reusing addresses between multiple accounts

Users can reuse the same addresses between multiple account records.

Users can reuse the same address between multiple accounts within the account hierarchy or between non-related accounts. Use the account hierarchy feature to create a parent-child relationship between accounts.

To allow address sharing between accounts in the account hierarchy, see Address sharing through account hierarchy.

To share addresses between non-related accounts, see Share an address through non-related accounts.

Address sharing through account hierarchy

Users can reuse the same address between multiple accounts within the account hierarchy.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Accounts**.
2. Select an account and navigate to **Related List**> **Account Addresses**.
3. Select **New**.
4. See all the locations associated with the selected account in the account hierarchy by selecting the search icon next to the **Location** field.

   Note:
   The **Account** field is already populated with the name of the account.

5. In the Locations pop up, select the location that you want to reuse.

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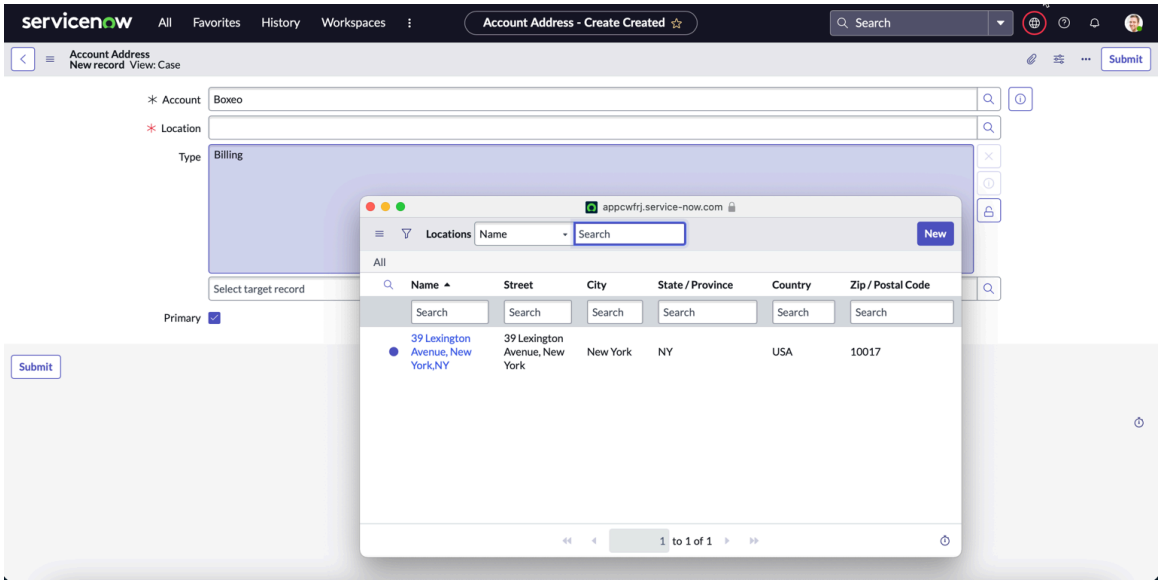

6. Select **Submit**.

Related topics

Reusing addresses between multiple accounts

Share an address through non-related accounts

Share an address through non-related accounts

Enable users to reuse the same address between multiple non-related accounts. Users can share an address between multiple accounts by using the **Location** field on the Account Address form.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Accounts**.
2. Select an account and navigate to **Related List**> **Account Addresses**.
3. Select **New**.
4. Select the search icon next to the **Location** field.
5. From the pop-up, select a location that you want to reuse.

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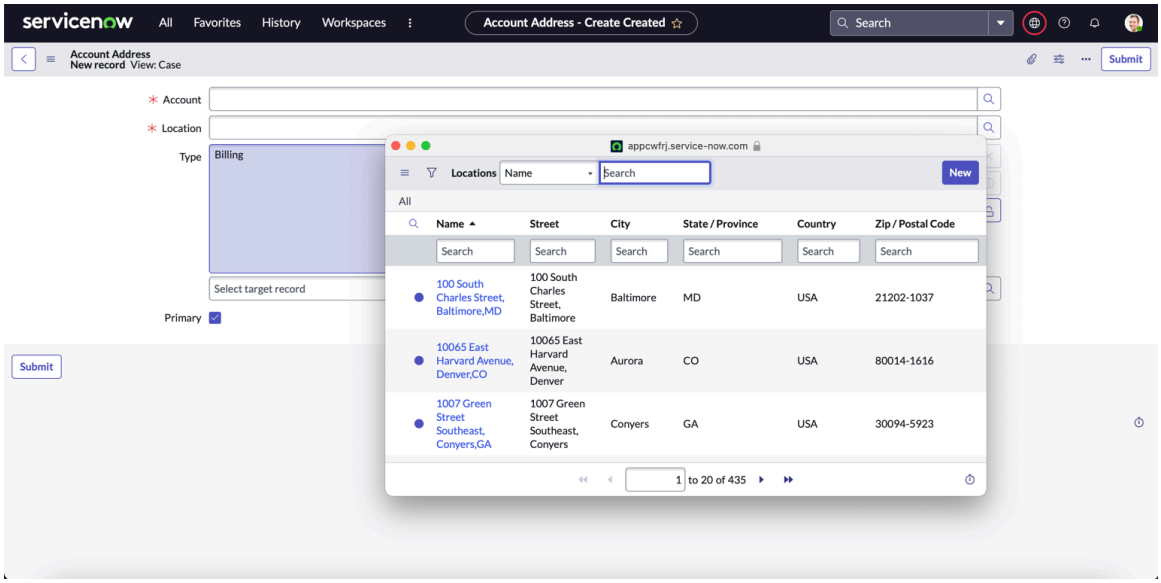
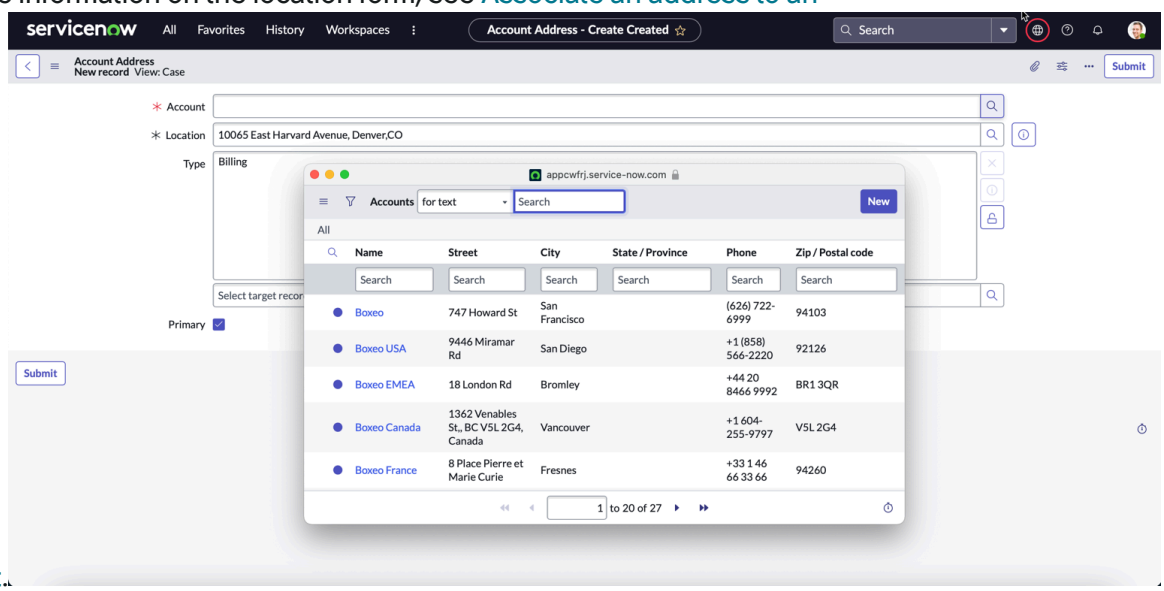


6. Click the search icon next to the **Account** field.
7. Choose the account for which you want to reuse the address.

Note:
You can reuse addresses through non-related accounts from the location form. For more information on the location form, see Associate an address to an account.



Related topics

Reusing addresses between multiple accounts

Address sharing through account hierarchy

Deleting or editing an address on the location form

As a user, you can edit or delete an existing record in the account address table without affecting any other associated records.

Assume that a user is trying to edit the fields of the location or trying to delete a location record. If the location record is being shared with multiple accounts, a confirmation pop-up is shown. The pop-up enables the user to proceed with the action or discard the action.

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To delete an address in the location table, select **Delete** from the location form or from the location list.

To edit a location form, select **Edit**.

Data migration from Location to Account Address table

Migrate your data from the Location table to the Account Address table.

Migrate data by following the steps provided in the Customer Service Guided Setup.

To access the Guided Setup, navigate to **Customer Service** > **Administration** > **Guided Setup** > **Foundation Data** > **Enable Enhanced Address Data Model for Accounts**.

Note:
Review step 4 within the Enable enhanced address model for accounts to get details on how to migrate data.

Domain separation for the Account Address table

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

All account address table records are present in the domain of the associated account.

Note:
Any location record is originally created in the global domain. However, when the location record is associated with an account, the location record is automatically added to the account's domain. Associating the same location to multiple accounts does not change the domain of the location.

Configure consumers

A consumer is a customer in the business-to-consumer (B2C) business model.

Before you begin
Role required: admin

About this task
Consumers can have multiple addresses, one of which is the primary address.

Procedure

- You can import existing consumers using a guided setup.
- You can create consumers using the Customer Service Management application.

Import consumers with guided setup

Use Customer Service Management guided setup to import existing consumers.

Before you begin
Role required: admin

About this task
Consumers can have multiple addresses, one of which is the primary address.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**
2. In the Foundation Data category, click **Get Started** and then click **Import Consumers (B2C)**.

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3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create consumers

A consumer is a customer in the business-to-consumer (B2C) business model. Use the Customer Service Management application to create consumer records.

Before you begin

Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

About this task

Consumers can have multiple addresses, one of which is the primary address.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Click **New** and fill in the fields on the Consumer form.
3. Enter the consumer information, such as the name, email address, and phone numbers.
4. Fill in the fields on the Primary Address tab.
   A consumer can have multiple addresses but only one primary address. The primary address is stored in the Primary Address tab on the Consumer form and in the **Addresses** related list.
5. **Optional:** Set the desired fields on the Preferences tab.
6. Click **Submit**.
   The record is added to the Consumers table (csm_consumer). The primary address is added to the **Addresses** related list and the **Primary** field is set to **true**.

Create additional consumer addresses

Consumers can have multiple addresses, including one primary address.

Before you begin

Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

About this task

The primary address is stored in the Primary Address tab on the Consumer form and in the **Addresses** related list. When you fill in the fields in the Primary Address tab and click **Submit**, this information is added to the **Addresses** related list as the primary address, with the **Primary** field set to true. Any changes made to the **Primary Address** fields are also updated in the related list. A consumer can have only one primary address.

Other addresses, such as billing or shipping addresses, can be created and stored in the **Addresses** related list. For these other addresses, the **Primary** field is set to **false**.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Click the number of the desired consumer.
3. In the **Addresses** related list, click **New**.
4. Fill in the fields on the Location form.

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5. To denote this address as the primary address for the consumer, enable the **Primary** check box.
   A consumer can have multiple addresses but only one primary address.
6. Click **Submit**.

Create a relationship between two consumers

Create a relationship between two consumers, regardless of household.

Before you begin
Role required: sn_customerservice.svc_location_manager, sn_customerservice_manager, admin

About this task
Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create a relationship between two consumers, use the Authorized Representative responsibility.

Procedure
1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select a consumer.
3. In the Consumer Relationships related list, select **New**.
   This related list shows the current relationships that exist for the selected consumer. When you select **New**, a new Consumer to Consumer Relationship form is displayed with the **Consumer is** field filled in.
4. In the **Responsibility** field, select the **Authorized Representative** responsibility.
5. In the **of Consumer** field, select the consumer who is being represented by the consumer in the **Consumer is** field.
6. In the **Type** field, select the type from the list of related party configurations and the **Order** field specifies the sequence in which records are displayed, organized according to business preferences.

   Note:
   Starting with the Yokohama release, the **Type** field is added to the Consumer Relationships form. For more information on how to populate the **Type** field for existing data, see Populate the Type field in relationship tables using the fix script.

7. Select **Submit**.
   The relationship is added to the Consumer Relationships related list.

Assign a team member to a consumer

Assign a team member to a consumer by selecting an employee and their role or responsibility in the Customer Service Management (CSM) application.

Before you begin
Role required: sn_customerservice_manager or admin

About this task
If you're the system administrator or a customer service manager, you can assign a team member to a consumer from the Consumer Team related list on the Consumer form.

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Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select a consumer.
3. From the Consumer Team related list, select **New**.
4. On the form, fill in the fields.

Consumer Team Member form fields

Field	Definition
Consumer	Consumer that the user is assigned to.
User	Employee selected to fulfill the role or responsibility.
Responsibility	Role or responsibility selected for this user.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.

Creating multiple consumer profiles for a user

The concept of consumer profiles refers to the idea that an individual can have multiple profiles associated with them. For example, a consumer might have a patient profile in Healthcare and Life Sciences and simultaneously have a constituent profile in Public Sector Digital Services.

Starting with the Utah release, Customer Service Management (CSM) introduced the consumer profile (sn_csm_consumer_profile) table with a reference to the consumer (csm_consumer) table to define and support consumer profiles. When creating multiple profiles for a user within Customer Service Management (CSM), each profile can have its own set of fields and relational data like sold products, cases, interactions, and installed bases. By creating and defining consumer profiles, you can identify and differentiate profile-specific data.

Industries must use the consumer_profile column on case (sn_customerservice_case), sold product (sn_install_base_sold_product), install base item (sn_install_base_item), interaction (interaction), or child tables for any transactional data. Industries can extend the consumer profile (sn_csm_consumer_profile) table for any industry-specific use case.

Tables used by consumer profiles

Customer Service Management (CSM) introduced consumer profile (sn_csm_consumer_profile) column on Case, Sold Product, Install Base Item, and Interaction tables to identify and differentiate profile-specific data to be used by industries for different use-cases.

Tables and plugins

Plugin	Tables	Column added
Customer Service Base Entities [com.snc.cs_base]	Case [sn_customerservice_case]	Consumer Profile [consumer_profile]
	Sold Product [sn_install_base_sold_product]	Consumer Profile [consumer_profile]
	Install Base Item	Consumer Profile

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Tables and plugins (continued)

Plugin	Tables	Column added
	[sn_install_base_item]	[consumer_profile]
	Interaction [interaction]	Consumer Profile [consumer_profile]
	Task [sn_customerservice_task]	Consumer Profile [consumer_profile]

Note:
Consumer Profile (sn_csm_consumer_profile) table is an extension-only table to be used for supporting multiple profiles for consumer both within and across different industries.

Consumer Profile Location table

The Consumer Profile Location [sn_csm_consumer_profile_location] table stores the relationship between the consumer profiles and locations.

Starting with the Vancouver release, the Consumer Profile Location [sn_csm_consumer_profile_location] table was introduced. By using this table, you can enhance your consumer profiles to support multiple addresses. Adding this functionality enables the relationship between the consumer profiles and locations, which enables various industries to manage multiple addresses for the individual profiles.

Consumer Profile Location table fields

Field	Data type	Description
Consumer profile	Reference	Profile that is associated with a consumer.
Location	Reference	Locations detail that is associated with the consumer.
Location type	List	Type of location that this record represents such as billing, shipping, and mailing. **Note:** You can associate a consumer profile location record with one or multiple location types.
Active	True/False	Status of the consumer profile-address mapping.

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Consumer Profile Location table fields (continued)

Field	Data type	Description
		Note: By default, the active field is set to **True**, but you can disable the Consumer Profile Location linkage by setting it to **False**.

Associating locations to consumer profiles

By enabling relationships between consumer profiles and locations across industries such as Financial Services Operations, Healthcare and Life Sciences, and Public Sector Digital Services Core, multiple consumer profiles can be associated with their corresponding addresses in the Customer Service Management (CSM) application.

Overview

Individual consumer profiles can be associated with multiple locations, or multiple consumer profiles can be linked to the same location by using consumer profile locations. That means that different industries can associate consumer profiles with multiple locations and location types. The Customer Service Management (CSM) application supports the consumer profile (sn_csm_consumer_profile) table with a reference to the consumer (csm_consumer) table that helps to define and support consumer profiles.

Use case

For example, in the Healthcare and Life Sciences industry, clinicians must be able to store multiple addresses for patients, like mailing addresses for sending reports and home addresses for sample collections. Similarly, in the Financial Services Operations industry, financial institutions must store multiple addresses, such as mailing addresses for important documents and work addresses for billing purposes, for their customers.

In some scenarios, business-to-consumer (B2C) customers may have multiple addresses that can be used across their profiles for various purposes, serving as distinct addresses. For example, a customer's address could function as a shipping address for a Financial Services Operations profile, while simultaneously serving as a billing address for a Healthcare and Life Sciences profile.

Related topics

- Associate an existing consumer location with a consumer profile
- Create and associate a location to a consumer profile

Associate an existing consumer location with a consumer profile

Associate an existing consumer location with a consumer profile by using the Consumer Profile Location [sn_csm_consumer_profile_location] table in the Customer Service Management (CSM) application. By connecting consumer profiles and locations, industries can handle multiple addresses that are associated with individual profiles.

Before you begin
Role required: admin

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About this task
By using the Consumer Profile Location [sn_csm_consumer_profile_location] table, you can store the relationship between the consumer profile and location.

Procedure
1. In the navigation filter, enter `sn_csm_consumer_profile_location_list.do`.
2. In the Consumer Profile Locations record, select **New**.
3. In the **Location** field, select the lookup icon to open the list of locations.
4. Select the location to be associated with the consumer profile.
5. On the form, fill in the fields.
   For a description of the field values, see Consumer Profile Location table.
6. Select **Submit**.

Result
A location has been added to the consumer profile. Additionally, you can include different addresses, like a mailing address or a shipping address, and associate them with the same consumer profile, depending on the use case.

Related topics
Create and associate a location to a consumer profile

Create and associate a location to a consumer profile

Create a location and associate it with the consumer profile in the Customer Service Management (CSM) application. With this functionality, you can create and associate multiple addresses to a consumer profile that serve other purposes.

Before you begin
Role required: admin

About this task
Here's an example of why a user created and associated a location to the consumer profile. In the Healthcare and Life Sciences industry, clinicians can store multiple addresses for a patient profile, like mailing addresses for sending reports and home addresses for sample collections.

Procedure
1. In the navigation filter, enter `sn_csm_consumer_profile_location_list.do`.
2. In the Consumer Profile Locations record, select a consumer profile.
3. In the **Location** field, select the lookup icon to open the list of locations.
4. In the Consumer Profile Locations record, select **New**.
5. On the form, fill in the fields.

   Note:
   Ensure that you fill in the **Consumer** field in the Location form. If the **Consumer** field is empty, you get an error.

6. Select **Submit**.

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Note:
If multiple consumer profile location records are associated with the location, you can't delete a location record.

A new address is created and added to the **Location** field. You can associate this location to the consumer profile. For a description of the field values, see Consumer Profile Location table.

7. Select **Update**.

Related topics

Associate an existing consumer location with a consumer profile

Configuring households

The household entity represents a group of consumers that usually share a common address and use services as a group.

A household is made up of consumers who have been added as members of that household.

Note:
A household has an address and consumers have their own addresses. These addresses do not need to be the same in order to add a consumer as a member to a household.

With the household entity, you can:

- Create households and add consumers as household members.
- Create cases for households and household members.
- Create relationships between household members. These relationships authorize one household member to manage cases on behalf of another member.
- Create relationships between staff members and households or household members that enable the staff members to manage cases for those households and members.
- Track information for households, including sold products, contracts, and entitlements.

Head of household

A household can have one member designated as the head of household. A consumer who is added as the head of household is automatically added as a member of the household.

The head of household has access to all of the cases and information for the household and the other household members. The head of household can also see:

- The sold products for the household.
- The sold products and install base items for household members.

Household information

Households can have multiple members. These members can be either consumers or consumer users. Consumers can also belong to multiple households.

Membership in a household is defined by the **Start Date** and **End Date** on the Household Member form. A household member is considered to be a current member if:

- The **Start Date** field is empty or is filled in with today's date.
- The **Start Date** field is filled in with a past date and the **End Date** field is empty or is filled in with today's date or a future date.

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Only one record with current membership dates is allowed for each consumer in a household. A consumer can leave and rejoin a household multiple times. This information is recorded using the start and end dates.

As members are added or removed from a household, the member history is retained. You can find this information in the following related lists on the Household form.

- **Current Members**: the consumers currently in the household.
- **All Members**: current and past members of a household. This list provides a history of the household. Members can appear multiple times in this list.

On the Household form, you can also find information about household cases and products in the following related lists:

- **Cases**: the cases that have been created for all of the members within a household
- **Sold Products**: the products owned by the household. These products can be owned or shared by multiple household members.

Household member relationships

The following types of relationships can be created for households and household members. These relationships are included in the following related lists on the Household form:

- **Member Relationships**: relationships that have been established between household members. These relationships are created using the Authorized Representative responsibility. Household members that have an Authorized Representative relationship with another household member can act on behalf of that member and can manage cases and information for that member.
- **Household Team**: relationships that have been established between an agent and a household. These relationships are created using the Relationship Manager responsibility. Agents that have a Relationship Manager relationship with a household can manage all of the cases for that household.

Consumer relationships

The following types of relationships can be created for consumers.

- **Consumer Relationships**: relationships that have been established between two consumers, regardless of household. These relationships are created using the Authorized Representative responsibility. Consumers that have an Authorized Representative relationship with another consumer can manage cases for that consumer.
- **Consumer Team**: relationships that have been established between an agent and a consumer. These relationships are created using the Relationship Manager responsibility. Agents that have a Relationship manager relationship with a consumer can access all of the cases for that consumer.

Create or update a household

Create or update a household.

Before you begin

Role required: sn_customerservice_manager, admin

About this task

A household is made up of a group of consumers who live at a common address and share products and services.

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A household can have a designated head of household and multiple current members. The head of household has access to all of the cases and information for the other household members.

A user with the system administrator role can create a household. This user can also delete a household. When a household is deleted, the system clears the references and associations to the household, including members, sold products, cases, and work orders, but does not delete these associated entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Customers** > **Households**.
2. Click **New** on the Households list.
3. Fill in the fields on the Household form.
4. Click **Submit**.
   The household is added to the Households list.

Related topics

Configuring households

Service Model Foundation relationships

Add consumers to a household

Add consumers as members of a household.

Before you begin
Role required: sn_customerservice_manager, admin

About this task
You can add existing consumers from the Consumer table to a household.

- A household can have multiple consumers.
- A consumer can belong to multiple households. One household can be designated as the primary household for that consumer.

Household member records are added to the Household Member table. When a consumer is added to a household, the consumer is assigned a unique household member number that begins with the prefix HM.

The Household form includes the following related lists for household members:

- Current Members: consumers that belong to the household as of the current date.
- All Members: current members and past members. The customer service manager or admin can indicate that a consumer no longer belongs to the household by adding a date to the **End Date** field. A consumer that has left a household can be added back to that household.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Households**.
2. Select a household.
3. In the Current Members related list, click **New**.
4. Add a user from the Consumer table in the **Consumer** field.
   The **Household** field is automatically updated with the household selected in step 2.
5. **Optional:** If desired, add the date that the consumer was added to the household in the **Start Date** field

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The **End Date** field can be added if the consumer is removed from the household.

6. Click **Submit**.
   The consumer is added to the Current Members related list.

   On the Consumer form for this consumer, the household is added to the following related lists:

   - Current Households
   - All Households

   Note:
   You may need to configure the Consumer form to display these related lists. For more information, see Configure Service Model Foundation.

Create a relationship between household members

Create a relationship between two consumers who are current members of the same household.

Before you begin

Role required: sn_customerservice_manager, admin

About this task

Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create a relationship between two consumers in a household, use the Authorized Representative responsibility.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Households**.
2. Select a household.
3. In the Member Relationships related list, click **New**.
   This related list shows the current relationships that exist between consumers in this household. When you click **New**, a new Household Member Relationship is displayed with the **Household** field already filled in.
4. In the **Consumer is** field, select the consumer in the household to fulfill the responsibility on behalf of another consumer within the same household.
5. In the **Responsibility** field, select the **Authorized Representative** responsibility.
6. In the **of Consumer** field, select the consumer who is being represented by the consumer in the **Consumer is** field.
7. In the **Type** field, select the type from the list of related party configurations and the **Order** field specifies the sequence in which records are displayed, organized according to business preferences.

   Note:
   Starting with the Yokohama release, the **Type** field is added to the Consumer Relationships form. For more information on how to populate the **Type** field for existing data, see Populate the Type field in relationship tables using the fix script.

8. Click **Submit**.
   The relationship is added to the Member Relationships related list.

Assign a team member to a household

Assign a team member to a household by selecting an employee and their role or responsibility in the Customer Service Management (CSM) application.

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Before you begin
Role required: sn_customerservice_manager or admin

About this task
If you're the system administrator or a customer service manager, you can assign a team member to a household from the Current Members related list on the Household form.

Procedure
1. Navigate to **All** > **Customer Service** > **Customer** > **Households**.
2. Select a household.
3. From the Household Team related list, select **New**.
4. On the form, fill in the fields.

Household Team Member form fields

Field	Definition
Household	Household that the user is assigned to.
User	Employee selected to fulfill the role or responsibility.
Responsibility	Role or responsibility selected for this user.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.

Create and manage cases for a consumer or household

Staff members with the location agent role can create and manage cases for consumers and households.

Before you begin
Role required: sn_customerservice.svc_location_agent, sn_customerservice.svc_location_consumer_agent, sn_customerservice.svc_location_manager

About this task
Staff members at a business location who have either the location agent or consumer location agent role can create cases for households and consumers.

Staff members or internal users who have a relationship with a household (based on the Relationship Manager responsibility) can create cases for that household and its members. Users with relationships to a household are listed in the following locations:

- The Household Team related list on the Household form.
- The Household Team Members list.

Relationship managers can perform the following actions on the cases that they can access:

- Add comments and work notes.
- Add attachments.
- Close cases.

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When a consumer case is created or updated, the consumer receives an email notification. If a household is added to a case, the head of household is also notified when the case is created or updated.

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** and click **Create New**.
2. **Optional:** Select the type of case that you want to create.
3. Perform one of the following actions.

Option	Description
Add a consumer.	Select a consumer in the **Consumer** field. ○ If the consumer belongs to only one house hold, the **Household** field is automatically updated. ○ If the consumer belongs to more than one household, select a household from the households that a consumer belongs to in the **Household** field. ○ If the consumer does not belong to a house hold, you can leave the **Household** field empty.
Add a household.	Select a household in the **Household** field. ○ If the household only has only one current member, the **Consumer** field is automatical ly updated. ○ If the household has multiple current mem bers, select a consumer from the house hold members in the **Consumer** field.

4. Fill in the remaining fields on the Case form.
5. If desired, add other members of the household to the watch list.
   If a user with a Relationship Manager relationship is creating a case for a household or household member, this user is automatically added to the watch list.
6. Click **Submit**.
   The case is added to the Cases related list on the Household form.

Related topics

Service Model Foundation cases

Create entitlements for a household

Create entitlements for a household so that all household members are covered under the same terms and conditions.

Before you begin

Role required: sn_customerservice_manager, admin

About this task

System administrators and customer service managers can create entitlements for a household. These entitlements apply to the current members of that household.

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When a case is created for a household or a consumer, the **Entitlement** field on the Case form lists the available entitlements:

Entitlements listed based on field types

If these fields are filled in	The Entitlement field lists these entitlements
Household and Consumer	Entitlements for both the consumer and household.
Household	Entitlements for the household.
Consumer	Entitlements for the consumer

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Entitlements**.
2. Click **New**.
3. Select a household in the **Household** field.
   When you select a household, the head of household is automatically added to the **Consumer** field.

   Note:
   You may need to configure the form layout and add the **Household** field.

4. **Optional:** If desired, select a different household member in the **Consumer** field.
5. Fill in the remaining fields on the Entitlement form.
   For more information, see Create entitlements for CSM entities.
6. Click **Submit**.
   The entitlement is added to the Entitlements related list on the Household form.

Create service contracts for a household

Create service contracts for a household so that all household members are covered under the same terms and conditions.

Before you begin

Role required: sn_customerservice_manager, admin

About this task

System administrators and customer service managers can create contracts for a household. These contracts apply to the current members of that household.

When a case is created for a household or a consumer, the **Contract** field on the Case form lists the available contracts:

- If the **Household** and **Consumer** fields are filled in, the **Contract** field lists the contracts for both the consumer and household.
- If only the **Household** field is filled in, the **Contract** field lists the contracts for the household.
- If only the **Consumer** field is filled in, **contracts** field lists the contracts for the consumer

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Service Contracts**.
2. Click **New**.

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3. Select a household in the **Household** field.
   When you select a household, the head of household is automatically added to the **Consumer** field.

   Note:
   You may need to configure the form layout and add the **Household** field.

4. **Optional:** If desired, select a different household member in the **Consumer** field.
5. Fill in the remaining fields on the Contract form.
   For more information, see Create service contracts.
6. Click **Submit**.
   The contract is added to the Contracts related list on the Household form.

Consumer Service Portal changes

Activating the Customer Service Household plugin enables you to view households and household members on the Consumer Service Portal as well as view and create cases for household members.

Viewing multiple households on the portal

Consumers can belong to multiple households and can have one primary household. When the Customer Service Household plugin is activated, consumers who are logged in to the Consumer Service Portal can see the following information on their user profile page:

- The consumer's primary household in the **Primary Household** field.
- The households that the consumer belongs to in the Households list.

Viewing household members on the portal

For consumers who are the head of household, the Support menu includes the **Household Members** menu item, which lists all current members of the household.

Selecting this menu item displays a page that lists the members of the households where the logged-in consumer is the head of household.

Creating cases for other members of a household or other consumers

A consumer can create cases for another consumer in the following instances:

- A consumer who is the head of a household can create cases for other members of the household.
- A consumer who is an authorized representative for another consumer can create cases on behalf of that consumer.

When creating a case, the head of household or authorized representative can select the household member in the **Consumer** field on the record producer.

- If the logged-in consumer belongs to only one household, the household is automatically added to the case when it is submitted.
- If the logged-in consumer belongs to more than one household, the correct household can be selected in the **Household** field on the record producer.
- If the household is selected first, the consumers listed in the **Consumer** field are restricted to the current members of the household.

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The default selections for the **Household** and **Consumer** fields on the record producer include the primary household and the logged-in consumer.

Viewing and updating cases on the portal

The logged-in consumer can see the following cases on the portal:

- All Cases: all of the cases that belong to their household or that belong to consumers with which they are an authorized representative.
- My Cases: the cases created by the logged-in consumer.

The head of household or authorized representative can perform the following actions for the cases that belong to their household:

- Add comments and attachments.
- Accept or reject a solution.
- Close a case.

Consumer case information

When the Customer Service Household plugin is activated, the Ticket Fields details tab includes the **Consumer** field.

Configuring billing accounts

Billing Account Core provides a foundational data model for managing billing accounts across organizations and users. It enables businesses to define, organize, and maintain billing relationships, supporting accurate billing, payments, and scalable financial operations.

Billing account overview

A billing account is a centralized record that manages payment and invoicing for services. Use billing accounts to organize billing schedules, payment terms, addresses, currency settings, and links to customers—including individuals, organizations, or sub-accounts.

Unlike a customer account, which represents the organizational relationship, a billing account is a financial entity specifically for managing billing and payments. A single customer can have multiple billing accounts for different billing arrangements, while multiple customers can share a consolidated billing account.

Billing accounts support both B2B and B2C scenarios and provide flexibility for complex billing structures through parent-child hierarchies.

Key capabilities

- Billing schedule: Define billing frequency (monthly, quarterly, annual) and billing cycles
- Payment terms: Configure payment terms (net 30, net 60) and accepted payment methods
- Bill-to address and currency: Specify invoice delivery address and billing currency
- Customer associations: Link billing accounts to customers, contacts, and households
- Hierarchy support: Create parent-child structures for consolidated billing

When to use billing account

Use billing accounts when your organization needs to:

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- Separate billing from customer relationship management
- Support multiple billing arrangements for a single customer
- Consolidate charges from multiple business units, geographies, or product lines
- Manage payment responsibility separately from service consumption
- Track billing-related cases and interactions distinct from general customer cases

Billing account versus cost centers

Aspect	Billing Account	Cost Center
Purpose	Manages external payment and invoicing for services	Tracks and allocates internal costs within the organization
Focus	Customer-facing financial transactions	Internal budget management and expense allocation
Typical users	Finance, billing, customer service teams	Finance, department managers, internal operations
Examples	Customer invoice account, corporate billing account	Marketing department budget, IT operations budget

User management

Configure the internal and external users for Customer Service Management to provide the right access to features, capabilities, and case data. Create relationships that facilitate case management and fulfill support roles for specific accounts.

Setting up users, user groups, and customer relationships

Task	Description
Configure users and groups	Configure the individual users and the user groups who can access your instance.
	Assign roles to individual users and user groups to control access to features, capabilities, and data.
Create multiple consumer profiles for a user	Individual consumers can have multiple profiles for different needs. You can create these profiles to identify and differentiate profile-specific data.
Configure a unified user	Enable users to maintain multiple profiles within the Customer Service Management (CSM) application and other ServiceNow applications with one login.
Create customer relationships	Establish different types of relationships between partners, customers, and contacts, to make case and account management easy and flexible:

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Setting up users, user groups, and customer relationships (continued)

Task	Description
	• Bi-directional account relationships • Contact relationships • Account hierarchies
Create account teams	Create teams made up of employees and customer contacts who fulfill the roles and functions to support specific accounts.
Configure Contributor Users	Configure contributor users to engage middle office teams in resolving customer issues and requests.
Configuring customer access management	Configure customer access management to support multiple contacts and consumers on cases and sold products, providing them with varying levels of access to the case.
Fix external user role assignments	Fix the issue with external users assigned with internal user roles.

Configure users and groups

A user is an individual who can access your instance and a group is a set of users who share a common purpose. The users associated with a group are listed as group members.

Before you begin

Role required: admin

About this task

Group information is used across most processes in the *ServiceNow AI Platform* for assigning work to teams and requesting approvals.

Any rule that is applied to a group is automatically assigned to group members; for example, roles and assignment rules.

Procedure

- You can import existing users and groups using guided setup.
- You can create new users and groups using the *ServiceNow AI Platform* user administration feature.
  - Create a user
  - Create a user group
  - Add a user to a group

Configuring a Unified User

By unifying multiple profiles for a single user in the Customer Service Management (CSM) application, you don't need to create and manage multiple user accounts for that user.

A user can maintain multiple profiles within the Customer Service Management (CSM) application and other ServiceNow applications with one login.

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Use cases

In the past, customers had to create multiple user records for a user who had different roles on different applications. For example, let's say that you have a CSM user who is both an internal employee and an external consumer. With a unified profile, your user can switch between different user records and seamlessly transition between roles.

By using multiple profiles within the CSM application, your organization can have these different profiles:

- Internal and external CSM profiles for the same user where that user has both internal and external accounts. For example, in a financial institution, a consumer might be an employee of a bank and at the same time hold a personal account in the same bank.
- Multiple external profiles for a CSM user where a user has multiple external accounts. For example, a consumer might have a patient profile in Healthcare and Life Sciences and also have a constituent profile in Public Sector Digital Services.
- Multiple profiles with the CSM and other ServiceNow® applications where a user has multiple accounts within CSM and other ServiceNow applications. For example, a user might have a CSM account for vendor support and a VRM account for vendor risk management.

Key benefits

- Improved user experience. A unified user can navigate between internal and external roles without switching profiles.
- Enhanced admin efficiency. Your organization can streamline the administrative processes so that you don't have to manage multiple user accounts for individuals with various profiles or roles.
- Increased customer satisfaction. Your organization can offer a consistent service to your customers across different roles, which could lead to increased customer loyalty and positive feedback.

Related topics

Configuring a user as a Unified Consumer

Configuring a user as a Unified Consumer

By creating a unified profile, you can integrate both internal and external personas or consumers in your organization. A user who has a unified profile has synchronized user's login interactions across the Customer Service Management (CSM) application.

Overview

Before a unified profile was available, a platform user could only hold either an snc_internal or an snc_external role, but not both roles due to role collision issues. Modeling a user as both an employee and a consumer wasn't possible in the past because the sn_customerservice.consumer role inherited the snc_external role. The role inheritance that was combined with the platform's behavior to help prevent role collision restricted a user from performing internal duties while that user was also a consumer.

With this new unified user functionality, a single user who is an employee (snc_internal) can also be a business-to-consumer (B2C) customer. With a unified profile, your user can switch between different user records and seamlessly transition between roles.

For example, in a financial institution, an individual could be both an employee and a personal account holder. Similarly, in the telecommunications industry, an internal employee might also use company voice services for personal use.

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Note:

You can activate this functionality by enabling the Customer Service (com.sn_customerservice) plugin.

Using a query rules framework

You can use the Unified Consumer feature only within the query rules framework. For example, when you update a consumer record, the associated user records synchronize through a business rule *sync_consumer* to *csm_consumer_user* through a business rule. This synchronization occurs only if the associated user class has the *csm_consumer_user* record and not any other user record. When you modify the following fields for the consumer user, the associated records also automatically update:

- First name
- Middle name
- Last name
- Email
- Mobile phone
- Business phone
- Home phone

You can synchronize all types of user records by customizing the business rule to the *sys_user* record instead of the *csm_consumer_user* record.

Related topics

Roles installed with Employee as a Consumer

Supported and unsupported roles and features

Setting up a user as a Unified Consumer

Roles installed with Employee as a Consumer

Use different roles to establish the relationships between your users and entities. By using the Employee as a Consumer functionality within the Customer Service Management (CSM) application, your organization can support both requesters and supporters.

Overview

The Unified Consumer (sn_customerservice.unified_consumer) role enables a user to have both the snc_internal and snc_external roles, which means that roles have greater control over consumer behavior, whether it's internal or external.

Earlier, the Consumer (sn_customerservice.consumer) role automatically included the snc_external role, which created a limitation. This limitation helped to prevent an organization from assigning the snc_internal role to a user and restricted the simultaneous use of both the snc_internal and snc_external roles. To address these limitations, a new role, independent of the snc_external role, was introduced to complement the sn_customerservice.consumer role. This additional role can be associated with both the snc_internal and snc_external roles, which means that your organization now has increased flexibility in managing a user's behavior.

Employee as a Consumer existing and new roles

The following diagram shows the existing roles and the new roles that enable the Employee as a Consumer functionality.

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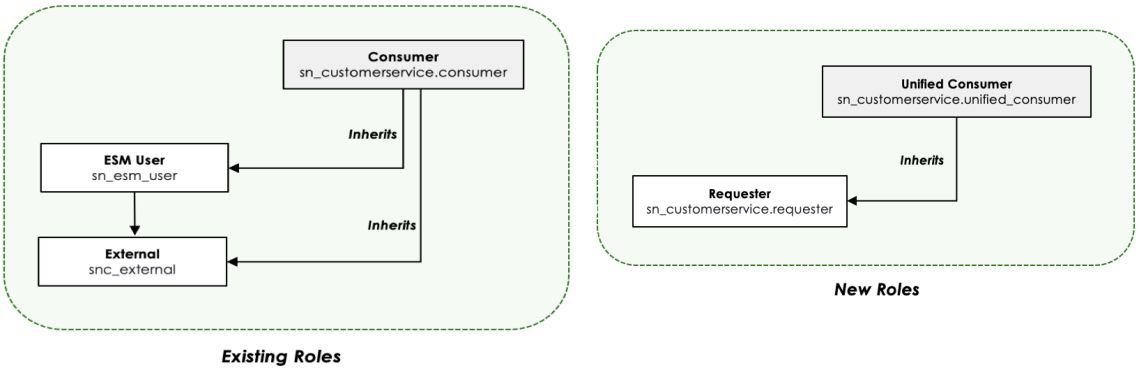
Existing and new roles



Note:
With the Employee as a Consumer functionality, the Requester (sn_customerservice.requester) and the Unified Consumer (sn_customerservice.unified_consumer) roles were introduced. Both these roles are independent of the snc_internal and snc_external roles.

Requester and Unified Consumer roles and descriptions

Role [name]	Description
Requester [sn_customerservice.requester]	Supports requesters and implements the base functionality. It serves as a base role, running in parallel with the Enterprise Service Management (ESM) User (sn_esm_user) role.
Unified Consumer [sn_customerservice.unified_consumer]	Supports consumers and runs parallel to the Consumer (sn_customerservice.consumer) role. It inherits the Requester (sn_customerservice.requester) role.

Related topics

- Configuring a user as a Unified Consumer
- Supported and unsupported roles and features
- Setting up a user as a Unified Consumer

Supported and unsupported roles and features

Explore the capabilities and limitations of the unified consumer role (sn_customerservice.unified_consumer) to understand the roles and features it supports. This analysis helps you can enhance the user experience and streamline administration, supporting a unified identity across different user contexts.

Supported and unsupported roles and personas

Supported or unsupported	Persona and role [Role Name]	Internal role(s)	External role(s)	Description
Supported	Administrator	Admin [admin]		Administrators who can set up unified consumer users.

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Supported and unsupported roles and personas (continued)

Supported or unsupported	Persona and role [Role Name]	Internal role(s)	External role(s)	Description
	Internal unified consumer	Internal employee [snc_internal] **Note:** Can have other internal roles across non-CSM applications.	Unified consumer [sn_customerservice.unified_consumer] **Note:** The unified consumer role doesn't contain snc_external roles.	An employee (internal user) who is also a consumer (external).
	External unified consumer		• Unified Consumer [sn_customerservice.unified_consumer] • External users [snc_external]	A user who is similar to a consumer [sn_customerservice.consumer], but has the unified consumer role.
Unsupported	Customer Service Management (CSM) fulfiller as a consumer	• Customer service manager [sn_customerservice_manager] • Relationship agent [sn_customerservice.relationship_agent] • Case task agent [sn_customerservice.case_task_agent] • Account customer agent [sn_acct_consumer.agent] • Location consumer agent [sn_customerservice.svc_location_consumer_agent] • Location agent [sn_customerservice.svc_location_agent] • Location manager [sn_customerservice.svc_location_manager] • Location relationship manager [sn_bus_loc.location_relationship_manager]	Unified Consumer [sn_customerservice.unified_consumer]	A customer service agent who is also a consumer.

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Supported and unsupported roles and personas (continued)

Supported or unsupported	Persona and role [Role Name]	Internal role(s)	External role(s)	Description
		• Customer service agent [sn_customerservice_agent] • Consumer service agent [sn_customerservice.consumer_agent]		
	CSM contributor as a consumer	• Account contributor [sn_customerservice.account_contributor] • Consumer contributor [sn_customerservice.consumer_contributor] • Relationship contributor [sn_customerservice.relationship_contributor] • Self-contributor [sn_customerservice.self_contributor] • Service organization contributor [sn_customerservice.service_organization_contributor] • Location manager contributor [sn_customerservice.svc_location_manager_contributor]	Unified Consumer [sn_customerservice.unified_consumer]	An employee (internal contributor) who can create cases on behalf of themselves and others, but is also a consumer.
	Employee as an account-consumer (B2B2C)	Internal employee [snc_internal]	Account consumer [sn_acct_consumer.consumer]	An employee who is also a consumer for a business-customer (B2B2C).

List of supported features and flows for unified consumer

Features
• Case Management • Case Tasks • Install Base Management • Inbound/Outbound Email Notifications • Targeted Communications

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List of supported features and flows for unified consumer (continued)

Features

• Service Catalog Product Case
• Consumer Profile and Consumer Profile Locations
• Household
• Case Application Programming Interface (APIs)
• Asset (IT Asset Management)
• Contracts and Entitlements
• Contracts on Sold Product or Install Base Items
• Virtual Agent or Agent Chat
• Live Agent Chat
• Look up and Verify
• Case Digest
• Case Escalations
• Case Types
• Case Playbooks for Complaint
• Case Playbooks for Onboarding
• Order Management
• Omnichannel Callback
• Engagement Messenger
• ServiceNow Voice for CSM
• Business Location
• Walk-up Experience for Customer Service Management
• Knowledge Management
• Communities
• CSM Integrations
  ○ Customer Service Management and Field Service Management Integration
  ○ Customer Service Management and Request Management Integration
  ○ Customer Service Management and Asset Management Integration
• Field Service Management
  ○ Work Orders and Work Order Tasks
  ○ Appointment Booking
  ○ Conversational Appointment Booking

Related topics

Configuring a user as a Unified Consumer

Roles installed with Employee as a Consumer

Setting up a user as a Unified Consumer

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Setting up a user as a Unified Consumer

Set up a user as a Unified Consumer by creating a single, unified profile that supports both the internal and external personas in the Customer Service Management (CSM) application.

Overview

You can model a single user both as an employee (snc_internal) and a business-to-consumer (B2C customer) by creating a unified profile. By unifying multiple profiles for a single user in the Customer Service Management (CSM) application, you don't need to create and manage multiple user accounts for that user.

Note:
You can also configure an external Unified Consumer, who lacks an internal (snc_internal) role and isn't an employee, by using similar setup tasks.

The following table describes how to set up the tasks for activating a Unified Consumer.

Set up the tasks for activating a Unified Consumer

Task	Description
Activate a Unified Consumer	Activate a Unified Consumer by updating the *ConsumerImpl* script include to display other sys_user records in the reference list for the csm_consumer table. For more information, see Activate a Unified Consumer.
Create a user	Establish an internal user or designate an existing user as a consumer. For more information, see Create a user.
Assign a role to a user	Assign the Unified Consumer (sn_customerservice.unified_consumer) role to the user. For more information, see Assign a role to a user.
Create a consumer record	Create a consumer record with the user, designating that user as a consumer. For more information, see Create a consumer record.
Associate an existing user with a consumer record	Associate a Unified Consumer user with a consumer record by creating a consumer user and then linking the user with a consumer record. For more information, see Associate an existing user to a consumer record.

Related topics

- Configuring a user as a Unified Consumer
- Roles installed with Employee as a Consumer
- Supported and unsupported roles and features

Activate a Unified Consumer user

Activate a user as a Unified Consumer user within the Customer Service Management (CSM) application by updating the *Consumer* script include. This modification enables you to display the other sys_user extension records in the reference list for the users in the csm_consumer table.

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Before you begin
Role required: admin

About this task
To enable access to sys_users (internal users), add the sys_user to the user extension in the *Consumer* script include.

Procedure
1. Navigate to **All** > **System Definition** > **Script Includes**.
2. Open the *Consumer* script include and modify the script as follows:

   Add the **initialize** method to the *Consumer* script include and set **this.userExtensions** value.

```
var Consumer = Class.create();

Consumer.prototype = Object.extendsObject(ConsumerImpl, {
    initialize: function() {
        ConsumerImpl.prototype.initialize.call(this);
        this.userExtensions = ["csm_consumer_user",
 "sys_user"];
    },

    type: 'Consumer',

});
```

3. Select **Update**.

What to do next
Add a user to your instance. For more information, see Create a user.

Create a user

You can add a user to your instance to enable them to log in and use designated application features.

Before you begin
Role required: user_admin

Procedure
1. Navigate to **All** > **User Administration** > **Users**.
2. Select **New**.
3. On the form, fill in the fields.

Field	Description
User ID	Create a unique identifier for this user's ServiceNow login user name. Typical examples of user IDs are `cwitherspoon` and `charlie.witherspoon`. You can't create a user whose User ID duplicates an existing user. If you do import duplicates from an update set, the more recently created name takes the duplicate User ID.
Given name	Enter the user's given (often their first) name.

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Field	Description
Family name	Enter the user's family name (often their last name). **Note:** You can clear the **First Name** field, or the **Last Name** field in an existing user record, but you can't clear both at the same time.
Title	Enter a title or job description, or select one from the list.
Department	Select the user's department from the list.
Password	Assign a password to the user. To set up the user's password, fill in the fields on the form and **save** the record. Then, select **Set Password**. This password can be permanent or temporary.
Password needs reset	Select this check box to require the user to change the password during the first login.
Locked out	Select this check box to lock the user out of the instance and terminate all their active sessions. The system helps prevent users with the admin role from locking themselves out.
Active	Select this check box to make this user active. Only the administrator sees an inactive user in: ○ Lists of users ○ The selection list on reference fields (magnifying glass icon) ○ The auto-complete list that appears when you type into a reference field
Web service access only	It designates a user as a non-interactive user. This field is available with Non-Interactive Sessions. **Note:** The Web service access only check box is automatically enabled when you select **Machine** in the Identity type field. The Web service access only check box is automatically disabled when you select **Human** or **AI**.
Internal Integration User	Select this check box to Mark service accounts as internal integration users.
Email	Enter the user's email address. To enter a non-standard email address that doesn't pass field validation, you must deactivate the validation script first: **a.** Navigate to **System Definition** > **Validation Scripts**. **b.** Select the **email** record. **c.** Clear the **Active** check box and save the change. **d.** Complete the user profile, including the email address, and update or submit the record. **e.** Reactivate the email validation script.
Identity type	Select the user identity type based on the user:

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Field	Description
	○ Human - Select this for a real person, such as an employee, customer, or admin. ○ Machine - Select this for a non-human system or device, such as a server, application, or service account that makes automated requests. ○ AI - Select this for an autonomous AI-driven system. AI users should be used when an AI agent or agentic workflow needs permissions greater than that of the invoking user. See Security for AI agents for more information on using AI Agent type users. **Note:** The Web service access only check box is automatically enabled when you select **Machine** in the Identity type field. The Web service access only check box is automatically disabled when you select **Human** or **AI**.
Language	Select your preferred language from the list.
Calendar integration	Select **Outlook** to have this user receive meeting notifications via email directly to the calendar. Otherwise, select **None**.
Time zone	Select the user's time zone.
Date format	Select the user's preferred format for dates.
Business phone	Enter the user's business phone number.
Mobile phone	Enter the user's mobile phone number.
Photo	Attach a photo of the user, if appropriate.

The minimum fields required to create a user record are: **User ID** and either **First name** or **Last name**.

You can select the **Personalize Form** icon to remove fields.

4. **Optional:** Add **Roles**, **Groups**, **Delegates**, **Skills**, and **Subscriptions** to the user.
   For more information, see Managing roles, Creating groups, and Delegating roles.
5. Select **Submit**.
   The new user record appears in the list.

Assign the Unified Consumer role to a user

Assign the Unified Consumer (sn_customerservice.unified_consumer) role to the sys_user to designate them as a consumer in the Customer Service Management (CSM) application.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Select the user from the user record.
3. In the Roles related list, select **Edit**.

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4. In the Collection list, select the Unified Consumer (sn_customerservice.unified_consumer) role and move it to the Roles list.
5. Select **Save**.

Result
The sys_user is assigned to a unified consumer role (sn_customerservice.unified_consumer).

What to do next
Create and associate a Unified Consumer user to a consumer record. For more information, see Creating and associating a Unified Consumer user to a consumer record.

Creating and associating a Unified Consumer user to a consumer record

Create and associate a Unified Consumer user with a consumer record so that your user can access the Customer Service Portal (CSP). This process involves creating a Unified Consumer user through a consumer form and then associating the user to a consumer record.

Create a Consumer User through a consumer form

Create a Consumer User through the User lookup list on the consumer form in the Customer Service Management (CSM) application.

Before you begin
Role required: admin

About this task
You can create both the internal (snc_internal) and external (snc_external) users.

Note:
Only administrators can associate a sys_user with a consumer, and each user can be associated with only one consumer.

Procedure
1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select the consumer from the consumer record.
3. In the Login Details related list, select the User lookup icon to open the list of sys_users.
4. On the Users form, select **New**.
5. On the form, fill in the fields.

   For a description of the field values, see Create a user.
6. Select **Submit**.

What to do next
Associate an existing user with a consumer record. For more information, see Associate an existing user with a consumer record.

Associate an existing user with a consumer record

Associate a user with a consumer record in the Customer Service Management (CSM) application. After the association is done, the user can access the Consumer Service Portal (CSP) as a consumer to search for information, create cases, and more.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select the consumer from the consumer record.
3. In the Login Details related list, select the User lookup icon to open the list of sys_users.
4. On the Users form, select the user to associate with the consumer record.
5. Select **Save**.

Result

The sys_user is associated with the consumer record. The user can now access the Consumer Service Portal (CSP) as a consumer.

Configure Contributor Users

The CSM Contributor User plugin enables you to engage middle office teams in resolving customer issues and requests.

Before you begin

Role required: admin

About this task

With the provided roles, relationships, and user profile attributes, contributors can report and collaborate on cases created for customers, service organizations, or themselves.

The CSM Query Rules plugin is automatically activated by CSM Contributor User plugin (com.snc.csm_contributor_user). For more information, see CSM Query Rules.

Procedure

1. Activate the CSM Contributor User plugin (com.snc.csm_contributor_user).
2. Assign the contributor user roles to middle office users.
3. Create relationships.
4. Ensure the **sn_cs_queryrules.use_query_rules** property is set to true.

Contributor users

With contributor user role, you can engage both internal and external users to resolve the customer issues and requests. This functionality is applicable to the users, recorded within the User (sys_user) table who possess either the snc_internal or snc_external role and external users, recorded within the Service Organization External Staff (sn_csm_service_organization_external_staff) table who possess snc_external role.

Note:
The contributor user role don't extend to the users belonging to the Contacts (customer_contact) class who are snc_external role.

The contributor users feature provides unified customer support for internal and external customers. With this feature, you can serve internal and external customers through shared service teams and service organizations:

- Enable service organizations to serve one another and external customers.
- Enable employees to request support for themselves and for external customers.
- Enable middle office agents to work on specific tasks that are required to resolve cases.

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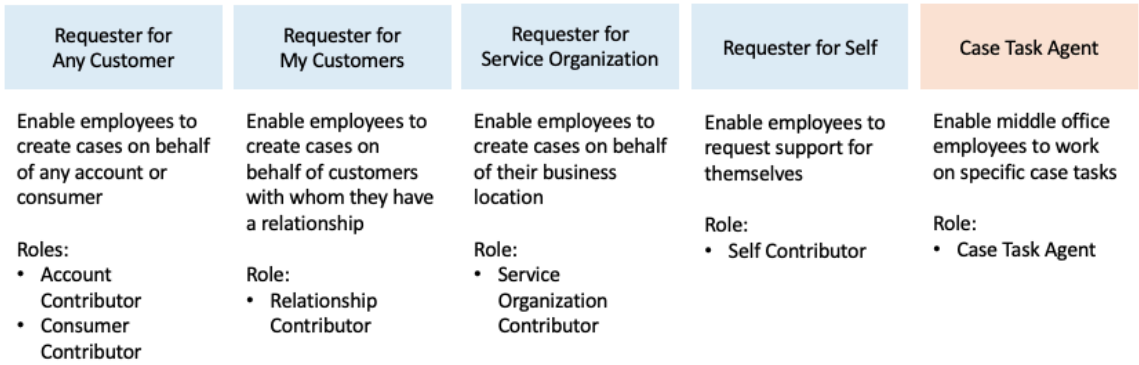
Overview of contributor user roles

The contributor users feature includes several roles that you can assign to users to control access to cases, case tasks, and case-related information. These roles can be assigned to users based on different business needs. In some cases, these roles also provide access to the parent cases and associated customer information.

Contributor user roles



The contributor users feature also includes viewer roles that enable employees to view cases, cases tasks, or core customer data. These roles include:

- Case Viewer
- Case Task Viewer
- Customer Data Viewer

Contributor user role description and capabilities

Requester type	Description	Capabilities
Requester for any customer	A requester who can create cases on behalf of any customer. This user: • Works with accounts and contacts or consumers. • Uses the Customer or Consumer Service Portal to assist customers. Roles: • Account contributor (sn_customerservice.account_contributor) • Consumer contributor (sn_customerservice.consumer_contributor)	This user can: • Search knowledge articles and catalog items. • Create cases for customers who visit a business location, including cases for catalog items (requests). • Create cases from communication channels available to customers including phone, web, chat, Virtual Agent, and messaging. If also an internal user on a case, this user can: • Add additional comments and attachments • Accept or reject a solution • Close a case • Receive notifications of case updates • Read work notes
Requester for my customers	A requester who can create cases on behalf of customers	This user can:

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Contributor user role description and capabilities (continued)

Requester type	Description	Capabilities

	with whom they have an established relationship.
	
	This user:
	• Works with accounts and contacts or consumers.
	• Uses the Customer or Consumer Service Portal to assist customers.
	• Manages customer relationships and assists with customer cases.
	
	Role: Relationship contributor (sn_customerservice.relationship_contributor)
		• Search knowledge articles and catalog items.
		• Create cases on behalf of customers with whom they have a relationship.
		• Create cases from communication channels available to customers including phone, web, chat, Virtual Agent, and messaging.
		• View and follow up on all cases created for customers with whom they have a relationship.
		• Update customer data such as adding contacts and addresses.
		• Update cases:
		  ○ Add additional comments and attachments
		  ○ Accept or reject a solution
		  ○ Close a case
		  ○ Receive notifications of case updates
		  ○ Read work notes

Requester for service organization	A requester who can create cases on behalf of their business location. This user: • Works with accounts and contacts, consumers, and households. • Uses the Customer or Consumer Service Portal to assist customers. Role: Service organization contributor (sn_customerservice.service_organization_contributor)	This user can: • Search knowledge articles and catalog items. • Create cases on behalf of their business location, including cases for catalog items (requests), and follow up on those cases. • Create cases from communication channels available to customers including phone, web, chat, Virtual Agent, and messaging. • View and follow up on other cases created for the user's business location. If also an internal user on a case, this user can: • Add additional comments and attachments • Accept or reject a solution • Close a case • Receive notifications of case updates • Read work notes
Requester for self	A requester who can create cases for themselves.	This user can:

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Contributor user role description and capabilities (continued)

Requester type	Description	Capabilities

	This requester accesses cases through a unified employee portal, if provided by their organization.
	
	Role: Self contributor (sn_customerservice.self_contributor)
		• Search knowledge articles and catalog items.
		• Create cases on behalf of themselves, including cases for catalog items (requests).
		• Create cases from communication channels available to customers including phone, web, chat, Virtual Agent, and messaging.
		• View and follow up on the cases that they have created from themselves:
		  ○ Add additional comments and attachments
		  ○ Accept or reject a solution
		  ○ Close a case
		  ○ Receive notifications of case updates
		  ○ Read work notes

Case task agent	A fulfiller, such as a middle office agent, who works on a specific set of tasks required to resolve a case. These case tasks: • Are assigned to the agent or to their department or group. • Focus on a specific function or expertise of the department or group. This agent typically uses a workspace to complete these tasks. Role: Case task agent (sn_customerservice.case_task_agent)	This user can: • View and work on the case tasks assigned to them or to their group or department. • View the parent cases for the case tasks that they can access. • Communicate with agents on the parent case through work notes and additional comments. • Communicate with agents on other case tasks for the parent case through work notes and additional comments. • Access customer information needed to complete a case task. • Make changes to a case task that causes an update to the state or stage of the parent case. • Search for knowledge articles to assist with the case task.

The contributor user roles are available with different CSM plugins. For a more detailed description of these user roles, see Contributor user roles.

Fields added to the Case form

The contributor users feature adds two fields to the Case form that are used to identify the customer for a case. These fields are used in addition to the **Account** and **Consumer** fields.

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Customer fields added to Case form

Field	Description
Requesting Service Organization	This field displays the name of a service organization. If this field is filled in, and the **Account** and **Consumer** fields are empty, the customer for the case is a service organization. This field is included with the Service Organization plugin (com.snc.service_organization).
Requested By	This field displays the name of the requester. If this field is filled in and the **Account**, **Consumer**, and **Requesting Service Organization** fields are empty, the customer for the case is an employee. This field is included with the Customer Service plugin (com.sn_customerservice).

The Customer Service plugin adds two fields to the Notes section of the Case form for contributor users.

Contributor fields added to Case form

Field	Description
Contributor Users	When a user with the case task agent role is assigned to a case task, the user is added to the **Contributor Users** field. If a user is removed from the **Assigned to** field on the Case Task form, and they are not assigned to any other tasks for the case, they are also removed from the **Contributor Users** field.
Contributor Groups	When a user with the case task agent role is assigned to a case task, the user's assignment group is added to the **Contributor Groups** field. If a user is removed from the **Assigned to** field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field. If a group is removed from the **Assignment group** field on the Case Task form, and the group is not assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field.

Create Case for Customer record producer

The contributor users feature adds a record producer that contributor users can access from the Customer and Consumer Service Portals and use to create cases. When creating a case, this record producer presents different options for the customer in the **Who are you creating this case for?** field, depending on the roles assigned to the logged-in user.

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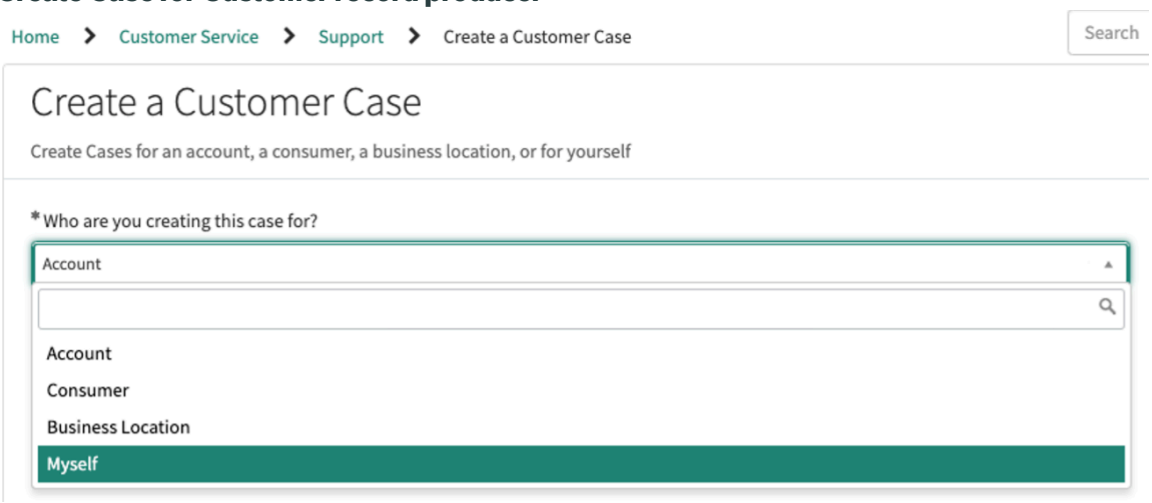
Create Case for Customer record producer



When the contributor user selects an option, additional fields related to that customer type are displayed.

Customer type fields added to Create a Customer Case record producer

Customer option	Additional fields
Account	• **Reported by**: the logged-in user with the account contributor role. • **Account**: the name of the account. • **Contact**: the contact for the account.
Consumer	• **Reported by**: the logged-in user with the consumer contributor role. • **Consumer**: the name of the consumer. • **Household**: the household that the consumer belongs to.
Business Location	• **Reported by**: the logged-in user with the service organization contributor role. • **Requesting Business Location**: the name of the service organization requesting assistance. • **Requesting support from Business Location**: the name of the service organization from which the **Requesting Business Location** is asking assistance.
Myself	**Reported By**: the logged-in user with the self contributor role.

Additional fields on the record producer that are common to all customer options include **Priority**, **Channel**, **Subject**, and **Description**.

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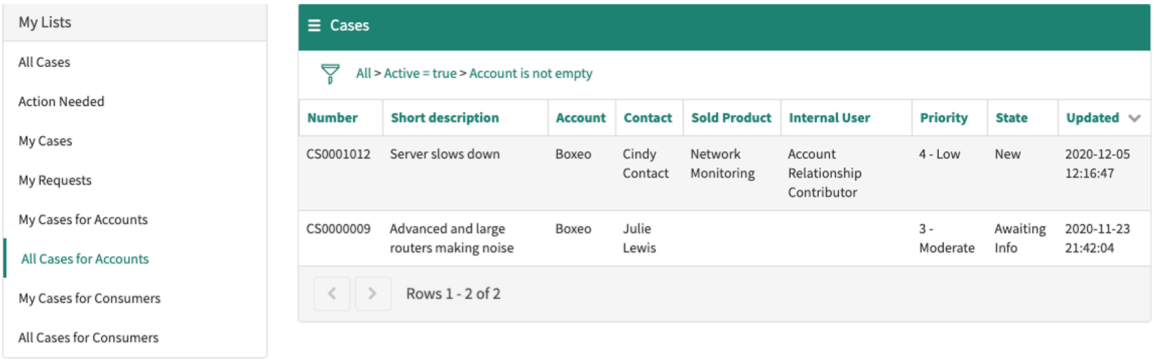
Viewing record lists on the Customer and Consumer Service Portals

The My Lists widget on the Customer and Consumer Service Portals includes different filters for viewing records.

My Lists widget on the Customer Service Portal



Depending on the roles assigned to the logged-in user, this widget displays the following filters.

My Lists filters

Contributor user	My Lists filters
Account contributor	**Cases for Accounts**
Consumer contributor	**Cases for Consumers**
Service organization contributor	• **My Cases for Business Locations**: cases created by the contributor user on behalf of their business locations. • **All Cases for Business Locations**: all cases created on behalf of the contributor's business locations, independent of who created the case.
Self contributor	**Cases for myself**
Relationship contributor	Displays filters depending on the relationships established for this user. • **My Cases for Accounts**: cases created by the contributor user on behalf of accounts where the user is an Account Manager. • **All Cases for Accounts**: all cases created on behalf of accounts where the user is an Account Manager, independent of who created the case. • **My Cases for Consumers**: cases created by the contributor user on behalf of consumers or households where the user is a Relationship Manager. • **All Cases for Consumers**: all cases created on behalf of consumers or households where the user is a Relationship Manager, independent of who created the case.

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My Lists filters (continued)

Contributor user	My Lists filters
	For more information, see Service Model Foundation relationships.

Access to case tasks

Users with the case task agent role can view and access case tasks in lists, on dashboards, and on landing pages.

Use widgets to display case tasks on dashboards and landing pages.

Widgets for displaying case tasks

Widget	Task information displayed
My Case Tasks	This widget includes the following information for each case task: • Task number • Status • Subject • Priority • Case number • Case short description
My Group's Case Tasks	This widget includes the following information for each case task: • Task number • Status • Subject • Priority • Assigned to • Case number • Case short description

Note:
If a playbook is available, the system opens the case task within in the playbook. If no playbook is available, the system opens the Case Task form.

Depending on assigned roles, contributor users can see different modules in CSM Agent Workspace and CSM Configurable Workspace.

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Module access by role

Role	Modules

Case task agent
 	
[sn_customerservice.case_task_agent]
	Users with the case task agent role have access to these modules:
	• **Case Task**: includes the case tasks that the user has access to.
	  ○ My Case Tasks
	  ○ My Open
	  ○ Unassigned for my groups
	  ○ My Accessible Tasks
	• **Customers**: Includes read-only access to customer information.
	  ○ Accounts
	  ○ Partners
	  ○ Contacts
	  ○ Consumers
	  ○ Households
	  ○ Household members

Case task viewer [sn_customerservice.case_task_viewer]	Users with the case task viewer role have access to All tasks in the **Case Task** module.
Case contributor viewer [sn_customerservice.case_contributor_viewer]	Users with the case contributor viewer role have access to My Contributing Tasks in the **Case Task** module.
Case viewer [sn_customerservice.case_viewer]	Users with the case viewer role can see the cases that they have access to in the **Cases** module.

Case task agent access to customer information

Users with the case task agent role have read-only access to some of the customer information for the parent case.

- For B2B cases: Account and contact records, including addresses, sold products, and install base.
- For B2C cases: Consumer and household records, including addresses, sold products, install base, and head of household.
- For business location cases: Service organization records, including internal contact information.

Related topics

Contributor user roles

Configure Contributor Users

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Contributor user roles

The contributor user data model uses several roles that can be assigned to users to control case access, case tasks, and case-related information based on different business needs.

These roles are included with several different plugins:

- Customer Service (com.sn_customerservice)
- CSM Contributor User (com.snc.csm_contributor_user)
- Business Location (com.snc.business_location)
- CSM Base Extension Entities (com.snc.cs_base_extension)

See the following tables for detailed role descriptions.

Roles included with the Customer Service plugin

The following table lists the contributor roles that are included with the Customer Service (com.sn_customerservice) plugin along with their descriptions and associated roles.

Customer service roles

Role	Description	Contains roles

Case task agent
 	
[sn_customerservice.case_task_agent]
	This role provides access to case tasks and related case information.
	
	A user with this role can work on the following case tasks:
	• Tasks that are assigned to the user or to the user's assignment groups.
	• Tasks that have been created by the user.
	
	With this role, the user can:
	• View and update case tasks.
	  ○ Add work notes, comments, and attachments.
	  ○ Update the status.
	  ○ Perform additional actions from a case task such as sending email.
	• Create case tasks and assign them to other users.
	
	With this role, users have read-only access to customer information for the case:
		• sn_customerservice.csm_workspace_user
		• sn_customerservice.customer_data_viewer
		• sn_customerservice.case_contributor_editor

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Customer service roles (continued)

Role	Description	Contains roles
	• Account and contact records (for B2B cases) • Consumer and household records (for B2C cases) • Service organization records (business location cases)	
Case task viewer [sn_customerservice.case_task_viewer]	This role provides read-only access to all case tasks. **Note:** When combined with the case viewer role (sn_customerservice.case_viewer), a user can access all customer service cases and all case tasks.	
Case viewer [sn_customerservice.case_viewer]	This role provides read-only access to all cases.	
Case contributor editor [sn_customerservice.case_contributor_editor]	This role provides limited write access to some of the fields on the Case form if the user has read access to the case through another role. Limited write access is available for the following fields: • Work notes • Additional comments • Attachments • State or stage changes • Contributor users • Contributor groups • Watchlist • Work notes list	
Case contributor viewer [sn_customerservice.case_contributor_viewer]	This role provides read access to all tables associated with a case if the user has read access to the case through another role.	• sn_shn.user • wm_read

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Customer service roles (continued)

Role	Description	Contains roles
	The user can access the **All tasks I participate in** module in CSM Agent Workspace.	

Roles included with the CSM Contributor User plugin

The following table lists the contributor roles that are included with the CSM Contributor User (com.snc.csm_contributor_user) plugin along with their descriptions and associated roles.

Roles for the contributor user plugin

Role	Description	Contains roles
Account contributor [sn_customerservice.account_contributor]	This role enables users to create cases for any account.	sn_customerservice.case_contributor_creator
Consumer contributor [sn_customerservice.consumer_contributor]	This role enables users to create cases for any consumer.	sn_customerservice.case_contributor_creator
Self contributor [sn_customerservice.self_contributor]	This role enables users with snc_internal role to create cases for themselves.	sn_customerservice.case_contributor_creator
Case contributor creator [case_contributor_creator]	This role enables users to create cases and is included in the top-level contributor roles.	

Roles included with the Business Location plugin

The following contributor roles are included with the Business Location plugin (com.snc.business_location).

Roles for the business location plugin

Role	Description	Contains roles
Service organization contributor [sn_customerservice.service_organization_contributor]	This role enables users to create cases for their service organization (business location). **Note:** A service organization contributor must be a member of a service organization to create cases on its behalf.	sn_customerservice.case_contributor_creator

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Roles included with the CS Base Extension Entities plugin

The following contributor roles are included with the CSM Base Extension Entities plugin (com.snc.cs_base_extension).

Roles for the CS base extension entities plugin

Role	Description	Contains roles
Relationship contributor [sn_customerservice.relationship_contributor]	This role enables users to create cases for customers with which they have an established relationship. **Note:** • The CSM Contributor User (com.snc.csm_contributor_user) plugin must be activated. • A relationship contributor must be a member of an account, contact, or household team to create cases on their behalf.	sn_customerservice.case_contributor_creator

Additional roles

Additional contributor roles

Role	Description	Contains roles
Customer data viewer [sn_customerservice.customer_data_viewer]	This role provides read access to customer data, including account, consumer, and household data, and the information included in the related lists.	
Workspace user [sn_customerservice.csm_workspace_user]	This role provides access to case tasks from the following modules in the CSM workspaces: • My Case Tasks • My Group's Case Tasks Users can also: • Use Agent Assist to search for knowledge articles (if the User Criteria is set to provide access to knowledge).	• agent_workspace_user • canvas_user • sn_templated_snip.template_snippet_reader • email_composer

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Additional contributor roles (continued)

Role	Description	Contains roles
	• Create email (if the user has write access to the record and the email_composer role). • View response templates (if response templates have been configured for the record. **Note:** By default, this role is added to the case task agent role (sn_customerservice.case_task_agent).	

Configuring customer access management

Ensure that the customer access management is set up correctly for the user by completing all configuration tasks using the Customer Service Management (CSM) application.

Overview of customer access management

Customer access management enables you to support multiple contacts and consumers on cases and sold products, providing them with varying levels of access to the case. You can also add additional internal users to a case.

As the needs of industry verticals grow, enterprises encounter complex use cases. There are use case scenarios where case management can be handled by more than one customer contact. For example, in a B2C scenario, let's assume that a loan applicant wants to add a co-borrower, guarantor, and an attorney to a housing loan application where everyone has the same level of access to respond to the loan application-related case. While in other cases, products purchased by a customer can have multiple departments tracking the product, like the finance team tracking the renewals of the product or the operations team tracking the maintenance of the product.

Customer access management enables enterprises across industry verticals such as hi-tech, telecommunications, financial services, government, and manufacturing to meet these complex use cases.

Customer access management helps customer service agents add multiple related parties and provides them with varying levels of access to a case. While adding related parties to a case, customer service agents can select the relationship type. The relationship type defaults the responsibility that drives the access level for the related parties, such as contacts or consumers on a case.

Key benefits

Customer access management:

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- Improves the customer experience by enabling related parties to track and collaborate on cases
- Improves operational efficiency by enabling customers to track cases for products and services
- Increases automation by automatically granting access to cases based on access to the sold product

Configuration tasks for customer access management

Listed are the following key configuration tasks required to set up and manage customer access.

Task	Description
Customer access management tables and plugins.	Add new tables or modify existing tables to enable customer access management.
Install roles with customer access management.	Use different predefined functional and granular roles to establish relationships between users and entities.
Create a responsibility definition	Define a role or responsibility that can support your organization and users in the Customer Service Management (CSM) application.
Configure access through the responsibility access configuration	Streamline how you create and update your responsibility definitions and access configurations by using the declarative responsibility framework in the Customer Service Management (CSM) application.
Create related party configurations.	Link related party entity responsibilities to responsibility definitions by adding related party configurations to a case.

Related topics

Data management for Customer Service Management

Using customer access management

Customer access management tables and plugins

Learn about the tables and plugins that you can use with customer access management.

The customer access management feature adds new tables or modifies existing tables. You can activate the following plugins that enable features, such as enabling restricted contact access. To activate these plugins, you must have the admin role. For details, see Activate a plugin.

Plugins used by customer access management

Plugin	Description	Tables
Customer Service [com.sn_customerservice]	Enables customers to provide service and support to external customers by using several	• Account Access [sn_csm_account_access] • Case [sn_customerservice_case]

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Plugins used by customer access management (continued)

Plugin	Description	Tables
	communication channels, such as email, web, and telephone.	• Related Party [sn_customerservice_related_party] • Related Party Configuration [sn_customerservice_related_party_configuration]
Customer Service Install Base Management [com.snc.install_base]	Enables customers to capture the current state of a customer's install base and establish the relationship to any downstream entities that might impact their functioning.	• Sold Product [sn_install_base_sold_product] • Sold Product Related Party [sn_install_base_sold_product_related_party] • Install Base Related Party [sn_install_base_related_party]

Tables used by customer access management

Table	Columns
Account Access [sn_csm_account_access] Enable restricted access to account contacts for sold products and install bases.	Account [customer_account] Account associated with the sold product.
	Restrict Contact Access Access that is restricted to entities due to their associated contacts. If the value of the field is **False**, the contacts that are associated with the account can read the sold products and install bases that are associated with the account. If the value of the field is **True**, the contacts that are associated with the accounts don't get access to the sold products and install bases, unless they're added as a contact on the record or as a related party. The following contacts get access to the sold products and install bases:

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Tables used by customer access management (continued)

Table	Columns
	• Contacts that are associated with the sold product and install base records. • Contacts that are added as related parties with an Authorized Representative responsibility. • Contacts that belong to accounts that are added as related parties with an Authorized Account responsibility.
Responsibility Definition [sn_customerservice_responsibility_def]	• Name • Applicable to • Type • Unique For more information on the column types, see Create a responsibility definition.
Related Party Configuration [sn_customerservice_related_party_configuration]	Default Responsibility [sn_customerservice_responsibility_def] Reference to the sn_customerservice_responsibility_def table. **Note:** Starting with the Washington DC release, the Related Party Configuration [sn_customerservice_related_party_configuration] table is reparented to the Application file [sys_metadata] table.
Sold Product [sn_install_base_sold_product]	Contact [customer_contact] Primary contact for the sold product.
	Additional Consumers [additional_consumers] Additional consumers that are associated with the sold product. The **Additional Consumers** field isn't exposed to customers through any forms or lists and is added for performance reasons.
	Additional Users [additional_users]

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Tables used by customer access management (continued)

Table	Columns
	Additional users that are associated with the sold product. The **Additional Users** field isn't exposed to customers through any forms or lists and is added for performance reasons.
Sold Product Related Party [sn_install_base_sold_product_related_party]	Sold Product [sn_install_base_sold_product] Products and components that are sold to an account or a consumer.
	Type [sn_customerservice_related_party_configuration] Type of relationship that the related party has with the sold product.
	Responsibility [sn_customerservice_responsibility_def] Access level that the user has on the sold product and associated entities.
	Consumer [csm_consumer] Consumer that has the assigned responsibility for the sold product.
	Contact [customer_contact] Contact that has the assigned responsibility for the sold product.
	Account [customer_account] All contacts within the account that have the assigned responsibility for the sold product.
Contact Sold Product [sn_install_base_rel_soldproduct_to_contact] Establishes account contact relationships with the sold products.	Sold Product [sn_install_base_sold_product] Products and components that are sold to an account or a consumer.
	Contact

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Tables used by customer access management (continued)

Table	Columns
Note: Starting with the Yokohama release, the sn_install_base_rel_soldproduct_to_contact table has been deprecated for new customers. For upgrade customers, the table continues to be supported and extends the sold product-related parties table [sn_install_base_sold_product_related_party].	[customer_contact] Contact that has the assigned responsibility for the sold product.
	Type [sn_customerservice_related_party_configuration] Name for this relationship.
	Responsibility [sn_customerservice_responsibility_def] Access level that the contact has on the sold product and associated entities.
Consumer Sold Product [sn_install_base_m2m_consumer_sold_product] **Note:** Starting with the Yokohama release, the sn_install_base_m2m_consumer_sold_product table has been deprecated for new customers. For upgrade customers, the table continues to be supported and extends the sold product-related parties table [sn_install_base_sold_product_related_party].	Type [sn_customerservice_related_party_configuration] Name for this relationship.
	Responsibility [sn_customerservice_responsibility_def] Access level that the consumer has on the sold product and associated entities.
Case [sn_customerservice_case]	Additional Consumers [additional_consumers] Additional consumers that are associated with the case. The **Additional Consumers** field isn't exposed to customers through any forms or lists and is added for performance reasons.
	Additional Users [additional_users] Additional users that are associated with the case. The **Additional Users** field isn't exposed to customers through any forms or lists and is added for performance reasons.
Install Base Related Party [sn_install_base_related_party]	Install Base Item sn_install_base_item

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Tables used by customer access management (continued)

Table	Columns
Note: The sn_install_base_related_party table is extendible and can be used to capture industry-specific attributes that correspond to a related party.	Instances of the product that are configured for a customer.
	Responsibility [sn_customerservice_responsibility_def] Access level to install the base and related information.
	Type [sn_customerservice_related_party_configuration] Name for this relationship.
	User sys_user Consumer, contact, service organization, member, or internal user that has the assigned responsibility for the install base.
	Consumer [csm_consumer] Consumer that has the assigned responsibility for the install base.
	Account [customer_account] All contacts within the account that have the assigned responsibility for the install base.
	Contact [customer_contact] Contact that is primarily responsible for the install base.
	Service Organization sn_customer_service_organization Service organization that is primarily responsible for the install base.
	Class class

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Tables used by customer access management (continued)

Table	Columns
	Type of record.
Related Party [sn_customerservice_related_party]	Responsibility [sn_customerservice_responsibility_def] Reference to the sn_customerservice_responsibility_def table.

Roles installed with customer access management

Customer access management uses different predefined functional and granular roles to establish relationships between users and entities. The granular and functional roles help provide user access to information and maintain data security.

Functional and granular roles overview

Functional and granular roles help provide authorized related parties access to the case, and provide additional contacts or additional consumers access to the sold product.

Granular roles provide access to cases, sold product, and related entities. One or more granular roles can be bundled together as a functional role to perform a meaningful action. Linking multiple granular roles to a functional role enables you to build your own access rules by applying the functional and granular roles for various Customer Service Management (CSM) entities.

A granular model helps to protect data by granting the required level of access to the relevant CSM entities. With this functionality, each role is associated with a set of privileges or responsibilities that determine users' access to certain information. You can set granular policies that authorize individuals to do their jobs efficiently and effectively, which helps to improve the customer experience.

Roles and descriptions

Functional roles are a set of granular roles that are required to perform a function that requires access on multiple entities. The following table lists the functional roles for customer access management.

Functional roles

Role title [name]	Plugins required	Description	Contains roles
Case Authorized Contact [sn_customerservice.case_authorized_contact]	Customer Service [com.sn_customerservice]	This role provides access to add additional comments and attachments, accept or reject a solution, receive notifications on case updates, close a case, and update case tasks.	sn_customerservice.case_write_granular
Case Authorized Consumer	Customer Service	This role provides access to add additional	sn_customerservice.case_write_granular

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Functional roles (continued)

Role title [name]	Plugins required	Description	Contains roles
[sn_customerservice.case_authorized_customer]	[com.snc.customer_service]	comments and attachments, accept or reject a solution, receive notifications on case updates, close a case, and update case tasks.	
Case Authorized Contributor [sn_customerservice.case_authorized_contributor]	Customer Service [com.snc.customer_service]	This role provides access to add additional comments and attachments, accept or reject a solution, receive notifications on case updates, close a case, and update case tasks.	sn_customerservice.case_write_granular
Sold Product Authorized Contact [sn_install_base.sold_product_authorized_contact]	Customer Service Install Base Management [com.snc.install_base]	This role provides access to view sold product and associated install base items, create cases, and access cases that are related to the sold product. Also, this role provides access to sold product related parties, affected install base items, and manage service catalog requests from the sold product.	• sn_customerservice.case_authorized_co • sn_install_base.sold_product_contact_r • sn_install_base.sold_product_read_gra • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_
Sold Product Authorized Consumer [sn_install_base.sold_product_authorized_consumer]	Customer Service Install Base Management [com.snc.install_base]	This role provides access to view sold product and associated install base items, create cases, and access cases related to the sold product. Also, this role provides access to sold product related parties, affected install base items, and manage service catalog requests from the sold product.	• sn_customerservice.case_authorized_co • sn_install_base.sold_product_consume • sn_install_base.sold_product_read_gra • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_
Install Base Authorized Contact [sn_install_base.install_base_authorized_contact]	Customer Service Install Base Management [com.snc.install_base]	This role provides the contact access to view the install base and its associated sold products when added as a related party. Additionally, it enables the contact to create and manage cases for the related install base records. Creation	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gra • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_

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Functional roles (continued)

Role title [name]	Plugins required	Description	Contains roles
		of case is only allowed if the contact and install base belong to the same account.	
Install Base Authorized Consumer [sn_install_base.install_base_authorized_consumer]	Customer Service Install Base Management [com.snc.install_base]	This role provides the consumer access to view the install base and its associated sold products when added as a related party. Additionally, it enables the user to create and manage cases for the related install base records.	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gra • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_
Install Base Authorized Contributor [sn_install_base.install_base_authorized_contributor]	Customer Service Install Base Management [com.snc.install_base]	This role provides the internal user to view the install base and its associated sold products when added as a related party. Additionally, it enables the user to create and manage cases for the related install base records.	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gra • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_
Install Base Authorized Member [sn_install_base.install_base_authorized_member]	Customer Service Install Base Management [com.snc.install_base]	This role provides the service organization member to view the install base and its associated sold products when added as a related party. Additionally, it enables the user to create and manage cases for the related install base records.	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gra • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_
Install Base Authorized Account	Customer Service Install Base Management [com.snc.install_base]	Provides access to all the contacts of the account to view the install base and its associated sold products when added as a related party. Additionally, it enables the contact to create and manage cases for the related install base records. Creation of case is only allowed if contact and install base belongs to same account.	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gra • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_

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Functional roles (continued)

Role title [name]	Plugins required	Description	Contains roles
Install Base Service Organization [sn_install_base.service_organization]	Customer Service Install Base Management [com.snc.install_base]	Provides access to all the members of service organization to view the install base and its associated sold products when added as a related party. Additionally, it enables the users to manage cases for the related install base records.	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gra • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_

The following table lists the granular roles for customer access management.

Granular roles

Role title [name]	Plugin required	Description	Contains roles
Sold Product Read [sn_install_base.sold_product_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to the sold product.	None
Sold Product Contact Read [sn_install_base.sold_product_contact_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to related parties of the sold product.	None
Sold Product Contact Write [sn_install_base.sold_product_contact_write_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular write access to related parties of the sold product.	sn_install_base.sold_product_contact_rea
Sold Product Consumer Read [sn_install_base.sold_product_consumer_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to additional consumers of the sold product and sold product-related parties.	None
Sold Product Consumer Write [sn_install_base.sold_product_consumer_write_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular write access to additional consumers of the sold product and sold product-related parties.	sn_install_base.sold_product_consumer_r

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Granular roles (continued)

Role title [name]	Plugin required	Description	Contains roles
	[com.snc.install_base]		
Case Read [sn_customerservice.case_read_granular]	Customer Service [com.sn_customerservice]	This role provides granular read access to the case.	None
Cases Create [sn_customerservice.case_create_granular]	Customer Service [com.sn_customerservice]	This role provides granular create access to the case.	sn_customerservice.case_read_granular
Case Write [sn_customerservice.case_write_granular]	Customer Service [com.sn_customerservice]	This role provides granular write access to the case.	• sn_customerservice.case_read_granular • sn_customerservice.case_create_granul
Case Related Party Write [sn_customerservice.case_related_party_write_granular]	Customer Service [com.sn_customerservice]	This role provides granular write access to case-related parties.	None
Install Base Read [sn_install_base.install_base_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to the install base.	None
Install Base Related Party Read [sn_install_base.install_base_related_party_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to install base related party records.	None
Install Base Related Party Write [sn_install_base.install_base_related_party_write_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular write access to install base related party records.	[sn_install_base.install_base_related_part]
Installed Product Read [sn_install_base.installed_product_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to the installed product.	None

Related topics

Assign granular roles to a functional role

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Assign granular roles to a functional role

Assign granular roles to a functional role to help provide authorized related parties with access to the case, and provide additional contacts and additional consumers with access to the sold product.

Before you begin
Role required: admin

Procedure

1. In the navigation filter, enter `sys_user_role.list`.
2. In the **Search** field, enter `*authorized`.
   You can see the list of functional roles that are provided in the base system.
3. Select the functional role that you want to customize.
4. From the Contains Roles related list, select **Edit** and add the desired granular role to the functional role.
5. Select **Save**.
   The granular role is added to the functional role.

Create a responsibility definition

A responsibility, or responsibility definition, specifies the role or function a user has within an entity, determining access through relationships. When creating a relationship, users are assigned specific responsibilities that grant access to the entity and its related entities.

Before you begin
Role required: admin

About this task
If you're using the Service Model Foundation feature, you can also create the responsibility definitions to use in customer and consumer relationships. For more information about configuring Service Model Foundation, see Configure Service Model Foundation.

The Responsibility Definition [sn_customerservice_responsibility_def] table supports domain separation. For more information on domain separation, see Domain separation and Customer Service Management.

Note:
Starting with the Vancouver release, the Responsibility Definition [sn_customerservice_responsibility_def] table is reparented to the Application file [sys_metadata] table.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Responsibility Definitions**.
2. Select **New**.
3. On the form, fill in the fields.

Responsibility Definition form fields

Field	Definition
Name	Name of the responsibility.
Applicable to	Persona type that the responsibility applies to, such as the customer service managers or agents.

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Field	Definition
Type	Type of users to whom the responsibility can be assigned to: ○ User: Select **User** if this responsibility should be assigned to an employee. When assigning this type, the list of available users comes from the Users [sys_users] table. ○ Contact: Select **Contact** if this responsibility should be assigned to a customer contact. When assigning this role, the list of available users comes from the Contacts [customer_contact] table. ○ None: Select **None** if this responsibility definition is to be used when creating relationships between consumers. **Note:** Only the responsibility definitions with **Type** set to **User** can be used in the following Service Model Foundation relationships: ○ Account Team Member ○ Consumer Team Member ○ Household Team Member
Unique	Option that you can select to disable the duplicate entries for the responsibility definition.

4. Select **Submit**.

Related topics

Service Model Foundation responsibilities

List of responsibilities provided with the base system

List of responsibilities that are provided with the base system.

Responsibility table

Responsibility	Plugin	Used in Relationship	Role Required	Supported through responsibility access configuration
Account Manager	Customer Service Base Extension Entities [com.snc.cs_base_extension]	Account Team Member [sn_customerservice_team_member]	• Relationship Agent [sn_customerser • Relationship Contributor [sn_customerser	Yes **Note:** Responsibility access configurations are currently inactive in Yokohama.

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Responsibility table (continued)

Responsibility	Plugin	Used in Relationship	Role Required	Supported through responsibility access configuration
Relationship Manager	Customer Service Base Extension Entities [com.snc.cs_base_extension]	• Consumer Team Member [sn_customer_rel_consumer_to_user] • Household Team Member [sn_customer_rel_household_to_user]	• Relationship Agent [sn_customer_service.relationship_agent] • Relationship Contributor [sn_customer_service.relationship_contributor]	No
Authorized Account	Customer Service [com.sn_customerservice]	Sold Product Related Party [sn_install_base_sold_product_related_party]	Sold Product Authorized Contact [sn_install_base.sold_product_authorized_contact]	No
		Install Base Related Party [sn_install_base_related_party]	Install Base Authorized Contact [sn_install_base.install_base_authorized_contact]	
Authorized Representative	Customer Service [com.sn_customerservice]	Sold Product Related Party [sn_install_base_sold_product_related_party]	• Sold Product Authorized Contact [sn_install_base.sold_product_authorized_contact] • Sold Product Authorized Consumer [sn_install_base.sold_product_authorized_consumer]	No
		Install Base Related Party [sn_install_base_related_party]	• Install Base Authorized Contact [sn_install_base.install_base_authorized_contact] • Install Base Authorized Consumer [sn_install_base.install_base_authorized_consumer]	
		Related Party [sn_customerservice_related_party]	• Case Authorized Contact [sn_customerservice.case_authorized_contact] • Case Authorized Consumer [sn_customerservice.case_authorized_consumer]	

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Responsibility table (continued)

Responsibility	Plugin	Used in Relationship	Role Required	Supported through responsibility access configuration
			• Case Authorized Contributor [sn_customerservice.case_authorized_contributor]	
		Consumer to Consumer Relationship [sn_customer_rel_consumer_to_consumer]	Consumer [csm_consumer]	
		Household Member Relationship [sn_customer_rel_household_member_relationship]	Consumer [csm_consumer]	
Preferred Technician	Customer Service [com.sn_customerservice]	Account Team Member [sn_customerservice_team_member]	N/A	No
Primary Support Agent	Customer Service [com.sn_customerservice]	Account Team Member [sn_customerservice_team_member]	N/A	No
Support Manager	Customer Service [com.sn_customerservice]	Account Team Member [sn_customerservice_team_member]	N/A	No
Asset Contact	Customer Service [com.sn_customerservice]	Account Team Member [sn_customerservice_team_member]	N/A	No
Authorized Service Organization	Customer Service Install Base Management [com.snc.install_base] **Note:** You must install com.snc.service_organization for activating com.snc.install_base plugin.	Install Base Related Party [sn_install_base_related_party]	Install Base Authorized Member [sn_install_base.install_base_authorized_member]	No
Location Relationship Manager	Business Location [com.snc.business_location]	Service Organization Location Responsibility [sn_csm_svc_org_member_responsibility]	Location Relationship Manager [sn_bus_loc.location_relationship_manager]	No

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Responsibility table (continued)

Responsibility	Plugin	Used in Relationship	Role Required	Supported through responsibility access configuration
Location Contributor	Business Location [com.snc.business_location]	Service Organization Location Responsibility [sn_csm_svc_org_location_member_responsibility]	Service Organization Contributor [sn_customerservice.service_organization_contributor]	No
Location Consumer Agent	Business Location [com.snc.business_location]	Service Organization Location Responsibility [sn_csm_svc_org_location_member_responsibility]	Location Consumer Agent [sn_customerservice.svc_location_consumer_agent]	No
Location Agent	Business Location [com.snc.business_location]	Service Organization Location Responsibility [sn_csm_svc_org_location_member_responsibility]	Location Agent [sn_customerservice.svc_location_agent]	No
Location Manager Fulfiller	Business Location [com.snc.business_location]	Service Organization Location Responsibility [sn_csm_svc_org_location_member_responsibility]	Location Manager [sn_customerservice.svc_location_manager]	No
Location Manager Contributor	Business Location [com.snc.business_location]	Service Organization Location Responsibility [sn_csm_svc_org_location_member_responsibility]	Location Manager Contributor [sn_customerservice.svc_location_manager_contributor]	No
Location Support Agent	Business Location [com.snc.business_location]	Service Organization Location Responsibility [sn_csm_svc_org_location_member_responsibility]	Location Support Agent [sn_bus_loc.svc_location_support_agent]	No

Configure access through the responsibility access configuration

Streamline how you create and update your responsibility definitions and access configurations by using the declarative responsibility framework in the Customer Service Management (CSM) application. This framework enables you to select the level of access for each responsibility by leveraging low-code or no-code capabilities, which reduces the time required for scripting.

Before you begin

Role required: admin

About this task

The Responsibility Access Configuration [sn_customerservice_responsibility_access_config] table is used to store the metadata of the responsibility access configuration. This configuration specifies the level of access and the entities that can be accessed by a particular responsibility. For more information about creating a responsibility definition, see Create a responsibility

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definition. The need for domain separation in configuring access records is determined by the domain of the referenced responsibility.

Note:
Starting with the Yokohama release, creating and updating responsibility definitions and access configurations using the declarative responsibility framework is deactivated.

Granular roles and supported entities for responsibility framework

Starting with the Yokohama release, multiple module-level granular roles are introduced to simplify defining and configuring the responsibility framework. These new granular roles simplify tasks by removing the need to create custom access control lists (ACLs) on the target table when a responsibility ACL is already in place. This change promotes a more straightforward and declarative migration process.

Granular roles for access through entities

The granular roles provides Create, Read, and Update (CRU) access across entities, based on the access permissions defined for each responsibility within the declarative responsibility framework.

Granular roles	Description
sn_customerservice.cust_data_resp_granular	Provides granular access to customer-related foundational entities (including accounts, contacts, consumers, and households) through the responsibility framework.
sn_customerservice.case_mgmt_resp_granular	Provides granular access to case and related entities through the responsibility framework.
sn_install_base.resp_granular	Provides granular access to installed base items, sold products, and related entities through the responsibility framework.
sn_customerservice.contract_entitlement_resp_granular	Provides granular access to contracts, entitlements, and related entities through the responsibility framework.

Granular roles and supported entities

Granular roles are designed based on feature sets and can be used to provide access to supported tables or entities though the responsibility framework.

Feature Set	Granular Role	Supported Tables/Entities
Customer Data	sn_customerservice.cust_data_resp_granular	• Account [customer_account] • Account Team Member [sn_customerservice_team_member] • Account Address [account_address_relationship] • Account Access [sn_csm_account_access] • Account Relationship [account_relationship]

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Granular roles and supported entities

Granular roles are designed based on feature sets and can be used to provide access to supported tables or entities though the responsibility framework.

(continued)

Feature Set	Granular Role	Supported Tables/Entities
		• Contact Relationship [sn_customerservice_contact_relationship] • Contact [customer_contact] • Consumer [csm_consumer] • Account Consumer [sn_acct_consumer_account_consumer] • Consumer Profile Location [sn_csm_consumer_profile_location] • Escalation [sn_customerservice_escalation] • Location [cmn_location]
Case Management	sn_customerservice.case_mgmt_resp_granular	• Case [sn_customerservice_case] • Task [sn_customerservice_task#] • Task SLA [task_sla#] • Escalation [sn_customerservice_escalation] • Work Order [wm_order]
Install Base Management	sn_install_base.resp_granular	• Installed Product [sn_install_base_m2m_installed_product] • Affected Install Base [sn_install_base_m2m_affected_install_base • Install Base Item [sn_install_base_item] • Sold Product Covered [sn_install_base_m2m_contract_sold_produc • Sold Product [sn_install_base_sold_product] • Install Base Related Party [sn_install_base_related_party] • Sold Product Related Party [sn_install_base_sold_product_related_party

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Granular roles and supported entities

Granular roles are designed based on feature sets and can be used to provide access to supported tables or entities though the responsibility framework.

(continued)

Feature Set	Granular Role	Supported Tables/Entities
		• Asset Contact [sn_customerservice_m2m_asset_contact] • Asset [alm_asset]
Contracts and Entitlements	sn_customerservice.contract_entitlement_resp_granular	• Contract [ast_contract] • Entitlement [service_entitlement]

System roles containing responsibility granular roles

System roles and related granular roles

System Roles	Granular Roles
sn_customerservice.relationship_contributor	• sn_customerservice.cust_data_resp_granular • sn_install_base.resp_granular • sn_customerservice.case_mgmt_resp_granular
sn_customerservice.relationship_agent	• sn_customerservice.cust_data_resp_granular • sn_install_base.resp_granular • sn_customerservice.case_mgmt_resp_granular • sn_customerservice.contract_entitlement_resp_granular

Create related party configurations

Related party configurations define the title of a relationship between an entity and an organization or user. These configurations also enable linking related party types with responsibility definitions to grant access as needed.

Before you begin

Role required: admin

Procedure

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

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Related Party Configuration record form

Field	Description
Name	Related party configuration type.
Applies To	Table assigned with the related party configuration.
Entity Type	Entity type such as an account, a consumer, or a product.
Reference Condition	Filter condition for defining the related party configuration. In the **Reference Condition** field, you can select **Add Filter Condition** or **Add "Or" Clause**.
Default Responsibility	Access level to different entities and the related information. **Note:** Whenever a related party record is created, the **Responsibility** field gets auto-populated from the default responsibility associated with the selected party type.
Default Order	Numerical value given to establish the priority of the relationship. **Note:** Whenever a related party record is created, the **Order** field gets auto-populated from the default order associated with the selected party type.

4. Select **Submit**.

List of related party configurations provided with the base system

Related party configurations for different entities that are provided with the base system are listed in the following tables.

Related party configurations for cases

Types and responsibilities for cases are listed in the following table.

Cases

Type	Default Responsibility
Authorized Contact	Authorized Representative
Authorized Consumer	Authorized Representative
Authorized Contributor	Authorized Representative
Listed Contact	Not applicable
Listed Consumer	Not applicable

Related party configurations for sold products

Types and responsibilities for sold products are listed in the following table.

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Sold Products

Type	Default Responsibility
Authorized Account	Authorized Account
Authorized Contact	Authorized Representative
Authorized Consumer	Authorized Representative
Listed Account	Not applicable
Listed Contact	Not applicable
Listed Consumer	Not applicable

Related party configurations for install bases

Types and responsibilities for install bases are listed in the following table.

Install Bases

Type	Default Responsibility
Authorized Account	Authorized Account
Authorized Contact	Authorized Representative
Authorized Consumer	Authorized Representative
Authorized Contributor	Authorized Representative
Authorized Member	Authorized Representative
Authorized Service Organization	Authorized Service Organization
Listed Account	Not applicable
Listed Contact	Not applicable
Listed Consumer	Not applicable
Listed Contributor	Not applicable
Listed Member	Not applicable
Listed Service Organization	Not applicable

For more information on install base related parties, see Add related parties to an install base item.

Related party configurations for account team members

Types and responsibilities for account team member are listed in the following table.

Account Team Members

Type	Default Responsibility
Account Manager	Account Manager
Preferred Technician	Preferred Technician
Primary Support Agent	Primary Support Agent

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Account Team Members (continued)

Type	Default Responsibility
Support Manager	Support Manager

Related party configurations for contact relationships

Types and responsibilities for contact relationship are listed in the following table.

Contact Relationships

Type	Default Responsibility
Asset Contact	Asset Contact

Related party configurations for consumer relationships

Types and responsibilities for consumer relationship are listed in the following table.

Consumer Relationships

Type	Default Responsibility
Authorized Representative	Authorized Representative

Related party configurations for household member relationships

Types and responsibilities for household member relationship are listed in the following table.

Household Member Relationships

Type	Default Responsibility
Authorized Representative	Authorized Representative

Related party configurations for service organizations

Types and responsibilities for service organizations are listed in the following table.

Service Organizations

Type	Default Responsibility
Location Agent	Location Agent
Location Consumer Agent	Location Consumer Agent
Location Contributor	Location Contributor
Location Manager Contributor	Location Manager Contributor
Location Manager Fulfiller	Location Manager Fulfiller
Location Support Agent	Location Support Agent
Listed Member	Not applicable

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Note:

- Whenever a related party record is created, the **Responsibility** field gets auto-populated from the default responsibility associated with the selected party type. Similarly, the **Order** field gets auto-populated from the default order associated with the selected party type.
- Listed role types don't have any responsibility. Since the correct role and responsibility determine access, related parties are not granted access if the **Responsibility** field is left empty.

Populate the Type field in relationship tables using the fix script

Leverage the fix script to add and manage the **Type** field in relationship tables. This script simplifies data mapping and enhances record consistency across the base system.

Before you begin

Role required: admin

About this task

Starting with the Yokohama release, a new optional **Type** field is added to the account team member [sn_customerservice_team_member] table, which previously included the fields **Account**, **User**, and **Responsibility**. This fix script applies to all relationship tables in the base system.

The **Type** field references the related party configuration [sn_customerservice_related_party_configuration] table, a metadata table that enables administrators to define a **Type Configuration** for each responsibility. This field enables administrators to assign meaningful business names to responsibilities, reducing duplication. By internally referencing the same responsibility, the **Type** field simplifies data management and improves record consistency.

You can use the following procedure to populate the **Type** field using the fix script.

Procedure

1. Identify distinct Responsibility values in the relationship table that you want to update.
2. Create corresponding Type Configuration records in the related party configuration [sn_customerservice_related_party_configuration] table.
3. Run the following fix script to populate the **Type** field.

```
fixRelatedPartyTypeField(String tableName, String
 appliesTo, String entityType, String typeField, String
 responsibilityField)
/**
  * Fixes the related party type field in the specified table.
  *
  * @param tableName  The name of the table to update.
  * @param appliesTo  The value for the applies_to field.
  * @param entityType The value for the entity_type field.
  * @param typeField  The name of the type field to update. If
 null, defaults to FIELD_TYPE.
  * @param responsibilityField The name of the responsibility
 field to update. If null, defaults to FIELD_RESPONSIBILITY.
  */
```

Result

The fix script:

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- Automatically populates the **Type** field for matching records in the selected relationship table.
- Maps existing responsibilities to their corresponding Type Configuration records.
- Processes updates in batches for optimized performance.
- Logs updates for reference.

Note:
For large record volumes, run the fix script during system downtime to avoid performance impacts.

You can manually populate the **Type** field by navigating to the related party configuration [sn_customerservice_related_party_configuration] table and creating Type Configuration records for each distinct responsibility.

Example:
Suppose you want to populate the **Type** field in the account team member [sn_customerservice_team_member] table, where the table uses the following responsibilities:

- Account Manager 1
- Account Manager 2
- Account Manager 3

1. Navigate to the related party configuration [sn_customerservice_related_party_configuration] table.
2. Create three Type Configuration records, one for each responsibility.
3. Run the fix script that automatically:
   - Maps each responsibility to its corresponding **Type**.
   - Populates the **Type** field for all records in the account team member [sn_customerservice_team_member] table.

Fix external user role assignments

You may have external users (contacts or consumers) on your instance that have been assigned internal roles. If so, you can use the Customer Service Management guided setup to evaluate and correct these role assignments as needed.

Because external users with internal roles can result in access issues, it is recommended that external users only be assigned external roles.

Use the tasks in the Fix External User Role Assignment category guided setup category to evaluate the contacts and consumers with the following role assignments:

- The snc_internal role only.
- The snc_internal role and one or more external roles.
- The snc_internal role and one or more additional internal roles.
- The snc_internal role and one or more additional internal and external roles.

Review the list of users in each group and tag those users with incorrect role assignments. Then run the scheduled job to fix the role assignments.

Note:
You can also review and update external user roles using a query-based list. For more information, see KB0829930.

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Using guided setup to fix external user role assignments

With the system administrator role, you can use guided setup to fix external user role assignments.

1. Navigate to **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Fix External User Role Assignment category, click **Get Started**.

   The Fix External User Role Assignment page opens with a list of tasks to evaluate groups of external users.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Fix External User Role Assignment tasks

The following table describes the different configuration tasks in the Fix External User Role Assignment category.

Fix External User Role Assignment tasks

Task	Description
External users with possible non-intentional internal role assignment	This is a set of contacts and consumers with the following role assignments: • The snc_internal role only. • The snc_internal role and one or more external roles. It is recommended that you do not assign internal roles to external users. Review the contacts in this list and fix the role assignment as needed.
External users with possible intentional internal role assignments	This is a set of contacts and consumers that have the following role assignments: • The snc_internal role and one or more additional internal roles. • The snc_internal role and one or more additional internal and external roles. It is recommended that you do not assign both internal and external roles to the same user. Review the users in this list and fix the role assignment as needed.
External users with intentional internal role assignments	This is a set of contacts and consumers that have the snc_internal role that is contained by another role. It is recommended that you do not assign internal roles to external users. Review the

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Fix External User Role Assignment tasks (continued)

Task	Description
	users in this list and fix the role assignments as needed.
Avoid such role assignments in future	To prevent external users from being assigned the snc_internal role in the future, enable the following property: *glide.security.explicit_roles.enable_intern* Click **Configure** to navigate to the property and verify that the value is true. If false, set the value to true.

Fix roles for external users with possible non-intentional internal role assignments

Review and fix roles for external users that may have non-intentional internal role assignments.

Before you begin

Role required: admin

About this task

It is recommended that you do not assign internal roles to external users. Use this procedure to review and fix the contacts and consumers that may have the following role assignments:

- snc_internal role only
- snc_internal role and one or more external roles

Note:
This guided setup task uses scheduled jobs to identify and fix role assignments. When fixing role assignments, the scheduled job fixes 3000 users at a time. If there are more than 3000 users in this group, change the configuration of the job so that it runs periodically.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Fix External User Role Assignment category, click **Get Started** and then click **External users with possible non-intentional internal role assignment**.
3. Run the scheduled job to tag users that may have non-intentional user role assignments.
   Users are tagged with the **Ext-user-non-intentional** tag.
4. Review the list of tagged users and remove the tag from any users for which you do not need to fix role assignments.
   If necessary, configure the list to display the Tag column.
5. Run the scheduled job to fix the role assignments for the users with the **Ext-user-non-intentional** tag.
   This scheduled job makes the following changes:

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- For users with the snc_internal role only, it removes the snc_internal role and adds the snc_external role.
- For users with the snc_internal role and one or more external roles, it removes the snc_internal role.

This scheduled job runs all of the insert/delete business rules on the User Role [sys_user_has_role] table.

Fix roles for external users with possible intentional internal role assignments

Review and fix roles for external users that might have intentional internal role assignments.

Before you begin

Role required: admin

About this task

It is recommended that you don't assign internal roles to external users. Use this procedure to review and fix the contacts and consumers that may have the following role assignments:

- snc_internal role and one or more additional internal roles
- snc_internal role and one or more additional internal and external roles

Note:
This guided setup task uses scheduled jobs to identify and fix role assignments. When fixing role assignments, the scheduled job fixes 3000 users at a time. If there are more than 3000 users in this group, change the configuration of the job so that it runs periodically.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**.
2. In the Fix External User Role Assignment category, select **Get Started** and then select **External users with possible intentional internal role assignments**.
3. Run the scheduled job to tag users that may have intentional user role assignments.
   Users are tagged with the **Ext-user-intentional** tag.
4. Review the list of tagged users and remove the tag from any users for which you don't need to fix role assignments.
   If necessary, configure the list to display the Tag column.
5. Run the scheduled job to fix the role assignments for the users with the **Ext-user-intentional** tag.
   This scheduled job makes the following changes:
   - For users with the snc_internal role and one or more additional internal roles, it removes the snc_internal role and all other internal roles, and adds the snc_external role.
   - For users with the snc_internal role and one or more additional internal and external roles, it removes the snc_internal role and all other internal roles.

   This scheduled job runs all of the delete business rules on the User Role [sys_user_has_role] table.

Fix roles for external users with intentional internal role assignments

Review and fix roles for external users that have intentional internal role assignments.

Before you begin

Role required: admin

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About this task

It is recommended that you do not assign internal roles to external users. Use this procedure to review and fix the contacts and consumers that have the following role assignments:

snc_internal role that is contained by another role.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Fix External User Role Assignment category, click **Get Started** and then click **External users with intentional internal role assignments**.
3. Run the scheduled job to tag users that have intentional user role assignments.
   Users are tagged with the **Ext-user-contained-role** tag.
4. Review the list of tagged users.
5. Manually fix the role assignments for the desired users.

Prevent future internal role assignments for external users

Enable a property to prevent external users from being assigned the snc_internal role.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Fix External User Role Assignment category, click **Get Started** and then click **Avoid such role assignments in future**.
3. Set the
   `glide.security.explicit_roles.enable_internal_user_blacklist`
   property to true.

Product data

Configure product data for Customer Service Management including product models, sold products, install base items, and installed products.

Setting up users, user groups, and customer relationships

Task	Description
Configure product data	Configure the product data for your company, including: • Product models: Goods or services that your company sells and supports. • Sold products: The products and components that have been sold to an account or a consumer.

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Setting up users, user groups, and customer relationships (continued)

Task	Description
	• Install base items: Items that represent the instances that have been installed or provisioned for a customer. • Installed products: Information about sold products and how they are deployed or installed.
Configure assets	An asset is a specific product or instance that is supported for an account or consumer.
Create asset contact relationships	Assign an asset to a customer contact who is responsible for managing that asset.
Create service contracts	Service contracts define the type of support that accounts and consumers receive for their products.
Configure entitlements	Entitlements define the type of support that an account or consumer receives as well as the supported communication channels.
Configure Customer Contracts and Entitlements	Use the Post-Sales Support application to configure and display customer service contracts and entitlements.
Use Customer Life Cycle Management Workflows to manage the life cycle of your sold products	This application enables you to update the existing configurations and to modify, suspend, resume, or disconnect the sold products and their complete hierarchy.
Create Lead to Cash for products and services	Use these workflows to analyze business opportunities and customer leads as well as the billing, support, and maintenance requirements after a sale is complete.

Configure product data

Configure product data including product models, sold products, install base items and installed products.

Before you begin

Role required: admin

About this task

- **Product models:** A product is a type of good or service that your company sells and supports. Product models identify different types of products, such as service, hardware, software, or consumables.

  Note:
  Product models require the Model Management plugin (com.snc.model).

- **Sold products:** The products and components that have been sold to an account or a consumer.

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- **Install base items:** Items that represent the instances that have been installed or provisioned for a customer.
- **Installed products:** Provide information on the sold products and how they are deployed or installed. Use installed products to create an association between sold products and install base items.

Procedure

- You can import the following product data using guided setup.
  - Import product models with guided setup
  - Import sold products with guided setup
  - Import install base items with guided setup
  - Import installed products with guided setup
- You can create product data using the Customer Service Management application.
  - Create a product model
  - Create sold products
  - Create install base items
  - Create installed products
- You can configure the following relationships and associations after importing or creating product data:
  - Product models
    - Associate service offerings to product models
    - Configure product model and catalog item relationships
  - Sold products
    - Associate service offerings with sold products
    - Associate sold products with contracts

Product models

Configure product models, such as service, hardware, software, or consumables that your company sells and supports.

Task	Description
Import product models with guided setup	Prepare and import data for each type of product model in a different table.
Create a product model	Create a record for a specific version or configuration of a product type that your company sells and supports.
Associate services with product models	Associate one or more service offerings to a product model to enable customers to choose service offerings for products.
Configure product model and catalog item relationships	Create relationships between product models and catalog items so that your customers can request services for products.

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Import product models with guided setup

A product is a type of good or service that your company sells and supports. Product models identify different types of products, such as service, hardware, software, or consumables.

Before you begin
Role required: admin

About this task
Information for each type of product model is stored in a different table. For example, service product models are stored in the Service Model [cmdb_service_product_model] table.

Note:
Product models require the Model Management plugin (com.snc.model).

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Foundation Data category, click **Get Started** and then click **Import Product Models**.
3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create a product model

Create a record for a type of product that your company sells and supports.

Before you begin
Role required: model_manager

Confirm that the Model Management plugin (com.snc.model) is installed.

About this task
A product model is a specific version or configuration of a product. Build hierarchical product models that represent the set of products that your organization offers to its customers and define relationships between different product models. Define whether a product is tracked as an asset, a CI, or both. Additionally, identify or create the CI and asset classes to capture configuration information for product models.
Product models provide customer service agents and customers with a common understanding of the products being used by a particular customer. Customers can view the products purchased on the Customer Service Portal and can open cases for any issues they are facing.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Product Models**.
2. Select **New**.
3. Select the type of product model to create:
   - **Application Model**
   - **Consumable Model**
   - **Contract Model**
   - **Facility**
   - **Hardware**

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- **Service**
- **Software**

4. Fill in the fields for the selected product model as appropriate.
   See Model form fields for field descriptions.
5. Select **Submit**.

> **Note:**
> In the **Sold Product** related list, you can see all the accounts and consumers that the product model has been sold to.

Associate services with product models

Enable customers to select services for products by associating services with product models.

Before you begin
Role required: sn_customerservice_manager or admin

About this task
One product model can have multiple associated services.

Procedure
1. Navigate to **All** > **Customer Service** > **Product Models**.
2. Select a product model.
3. Configure the form to display the Services related list.
   For more information, see Add a related list to a form.
4. On the Services related list, click **New** or **Edit** to add an existing service offering to the product model.

Configure product model and catalog item relationships

Enable customers to request services for the products that they own. Create definitions for the services that support your products and then configure service definitions to associate them with the appropriate products and catalog items.

Before you begin
Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task
Use the Service definitions feature to create definitions for the services that are offered to support your products. This feature is available with the Customer service case types plugin.

From the Customer and Consumer Portals, end users can select available services from the Services portal widget. Selecting a service displays the record producer associated with the service definition. Submitting the record producer creates a case of the correct case type.

Procedure
1. Create a service definition.
2. Associate a product with a service definition.
3. Associate one or more catalog items with a service definition.

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Related topics

View product information from the Customer Service Portal

Configure install base

Track which products and services have been purchased by a customer, how they've been installed or provisioned, along with the detailed configuration for each installed item.

Before you begin

Role required: admin

About this task

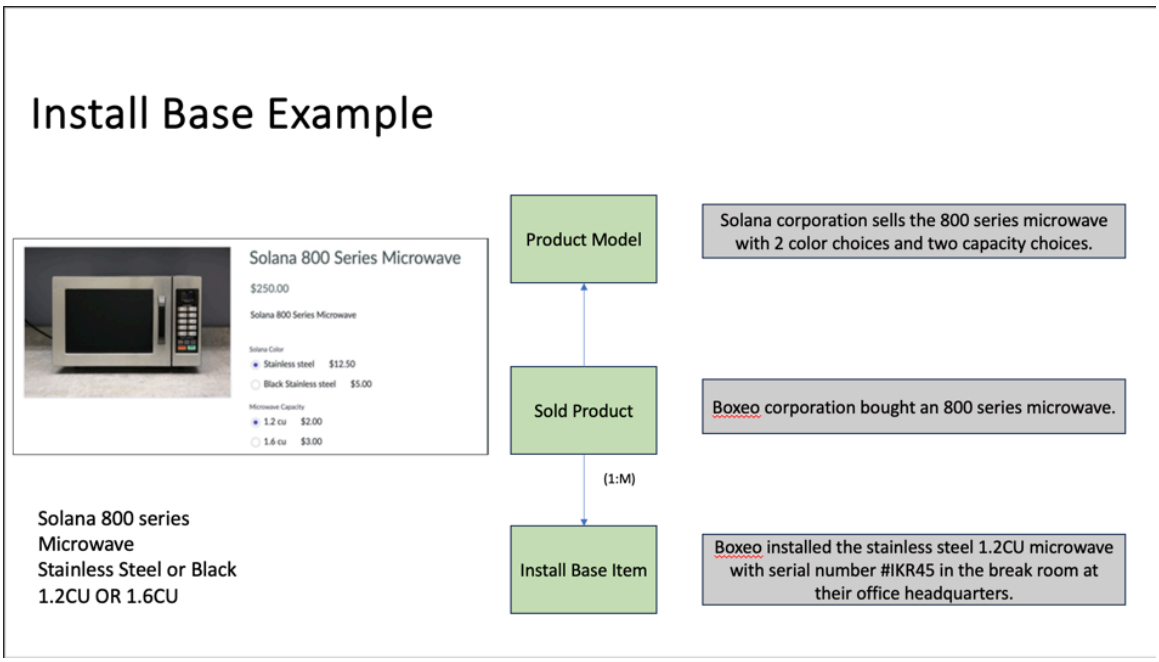
Install the Customer Service Install Base Management plugin (com.snc.install_base) from the ServiceNow Store.

Capture the install base for a customer by creating sold products, install base items, and installed products. This would enable the customer service agents to trace issues back to the relevant product, instances of that product, and other entities impacting their functioning.

Before setting up your install base, create your product data by creating or importing product models. For more information, see Configure product data.

Using install base management

This example shows the summary of the customer's purchase on the Solana microwave.



There are three parts to setting up your install base.

Customer service install base management plugin description

Sold Products	Create a sold product to provide customers, consumers, and customer service agents visibility into the products and services sold to an account or a consumer.

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Customer service install base management plugin description (continued)

Install Base Items	Create an install base item to track instances that have been provisioned for an account or consumer. An install base item can be any configuration item that has been made accessible to customers. For Software as a Service (SaaS) products, an install base item refers to an application service configuration item.
Installed Products	Create an installed product to track information on the instances that a sold product is deployed on at an account or consumer. A sold product can have multiple installed product records depending on the number of instances of the product in use.

You can create sold products, install base items, and installed products as individual records, import them in bulk, or create them from an Account or Consumer record.

Customer service agents can view install base information in Agent Workspace. Customers can view install base information on the Customer Service Portal.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**
3. In the Foundation Data category, view the list of tasks to configure the feature.

Install base description

Task	Description
Import Sold Products	Import sold products to track the products or services sold to an account or consumer.
Import Install Base Items	Import install base items that represent the items installed or provisioned for a customer.
Import Installed Products	Import installed products to create an association between sold products and install base items.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Sold products

Create or import sold products to provide customers, consumers, and customer service agents with a view into the products and services that have been sold to an account or a consumer. A sold product can have child and parent sold items in a hierarchical structure.

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Sold products are products and components that have been sold to an account or a consumer. By looking at which products and components have been sold to an account or consumer, you can get an overview of all the products that have been sold to that account or consumer. A sold product can have child and parent sold products in a hierarchical structure. For example, if issues arise with a configuration item, customer service agents can trace which sold product is affected on the Case form.

From the Sold Products form, you can edit install base items, create entitlements and cases, and add contracts. To learn more about creating entitlements, see Create an entitlement.

Setup sold products

Task	Description
Import sold products with guided setup	Use guided setup to import sold products so that you can track the products or services sold to an account or consumer.
Create a sold product	Create a sold product to track the products or services that are sold to an account or consumer.
Associate service offerings with sold products	Associate a service offering with a sold product to provide customer service agents visibility into sold products and their service offerings.
Associate sold products with contracts	Associate sold products to contracts to capture complete information on a customer's install base.

Import sold products with guided setup

Sold products are products and components that have been sold to an account or a consumer. Use guided setup to import sold products so that you can track the products or services sold to an account or consumer.

Before you begin
Role required: admin

About this task
This provides an overview of the complete product sold to an account or consumer. A sold product can have child and parent sold items in a hierarchical structure.

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Foundation Data category, click **Get Started** and then click **Import Sold Products**.
3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create a sold product

Create a sold product to track the products or services that are sold to an account or consumer.

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Before you begin

Verify that the Customer Service Install Base Management (com.snc.install_base), Customer Service with Service Portfolio Management (SPM) (com.snc.csm_spm), and the Product Catalog Management Core (sn_prd_pm) plugins are installed.

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select **New**.
3. On the Sold Product form, fill in the fields.
   To learn more about the descriptions, see Sold product form.
4. Right-click the form header and select **Save**.
   The Child Sold Products, Install Base Items, Cases, Entitlements, Contracts, Additional Contacts, and Additional Consumers related lists are displayed.
5. Fill in the related lists as required.

Sold product related lists

Related list	Description
Child Sold Products	Create a child sold product by selecting **New**.
Install Base Items	Edit an install base item by selecting **Edit**.
Cases	Add a case to the sold product by selecting **New**. The system displays any open cases that are related to the sold product automatically.
Entitlements	Add an entitlement for the sold product by selecting **Select**. **Note:** Customer service managers create entitlements. Customer service agents can view entitlements.
Contracts	Associate a contract with the sold product by selecting **Edit**. **Note:** You can also associate a contract with a sold product from the Service Contracts form. Customer service managers associate the contracts to the sold products. Customer service agents can view the contract information.
Additional Contacts	Add additional contacts to the sold product by selecting **New**.

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Related list	Description
	You can associate a contact with a sold product by defining its name and responsibility. The additional contacts added can be from the same account, partner account, or contact relationship. You can see the Additional Contacts related list for the sold products that are associated with the B2B account. **Note:** Starting with the Utah release, the sn_install_base_rel_soldproduct_to_contact table has been deprecated for new customers. For upgrade customers, the table continues to be supported and extends the sold product related parties table [sn_install_base_sold_product_related_party].
Additional Consumers	Add additional consumers to the sold product by selecting **New**. You can associate a consumer with a sold product by defining its name and responsibility. You can see the Additional Consumers related list for the sold products that are associated with the B2C account. **Note:** Starting with the Utah release, the sn_install_base_rel_soldproduct_to_contact table has been deprecated for new customers. For upgrade customers, the table continues to be supported and extends the Sold Product Related Parties table [sn_install_base_sold_product_related_party].
Sold Product Related Parties	Add contacts, accounts, and consumers as related parties by selecting **New**.

Note:
For business-to-business and business-to-consumer, you can see both the additional contacts and additional consumers in the sold product related lists and you can also add new records.

6. Select **Update**.

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The sold product is added to the account or consumer that you selected. Select an account or consumer to see a list of all sold products that are related to the account or consumer. You can also view a list of sold products according to the product model.

Note:
You can also create sold products directly from an account or a consumer.

a. Navigate to **Customer Service** > **Customer** > **Accounts** or **Customer Service** > **Customer** > **Consumer**.

b. Select an account or a consumer.

c. Select the Sold Products related list.

d. Select **New**.

Related topics

Create and manage sold products for a business location

Edit a contract

Create an entitlement

Associate service offerings with sold products

Associate a service offering with a sold product giving customer service agents visibility into sold products and their service offerings.

Before you begin
Role required: sn_customerservice_manager or admin

Ensure that the Customer Service with Service Portfolio Management (SPM) plugin (com.snc.csm_spm) is installed.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select the desired record where you want to associate service offerings.
3. In the **Service Offering** field, select an existing service offering.

Note:
The **Service Offering** field may not appear by default in the user interface. If this happens, add **Service Offering** field using the form layout.

4. Click **Update**.

Related topics

Create a service offering

Associate sold products with contracts

Capture complete information on a customer's install base by associating sold products to contracts.

Before you begin
Role required: sn_customerservice_manager or admin

About this task
Associate sold products to contracts so that your customer service agents working on cases can:

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- Check a sold product and view any contracts that exist for the sold product.
- View which products have been sold to the customer under the contract.
- Track when sold products were added to the contract, and how long they are covered for.

You can also associate a sold product with a contract from the Sold Product form.

A sold product can be part of multiple contracts. If a sold product is deleted, it is also deleted from any associated contracts. If a contract is deleted, the sold product remains.

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Service Contracts**.
2. Click a contract you want to add a sold product to.
3. On the **Products Covered** related list, click **New** to associate sold products to the contract. The list of sold products is filtered based on the account.

   Click **Run filter** to see a list of all sold products. You can only add the sold products that belong to the account selected or to the account hierarchy.
4. Click **Save**.
5. On the **Products Covered** related list, click the **Add All Child Sold Products** related list action to add all child sold products to the contract without having to select each item individually.
6. Click **Update**.

Install base items

Create an install base item to track instances that have been provisioned for an account or consumer. An install base item can be any configuration item that has been made accessible to customers. For Software as a Service (SaaS) products, an install base item refers to an application service configuration item.

Task	Description
Import install base items with guided setup	Use guided setup to import install base items so that you can track instances that have been provisioned for an account or consumer.
Create an install base item	Create an install base item that represents the instance of the product that has been configured for a customer. The install base item enables you to track all the purchases that were made by a customer.
Associate multiple install base items to a case	Associate one or more related install base items to a case to access all the install base items that are associated to the parent install base item.
Install base characteristics	Configure characteristics of install base items to provide information about the service requirements and ensure timely maintenance services for the install base item.

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Import install base items with guided setup

Install base items represent the instances of the product that have been configured for a customer.

Before you begin
Role required: admin

About this task
Each install base item references the configuration item record for the customer.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Foundation Data category, click **Get Started** and then click **Import Install Base Items**.
3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create an install base item

Create an install base item in the Customer Service Management application that represents the instance of the product that has been configured for a customer. The install base item enables you to track all the purchases that were made by a customer.

Before you begin
Ensure that the Customer Service Install Base Management plugin (com.snc.install_base) is installed.

Role required: sn_customerservice_manager or admin

About this task
An install base item is any configuration item (CI) that has been made accessible to customers. For Software as a Service (SaaS) products, an install base item refers to an application service configuration item. Each install base item references the configuration item record for the customer. If issues arise with a configuration item, customer service agents can trace which install base items that the case is affecting.

https://player.vimeo.com/video/1073309365?h=79d5721672&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**.
2. Select **New**.
3. On the form, fill in the fields.

Install Base Item form

Field	Description
Number	Unique ID of the install base item. This field is automatically filled in, but you can change it.
Name	Name of the install base item.

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Field	Description
Configuration Item	Configuration item that is associated with the install base item. The sn_customerservice_manager role must also have the app_service_user role to create the install base items for the Application Service configuration item class. For more information, see Application services. Service models have a model category called the Application Service, which links a service model to the Application Service CI class. For more information, see Models and Model categories.
Service Organization	Internal or external entity that is involved in providing service to the customer. **Note:** If you select a service organization, the **Account**, **Contact**, and **Consumer** fields are hidden. The **Service Organization** field is active only when the Service Organization (com.snc.service_organization) plugin is installed.
Account	Account that is associated with the install base item. **Note:** If you enter an account, the **Consumer** field is hidden. The Consumer field is active only when the B2B2C plugin is installed.
Contact	Account contact that is primarily responsible for the install base item.
Consumer	Consumer that is associated with the install base item. **Note:** The Account field is hidden if the **Consumer** field is entered first.
Owned by	Business manager of the install base item. If the business manager is entered in the configuration item, this field is automatically filled in with the information from the configuration item.
Supported by	If the CI contains this information, this field is automatically filled in with the information from the configuration item.
Service Context	Service that is associated to the underlying CI for calculating the impact severity from Event Management. For more information, see Service health status for install base. **Note:** This field is only available if you have the Proactive Customer Service Operations with Event Management plugin installed. The health status of an install base item appears only if an install base item has a CI and a service context that is associated to it. Configure the form layout to add this field.
Parent install base item	Install base item that is the parent of the current install base item.
Root install base item	Install base item that is used to fetch the entire install base hierarchy in a single query.

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Field	Description
Household	Household that is associated with the install base item. **Note:** This field is available only when the Customer Service Household (com.snc.household) plugin is installed.
Product	Product model that is associated with an install base and is used to identify the services that are associated with any product model. **Note:** A product model must have a single specification. The specification that is associated to the product model appears only on the install base form.
Location	Location that is associated with the product.
State	Current state of the Install base item and represents the various phases of the life cycle. **Note:** The state of the install base item determines the **Active** field and the **Uninstall date** field on the install base form.
Status	Option that determines whether the product is original or a replacement.
Life cycle stage	CSDM life cycle stage of an install base item.
Life cycle stage status	CSDM life cycle stage status of an install base item.
Active	Option that represents whether the install base is active or inactive. If the state is active, related cases for a product can be created. **Note:** A sync between the active state, install date, and uninstall date is always present. On the install base form, if the **State** is **In Use**, it means that the **Active** option is selected. The **Active** option remains unselected if the **State** is set to **Inactive**.
Install date	Date on which the install base becomes active.
Uninstall date	Date on which the install base becomes inactive.
Asset	Asset that is associated with an install base.
Specification	Specification that is associated with an install base item. Option that helps in fulfilling orders to create an install base item and its hierarchy. **Note:** The **Specification** field appears only to CSM agents, managers, and contributor persona.
Install base identifier	Identify finished goods in the system using their unique identifier.

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Field	Description
Provider service organization	The service organization that sells and supports the products or services owned by the customer.

Note:
In the List view of the install base item, you can filter the data by Condition, Active, Uninstall Date, and Asset.

4. Right-click the form header and select **Save**.
The Sold Products, Entitlements, and Cases related lists are displayed.
5. Fill out the related lists as described in the following table.

Install base item related lists

Related list	Description
Child Install Base items	List of all child install bases that are related to the parent install base item.
Sold Products	List of the sold products that are associated with an install base Item. Edit a sold product by selecting **Edit**.
Cases	List of cases that are associated with an install base item.
All Cases	List of all cases that are related to an install base in the install base hierarchy. **Note:** The All Cases related list appears only when an install base hierarchy is added to the Install base item.
Entitlements	List of entitlements that are associated with an install base item. Add an entitlement for the install base item by selecting **New**. **Note:** Customer service managers can create entitlements. Customer service agents can view entitlements.
Contracts	List of contracts that are related to an install base. Edit a contract by selecting **Edit**.
Install Base Related Parties	List of contacts, consumers, accounts, members, contributors, and service organizations that have access to an install base. For more information on Install Base Related Parties, see Create related party configurations.

For more information on related lists, see Related list for an install base item.

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6. Select **Update**.
   The install base item is added to the account or consumer that you selected. You can select an account or consumer to see a list of all the install base items that are related to the account or consumer.

   Note:
   You can also create install base items directly from an account or a consumer.

   a. Navigate to **Customer Service** > **Customer** > **Accounts** or **Customer Service** > **Customer** > **Consumer**.

   b. Select an account or a consumer.

   c. Select the Install Base Items related list.

   d. Select **New**.

Related topics

Create and manage install base items for a business location

Related list for an install base item

In the Customer Service Management application, you can use the Install base related list to track information that is related to the install base hierarchy, cases, entitlements, and other entities. By using these tables, you can understand your customers' purchases and provide efficient post-sales support.

Related list for install base item

Related list	Description
Create a child install base item	List of all the child install base items associated to the parent install base item.
Sold Products	List of all the products or services sold to a customer. For more information on how to create a sold product, see Create a sold product.
Cases	List of all the cases associated to the current install base item. The list of cases enables customer service agents to access all the cases and issues that are related to an install base in one place. For more information on cases and case access, see Service Model Foundation cases.
All Cases	List of all the child cases associated to the parent install base item. **Note:** You cannot see the parent cases that are associated with a child install base item.
Create an entitlement	List of the existing cases for an account, product, or service contract that defines the type of support that a customer receives. For more information on entitlements, see Configure entitlements.

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Related list for install base item (continued)

Related list	Description
Edit a contract	List of all the contracts associated to the current install base item.
Install Base Related Parties	List of all the additional parties that have access to an install base item. You can add related parties only to the root install base item. For more information to the list of related parties and default responsibilities, see Create related party configurations. To add a related party to an install base, see Add related parties to an install base item.

Create a child install base item

Create a child install base item in the Customer Service Management application to view a list of all the cases and issues of the parent install base item.

Before you begin
Role required: admin and sn_customerservice_manager

About this task
A child install base related list provides the information about all the child install bases of the current install base item.

Procedure

1. Navigate to **All** > **Customer Service** > **Product** > **Install Base Item**.
2. In the related list section of the Install base form, select an install base item and open **Child Install Base Items**.
3. Select **New.**
   The **Parent install base item** field on the new install base form is automatically filled or defaulted to the current install base selection. The **Account** and **Contact** fields are automatically filled in on the child install base form.
4. Select **Submit**.

Create an entitlement

Create an entitlement in the Customer Service Management application to view the existing cases for an account, product, or service contract. Creating an entitlement helps you to understand the level of support and the communication channels that an agent can use.

Before you begin
Role required: admin or sn_customerservice_manager

About this task
Create an entitlement to define the type of support that a customer receives.

Procedure

1. Open an install base item and from the related list, select **Entitlements**.
2. Select **New**.

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3. On the form, fill in the fields.
   For more information, see Configure entitlements and Create entitlements for CSM entities.
4. Select **Submit**.

Edit a contract

Enable an agent or manager to edit an open contract that is related to the parent install base item in the Customer Service Management application.

Before you begin
Role required: admin or sn_customerservice_manager

About this task
The Contracts related list provides a list of all the contracts that are related to the current install base item.

Procedure
1. Open an install base item and from the related list, select **Contracts**.
2. To edit a contract, select **Edit**.
3. From the list of contracts, select the contract that you want to link to the install base item.

   Note:
   The list of contracts that are displayed are related to the **Account** option that you selected in the Install Base form.

4. Select **Save**.

Associate multiple install base items to a case

In the Customer Service Management application, you can associate one or more related install base items to a case to access all items associated with the parent install base item.

Before you begin
Role required: sn_customerservice_manager and admin

Procedure
1. Navigate to **All** > **Customer Service** > **Cases** > **All**.
2. Open the case that you want to associate the multiple install base items to.
3. Open the Affected Install Base Items related list.
4. Select **Edit**.
5. From the existing list of install base items in the **Collection** box, select the install base that you want to add by selecting the right arrow.
   The install base that you select is displayed in the **Affected Install Base Items List** box.
6. Select **Save**.

Install base characteristics

Customer service managers can create the characteristics of the install base items, while administrators can capture and track the characteristics of the install base items by using the Customer Service Management application. These characteristics can provide information about the service requirements and verify timely maintenance services for the install base item.

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Overview

Install base characteristics enable flows like case management, field service management, planned maintenance, and reactive service requirements to occur on a schedule. Some install base characteristics are configurable and vary from product to product. The product model characteristics are non-configurable and are directly taken from the product model that is associated with the install base item.

Only users with the sn_customerservice_manager role can create the characteristics for the install base items. Users with the administrator role can activate the Install base characteristics plugin [com.snc.install_base_characteristics] to capture and view all the install base characteristics on the Install base form. To activate the plugin, see Activate a plugin.

The Install base characteristics data model represents how the characteristics of an install base item are stored. To learn about the different fields and tables that they're stored in, see Data model for the Install base item characteristics.

Roles

With the admin role, you can track the characteristics to provide the required product information to administrators, agents, business stakeholders, and customers. You can also track the services that are associated with an install base item at the time of purchase. With this role, you can capture the configurable and non-configurable characteristics to view the configuration specifications for an install base item.

With the sn_customerservice_manager role, you can create a set of configurable characteristics for an install base item on the Customer Service Management (CSM) application. It enables you to view the install base item details and its associated services. After you create an install base characteristic, the characteristic appears in the related list on the install base item form. For more information, see Create the install base characteristics for an install base item.

There are different functional and granular roles to provide varying levels of permissions to users. For information on the different access levels, see Security roles for the install base characteristics.

Install Base characteristics

The install base characteristics are stored in the Install Base Characteristics table [sn_install_base_item_characteristic]. However, both the install base and product model characteristics are displayed in the Install base characteristics and product model related lists on the install base form. You can use the text search option on the Customer Service platform and portals to search for the characteristics on the Install Base characteristics table.

You can view the install base characteristics on the Customer Service, Consumer Service, and Business Location Service Portal (BLSP).

Under the **Support** header on the portals home page, you can view the information about the install base characteristics that are associated with the parent install base item. The characteristics that are associated with the child items aren't visible on the portals. For more information about the install base items from the Customer Service Portal, see View install base information from the Customer Service Portal.

Data model for the Install base item characteristics

The data model for the install base item characteristics represents how the characteristics of an install base item are stored in the Customer Service Management application. The data model refers to the characteristic values and options and provides a view of how to store a set of characteristics associated to an install base item.

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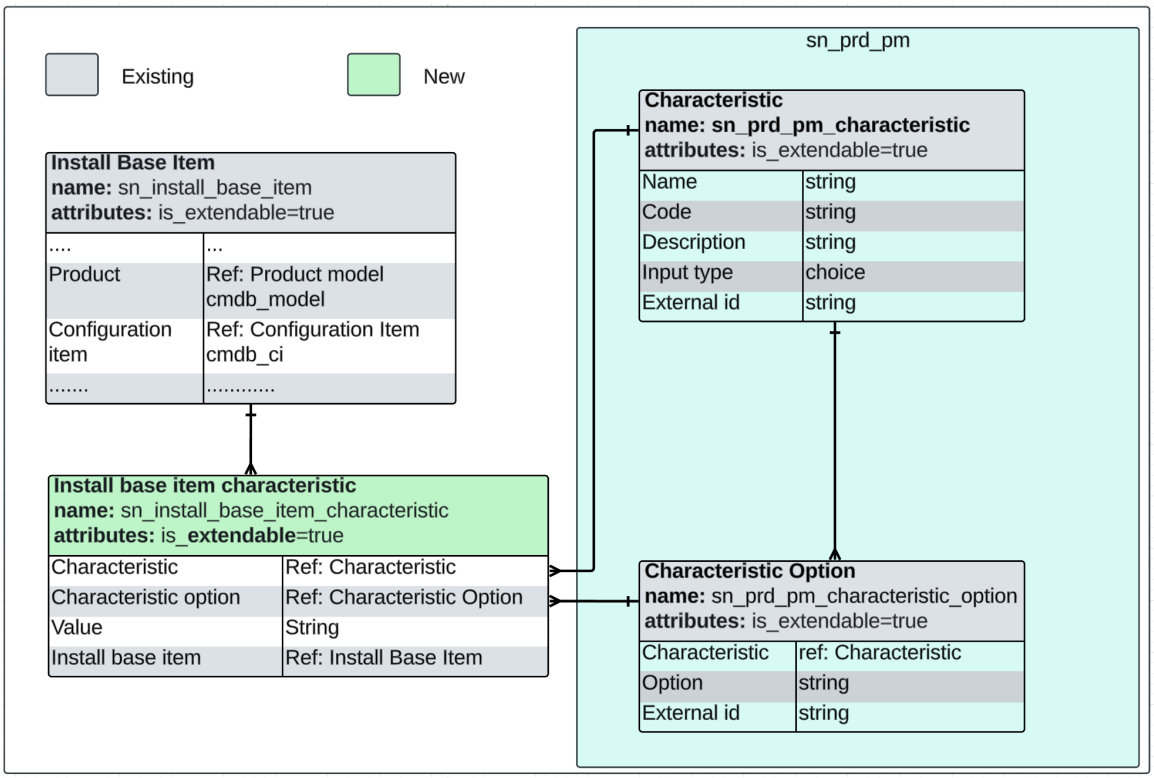
The Customer Service Management application has several functional and granular roles that provide access levels to create, read, and update characteristics for an install base item. The install base item characteristics table [sn_install_base_item_characteristic] comes with different security roles and plugins. For more information on security roles, see Security roles for the install base characteristics.

The following diagram shows the data model for the Install base characteristics. The data model represents the new and existing install base item and install base item characteristics tables.

Data model for Install base characteristics



The following table describes the different fields on the Install base characteristics form.

Install base item characteristics table

Field	Description
Characteristic	Characteristic that is associated with the install base item.
Characteristic option	Characteristic option that you chose from a list of options for the selected characteristic. **Note:** This field is available when the characteristic that you select is a choice, Boolean, or check box type of option.
Value	String value for the selected characteristic.

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Install base item characteristics table (continued)

Field	Description
	Note: This field is available when the characteristic that you select expects a string input and isn't a choice, Boolean, or check box type of option.
Install base item	Install base item that the characteristics are added to.

Security roles for the install base characteristics

You can assign functional and granular roles to Customer Service Management (CSM) users and administrators so that they can access the different capabilities and features of the install base characteristics.

Functional and granular roles come with varying levels of permissions for the configuration of install base characteristics on the Customer Service Management (CSM) application.

The following tables describe the different functional and granular roles and their descriptions.

Functional roles for the install base characteristics

Role title	Required Plugin	Description	Contains roles	Added to roles
sn_install_base.install_base_viewer	Customer Service Install Base Management [com.snc.install_base_chars] and Product Catalog Management Core] [sn_prd_pm plugin	This role provides read access to an install base characteristics, and all the product model characteristics. This role is intended for internal users only.	• sn_ib_chars.install_base_item_characteristics_read • sn_prd_pm.product_model_characteristic_viewer • sn_install_base.install_base_read_granular	sn_install_base.install_base_mana
sn_install_base.customer_install_base_viewer	Customer Service Install Base Management [com.snc.install_base_chars] and Product Catalog Management Core [sn_prd_pm plugin]	This role provides read access to an install base characteristics, and only the customer visible product model characteristics. This role is intended for external users only.	• sn_ib_chars.install_base_item_characteristics_read • sn_prd_pm.product_model_characteristic_granular • sn_install_base.install_base_read_granular	None

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Functional roles for the install base characteristics (continued)

Role title	Required Plugin	Description	Contains roles	Added to roles
sn_install_base.install_base_item_characteristics_manager	Customer Service Install Base Management [com.snc.install_base_item_characteristics]	This role provides access to manage the install base item characteristics. This role is intended for internal users only.	• sn_ib_chars.install_base_item_characteristics_write • sn_ib_chars.install_base_item_characteristics_crea • sn_install_base.install_base_viewer	None

Granular roles for the install base characteristics

Role title	Required Plugin	Description	Contains roles	Added to role
sn_ib_chars.install_base_item_characteristics_reader	Customer Service Install Base Characteristics [com.snc.install_base_item_characteristics]	This role provides granular read access to install base characteristics.	sn_prd_pm.characteristics_viewer	• sn_ib_chars.install_base_item_c • sn_ib_chars.install_base_item_c • sn_install_base.install_base_vie • sn_install_base.customer_instal
sn_ib_chars.install_base_item_characteristics_creator	Customer Service Install Base Characteristics [com.snc.install_base_item_characteristics]	This role provides granular create access to install base characteristics.	sn_ib_chars.install_base_item_characteristics_reader	
sn_ib_chars.install_base_item_characteristics_writer	Customer Service Install Base Characteristics [com.snc.install_base_item_characteristics]	This role provides granular write access to install base characteristics.	sn_ib_chars.install_base_item_characteristics_reader	

Create the install base characteristics for an install base item

Create a set of configurable characteristics for an install base item on the Customer Service Management (CSM) application. You can then view the details about the install base item and the services that are associated with it.

Before you begin

Role required: sn_customerservice_manager

About this task

Each product has its own set of attributes, some of which are configurable by the user and some that are non-configurable. Configurable characteristics are a set of characteristics related to an install base item that the user can choose or customize at the time of purchase. These characteristics differ from user to user and product to product. However, non-configurable characteristics are fixed characteristics related to an install base item and can't be chosen or customized by the user at the time of purchase. To learn more about characteristics, see Install base characteristics.

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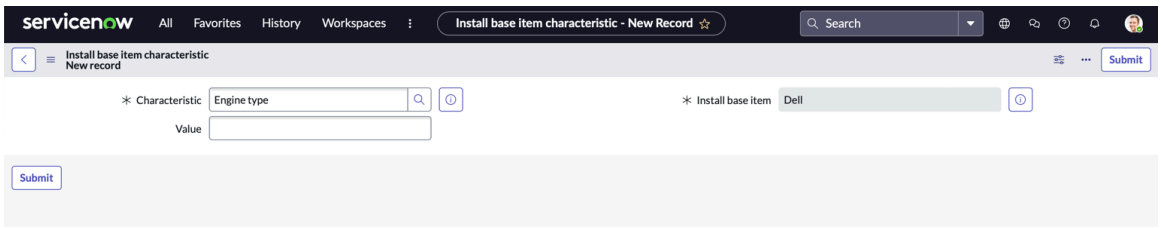
Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**.
2. Open an install base item from the list.
3. Navigate to the Install Base Characteristics related list.
4. Select **New**.
5. In the **Characteristic** field, select a characteristic.

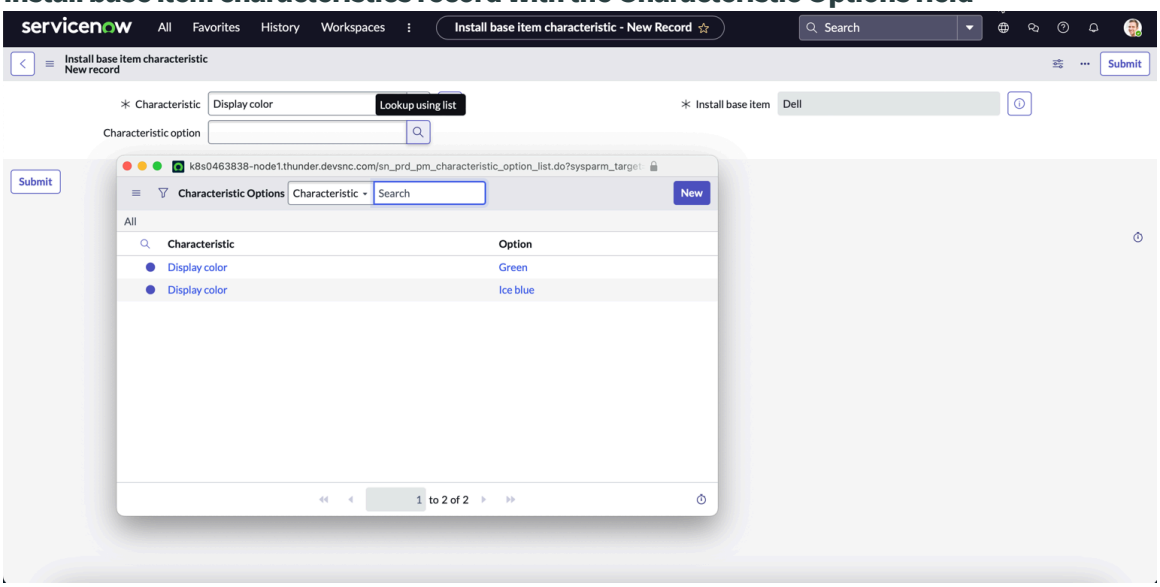
   Choose a string type or value for the **Characteristic** field. If the characteristic field has a string type, then the **Value** field appears as shown in the following example.

   Install base item characteristics record with the Value field



   If the characteristic field has an option, then the **Characteristic option** field appears as shown in the following example.

   Install base item characteristics record with the Characteristic Options field



6. Select **Submit**.

Result

After creating an install base characteristic, the characteristic appears in the related list on the install base item form.

Synchronizing an asset class with a configuration item class and install base class

You can synchronize the asset class, configuration item (CI) class, and the install base class by mapping the model categories in the Customer Service Management (CSM) application. With this synchronization, the data can flow between the different entities because the same information is replicated on both entities.

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Overview

By mapping the install base class, configuration item class, and asset class fields, you can synchronize the information on both the install base item and the asset form. This mapping creates a bidirectional synchronization. For example, you can update any one of the **Location**, **Install date**, **Consumer**, **Account**, **State**, and **Contact** fields on the install base item form to create a synchronization between the install base item and the asset form. For more information on the different fields on the install base form, see Create an install base item.

Note:
You must update the **Consumer** and **Account** fields from the install base item to synchronize the updates to the asset form. Updating the fields on the asset form doesn't synchronize the updates to the install base item.

Install Base item class

The Install Base item class on the model category form only displays the tables that extend from the install base table [sn_install_base_item]. If the install base table has no extensions, no options are displayed in the Install Base Class list. You can create a synchronization between an install base record and an existing associated record by using the following sample migration script.

```
var ibClasses = []; //If the list is empty, system will fetch
 model categories for all Install base item classes
var assetIBIntegrationUtil = new
 sn_install_base.AssetIBIntegrationUtils();
assetIBIntegrationUtil.syncExistingInstallBaseRecordsToAsset(ibC
lasses)
```

Product instance identifier

The product instance identifier helps to avoid creating duplicate records by tracking install base items and their corresponding assets. The product instance identifier applies to all the extensions of the install base [sn_install_base_item] table.

Note:
The **Is product instance** flag on the Model Category form is read-only by default and is marked true for selective model categories only. The product instance identifier is a hash value and not a user-friendly field.

Product instance hierarchy for Install Base Management

Adopt the product instance hierarchy into Install Base Management to maintain a synchronization between an asset and an install base item in the Customer Service Management application.

Enable the product instance to create a synchronization for all changes that occur in the asset hierarchy to automatically reflect in the install base hierarchy. An install base item hierarchy depends on the hierarchy of its associated assets. The Install base hierarchy mirrors its corresponding asset model hierarchy for both the parent and child install base items.

Note:
All the instances in the hierarchy must belong to the same model category.

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Synchronizing the install base life cycle fields with the state and status fields

You can synchronize the **Life cycle stage** field and the **Life cycle stage status** fields with the **State** and **Status** fields on the install base form so that you can track the lifecycle of an install base entity.

Overview

Track the lifecycle of an install base entity by migrating to the Common Service Data Model. To learn more about the CSDM framework, see Common Service Data Model framework for Install Base Management.

Life Cycle Mapping table

The Life Cycle Mapping [life_cycle_mapping] table is already populated with the lifecycle mapping values and choices that you must begin your synchronization of the **Life cycle stage** field and the **Life cycle stage status** fields with the **State** and **Status** fields on the install base form. The mapping record maps the **State** fields with their corresponding lifecycle fields on the install base form. The **In Use** and **InActive** options are available in the **State** field and their corresponding mappings are available in the Life Cycle Mapping [life_cycle_mapping] table. With these default options, you can initiate a synchronization with the life cycle fields.

You can create custom choices for the **State** and **Status** field by adding a mapping record in the Life Cycle Mapping [life_cycle_mapping] table. Each custom value has related records on the Life Cycle Mapping [life_cycle_mapping] table. You must activate the mapping records for the synchronization to begin.

For information on how to create the custom choices and then map the **Life cycle stage** and **Life cycle stage status** fields with the legacy **State** field, see Enabling CSDM life-cycle sync between legacy fields and related assets.

Note:
If the custom choices have no lifecycle mappings, then the **Life cycle stage** and the **Life cycle stage status** fields remain in the **To Be Determined** state.

Migration of the Install Base table

If you don't want to activate all the tables and records in the CSDM framework, you can migrate only the Install Base table (sn_install_base_item) as a part of your CSDM migration process. Use the following script to migrate the existing records to synchronize the legacy **State** field with the install base lifecycle fields.

```
var tableNames = [];//list of tablenames ex:
 ['sn_install_base_item'];
new sn_install_base.IBProductInstanceUtil().
 syncLifeCycleFields(tableNames);
```

Install base hierarchy visualization

Use the **Install Base Hierarchy** tab on the CSM Configurable Workspace to view the parent-child hierarchy structure of an install base item.

The install base hierarchy provides a node map of both parent and child items associated with an install base item. The hierarchy node begins with the install base item that is currently open. The node map extends toward both the root install base item and the child install base item up to seven levels of hierarchy.

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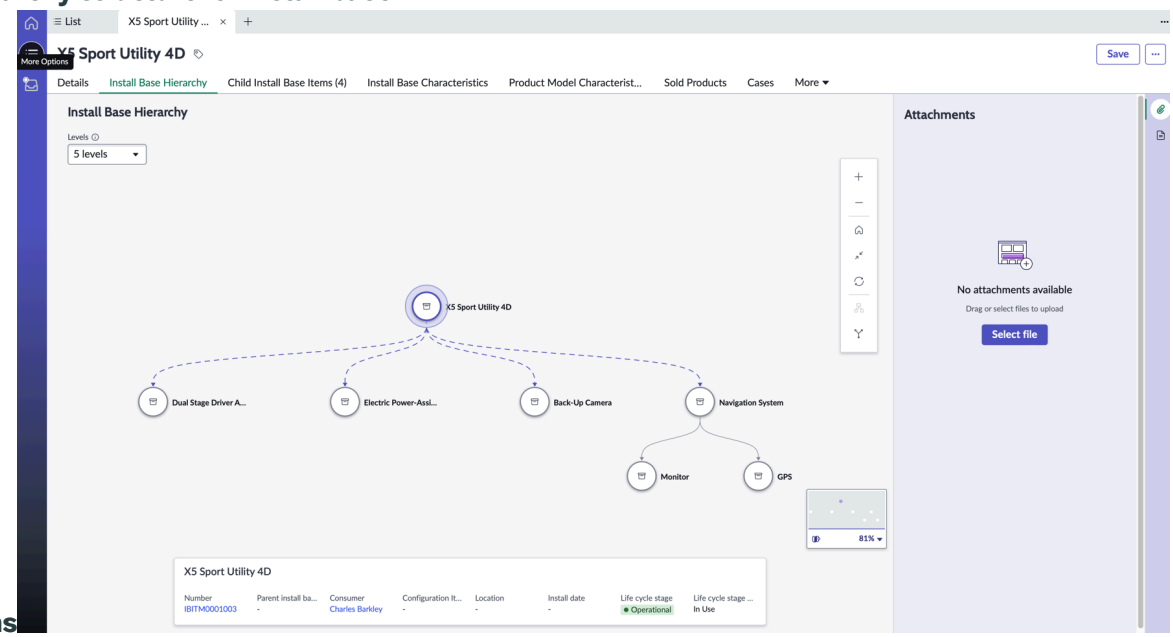
The first level of the install base hierarchy node map always displays the child items associated with the current install base item. Select the levels from the level selector to view the number if install base levels associated with the current install base item.

For example, select Level 1 with the current install base item as the home node, to view all the child items associated with it. Subsequently, at Level 2, set one of the child install base items as a home node to have further insight into its own child items. The number of child items are denoted by a number badge next to the install base node. You can continue to expand the hierarchy structure up to the seventh level or to 250 nodes, whichever comes first.

Hierarchy structure for install base items



Note:
Badges against child items aren't displayed beyond the seventh level of hierarchy. To view the hierarchy beyond the seven levels, set any one of the install base items in the hierarchy as the home node.

You can use the hierarchy structure of an install base item to perform the following contextual actions on individual nodes.

- Set any node as a home node.
- Create a case from the node.

  To learn about different case types and how to create a case from an install base node, see Customer service case types.

- View details of a node. This opens up the entire record of the install base item.

View the details of any install base that is selected in the hierarchy structure on the record card.

Note:
Select the **Number**, **Parent install base item**, **Account**, **Configuration item**, and **Location** fields on the record card to navigate to the install base record.

Installed products

Create an installed product to track information on the instances that a sold product is deployed on at an account or consumer. A sold product can have multiple installed product records depending on the number of instances of the product in use.

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Task	Description
Import installed products with guided setup	Import installed products to provide information on the sold products and how they are deployed or installed. Import installed products to create an association between sold products and install base items.
Create installed products	Create an installed product to create an association between sold products and install base items.

Import installed products with guided setup

Installed products provide information on the sold products and how they are deployed or installed. Import installed products to create an association between sold products and install base items.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Foundation Data category, click **Get Started** and then click **Import Installed Products**.
3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create installed products

Create an installed product to create an association between sold products and install base items. Installed products provide information on the instances that a sold product is deployed on.

Before you begin

Role required: sn_customerservice_manager or admin

Ensure that the Customer Service Install Base Management plugin (com.snc.install_base) is installed.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Installed Products**.
2. Click **New**.
3. Fill out the fields on the form.

Installed Product form

Field	Description
Install Base Item	Instance the sold item is deployed on.

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Field	Description
Sold Product	Sold product deployed to the customer.

4. Click **Submit**.

Common Service Data Model framework for Install Base Management

The Common Service Data Model (CSDM) framework is a standard set of terms and definitions that you can adopt across all ServiceNow® products on the ServiceNow AI Platform. By using this framework, you can effectively track assets through their lifecycle transitions.

The CSDM is the data framework that you follow when you set up ServiceNow products and applications. You adhere to the CSDM guidelines when you define the configuration items (CIs) and the relationships between CIs in the CMDB. This process helps to ensure that your data resides in the appropriate CMDB tables so that you get the maximum value from your ServiceNow AI Platform applications. To learn about CSDM, see Common Service Data Model.

To set up a CSDM environment for Install Base Management, see Activate the CSDM plugin.

Note:
It's optional to adopt CSDM. You can either adopt the CSDM framework or continue using the existing model.

You can use a migration script to update the CSDM life-cycle values in the existing install base records. To learn about the migration script, see Synchronizing the install base life cycle fields with the state and status fields.

Configure assets

An asset is a specific product or instance that is supported for a customer.

Role required: admin

Assets can have serial numbers or asset tag numbers and can be allocated to individual accounts or to a contact within an account. Assets can also have associated support contracts.

Note:
Customer Service Management leverages the Asset Management application to create and maintain assets. Ensure that the Asset Management plugin (com.snc.asset_management) is activated.

You can either import your existing assets using guided setup or create new assets using the Customer Service Management.

Related topics

Configure install base

Import assets with guided setup

Use Customer Service Management guided setup to import existing assets.

Before you begin

Role required: admin

About this task

There are different types of assets and information for each type of asset is stored in a different table. For example, hardware assets are stored in the Hardware [alm_hardware] table.

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Foundation Data category, click **Get Started** and then click **Import Assets**.
3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create an asset

Create a record for a specific instance of a product.

Before you begin

Role required: sn_customerservice_manager or admin

Customer Service Management leverages the Asset Management application to create and maintain assets. Ensure that the Asset Management plugin (com.snc.asset_management) is activated.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Assets**.
2. Click **New**.
3. Select the type of asset to create:
   - Hardware
   - Software License
   - Consumable
   - License
   - Facility
4. Fill in the fields for the selected asset type on the Asset form, as appropriate.
5. Click **Submit**.

Create asset contact relationships

Assign an asset to a customer contact who is responsible for managing that asset.

Account and partner contacts can see all of the assets related to an account. To limit access to an asset, you can create an asset contact relationship and assign the asset to one or more contacts. Then you can enable the associated property to restrict access to the asset information to the assigned contacts.

The system administrator can add a primary contact to an asset by selecting a user in the **Primary Contact** field on the Asset form. This field references the Contacts table and is filtered by the asset's account.

The system administrator can also create relationships with additional contacts from the **Asset Contacts** related list on the Asset form. When you create an asset contact relationship, you can select contacts from:

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- The account that the asset belongs to.
- The partner of the account that the asset belongs to.
- Any contacts added to these accounts using contact relationships.

After adding contacts to an asset, enable the related property to limit access. When enabled, the following access is limited from the customer portal:

- When a user clicks **My Assets**, the list shows only those assets for which the user is a contact.
- When a user clicks **Create Case**, the **Asset** field on the Create Case form shows only those assets for which the user is a contact.

Assign a primary contact to an asset

Users with the system administrator role can assign a primary contact to an asset.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Assets**.
2. Click the desired asset.
3. Select a **Primary Contact**.
   This field references the Contacts [customer_contact] table and is filtered by the account selected in the **Account** field.
4. Click **Update**.
   The contact is added to the **Asset Contacts** related list on the asset form.

Assign a contact to an asset

Users with the system administrator role can assign a contact to an asset.

Before you begin
Role required: admin

About this task
Users with the sn_customerservice.customer_admin can also assign a contact to an asset from the Customer Service Portal.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Assets**.
2. Select the desired asset.
3. From the **Asset Contacts** related list, select **New**.
   When you select **New**, a new Asset Contact form is displayed with the **Asset** field filled in.
4. Select a **Contact** from the list of available contacts within the asset's account.
5. Select the **Order** field to specify the sequence in which records are displayed, organized according to business preferences.
6. Select **Submit**.
   The contact is added to the **Asset Contacts** related list.

Enable the asset contact relationship property

Limit access to asset information to the assigned contacts by enabling the associated property.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Properties**.
2. Set the *Restrict Assets based on Contacts assigned to the assets* property to **true**.
3. Click **Save**.

Create service contracts

Service contracts define the type of support that customers receive.

Before you begin
Role required: sn_customerservice_manager or admin

About this task
A contract can include an account and contact or a consumer and the specific assets that are covered. A contract can also include multiple service entitlements and SLAs.

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Service Contracts**.
2. Click **New**.
3. Fill in the fields on the Contract form, as appropriate.

Contract form

Field	Definition
Number	The automatically created contract number.
Account	The name of the account associated with this contract.
Consumer	The name of the consumer associated with this contract.
Contract administrator	The individual who is responsible for managing the contract.
Approver	The user who approves or rejects the contract.
Contract number	The number assigned to the contract by the customer.
State	The current state of the contract: ○ Draft ○ Active ○ Expired ○ Canceled
Starts	The date that the contract starts.
Ends	The date that the contract ends.
Name	A name for the contract.

4. Right-click the form header and select **Save**.
   The **Entitlements**, **Assets Covered**, **Terms and Conditions**, **Contracts**, **Cases**, and **Products Covered** related lists are displayed.

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5. On the **Products Covered** related list, click **Edit** to associate sold products to the contract. The list of sold products displayed is filtered based on the account. Click **Run filter** to see a list of all sold products, but you can only add the sold products that belong to the account selected or to the account hierarchy.
6. Click **Submit**.
   You can also click **Submit For Review** to place the contract in the **Draft** state and send an email to the **Approver** to review the contract.
   Customer service agents can view contract information in Agent Workspace and customers can view contract information on the Customer and Consumer Service Portals.

Associate an install base to a service contract

Associate install base items with a service contract to see the list of all the different service contracts that are associated to an install base item in the Customer Service Management application. By associating an install base, you can set a relationship between an install base and a contract.

Before you begin
Role required: sn_customerservice_manager and admin

About this task
Associate install bases to service contracts to access all the contracts that are related to the parent install base item.

Procedure
1. Navigate to **All** > **Customer Service**> **Contracts**> **Service Contracts**.
2. Open the contract that you want to associate the install base to.
3. Select **New**.
4. Create an association by selecting a value for the **Install base Item** field.
5. Select **Submit**.

Configure entitlements

An entitlement defines the type of support that a customer receives as well as the supported communication channels.

Before you begin
Role required: sn_customerservice_manager or admin

About this task
You can associate an entitlement with a product, an asset, an account, or a contract. An entitlement check is performed when a case is opened. This check considers the existing cases for the specific account, product, asset, and service contract. Entitlements can also have associated workflows that drive recommended activities for a case.

Entitlements are counted on a per-unit basis. The **Unit** field on the Service Entitlement form defines the unit type, either cases or hours.

The **Total Units** field defines the total number of cases or hours available for this entitlement and the **Remaining Units** field tracks the number of units remaining. These counters are active if the **Per Unit** field is enabled.

The **Remaining Units** field is updated using business rules.

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- When using cases as the unit type, the **Update case entitlement on Close** business rule updates this field when a case for a product, asset, company, or contract that has an associated entitlement is closed.
- To use hours as the unit type, customers must create a separate business rule. For example, create a rule that is applied to the amount of time an agent spends on a case. When a case is resolved, deduct the hours spent from the total service hours available in the entitlement.

Keep these guidelines in mind as you create entitlements.

- Product entitlements: When creating an entitlement for a product, select the product from the **Product** field and then select an account or a consumer.
- Asset entitlements: When creating an entitlement for an asset, first select a company. The only assets then shown belong to that company.
- Contract entitlements: When creating an entitlement for a contract, select the contract and then the assets that are covered as a contract line item. The resulting contract entitlement is valid for the assets listed within that contract.

Procedure

- Create entitlements for customer service entities
- Associate entitlements with customer service entities

Create entitlements for CSM entities

Create an entitlement for a Customer Service Management entity such as an account, a consumer, or a product.

Before you begin

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Entitlements**.
   You can also create an entitlement from the **Entitlements** related list on the Account and Contract forms.
2. Click **New** at the top of the Entitlements list.
3. Fill in the fields on the Entitlement form.

Service Entitlement form

Field	Definition
Name	The name of the entitlement.
Product	The product model associated with this entitlement.
Account	The name of the account associated with this entitlement.
Consumer	The name of the consumer associated with this entitlement.
Contract	The contract number associated with this entitlement .
Asset	The asset tag number or the serial number of the asset associated with this entitlement.
Active	Check this box to enable the entitlement. Active entitlements are available for selection when creating a new case.
Channel	One or more communication channels associated with this entitlement.

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Field	Definition
	○ Email ○ Web ○ Phone ○ Chat
Install Base Item	The install base item associated with the entitlement. Configure the form layout to add the **Install Base Item** field. **Note:** This field is only available if the Customer Service Install Base Management plugin (com.snc.install_base) is installed.
Sold Product	The sold product associated with the entitlement. Configure the form layout to add the **Sold Product** field. **Note:** This field is only available if the Customer Service Install Base Management plugin (com.snc.install_base) is installed.
Business hours	The schedule associated with this entitlement.
Start date	The start date for this entitlement.
End date	The end date for this entitlement.
Total Units	The total number of units designated for this entitlement. This field is active if the **Per unit** check box is enabled.
Remaining Units	The number of available units that are remaining for this entitlement. This field is active if the **Per unit** check box is enabled. This field is updated using business rules. ○ When using cases as the unit type, the **Update case entitlement on Close** business rule updates this field when a case for a product, asset, company, or contract that has an associated entitlement is closed. ○ To use hours as the unit type, customers must create a separate business rule. For example, create a rule that is applied to the amount of time an agent spends on a case. When a case is resolved, deduct the hours spent from the total service hours available in the entitlement.
Unit	The type of unit being measured for this entitlement: **Cases** or **Hours**.
Per unit	Select this check box to enable unit counters. If enabled, the **Total Units** and **Remaining Units** fields are activated.

4. Click **Submit**.

Associate an entitlement with a Customer Service Management entity

Associate an entitlement with a CSM entity such as an account, contract, asset, product, or install base item, to determine the type of support that a customer needs to receive.

Before you begin

Role required: sn_customerservice_manager or admin

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Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Entitlements**.
2. From the Entitlements list, select an entitlement.
3. Select the lookup icon to the right of one of the **Product**, **Account**, **Contract**, **Asset**, or **Install Base Item** fields.
4. From the list, select the entity that you want.

   Note:
   If you select an entity in more than one of the listed fields, the selections that are available in subsequent fields are filtered by the selections already made.

5. To associate an entitlement with an install base, right-click the Configuring Entitlement Form and navigate to **Form Layout** > **Configure** .
6. From the **Available** box, select **Install Base Item**.

   Your selection is automatically moved into the **Selected** box.

7. Select **Save**.
8. In the Entitlement form that reappears, select the **Install Base Item** field and add the install base item that you want to associate with the entitlement.

Customer service case entitlement calculation

When a customer service agent creates a case, the system uses a configurable method to derive the entitlement based on several fields related to the case record.

These fields include:

- Account
- Consumer
- Product
- Asset
- Contract
- Case Channel

If the Proactive Customer Service Operations plugin (com.snc.proactive_cs_ops) is active, the system also considers these fields:

- Sold Product
- Install Base

Relative weights are assigned to each field. Entitlements are calculated based on the weight and precedence. The entitlement with the highest score is assigned to the case.

Weights assigned to different fields

Field	Weight/Precedence Assigned
Account / Consumer	1
Product	2
Asset / Sold Product / Install Base item	3

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Weights assigned to different fields (continued)

Field	Weight/Precedence Assigned
Contract	4

The entitlement calculation uses the **global.CSManagementUtils** script and the **getFirstEntitlement** method.

Customer Life Cycle Management Workflows

Manage the life cycle of your sold products by activating the Customer Life Cycle Management Workflows (com.snc.customer_lifecycle_mgmt_workflows) application.

Overview of workflows

The Customer Life Cycle Management Workflows (com.snc.customer_lifecycle_mgmt_workflows) application enables you to update the existing configurations, and to modify, suspend, resume, or disconnect the sold products and their complete hierarchy. The workflows are built and composed by using the lead-to-cash transactional operations like Effect, Create Instance, Delta, and Commit Instance. To learn more about the transactional operations of the Lead to Cash Core (com.snc.l2c_core) plugin, see Lead to Cash.

Plugins for the Customer Life Cycle Management Workflows

The following table lists the required plugins for the Life Cycle Management Workflows plugin.

Required plugins for the Life Cycle Management Workflows plugin

Plugin	Description
Customer Service Install Base Management (com.snc.install_base)	Enables customers to capture the current state of a customer's install base and establish the relationship to any downstream entities that might impact their functioning. To learn more about install base management, see Configure install base.
Product Catalog Management Core (com.sn_prd_pm)	Enables companies to define the products and services they market, sell, and deliver to customers. To learn more about product catalogs, see Product Catalog Management.
Lead to Cash Core (com.snc.l2c_core)	Enables customers to compose and build the workflows for various entities. To learn more about the Lead to Cash Core plugin, see Lead to Cash.

Life Cycle workflows and configurations

Perform the **Modify**, **Suspend**, **Resume**, and **Disconnect** declarative actions on the complete hierarchy of the sold products. These actions will transform and maintain their state and characteristics. You can perform these actions on the sold product entities to update the existing products or services. The declarative actions are available on the sold product related list on the account detail page on Configurable Workspace.

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Note:
The declarative actions with the sold product to order flow are available only if the Order Management (com.sn_ind_tmt_orm) plugin is installed.

The Sold Product related list on the Accounts page displays all the sold products regardless of the product offer having a product specification. You can also select a sold product with a product specification associated with the product offering and perform any of the MACD flows. Be sure to upgrade to Xanadu to perform the modify, suspend, resume, and disconnect actions on product offerings that have a specification associated with it.

Note:
If Product Inventory records are selected, the **Modify**, **Suspend**, **Resume**, and **Disconnect** actions are deactivated.

Workflows

Multiple sub-flows are based on the modify, suspend, resume, and disconnect actions that help to update the sold products and their configurations. The flows are based on a set of entity configurations that are shipped when you activate the Customer Life Cycle Management Workflow plugin.

The following table lists the flows for the declarative actions.

Flow Designers for declarative actions

Flow	Description
Sold product to Suspend order	This flow is responsible for creating a suspend order when the **Suspend** action is triggered on a sold product.
Sold product to Resume order	This flow is responsible for creating a resume order when the **Resume** action is triggered on a sold product.
Sold product to Disconnect order	This flow is responsible for creating a disconnect order when the **Disconnect** action is triggered on a sold product.
Add order to sold product	This flow is responsible for creating a sold product order when order is moved to completed.

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Flow Designers for declarative actions (continued)

Flow	Description
	Note: The sn_ind_tmt_orm.enable_prod_invt_for_order_management property is set to **False** by default with the Order Management (com.sn_ind_tmt_orm) plugin. However, if the Order Management for Telecom, Media and Tech (com.sn_om_tmt) plugin is installed, the property value is set to **True**. If the property value is false, a record is created in the sold product (sn_install_base_sold_product) table. If the property value is true, a record is created in the Product inventory (sn_prd_invt_product_inventory) table.
Change order to sold product	The sn_ind_tmt_orm.enable_prod_invt_for_order_management property is set to **False** by default with the Order Management (com.sn_ind_tmt_orm) plugin. However, if the Order Management for Telecom, Media and Tech (com.sn_om_tmt) plugin is installed, the property value is set to **True**. If the property value is false, a record is created or updated in the sold product (sn_install_base_sold_product) table. If the property value is true, a record is created or updated in the Product inventory (sn_prd_invt_product_inventory) table.
Suspend order to sold product	This flow is responsible for suspending a sold product on completion of an order.
Resume order to sold product	This flow is responsible for resuming a sold product on completion of an order.
Disconnect order to sold product	This flow is responsible for disconnecting a sold product on completion of an order.

Note:
If the 'sn_ind_tmt_orm.enable_prod_invt_for_order_management' property is set to true, the last five flows in the displayed table are disabled.

Note:
The back and forth flow of the data (from a sold product to an order, an order to a sold product) happens with the help of a set of entity configurations.

Configurations

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Configurations are a set of end-to-end flows that enable the data to flow from one entity to the other. The subflows that are triggered with each declarative action are based on the configurations that are listed in the following table.

Configurations for declarative actions

Configuration	Configuration ID	Source Entity	Target Entity
Sold product to Order	sn_l2c-cust_flows_sp_to_order	Sold product	Order
Order to Sold Product	sn_l2c_cust_flows_order_to_sp	Order	Sold product

To learn more about the configurations, see Entity configuration and mapping.

Related topics

- Modify a sold product and hierarchy
- Modify a sold product to create a quote
- Resume a single sold product
- Resume multiple sold products
- Disconnect a single sold product
- Disconnect multiple sold products
- Suspend a single sold product
- Suspend multiple sold products

Modify a sold product and hierarchy

Modify a sold product and its complete hierarchy on the CSM Configurable Workspace so that you can update its existing configurations. For example, you may want to modify a sold product's characteristics and the line items (hierarchy) that are associated with it.

About this task

After an order is created, the fulfillment process for the order begins. After the order is fulfilled and marked **Complete**, the order to sold product flow is triggered. This flow applies the changes to the sold products. The changes are based on the updates that are specified on the order.

Before you begin

Required plugins: Product Configurator UI (app-prd-config-ui)

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold Products related list, select the product that you want to modify the characteristics and line items for.

Note:
You can do a **Modify** action on either the root or the child sold products only if the sold product is in the **Active** state. The sold product must have a product offering without a specification that is associated with it. If you select two sold products at the same time, you can't do the **Modify** action.

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5. Select **Modify**.
6. On the Configurator UI, modify the existing configurations for the sold product.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.
   An order to modify the sold product is created. You can select the order number from the confirmation message on the sold products page to open the order and see the order line items. Alternatively, you can find the order in the Customer Orders list.

Modify a sold product to create a quote

Modify a sold product and its complete hierarchy on the CSM Configurable Workspace to generate a quote for any updated characteristics or configurations. For example, a customer may want to find the price to modify a sold product's characteristics and the line items (hierarchy) that are associated with it.

About this task

Change a sold product or its characteristics. When you modify a sold product's characteristics, a sold product to quote flow is triggered. This flow applies changes to the existing sold product characteristics and presents customers with a quotation based on their selected changes.

Required plugins: Product Configurator UI (com.sn_prd_config_ui), Quote Management (app-l2c-quote-mgmt), and Customer Lifecycle Management workflows (com.snc.customer_lifecycle_mgmt_workflows) (

Role required: Sales Agent (sn_sales_common.sales_agent) and Sales Manager (sn_sales_common.sales_manager)

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold products related list, select the product that you want to modify the characteristics and line items for.
5. Select **Modify** to update the characteristics of the sold product.

   Note:
   If you have both the Order Management (com.sn_ind_tmt_orm) and Quote Management (app-l2c-quote-mgmt)) plugins the order agent, order admin, sales agent, and sales manager can perform the **Modify** action that results in an order. To specifically create a quote, customers must configure the decision table to modify existing sold product according to their business needs. Users performing the modify flow must have both the sales agenda and the order agent roles. To learn more about the decision table, see Modify decision table rules in Workflow Studio.

6. On the Configurator UI, modify the existing configurations for the sold product.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.

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A quote to modify the sold product and its hierarchy is created. You can select the quote number from the confirmation message on the sold products page to open the quote and see the quote line items.

In the Sold product to Quote flow, the data from **Account**, **Contact**, **Name**,**Product Offering**, **Quantity**, **Sys_id**, **Characteristic**, **Characteristic Option**, and **Characteristic Value** fields are transferred from the Sold Product to Quote Line Item records.

Resuming sold products

Resume sold products to create a resume order on the CSM Configurable Workspace.

Resume single or multiple root sold products and create combined orders for suspension and resumption of products and services at the same time, to improve agent efficiency.

Resume sold products

Task	Description
Resume a single sold product	Resume a single sold product
Resume multiple sold products	Resume multiple sold products

Resume a single sold product

Create an order to resume a sold product and its hierarchy on the CSM Configurable Workspace. By resuming a sold product, you can restart a product or service.

About this task

After an order is created and marked **Complete**, the order to sold product flow is triggered after fulfillment. This flow enables you to resume a sold product.

Before you begin

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold Products related list, select the sold product that you want to resume.

   Note:
   You can do a **Resume** action on the root sold product only if it is in the **Active** state. The sold product must not have a specification that is associated with it. The **Resume** option isn't visible if you select a child sold product.

5. Select **Resume**.

   The **Resume** action is enabled on sold products that are in **Inactive** or **Suspended** states only.

6. In the Resume sold product window, in the **Start date and time** field, enter when you want to resume the sold product.
7. Select **Resume**.

Result

An order for resuming the sold product is created.

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Resume multiple sold products

Create an order to resume multiple sold products and their hierarchy on the CSM Configurable Workspace.

About this task

After an order is created and marked **Complete**, the order to sold product flow is triggered after fulfillment. This flow creates sold products on the sold product table (sn_install_base_sold_product).

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold Products related list, select the sold products that you want to resume.

> **Note:**
> You can do a **Resume** action only on the root sold product with a product offering and if it is in the **Inactive** or **Suspended** state. The **Resume** option is disabled if you select a child-sold product.

5. Select **Resume**.
6. In the Resume sold products window, in the **Start date and time** field, enter when you want to resume the sold products.
7. Add a reason for a resumption in the **Reason for resumption** field.
8. Select **Resume**.

Result

An order for resuming the sold products is created, while order line items are created in an asynchronized manner.

Suspending sold products

Suspend sold products to create a suspend order or quote on the CSM Configurable Workspace.

Suspend single or multiple root-sold products, and create combined suspension and resumption orders of products and services at the same time to improve agent efficiency.

Suspend sold products

Task	Description
Suspend a single sold product	Suspend a single sold product
Suspend multiple sold products	Suspend multiple sold products

Suspend a single sold product

Create an order to suspend a sold product and its hierarchy on the CSM Configurable Workspace. By suspending a sold product, you can reduce the number of canceled products or services and take the time to fix that product or service.

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About this task

After an order is created and marked **Complete**, the order to sold product flow is triggered after fulfillment. This flow enables you to suspend a sold product.

Note:
You can also indefinitely suspend a sold product without creating a resume order.

Before you begin

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold Products related list, select the sold product that you want to suspend.

   Note:
   You can do a **Suspend** action on the root sold product only if it is in the **Active** state. The sold product must not have a specification that is associated with it. The **Suspend** option isn't visible if you select a child sold product.

5. Select **Suspend**.
6. In the Suspend sold product window, in the **Start date and time** field, enter the start date and time that you want to start the suspension.

   Note:
   If you fill in only the **Start date and time** field, a suspend order line item is created. A resume order line item is created within the same order header if the **End date and time** field is also filled in.

7. Add a reason for a suspension in the **Reason for suspension** field.
   For example, a disturbance due to a renovation can be a reason for suspension.
8. Select **Suspend**.

Result

An order with the suspend action is created for the suspend order line items. If you specify an end date and time, a resume order line item is created as a part of the same order. When you update the suspend action line item to **Complete**, the sold product state automatically updates to **Suspended**. When you move the state of the resume action line item to **Completed**, the sold product state updates to the **Active** state. The **Resume** action is enabled only if you set the state of the sold product as **Inactive**.

Suspend multiple sold products

Create an order to suspend multiple sold product and their hierarchy on the CSM Configurable Workspace. By suspending a sold product, you can reduce the number of canceled products or services and take the time to fix that product or service.

Before you begin

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

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About this task

After an order is created and marked **Complete**, the order to sold product flow is triggered after fulfillment. This flow creates sold products on the sold product table (sn_install_base_sold_product).

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold Products related list, select the sold products that you want to suspend.

   Note:
   You can do a **Suspend** action only on root sold products with a product offering and if it is in the **Active** state. The **Suspend** option is inactive if you select a child sold product.

5. Select **Suspend**.
6. In the Suspend sold products window, in the **Start date and time** field, enter the start date and time that you want to start the suspension.
   You can see the selected sold products in the account.

   Note:
   If you fill in only the **Start date and time** field, a suspend order line item is created. If you fill in the **End date and time** field, a resume order line item is also created within the same order header.

7. Add a reason for a suspension in the **Reason for suspension** field.
   For example, a disturbance due to a renovation can be a reason for suspension.
8. Select **Suspend**.

Result

An order with the suspend action is created. Suspend order line items are created in an synchronized process. If you specify an end date and time, a resume order line item is also created as a part of the same order.

When you update the suspend order line item to **Complete**, the sold product state automatically updates to **Suspended**.

When you update the state of the resume order line item to **Completed**, the sold product state updates to the **Active** state.

Disconnecting sold products

Disconnect sold products to create a disconnect order on the CSM Configurable Workspace.

Disconnect single or multiple root sold products at the same time, to improve agent efficiency.

Disconnect sold products

Task	Description
Disconnect a single sold product	Disconnect a single sold product
Disconnect multiple sold products	Disconnect multiple sold products

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Disconnect a single sold product

Disconnect a sold product in the CSM Configurable Workspace so that you can permanently disconnect a product and its services.

About this task

After an order is created on the order form and is marked **Complete**, a flow is triggered. This flow enables you to disconnect a sold product and its services after fulfillment.

Before you begin

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. From the Sold Products related list, select the sold product that you want to disconnect.

   Note:
   You can do the **Disconnect** action only on one root sold product whose state is **Active** and has a product offering without a specification that is associated with it. The option isn't visible if you select a child sold product.

5. Select **Disconnect**.
6. In the Disconnect sold product pop-up window, enter when you want the disconnection to start in the **Start date and time** field and the reason why you want to disconnect the product in the **Reason for disconnection** field.
7. Select **Submit**.

Result

An order for a disconnection is created. After the order is fulfilled, the sold product is moved to the **Inactive** state.

Disconnect multiple sold products

Create an order to disconnect multiple sold products and their hierarchy on the CSM Configurable Workspace.

About this task

After an order is created and marked **Complete**, the order to sold product flow is triggered after fulfillment. This flow creates sold products on the sold product table (sn_install_base_sold_product).

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold products belong to.
4. In the Sold Products related list, select the sold products that you want to disconnect.

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Note:
You can do a **Disconnect** action only on the root sold product with a product offering only if it is in the **Active** state. The **Disconnect** option is inactive if you select a child-sold product.

5. Select **Disconnect**.
6. In the disconnect sold products window, in the **Start date and time** field, enter when you want to disconnect the sold products.
7. Add a reason for a suspension in the **Reason for disconnection** field.
8. Select **Disconnect**.

Result
An order for disconnecting the sold products is created, while order line items are created in a synchronized manner.

Extension points for workflows

Override existing scripts or call custom scripts for the workflows by using extension points on the ServiceNow AI Platform®.

You can access the available extension points for the customer life cycle management workflows in the ServiceNow AI Platform®. Start by entering **sys_extension_point.list** in the application navigator and pressing **Enter**. Then, you can select the extension point that you want to view the record details of. If you want to override an existing script, you can select **Create implementation**.

You can create extension points so that you can create a workflow for a sold product extension that is not already configured. You can also override extension points in order to create configurations. To learn more about the existing extensions and configurations of the Customer Life Cycle Management Workflows, see Customer Life Cycle Management Workflows.

You can create several implementations for each extension point and provide an order number for each implementation. The implementation that has the lowest order number is the one that is executed.

The following table lists the extension points of the Customer Life Cycle Management Workflows.

Extension points for the Customer Life Cycle Management Workflows application

Extension points	Description
CustomerWorflowsEP sn_l2c_cust.flows.CustomerWorkflowEP	Overrides the existing flows and configurations. This extension can be used for any one of these two reasons: • If you want to execute custom flows that are extensions of the current sold product (sn_install_base_sold_product) table. To learn more about existing flows, see Customer Life Cycle Management Workflows.

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Extension points for the Customer Life Cycle Management Workflows application (continued)

Extension points	Description
	• If you want to execute custom Lead to Cash Core configurations. To learn more about existing Lead to Cash configurations, see Entity configuration and mapping.
GetSoldProductClassEP sn_l2c_cust_flows.GetSoldProductClassEP	Returns the correct sold product and product inventory class. The extension can be used to create custom flows in the **Add** and **Modify** flows.
CustomerWorkflowCompleteEP sn_l2c_cust_flows.CustomerWorkflowCompleteEP	Overrides existing methods to perform any custom post-processing actions after an order to sold product flow is complete.

Product inventory configurations

You can select one or more product inventory records to update their configurations and perform the **Modify**,**Suspend**, **Resume**, and **Disconnect** operations.

Create orders or quotes from product inventory records on the CSM Configurable Workspace.

Configurations for product inventory records

Action	Description
Modify product inventory records	Perform the **Modify** operation on a single product inventory record that results in the creation of an order.
Modify product inventory records to create a quote	Perform the **Modify** operation on a single product inventory record that results in the creation of a quote.
Resume product inventory records	Perform the **Resume** operation on single or multiple product inventory records that result in the creation of resume orders.
Suspend product inventory records	Perform the **Suspend** operation on single or multiple product inventory records that result in the creation of suspend orders.
Disconnect product inventory records	Perform the **Disconnect** operation on single or multiple product inventory records that result in the creation of disconnect orders.

Modify product inventory records

Perform the **Modify** operation on a single product inventory record that results in the creation of an order on the CSM Configurable Workspace to update its existing configurations. For example, you may want to add or delete an optional product inventory or update its configurations.

Before you begin

Role required: Sales Agent (sn_sales_common.sales_agent) or Sales Manager (sn_sales_common.sales_manager)

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About this task

When a **Modify** action is performed and an order is created, the fulfillment process for the order begins. After the fulfillment flow is complete, the order is marked as **Complete** and the product inventory record is updated.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the product inventory belongs to.
4. Navigate to the Product Inventories related list.

   Note:
   The Product Inventories related list will be available out of the box starting from the Yokohama release. Customers using the Washington or Xanadu versions must add the related list manually.

   You can retain either the sold product or the product inventories related list. If you want to retain both the lists, filter out the product inventory records from the sold product related list and perform the **Modify** flow from the product inventory record.

5. Select a product inventory record in **Active** state and select **Modify**.

   Note:
   The **Modify** flow can be triggered only on a root product inventory record.

6. On the Configurator UI, modify the existing configurations for the product inventory record. To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.
   An order to modify the product inventory is created. You can select the order number from the confirmation message on the account page to open the order and see the order line items. Alternatively, you can find the order in the Customer Orders list.

Modify product inventory records to create a quote

Perform the **Modify** operation on a single product inventory record that results in the creation of a quote on the CSM Configurable Workspace. For example, you might want to add or delete an optional product inventory or update its configurations.

Before you begin

Role required: Order admin (sn_ind_tmt_orm.order_admin) or Order agent (sn_ind_tmt_orm.order_agent)

About this task

The **Modify** flow generates a quote. After the quote is marked as **Complete**, an order is created. On fulfillment of the order, the product inventory record is updated.

Required plugins: Product Configurator UI (com.sn_prd_config_ui), Quote Management (app-l2c-quote-mgmt), and Customer Lifecycle Management workflows (com.snc.customer_lifecycle_mgmt_workflows)

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Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the product inventory belongs to.
4. Navigate to the **Product Inventories** related list.
5. Select a single product inventory record in **Active** state and select **Modify**.

   Note:
   The **Modify** flow can be triggered only on a root product inventory record.

   If you have both the Order Management (com.sn_ind_tmt_orm) and Quote Management (app-l2c-quote-mgmt)) plugins the order agent, order admin, sales agent, and sales manager can perform the Modify action that results in an order. Users performing the modify flow must have both the sales agent and the order agent roles. To specifically create a quote, customers must configure the decision table to modify existing sold product according to their business needs. Update the configurations on the Customer Life Cycle Workflows policy decision table. To learn more about the decision table, see Modify decision table rules in Workflow Studio.

6. On the Configurator UI, modify the existing configurations for the product inventory.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
   A quote to modify the product inventory is created. You can select the quote number from the confirmation message on the account page to open the quote and see the quote line items. Alternatively, you can find the quote from **All Menu** > **Quote** in the Quote list.

Suspend product inventory records

Perform the **Suspend** operation on single or multiple product inventory records that result in the creation of orders or quotes on the CSM Configurable Workspace. By suspending a product inventory, you can pause your services for a period of time.

Before you begin

Role required: Order admin (sn_ind_tmt_orm.order_admin) or Order agent (sn_ind_tmt_orm.order_agent)

About this task

After performing the **Suspend** action, a suspend order is created and the fulfillment process for the order begins. This fulfillment flow marks the order as **Complete** and updates the product inventory records.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the product inventory belongs to.
4. Navigate to the **Product Inventories** related list and select one or more root product inventory records.

   Note:
   You can do a **Suspend** action on a single or multiple root sold products only if it is in the **Active** state and is disabled for any other state.

5. Select **Suspend**.

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6. In the Suspend window, in the **Start date and time** field, enter the start date and time that you want to start the suspension.

   Note:
   If you fill in only the **Start date and time** field, suspend order line items are created. Resume order line items are created within the same order header if the **End date and time** field is also filled in. You can also indefinitely suspend a product inventory without creating a resume order by not entering an end date.

7. If you know when you want to end the suspension, enter the **End date and time** field.
8. Add a reason for a suspension in the **Reason for suspension** field.
   For example, a disturbance due to a renovation can be a reason for suspension.
9. Select **Suspend**.

Result
An order to suspend the product inventory record is created.

Resume product inventory records

Perform the **Resume** operation on single or multiple product inventory records that result in the creation of orders or quotes on the CSM Configurable Workspace. By resuming a product inventory, you can restart a product or service.

Before you begin
Role required: Order admin (sn_ind_tmt_orm.order_admin) or Order agent (sn_ind_tmt_orm.order_agent)

About this task
After performing the **Resume** action, a resume order is created and the fulfillment process for the order begins. This fulfillment flow marks the order as **Complete** and updates the product inventory records.

Procedure
1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. Navigate to the **Product Inventories** related list and select one or more root product inventory records.

   Note:
   You can do a **Resume** action on the root product inventory only if it is in the **Suspended** state.

   The **Resume** option is enabled only if the root product inventory with **Suspended** state is selected and is inactive for any other state.

   If you select a child sold product, the option is inactive.

5. Select **Resume**.
6. In the Resume window, in the **Start date and time** field, enter when you want to resume the product inventory.
7. Select **Resume**.

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Result
An order for resuming the product inventory records is created.

Disconnect product inventory records

Perform the **Disconnect** operation on single or multiple product inventory records that result in the creation of orders or quotes on the CSM Configurable Workspace so that you can permanently disconnect a product and its services.

Before you begin
Role required: Order admin (sn_ind_tmt_orm.order_admin) or Order agent (sn_ind_tmt_orm.order_agent)

About this task
After performing the **Disconnect** action, a disconnect order is created and the fulfillment process for the order begins. This fulfillment flow marks the order as **Complete** and updates the product inventory records.

Procedure
1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the product inventory belongs to.
4. Navigate to the **Product Inventories** related list and select one or more root product inventory records.

   Note:
   You can do the **Disconnect** action only on one root sold product whose state is **Active** or **Suspended**, and the option is enabled only if the root product inventory with **Active** or **Suspended** states are selected and is disabled for any other state.

5. Select **Disconnect**.
6. In the Disconnect window, enter when you want the disconnection to start in the **Start date and time** field.
7. Add a reason for a disconnection in the **Reason for disconnection** field.
8. Select **Disconnect**.

Result
An order to disconnect the product inventory record is created.

Activate Customer Life Cycle Management Self-Service

If you have the admin role, you can install the Customer Life Cycle Management Self Service plugin.

Before you begin
- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Life Cycle Management Self Service plugin (sn_clm_selfservice) using the filter criteria and search bar.

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

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.
   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install the Customer Life Cycle Management Self Service plugin (sn_clm_selfservice).
4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Related topics

View product information from Business Portal

View Product Inventory information on Business Portal

Configure Customer Contracts and Entitlements

Use the Customer Contracts and Entitlements application to configure and display customer service contracts and entitlements.

Activate Customer Contracts and Entitlements

As an admin, you can activate the following plugins to enable users to create and manage Customer Contracts and Entitlements. For more information, see Activate a plugin.

Customer Contracts and Entitlements plugins

Plugin	Description	Dependency
Customer Contracts and Entitlements [com.sn_pss_core]	Provides foundational objects to manage Customer Contracts and Entitlements and APIs for integration.	• Customer Service Install Base Management [com.snc.install_base] • Product Catalog Management Core [com.sn.prd_pm]
Entitlements Verification	Provides APIs to verify entitlement.	Customer Contracts and Entitlements

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Customer Contracts and Entitlements plugins (continued)

Plugin	Description	Dependency
[com.sn_ent_verify]		[com.sn_pss_core]
Contracts and Entitlement Workflows [com.sn_contract_ent_wf]	Provides workflows to manage changes on Customer Contracts and Entitlements.	• Customer Contracts and Entitlements Foundation [com.sn_pss_core] • Lead to Cash Primitives [com.sn_l2c_core] • Customer Life Cycle Management Workflows [com.sn_l2c_cust_flows]

With the activation of Customer Contracts and Entitlements, the existing contracts are available for viewing only.

For more information on the installed roles and tables, see Components installed with Customer Contracts and Entitlements.

Request apps from the ServiceNow Store

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

Components installed with Customer Contracts and Entitlements

Several types of components are installed with the Customer Contracts and Entitlements application, including tables and roles.

The following roles are added with the activation of the Customer Contracts and Entitlements plugins.

Roles installed

Role	Description	Contains role	Targeted per
sn_pss_core.service_contract_viewer Service contract viewer	Performs read operation on: • Service contracts • Contract lines • Entitlements	• sn_prd_pm.characteristics_viewer Characteristic viewer • sn_prd_pm.product_catalog_viewer Product catalog viewer	• sn_custor Consume • sn_custor Customer

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Roles installed (continued)

Role	Description	Contains role	Targeted pers
	• Characteristics • Entitlement usages		• sn_custor Customer
sn_pss_core.service_contract_manager Service contract manager	Performs create/read/update operations on: • Service contracts • Contract lines • Entitlements • Characteristics • Entitlement usages	sn_pss_core.service_contract_viewer Service contract viewer	sn_custome CSM Manag
sn_pss_core.pss_integrator Integration user	Performs create/read operations by using rest endpoints on service contracts and entitlements.	sn_customerservice.manager CSM Manager	sn_pss_core Integration U

The following tables are added with the activation of the Customer Contracts and Entitlements application.

Tables installed

Table name	Description
Characteristics [sn_pss_core_entitlement_characteristic]	Stores the characteristic values for entitlements or service contract lines.
Entitlement Usage [sn_pss_core_contract_entitlement_usage]	Stores the values used by end customers for entitlement characteristics.
Service Contract [sn_pss_core_service_contract]	Stores runtime contracts.
Service Contract Line [sn_pss_core_service_contract_line]	Stores the runtime contract lines like a service plan.

You can assign roles to users and groups using the ServiceNow AI Platform user administration features. For more information, see:

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- Assign a role to a user
- Assign a role to a group

The default view on service contracts and entitlements in Customer Service Management workspace is Service Contract Workspace view. It can be changed by an administrator.

Configuring Contracts and Entitlement Workflows

Configure the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf) to generate and modify contracts using order management.

As an admin, you can activate the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf). For more information, see Activate a plugin.

The following plugins are prerequisites for activating the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf):

Required plugins

Plugin	Description
Product Configuration UI (com.sn_prd_config_ui)	Graphical interface that enables to configure complex products or services according to specific needs and requirements.
Order Management (com.sn_ind_tmt_orm)	Captures, enhances, and oversees the complete life cycle of the product and service orders. With this plugin, you can efficiently handle the order orchestration, data enrichment, and composition to ensure an accurate and timely fulfilment.

After installing the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf), the following plugins are automatically installed:

Dependent plugins

Plugin	Description
Customer Contracts and Entitlements (com.sn_pss_core)	Provides foundational objects to manage customer contracts and entitlements.
Lead to Cash Core (com.snc.l2c_core)	Enables customers to compose Sales CRM flows.
Customer Life Cycle Management Workflows (com.snc.l2c_cust_flows)	Provides workflows to manage the life cycles of sold products and install base items.

Creating contracts and entitlements using workflows

After a product offer is selected by the customer and the product is sold to the customer, this workflow creates contracts and entitlements based on the services associated with that sold product and the extra services that the customer has purchased.

There are the product offering scenarios and their configurations.

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Offering types and workflows

Offering types	Description
Offers for entitlements	The workflow creates entitlement records for such offerings. These entitlements can be associated with existing sold products, install base items, product inventory records, or the customer.
Offers for services (contract lines)	The workflow enables automatic creation of a service contract, service contract lines, and the entitlements for those contract lines.
Implicit offerings	Implicit entitlements and service contract lines are not shown on order lines. These offers can be marked as implicit when they do not need to be configured while capturing the order and are available as part of a package. These entitlements and service contract lines are automatically created as a part of this workflow.

Creating a contract from an order

For every order with multiple product offerings, a single contract with multiple contract lines is created. You can add multiple product offerings from an order to an existing contract. To add a product offering to an existing contract, add the contract reference in the **Existing Contract** field of the order line item. As part of the order processing, a sold product is generated for every order line.

Creating contracts from product inventory records

If the system property sn_ind_tmt_orm.enable_prod_invt_for_order_management is set to true, order fulfillment workflows create product inventories based on customer orders, product offerings and specifications. On creation of a product inventory, contract lines and entitlements will be created. When a product inventory undergoes a state change, the associated contract lines and entitlements are synced. For more information, see Product inventory configurations. Product inventory records trigger updates to contracts and entitlements under the following conditions:

- Process Telecom Order Line flow: The ADD flow creates contract and entitlement records from the product inventory. The MODIFY flow updates the states of the contract line items and entitlements.
- Post Process Telecom Top Domain Order flow: The MODIFY flow updates the states, fields, and characteristics for contract line items and entitlements.
- Product Inventory Operations record: Depending on the scheduled date and time, the DISCONNECT, RESUME, and SUSPEND flows cancels, activates, or suspends the contract line items and entitlements.

Configuring Customer Life Cycle Workflows Policy decision table

Customer Life Cycle Workflows Policy decision table decides the target entity while renewing and modifying service contracts, service contract lines, and entitlements. Based on this decision table, you can create a quote, an order, an opportunity, or an opportunity and a quote together while renewing or modifying a service contract. For a target entity, you can also select when you want to initiate the renewal of the service contract.

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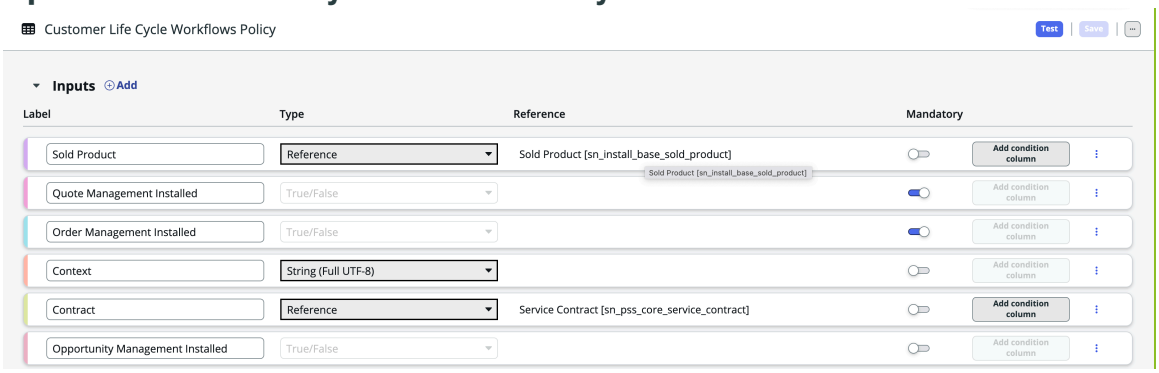
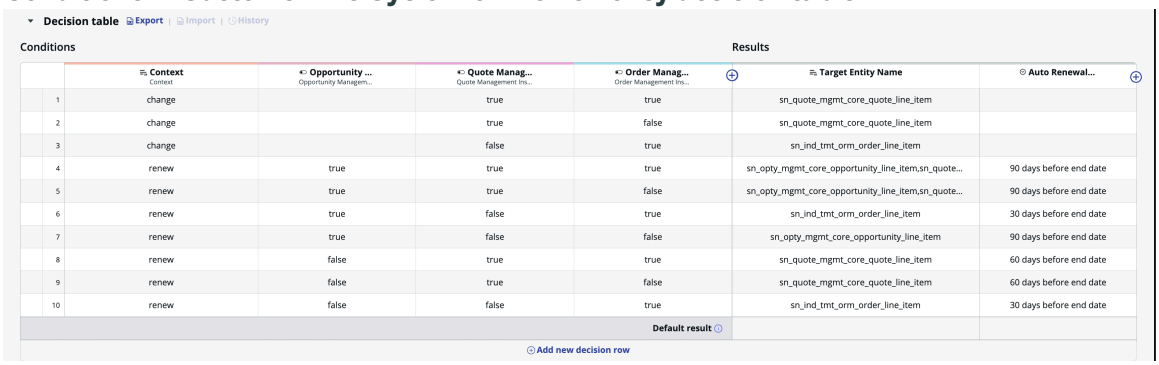
Inputs in Customer Life Cycle Workflows Policy decision table



Conditions in Customer Life Cycle Workflows Policy decision table



You can configure rules based on the six available input parameters to a required target entity while renewing and modifying contracts. Select the following values in the Target Entity Name column to create the corresponding target entities.

Values of target entities

Value	Target Entity
`sn_ind_tmt_orm_order_line_item`	Order
`sn_quote_mgmt_core_quote_line_item`	Quote
`sn_opty_mgmt_core_opportunity_line_item`	Opportunity **Note:** You cannot create opportunities for modifying process.
`sn_quote_mgmt_core_quote_line_item,sn_opty_mgmt_core_opportunity_line_item`	Opportunity and quote together **Note:** You cannot create opportunities and quotes for modifying process.

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Note:
To create an opportunity or opportunity and quote together during renewal, the admin needs to set up the following records:

- Sales Cycle Type: In the Code field, enter **RENEW** and set the Active option to **True**. For more info, see Create a sales cycle for an opportunity.
- Opportunity Stage: In the Name field, enter **Develop** and set the Active option to **True**. For more info, see Create opportunity stages.

If the user selects an opportunity and a quote as target entities, a renewal opportunity and a quote is created. The opportunity and the quote are associated to each other.

Select one of the following options in the Auto Renewal Initiation column to indicate when you want to automatically renew the contract: 90, 60, 30 days before contract end date or on the contract creation date.

Setting up the Customer Contracts and Entitlements application

Configure the features and components of Customer Contracts and Entitlements to enable a seamless, end-to-end service experience including after sales services for your customers.

As a user with the admin role, you can set up the Customer Contracts and Entitlements application to enable users to create entitlements and service contracts for users.

Task	Description
Create a characteristic	Create a characteristic to add to an entitlement. A characteristic refers to the specific attributes or properties that define the entitlement.
Create a user	Add a user to your instance to enable them to log in and use designated application features. After adding the user, you make them approver to review service contracts.
Assign a role to a user	Assign roles to users. Use this feature to grant the sn_customerservice_manager (CSM manager) role to a newly added user and authorize them to make an informed judgment to review a service contract.
Create customer accounts **Note:** On the Accounts form, to view the service contracts, remove the contract-related lists and configure the Service contracts related list.	Create an account and associate it to a service contract.
Create a consumer record	Create a consumer record in Customer Service Management. A consumer can be associated with a service contract in the Customer Contracts and Entitlements application.
Create a sold product	Create a record for a product that is sold to an account or a consumer. A sold product can be associated with multiple contracts.

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Task	Description
Create an install base item	Create a record for an install base item that is sold to an account or a consumer. An install base item can be associated with multiple contracts.

Create a characteristic

Create a characteristic that can be associated with an entitlement or service contract line.

Before you begin

Role required: sn_customerservice_manager

About this task

A characteristic is used for defining the service coverage that is provided to customers. These characteristics might include the scope of the service, the time period, and any limitations or exclusions such as geographical location and other attributes.

Procedure

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

Characteristic form

Field	Description
Name	The name of the characteristic for the entitlement.
Input type	The type of input for the coverage value related to this characteristic. For example, Choice and CheckBox.
Description	The short overview of the entitlement characteristic.

4. Select **Submit**.

Lead to Cash

Create the Lead to Cash workflows for a product and service through entity configurations and mappings. By creating this workflow, your organization can analyze lucrative business opportunities, customer leads, and the billing, support, and maintenance requirements after a sale is complete.

Overview of the Lead to Cash workflows

A product goes through multiple phases and workflows from the time that a product is identified to the time that it's purchased by the customer. The workflow includes the creation of a quote for a product or services, the creation of orders, the sold products, the install base items, and the contracts and entitlements.

If you're an administrator, you create the workflows for your organization and configure the metadata for your various lead-to-cash entities by activating the foundational Lead to Cash Core (com.snc.l2c_core) application. With the Lead to Cash Core (com.snc.l2c_core) plugin, you can compose and build the workflows that your organization maintains for the life cycle of a sold product. For example, on the Lead to Cash Entities Mapping form on the ServiceNow AI Platform®, you select the sold product entity as a source entity and the order as a target entity. You then map these entities and configurations to create a source to the target flow that is a

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sold product to order flow. This mapping provides your users with a unified workflow experience across the different entities.

Note:
An entity is defined as a collection of tables that have information about an order. The information can come from multiple tables.

Entity configurations

You can configure the definition of a lead-to-cash entity by defining a name and configuration ID on the Lead to Cash Entity form. The definition creates a back and forth flow of the information between the various entities.

To learn how to create entity configurations, see Create an entity configuration. To learn how to create entity mappings, see Create an entity mapping.

Reconfiguration

You can reconfigure an order or a quote that is in the **Draft** state to make customizations in the Configurator UI. After the configuration is complete, all the order line items associated with the order are also updated. To learn more about reconfiguration, see LeadtoCashCore - Scoped.

Entity configuration and mapping

Use the Entity Configuration tables and forms to configure and map an entity that defines a structure and transfers the data from the source entity to the target entity.

Mapping and configuration

Create the configurations and mappings for the entities by using the Entity Configuration tables.

Entity Configuration tables

The entity configuration tables provide you with the information for the fields on the entity configuration form.

Entity Configuration tables

Table	Name	Description
Lead to Cash Entity	sn_l2c_core_entity	Defines and manages the lead-to-cash entities.
Lead to Cash Entity Definition	sn_l2c_core_entity_definition	Defines and manages the definitions that are associated with the lead-to-cash entities.
Lead to Cash Entity Attribute	sn_l2c_core_entity_attribute	Defines and manages the attributes that are associated with the lead-to-cash entities. The lead-to-cash attributes are based on the definitions that are set for the entities.

Each field on the entity configuration form gathers the information from one entity configuration table. The following table has the information about the fields, their descriptions, and the entity tables that the data is populated from.

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Note:
The Lead to Cash Entity Definition and Lead to Cash Entity Attributes are related lists on the Entity Configuration form.

Entity Configuration form

Table	Field	Description
Lead to Cash Entity	Name	Name of the lead-to-cash entity.
Lead to Cash Entity	Config ID	Unique configuration ID for the entity.
Lead to Cash Entity	Active	Status of the entity, whether active or inactive for the configuration.
Lead to Cash Entity Definition	Entity	Reference to the lead-to-cash entity definition.
Lead to Cash Entity Definition	Type	Type of the entity definition.
Lead to Cash Entity Definition	Table	Table that is associated with a lead to cash entity.
Lead to Cash Entity Definition	Label	Label for the entity definition.
Lead to Cash Entity Definition	Parent definition	Parent of the current entity definition.
Lead to Cash Entity Definition	Relationship field	Query field that is associated with the parent entity definition record.
Lead to Cash Entity Definition	Parent field	Query field that is associated with the current entity definition record.
Lead to cash Entity Definition	Inherit parent definition	Parent definition that is also used by the current entity definition. **Note:** To make the current entity definition record follow the same definition that is associated to the parent record, select **Inherit parent definition**.
Lead to Cash Entity Definition	Order	Numerical order to process and visualize the hierarchy of configurations.
Lead to Cash Entity Attribute	Field	Name of the field.
Lead to Cash Entity Attribute	Entity	Reference to the lead-to-cash entity attribute.

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Entity Configuration form (continued)

Table	Field	Description
Lead to Cash Entity Attribute	Table	Table that is associated with the lead-to-cash attribute.
Lead to Cash Entity Attribute	Key	Unique key for the entity attribute.
Lead to Cash Entity Attribute	Advanced	Option for advanced configurations. **Note:** To modify the script according to your requirements, select **Advanced**.
Lead to Cash Entity Attribute	Script	Script for the advanced attributes.

Entity mappings

With entity mappings, you can map the source and target tables to transfer the data between the entities that depend on the available entity configurations. The entity mapping tables provide the information for the fields on the entity mapping forms.

Entity Mapping table

Table	Name	Description
Lead to Cash Entity Mapping	sn_l2c_core_entity_mapping	Defines and maps the lead-to-cash entity mappings.
Lead to Cash Entity Table Mapping	sn_l2c_core_entity_table_mapping	Defines and manages the mappings for the different tables that are associated with the lead-to-cash entities.
Lead to Cash Entity Attribute Mapping	sn_l2c_core_entity_attribute_mapping	Defines and manages the attributes and their mappings with the corresponding lead-to-cash entity.

The entity mapping form enables you to map the entities with their corresponding tables and attributes.

Note:
The Lead to Cash Entity Table Mapping and Lead to Cash Entity Attribute Mapping are related lists on the Entity Mapping form.

Entity Mapping form

Table	Field	Description
Lead to Cash Entity Mapping	Mapping name	Name of the mapping.

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Entity Mapping form (continued)

Table	Field	Description
Lead to Cash Entity Mapping	Mapping config ID	Unique ID for the mapping.
Lead to Cash Entity Mapping	Source entity	Source entity in the mapping process.
Lead to Cash Entity Mapping	Target entity	Target entity in the mapping process.
Lead to Cash Entity Mapping	Active	State of the target entity, whether active for mapping or not.
Lead to Cash Entity Table Mapping	Source entity table	Table that is associated with the source entity.
Lead to Cash Entity Table Mapping	Target entity table	Table that is associated with the target entity.
Lead to Cash Entity Table Mapping	Use condition	Conditions required for mapping. **Note:** To set specific mapping conditions, select **Use condition**.
Lead to Cash Entity Table Mapping	Condition	Conditions for mapping tables from the source entity to the target entity.
Lead to Cash Entity Table Mapping	Active	State of the source entity, whether active for mapping or not.
Lead to Cash Entity Table Mapping	Order	Numerical priority for mapping.
Lead to Cash Entity Attribute Mapping	Entity table mapping	Reference to the Lead-to-Cash entity table mapping.
Lead to Cash Entity Attribute Mapping	Source attribute	Attribute that is associated with the source entity.
Lead to Cash Entity Attribute Mapping	Target attribute	Attribute that is associated with the target entity.
Lead to Cash Entity Attribute Mapping	Advanced	Option for advanced mapping. **Note:** To modify the script according to your requirements, select **Advanced**.
Lead to Cash Entity Attribute Mapping	Script	Script to customize the mappings.

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Create an entity configuration

Create an entity configuration to compose a workflow between two entities so that you can update their existing configurations and perform actions like suspend, resume, or disconnect a sold product.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Lead to Cash** > **Entity Configurations**.
2. On the Lead to Cash Entities form, create an entity by selecting **New**.
3. On the form, in the **Name** field, enter the entity name and in the **Config ID** field, enter the entity ID.

   For a description of the field values, see Entity configuration and mapping.
4. Select **Submit**.
   You've created an entity configuration. You must now create lead-to-cash entity definitions and attributes.
5. On the Lead to Cash Entity form, in the Lead To Cash Entity Definitions related list, create an entity definition by selecting **New**.
6. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
7. Select **Submit**.
8. On the Lead to Cash Entity form, in the Lead To Cash Entity Attributes related list, create an entity attribute by selecting **New**.
9. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
10. Select **Submit**.

Result
You've created an entity configuration and defined its definition and attributes. You must now create a custom entity mapping. To learn how to create a mapping, see Create an entity mapping.

Create an entity mapping

Create an entity mapping to compose a workflow between two entities so that you can update their existing configurations and perform a set of declarative actions like suspend, resume, or disconnect a sold product.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Lead To Cash** > **Entity Mappings**.
2. On the Lead to Cash Entity Mappings form, create a mapping by selecting **New**.
3. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.

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4. Select **Submit**.
   You've created an entity mapping. You must now create an entity table mapping and an entity attribute mapping.
5. On the lead to cash entity mapping form, in the Lead To Cash Entity Table Mappings related list, create an entity table mapping by selecting **New**.
6. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
7. Select **Submit**.
8. On the lead to cash entity mapping form, in the Lead To Cash Entity Table Mappings related list, create an attribute mapping by selecting **New**.
9. On the form, fill in the fields.

   For a description of the field values, see Entity configuration and mapping.
10. Select **Submit**.

Sales and Order Management Request Tracker

Track the status of Sales CRM workflows and enable agents to track the status of any synchronous and asynchronous flows. It also supports processing dependent records sequentially to make sure that the data stays accurate and consistent.

Inbound request table

Add a record to the modified Inbound Request table [sn_tmt_core_inbound_queue].

The following fields have been added to enhance the Inbound Request table:

- Requested flow
- Account
- Contact
- Consumer
- Response payload
- Source record ids
- Status
- Run in the background
- Initiated by
- Domain
- Execute after
- Request configuration

Inbound Request table fields and descriptions

Fields	Description	Field type
Requested flow	The reference to the Lead to Cash Entity mapping, for example Sold Product to Order mapping.	Reference: sn_l2c_core_entity_mapping

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Inbound Request table fields and descriptions (continued)

Fields	Description	Field type
Run in background	Determines whether the flow is synchronous or asynchronous.	True/False Default value: True
Resource	The name of the flow that creates the record in the Inbound Request table.	String
Source record ids	System-generated id of the source records.	List
Source table	Primary Lead to Cash Entity table on which the request is triggered.	Table name
Record id	System-generated id of the target record.	String
Reference table	Name of the target entity table for the request.	Table name
Payload	Request received as input to trigger the flow.	String
Response payload	Response of the request that contains the result of the flow and captures the record-level action and transaction status.	JSON
State	Current state of the transaction.	String (choice) New, In progress, Completed, Error, Pending
Status	The status of completion of the flow, for example success, partial success, failure	String (choice) Success, partial success, failure
Error message	Error message that is returned for an exception.	String
Account	The account associated with the source or target record.	Reference: customer_account
Contact	The contact associated with the source or target record.	Reference: customer_contact
Consumer	The consumer associated with the source or target record.	Reference: csm_consumer
Initiated by	The user id from the current user session.	Reference: sys_user
Domain	The current domain scope of the record, for example global	Domain id
Request Configuration	The reference to the Inbound Request Configuration table.	Reference: sn_tmt_core_inbound_queue_config

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Inbound Request table fields and descriptions (continued)

Fields	Description	Field type
Execute After	Inbound request that must be processed before the current request.	Reference: Inbound Request

Note:
The **requested_flow** and **response_payload** fields aren't visible to agents.

Use the **Requested flow <is not empty>** to filter out records using the Lead to Cash core APIs. The Inbound Request table [sn_tmt_core_inbound_queue] provides the status and other details related to the request. For example, while creating an order through a quote record, a confirmation message with the order header number and a link to check the request status appears.

Select the links in the confirmation message to view the status of the **Inbound Request** record and other details related to the request.

Note:
The flow designer **SOM Request Processor** is deprecated. Requests are directed to the flow designer IBQ Request Processor.

Security roles

Security roles and access for the Inbound Request table

Role	Permission
Inbound Queue Admin [sn_tmt_core.inbound_queue_admin]	This user can create, read, and update actions on the requests in the inbound request table. **Note:** For Sales and Order management requests, the user doesn't have access to the **requested_flow** field.
Inbound Queues Create User [sn_tmt_core.inbound_queue_create_user]	Create **Note:** For Sales and Order management requests, the user doesn't have access to the **response_payload**, **payload**, or **requested_flow** fields.
Inbound Queues Write User [sn_tmt_core.inbound_queue_writer]	Write access for non Sales and Order management (SOM) requests Read only access for Sales and Order management (SOM) requests

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Security roles and access for the Inbound Request table (continued)

Role	Permission
	Note: For sales and order management requests, the user doesn't have access to the **response_payload**, **payload**, or **requested_flow** fields.
Inbound Queue Read User [sn_tmt_core.inbound_queue_read]	Read access to all Sales and Order Management requests **Note:** For sales and order management requests, the user doesn't have access to the **response_payload**, **payload**, or **requested_flow** fields.

Archival policies

Archive the records in the Inbound Request table and determine when to clean up records on the table after a certain number of days. You can implement a different retention period for successful and failed requests.

Archival rule	Time period
Successful requests	10 days
Failed requests	30 days

Related topics

Inbound Request Configuration table

Inbound Request Configuration table

The Inbound Request Configuration table enables users to define the configurations to determine how each flow is processed and tracked within an Inbound Request.

Overview of the Inbound Request Configuration table

The Sales and Service Core API (app-tmt-core) plugin is required to use the Inbound Request Configuration table (sn_tmt_core_inbound_queue_config).

The Inbound Request Configuration table is a metadata table that must be configured to decide how a particular flow is executed, whether synchronous or asynchronous.

The table can be used to perform the following tasks.

- Enable admins to configure synchronous vs asynchronous processing of requests.
- Adapt the Sales and Order Management Request Tracker across all CRM flows.
- Enable configuration of notification types, whether default, custom, or no notifications.

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The **Request Configuration** field on the existing Inbound Request Table [sn_tmt_core_inbound_queue] is a reference to the new Inbound Request Configuration table (sn_tmt_core_inbound_queue_config).

Any workflow that requires the tracking of a completion status, can use the Inbound Request Configuration table and configure whether a flow is synchronous or asynchronous.

Fields on the Inbound Request Configuration Table

An admin creates a record in the table and specifies the configuration using the **run_mode**, **trigger_notification**, and **configuration_api** fields.

Field and descriptions

List of fields on the inbound request configuration table, their descriptions, and the type of fields.

Field	Description	Type
Config ID	Unique configuration ID for the metadata configuration.	String
Label	Unique label name for the metadata configuration.	Translated text
Active	Specifies whether the Inbound request configuration record is active or not.	True/False Default value is **False**
Run Mode	Specifies whether a request runs synchronously or asynchronously.	String (choices): **Sync**, **Async**, **Advanced**. • Synchronous: Synchronous processing. • Asynchronous: Asynchronous processing • Advanced: Use custom script to determine if the flow has to be synchronous or asynchronous.
Trigger Notification	Specifies how a user wants to receive notifications. A notification is triggered in one of the following situations. • **Trigger notification** field is set to **Default**. • State of a request is **Complete** and the status is either **Success** or **Partial success**. The notifications for the record in the Inbound table	String (choices): None, Default, Custom • None: No notifications • Default: Notifications only for asynchronous requests. • Custom: Custom notification for asynchronous requests based on requirements. Configure custom notifications by using the existing event (sn_tmt_core.ibq.custom.notification)

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Field and descriptions

List of fields on the inbound request configuration table, their descriptions, and the type of fields.

(continued)

Field	Description	Type
	are only received by whoever has initiated the flow.	or by handling your own custom event. Default value for the field is **Default**.
Configuration API	Script required to process the inbound request. To learn more about the configuration API, see IBQConfigBase API - Scoped.	Reference: sys_script_include
Domain	The current domain scope of the record, for example global.	Domain ID

Security roles

The security roles for the Inbound Request Configuration table (sn_tmt_core_inbound_queue_config) provide different levels of access to the [sn_tmt_core.inbound_queue_admin] role.

Roles and access

Role	Access
Admin	Create, read, update, delete
Inbound Queue Admin (sn_tmt_core.inbound_queue_admin)	Create, read, update

Related topics

IBQConfigBase API - Scoped

Data models

Create structured and flexible data models to represent the need across various industries.

Setting up service and data models

Task	Description
Configure Service Model Foundation	Create foundational data models, such as service organizations, internal and external business locations, and households.
Configure Customer Data Models for B2B2C	Configure the business-to-business-to-consumer (B2B2C) model to enable business customers to support their end consumers by

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Setting up service and data models (continued)

Task	Description
	creating cases and tracking the services for products and services consumers use.

Configure Service Model Foundation

Configure the Service Model Foundation feature to enable a foundational data model framework. You can use this framework to create structured and flexible data models that represent your business needs.

Before you begin

Role required: admin

About this task

Service Model Foundation provides the core framework and guidance for building and modeling the entities that are involved in the customer service value chain. This framework introduces new entities, such as service organizations, internal and external business locations, and households. It also introduces roles and relationships that provide both flexibility and control in granting access to customer cases and information.

With the Service Model Foundation plugins, you can support:

- Internal business locations and staff members
- External business locations and staff members
- Households and household members

For more information about this feature, see Service Model Foundation overview.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Service Model Foundation category, view the list of tasks to configure the feature.

Customer central configuration tasks

Task	Description
Activate plugins	Activate the plugins: ○ Business Location (com.snc.business_location) ○ Customer Service Household (com.snc.household)
Activate query rules	Activate the query rules by setting the system property [sn_cs_queryrules.use_query_rules] value to **true**.
Configure forms and lists	Configure forms to add the fields and related lists that support the business location and household models.

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Task	Description
Assign responsibilities	Assign responsibilities to the service organization (SO) member using the responsibility data model.
Assign roles	Roles control access to features, capabilities, and data. The Service Model Foundation plugins add roles that you can assign to internal and external users in your organization.
Create relationships	Use relationships to provide internal and external users with additional access to customer data. Relationships are based on responsibility definitions. When you create a relationship, you select the users involved in the relationship and the responsibility that one user performs on behalf of another. The Service Model Foundation plugins provide both relationships and responsibility definitions that you can use to create relationships between users.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Service Model Foundation overview

Service Model Foundation provides a framework enabling customers to model and manage their operational hierarchy of the entities involved in offering CRM functions likes sales and customer service in alignment with their business needs.

The Service Model Foundation framework expands the Customer Service Management data model, including the install base model. It provides the flexibility and security needed to support business organizations with internal and external locations, households, customers and consumers, and the relationships that exist between these entities.

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Use the Service Model Foundation framework to model the service organization structure that is involved in supporting your end customers. With this framework, you can:

- Create a service organization structure that includes both internal and external business locations.
- Assign customer service agents to business locations and provide access to the cases and customer information in their business location hierarchy.
- Establish relationships between agents and specific customers that enable agents to manage cases and information for those customers.
- Establish relationships between consumers, including consumers who are members of the same household.

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Entities included with Service Model Foundation

The Service Model Foundation feature includes the following entities.

Industry data models entities

Entity	Definition	Examples
Service organizations	The internal and external entities that are involved in providing a service to customers. A service organization provides the base framework that supports the customer service value chain. This includes internal and external service organizations. You can extend the service organization to create new entities as needed.	• Financial service organizations with multiple branches • Automobile manufacturers with multiple dealerships • Government agencies with multiple office locations
Internal business locations	The internal entities that belong to a service organization and are involved in providing goods and services.	• Stores • Branches • Centers
External business locations	The external entities that belong to a service organization and are involved in providing goods and services.	• Franchises • Dealerships
Customers (B2B)	The external customers in the business-to-business model who use goods and services.	• Accounts • Contacts
Configuring households	The external customers in the business-to-consumer model who use goods and services.	• Consumers • Households
Employees and staff members	The people who work at internal and external service organizations and assist customers.	• Internal employees • External agents • External staff
Roles	Job functions that are performed by various users in the service organization.	• Location managers • Location agents • Location consumer agents

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Industry data models entities (continued)

Entity	Definition	Examples
		• Location relationship managers • Location manager contributors
Responsibility definitions	Definitions of the responsibilities that an agent can perform for a customer or that a consumer can perform for another consumer. Use these responsibilities to create relationships between agents and customers or between consumers.	• Location agents • Location consumer agents • Location contributors • Location manager contributors • Location manager fulfiller • Location relationship manager
Relationships	Relationships that are created between agents and customers or between two consumers, are based on specific responsibilities. Use these relationships to provide additional access to data.	• Relationships between an employee or staff member and a customer • Relationships between two consumers

Plugins for Service Model Foundation

Users with the system administrator role can activate the following plugins to enable Service Model Foundation features.

Business Location

Activate the Business Location plugin (com.snc.business_location) to enable support for businesses that interact with customers through physical channels such as stores, branches, franchises, and dealerships. This plugin automatically activates the Service Organization plugin (com.snc.service_organization).

Customer Service Household

Activate the Customer Service Household plugin (com.snc.household) to manage customer service for households. This plugin enables you to create households, define the members of a household, and identify relationships between household members. This plugin automatically activates the Customer Service Base Extension Entities plugin (com.snc.cs_base_extension).

Related topics

Configure Service Model Foundation

Service Model Foundation responsibilities

A responsibility, or responsibility definition, describes a role or a function that supports a customer. Use responsibility definitions to create relationships between an agent and a customer or between two consumers.

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When you create a relationship, you select the users involved in the relationship and the responsibility that one user performs on behalf of another. The responsibility that is assigned to a relationship provides access to customer cases and information.

Service Model Foundation includes responsibility definitions that you can use to create relationships:

- Between agents and accounts, households, or consumers.
- Between two consumers.

The following responsibilities are provided with the Service Model Foundation plugins.

Note:
Responsibilities are stored in the Responsibility Definition [sn_customerservice_responsibility_def] table.

Responsibilities included with Service Model Foundation plugin

Responsibility	Used in relationship	Description
Account Manager	Account Team Member	Use the Account Manager responsibility to create a relationship between an agent and an account. With this relationship, the agent can: • Create and manage cases for their accounts. • View account information, including the related entities for an account. • Create and manage contacts and additional addresses for their accounts.
Relationship Manager	• Consumer Team Member • Household Team Member	Use the Relationship Manager responsibility to create a relationship between: • An agent and a consumer. • An agent and a household. With this relationship, the agent can do the following: • For a consumer: ◦ Create and manage cases for the consumer. ◦ View household information, including the related entities for that consumer. • For a household: ◦ Create and manage cases for the household. ◦ View household information, including the related entities for that household. ◦ Create and manage household members.

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Responsibilities included with Service Model Foundation plugin (continued)

Responsibility	Used in relationship	Description
Authorized Representative	• Consumer to Consumer Relationship • Household Member Relationship	Use the Authorized Representative responsibility to create a relationship between two consumers, regardless of household, or between two consumers within the same household. With this relationship, a consumer can: • Create and manage cases for another consumer. • View the information of another consumer. • View the install base information of another consumer and create cases for: ○ Sold products ○ Install base items

Customizing responsibility definitions

You can use the responsibility definitions provided with Service Model Foundation plugins. You can also modify these definitions or create your own definitions to meet your business requirements.

Note:
If you modify the existing definitions or create new definitions, you may also need to update ACLs to reflect the changes.

If you have an existing account manager responsibility definition, you may need to evaluate the functionality of the account manager responsibility definition provided with the Service Model Foundation plugins.

Note:
Creating and using responsibility definitions is a feature available in releases prior to Paris. Customers can create responsibility definitions using the Responsibility Definition (sn_customerservice_responsibility_def) table and use those definitions to create account teams using the Account Team Member (sn_customerservice_team_member) table. For more information, see Create account teams.

Create a responsibility definition

Users with the system administrator role can create responsibility definitions.

1. Navigate to **Customer Service** > **Administration** > **Responsibility Definitions**.
2. Select **New** and fill in the fields on the Responsibility Definition form.
3. In the **Type** field, select **User** if this responsibility is to be used in the following relationships:
   - Account Team Member
   - Consumer Team Member
   - Household Team Member
4. If this responsibility is to be used in the following consumer relationships, set the **Type** field to **None**.

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- Consumer to Consumer
- Household Member

For more information, see Create a responsibility definition.

Create a unique responsibility definition

A responsibility definition can be unique, meaning that the responsibility can only be assigned to one user. To make a responsibility definition unique:

1. Navigate to **Customer Service** > **Administration** > **Responsibility Definitions**.
2. Select a responsibility definition.
3. Enable the **Unique** check box on the Responsibility Definition form.
4. Select **Update**.

When creating or updating records in the following tables, the system checks for and enforces unique responsibilities.

- Household Team Member [sn_customer_rel_household_to_user]
- Consumer Team Member [sn_customer_rel_consumer_to_user]
- Account Team Member [sn_customerservice_team_member]

For example, the following table describes the table type, an associated responsibility and the applied unique behavior.

Unique responsibility definition

Table	Responsibility Example	Unique behavior
Account Team Member	Account Manager	An account can have only one account manager but a user with the Account Manager responsibility can manage multiple accounts.
Consumer Team Member	Relationship Manager	A consumer can have only one Relationship Manager but a user with the Relationship Manager responsibility can manage multiple consumers.
Household Team Member	Relationship Manager	A household can have only one Relationship Manager but a user with the Relationship Manager responsibility can manage multiple households.

Note:
The unique behavior of a responsibility definition is not enforced when the responsibility is used for relationships between consumers or household members.

Service Model Foundation relationships

Create relationships between an agent and a customer or between two consumers that provide additional access to customer data.

With the Service Model Foundation feature, you can create relationships between the following users:

- Between an internal user and an account, household, or consumer.
- Between two consumers.

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Relationships are based on responsibilities, or responsibility definitions. When you create a relationship, you select the users involved in the relationship and the responsibility that one user performs on behalf of another. The responsibility that is assigned to a relationship provides access to customer cases and information.

The following relationships are provided with the Service Model Foundation plugins.

Relationships and Responsibilities for Service Model Foundation plugin

Relationship	Responsibility used in the relationship	Description
Account Team Member [sn_customerservice_team_member]	Account Manager	Create a relationship between an internal user and an account. **Note:** The internal user in this relationship must also be assigned the relationship agent role (sn_customerservice.relationship_agent).
Consumer Team Member [sn_customer_rel_consumer_to_user]	Relationship Manager	Create a relationship between an internal user and a consumer. **Note:** The internal user in this relationship must also be assigned the relationship agent role (sn_customerservice.relationship_agent).
Household Team Member [sn_customer_rel_household_to_user]	Relationship Manager	Create a relationship between an internal user and a household. **Note:** The internal user in this relationship must also be assigned the relationship agent role (sn_customerservice.relationship_agent).
Consumer to Consumer [sn_customer_rel_consumer_to_consumer]	Authorized Representative	Create a relationship between two consumers, regardless of household.
Household Member Relationships [sn_customer_rel_household_member_relationship]	Authorized Representative	Create a relationship between two consumers within a household.

Relationships between internal users and customers

Internal users can have relationships with accounts, consumers, and households. These relationships provide internal users with additional access to customer cases and information.

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An internal user with a relationship to a customer can create and manage cases on behalf of that customer.

Relationships are created using responsibilities. Use the following responsibilities to create relationships between internal users and customers:

- Account Manager: use this responsibility to create a relationship between a staff member and an account.
- Relationship Manager: use this responsibility to create a relationship between a staff member and a household or a consumer.

Relationships that you create are added to the following related lists:

- Account Staff Relationships on the Business Location form
- Consumer Staff Relationships on the Business Location form
- Household Staff Relationships on the Business Location form
- Account Team on the Consumer form
- Consumer Team on the Consumer form
- Household Team on the Household form

Relationships between consumers

Consumers can have relationships with other consumers. These relationships enable consumers to view and manage cases and information on behalf of other consumers.

Relationships are created using responsibilities. Use the Authorized Representative responsibility to create relationships between consumers. With this responsibility, you can:

- Create a relationship between two consumers, regardless of household.
- Create a relationship between two consumers within a household.

Relationships that you create are added to the following related lists:

- Member Relationships on the Household form
- Consumer Relationships on the Consumer form

Deleting relationships

When a relationship definition is deleted, all of the relationships that use the definition are also deleted.

When a consumer is deleted, all of the relationships to which the consumer belonged are also deleted.

When a household is deleted, all of the relationships created for the household are also deleted.

When a consumer stops being a current member of a household, all of the relationships created for the consumer within the household are also deleted. .

Service Model Foundation tables

Tables that are included with or modified by the plugins that enable the Service Model Foundation feature.

The Service Model Foundation feature adds new tables or modifies existing tables when you activate the following plugins:

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- Business Location (com.snc.business_location)
- Customer Service Household (com.snc.household)
- Service Organization (com.snc.service_organization)
- Customer Service Base Extension Entities (com.snc.cs_base_extension)
- Customer Service Install Base Management (com.snc.install_base)

Business Location plugin

The Business Location plugin adds the following tables.

Different table names for the Business Location plugin

Table	Description
Business Location [sn_csm_business_location]	Extends the Service Organization [sn_customer_service_organization] table. A business location is one type of service organization. This table stores business location records.
Internal Business Location [sn_csm_business_location_internal]	Extends the Business Location [sn_csm_business_location] table. This table stores internal business location records. **Note:** An internal business location is a business location with the **Internal** field set to **true**.
External Business Location [sn_csm_business_location_external]	Extends the Business Location [sn_csm_business_location] table. This table stores external business location records. **Note:** An external business location is a business location with the **Internal** field set to **false**.

Customer Service Household plugin

The Customer Service Household plugin adds or modifies the following tables.

Table names for the Customer Service Household plugin

Table	Description
Household	Stores consumer household records.

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Table names for the Customer Service Household plugin (continued)

Table	Description
[csm_household]	For the Service Model Foundation feature, this table is updated to support the head of household.
Household Member [csm_household_member]	Stores records of the consumers who have been added to households.
Household Team Member [sn_customer_rel_household_to_user]	Stores records for each of the household team member relationships that have been created between an internal user and a household.
Household Member Relationship [sn_customer_rel_household_member_relationship]	Extends the Consumer to Consumer Relationship [sn_customer_rel_consumer_to_consumer] table. This table stores records for each of the relationships that have been created between two consumers who belong to the same household.

Service Organization plugin

The Service Organization plugin adds the following tables.

Table names added by the Service Organization plugin

Table	Description
Service Organization [sn_customer_service_organization]	A unidirectional relationship between a company and a service organization, with a reference to the company record added from the service organization. Stores records for service organizations, including business locations and internal business locations.

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Table names added by the Service Organization plugin (continued)

Table	Description
	Note: The following new columns are replicated from the company [core_company] table to the service organization [sn_customer_service_organization] table: • Active: Track the operational status of the service organization. • Domain: Enable domain separation. • Company: Reference to the core_company table.
Service Organization Member [sn_csm_service_organization_member]	Stores records for the users who belong to internal service organizations.
Service Organization External Staff [sn_csm_service_organization_external_staff]	Extends the User [sys_user] table. Stores records for the users who belong to external service organizations. **Note:** If the **Company** field is populated, the **Service Organization** field displays only those service organizations that are associated with the company record. Similarly, if the **Service Organization** field is populated, the **Company** field displays only those companies that are associated with the service organization.
Service Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Configure the responsibilities of the staff working at service organizations or its extended entities.

Customer Service Base Extension Entities plugin

The Customer Service Base Extension Entities plugin adds the following tables.

Table names added by the Customer Service Base Extension Entities plugin

Table	Description
Consumer to Consumer Relationship [sn_customer_rel_consumer_to_consumer]	Stores records for each of the relationships that have been created between two consumers, regardless of household.

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Table names added by the Customer Service Base Extension Entities plugin (continued)

Table	Description
Consumer Team Member [sn_customer_rel_consumer_to_user]	Stores records for each of the consumer team member relationships that have been created between an internal user and a consumer.

Customer Service Install Base Management plugin

The Customer Service Install Base Management plugin adds the Consumer Sold Product [sn_install_base_m2m_consumer_sold_product] table. This table stores records for each sold product (products and components) that have been sold to a consumer.

Tables used by Service Model Foundation

Tables from existing plugins that are used by the Service Model Foundation feature to support customers.

Existing plugins and tables used by the Service Model Foundation feature

Plugin	Table	New columns
Customer Service (com.sn_customerservice)	Responsibility Definition [sn_customerservice_responsibility]	
	Account Team Member [sn_customerservice_team_member]	
	Related Party Configuration [sn_customerservice_related_party_configuration]	
	Case [sn_customersrevice_case]	Household Service Organization Consumer Profile
Customer Service Install Base Management (com.snc.install_base)	Sold Product [sn_install_base_sold_product]	Household Consumer Profile
	Install Base Item [sn_install_base_item]	Consumer Profile
Customer Service Management for Orders (com.snc.csm.order)	Order [csm_order]	Household Service Organization

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Service Model Foundation roles

Roles that are included with the plugins that enable the Service Model Foundation feature.

The following table describes the roles that the administrator can assign to the internal users.

Service Model Foundation roles

Role	Description	Contains roles
Location agent [sn_customerservice.svc_location_agent]	Create and fulfill cases for the accounts and contacts in the agent's business location.	• sn_fsm_servicedesk_agent • sn_esm_location_agent
Location consumer agent [sn_customerservice.svc_location_consumer_agent]	Create and fulfill cases for the consumers and households in the agent's business location.	• sn_fsm_servicedesk_agent • sn_esm_location_agent
Location manager [sn_customerservice.svc_location_manager]	Create and update cases for accounts, contacts, consumers, and households that work with the business locations within their location hierarchy.	• sn_fsm_servicedesk_agent • sn_customerservice.svc_location_agent • sn_customerservice.svc_location_consumer_ • email_client_quick_message_author • sn_templated_snip.template_snippet_writer • sn_shn.admin • approver_user • sn_publication.approver
Location Project Member [sn_bus_loc.location_project_stakeholder]	Views project details and project tasks of their respective business location. Marks customer visible project tasks as complete.	None
Location Project Manager Contributor [sn_bus_loc.location_manager_project_stakeholder]	Views project details and project tasks of their respective business location and child business locations. Marks customer visible project tasks as complete.	None
EBL Viewer [sn_bus_loc.ebl_viewer]	Views all external business location details and location staff	None
IBL viewer [sn_bus_loc.ibl_viewer]	Views all internal business location details and location staff.	None

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Service Model Foundation roles (continued)

Role	Description	Contains roles
Service Organization Project Manager [sn_service_org.project_manager]	This role can perform the following actions: • Project initiation: Creates and launches projects **Note:** Service Organization project manager and customer project manager can access all project modules. • Project planning: Develops project plans, such as, task assignments and resource allocation. **Note:** On task assignment, an automated mail is generated. Update "Send Email to Contact when Customer Project Task is assigned" flow to disable or enable notifications. • Task management: Monitors and manages task dependencies and execution. • Coordination: Views and collaborates with location staff, assigning, and tracking tasks of their respective location.	• sn_bus_loc.ibl_viewer • sn_bus_loc.ebl_viewer
Relationship agent [sn_customerservice.relationship_agent]	This role restricts an agent's access to only those cases for the accounts, contacts, consumers, and households that they have a relationship with. This role includes the following relationships that are provided with the Service Model Foundation plugins:	• agent_workspace_user • snc_internal • sn_shn.editor • email_composer • sn_fsm_servicedesk_agent • sn_customerservice.csm_workspace_user • sn_templated_snip.template_snippet_reader

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Service Model Foundation roles (continued)

Role	Description	Contains roles
	• Account Manager: Creates a relationship between an internal user and an account. • Relationship Manager: Creates a relationship between an internal user and a consumer or a household.	
Service Management agent [sn_esm_location_agent]	A service management agent role for a business location	• sn_lookup_verify_user • assignment_workbench • knowledge • agent_workspace_user • chat_admin • cmdb_read • agent_schedule_user • interaction_agent • sn_templated_snip.template_snippet_reader • sn_shn.editor • template_editor • email_composer • template_editor_global

Service Model Foundation table access by role

The user roles that can access the Service Model Foundation tables.

Service Model Foundation table access by role

Table	Create	Read	Update	Delete
Service Organization [sn_customer_service_organization]		• CSM manager • Customer agent • Consumer agent		
Business Location [sn_csm_business_location]		• CSM manager • Customer agent		

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Service Model Foundation table access by role (continued)

Table	Create	Read	Update	Delete
		• Consumer agent • Location manager • Location agent • Location consumer agent		
Internal Business Location [sn_csm_business_location_internal]		• CSM manager • Customer agent • Consumer agent • Location manager • Location agent • Location consumer agent • Location manager contributor • Service organization contributor		
External Business Location [sn_csm_business_location_external]		• CSM manager • Customer agent • Consumer agent • Location manager contributor • Location relationship manager • Service organization contributor		

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Service Model Foundation table access by role (continued)

Table	Create	Read	Update	Delete
Service Organization Member [sn_csm_service_organization_member]	• CSM manager • location manager (for their hierarchy only)	• CSM manager • Customer agent • Consumer agent • Location manager (for their hierarchy only) • Location agent (for their locations only) • Location consumer agent (their locations only)	• CSM manager • Location manager (for their hierarchy only)	• CSM manager • Location manager (for their hierarchy only)
Household [csm_household]		• CSM manager • Consumer agent • Location manager • Location consumer agent • Relationship agent (for households they have relationships with) • Consumer (for their households)	CSM manager	
Household Member [csm_household_member]	CSM manager	• CSM manager • Consumer agent • Location manager • Location consumer agent	• CSM manager • Relationship agent (for households they have relationships with)	

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Service Model Foundation table access by role (continued)

Table	Create	Read	Update	Delete
		• Relationship agent (for households they have relationships with) • Consumer (for households where they are head of household or for consumers that they represent)		
Consumer to Consumer Relationship [sn_customer_rel_consumer_to_consumer]	CSM manager	• CSM manager • Consumer agent • Location manager • Location consumer agent	CSM manager	
Household Member Relationship [sn_customer_rel_household_member_relationship]	CSM manager	• CSM manager • Consumer agent • Location manager • Location consumer agent	CSM manager	
Account Team Member [sn_customerservice_team_member]	• CSM manager • Location manager (for their hierarchy)	• CSM manager • customer agent • Location manager (for their hierarchy) • Location agent (for their locations) • Relationship agent (for	• CSM manager • Location manager (for their hierarchy)	• CSM manager • Location manager (for their hierarchy)

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Service Model Foundation table access by role (continued)

Table	Create	Read	Update	Delete
		accounts that they have relationships with)		
Consumer Team Member [sn_customer_rel_consumer_to_user]	• CSM manager • Location manager (for their hierarchy)	• CSM manager • Consumer agent • Location manager (for their hierarchy) • Location consumer agent (for their locations) • Relationship agent (for consumers that they have relationships with)	• CSM manager • Location manager (for their hierarchy)	• CSM manager • Location manager (for their hierarchy)
Household Team Member [sn_customer_rel_household_to_user]	• CSM manager • Location manager (for their hierarchy)	• CSM manager • Consumer agent • Location manager (for their hierarchy) • Location consumer agent (for their locations) • Relationship agent (for households that they have relationships with)	• CSM manager • Location manager (for their hierarchy)	• CSM manager • Location manager (for their hierarchy)

Service Model Foundation modules

The Service Model Foundation plugins add several modules to the application navigator.

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Business Location modules

Service Organizations > Internal/External Business Locations: This module lists the internal and external business locations that have been created.

Note:
This module is available in Agent Workspace and in the platform interface.

Users with the following roles have access to these modules.

- sn_customerservice_manager
- sn_customerservice_agent
- sn_customerservice.consumer_agent
- sn_customerservice.svc_location_agent
- sn_customerservice.svc_location_consumer_agent

Service Organization External Staffs module

Service Organizations > Service Organization External Staffs: This module lists the external staff members created and added to the external business location.

Note:
This module is available in Agent Workspace and in the platform interface.

Users with the following roles have access to these modules.

- sn_customerservice_manager
- sn_customerservice_agent
- sn_customerservice.consumer_agent
- sn_customerservice.svc_location_agent
- sn_customerservice.svc_location_consumer_agent

Household modules

- Customer > Households: lists the households that a user has access to.
- Customer > Household Members: lists the consumers that have been added to households.

Note:
These modules are available in Agent Workspace and in the platform interface.

Users with the following roles have access to these modules.

- sn_customerservice_manager
- sn_customerservice.consumer_agent
- sn_customerservice.svc_location_consumer_agent
- sn_customerservice.relationship_agent

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Customer Relationship modules

- Customer Relationships > Consumer Team Members: lists the relationships that have been created between an internal user and a consumer.
- Customer Relationships > Household Team Members: lists the relationships that have been created between an internal user and a household.
- Customer Relationships > Consumer Relationships: lists the relationships that have been created between two consumers, regardless of household.
- Customer Relationships > Household Relationships: lists the relationships that have been created between two consumers who are members of the same household.

Note:
These modules are only available in the platform interface. You can view relationships in Agent Workspace in related lists. Customer service managers and location managers can also modify account, consumer, and household team member relationships in Agent Workspace.

Users with the following roles have access to these modules.

- sn_customerservice_manager
- sn_customerservice.consumer_agent
- sn_customerservice.svc_location_manager
- sn_customerservice.svc_location_consumer_agent

Service Model Foundation cases

Location agents and location consumer agents at a business location can create cases for accounts, contacts, consumers, and households.

Staff members with the location agent or location consumer agent role can do the following:

- View information for the customers at their location.
- Create cases for accounts, contacts, households, and consumers.
- Update cases created at their location.
- Create consumers.

Case location

A case belongs to a business location. When a case is created by a location agent or manager, the **Service Organization** field on the Case form is automatically updated with the business location to which the agent or manager belongs. If the case is reassigned, this field is updated to that of the new agent or manager.

If the location agent or manager belongs to multiple locations, the **Service Organization** field can be kept empty. When you fill in this field, select carefully as the service organization controls a location agent's access to cases.

Note:
A case can belong to only one business location.

The **Service Organization** can be set manually for a new case or changed for an existing case. Changing the **Service Organization** doesn't change the assigned agent.

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Case access

Case access is controlled by the business location in the **Service Organization** field on the Case form. The following users can access cases:

- Staff members at the business location with the location agent or location consumer agent role.
- Managers at the business location with the location manager role.

Cases for a business location are added to the Cases related list on the internal or external business location form.

- When a case is created, the service organization on the case is the service organization of the user who creates the case.
- When a case is assigned to an agent, the service organization on the case is updated to the service organization of the assigned agent.

Note:
Only external staff with the location agent can act as fulfillers. For more information, see External business location (EBL) as a fulfiller.

Case access for consumers

Consumer type	Case access
Consumer	Can manage their own cases.
Head of household	Can manage cases for all household members.
Authorized representative, regardless of household	Can manage cases for the consumer they represent.
Authorized representative, inside of household	Can manage cases for the consumer they represent as long as both are current members of the household.

Case access for users

User	Required role	Case access
Location manager	Location manager	Can manage the cases in their location hierarchy.
Location staff member	Location agent Location consumer agent	Can manage the cases in their locations.
Account manager	Relationship agent	Can manage cases for their accounts.
Consumer relationship manager	Relationship agent	Can manage cases for their consumers.
Household relationship manager	Relationship agent	Can manage cases for their households.

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External business location (EBL) as a fulfiller

External business location (EBL) as a fulfiller enables partners, external agencies, and franchises to fulfill customer cases. You can use this capability to maintain consistent customer experiences across both internal and external business locations.

EBL as fulfiller

In the past, only location staff at internal business locations (IBL) could resolve customer-related cases through both platform and workspace. External staff could only create cases from the business location service portal (BLSP) but couldn't resolve them for the business locations. By using EBL as a fulfiller, external location agents having svc_location_agent and snc_external roles can access the platform to create and resolve cases, similar to internal location agents. To learn more, see Service Model Foundation roles and refer to the location agent role.

You can activate this functionality by enabling the business location (com.snc.business_location) plugin.

Note:
Only external location agents can serve as a fulfiller for an external business location.

Use case

For example, the financial institution agencies perform various activities, from policy issuance to claims processing. These activities include underwriting, reviewing claims, and helping customers in claims submission. As most of these tasks are fulfillment activities currently performed by external members or third parties. Now, by using EBL as a fulfiller capability, external location agents in these agencies can efficiently manage and resolve cases.

Related topics

- Access limitations for external location agents
- Integrate with Customer Project Management using Guided Setup

Access limitations for external location agents

Explore the limitations that an external location agent faces when using various platform modules during case resolution. You can use this topic to get a comprehensive overview of the modules that are supported and unsupported with the external location agent persona.

Supported and unsupported modules

List of modules and submodules under the customer service platform that are supported and unsupported:

Modules	Submodules	Supported/unsupported
Overview		Supported
Knowledge		Supported
Cases	Create New	Supported
	My Cases	
	Assigned to My Locations	
	Requested by My Locations	
	All	

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Modules	Submodules	Supported/unsupported
	Open	
	Unassigned	
	Escalated	
Escalations	All	Supported
Customer	Partners	Supported
	Accounts	
	Contacts	
Customer Relationships	Account Team Members	Supported
Service Organization	Internal Business Locations	Supported
	External Business Locations	
	Service Organization External Staffs	
Contracts	Service Contracts	Unsupported
	Entitlements	
Products	Assets	Supported
	Product Models	Unsupported **Note:** All configuration management database (CMDB) tables are unsupported.
	Outsourced Service Providers	Supported
Interaction	All	Unsupported
	Active	
	Assigned to Me	
	Overview	
Special Handling Notes	Special Handling Notes	Supported
Configuration		Unsupported
Knowledge > **Articles**	Create New	Unsupported
	Import Articles	
	Open Submissions	
	Unpublished	Supported
	Published	
	Retired	
	All	
Knowledge > **Feedback Management**	My Flagged	Supported

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Modules	Submodules	Supported/unsupported
	My Submitted Tasks	
	My Assigned Tasks	
	My Closed Tasks	
Knowledge > **Homepage**		Supported
Knowledge > **Notification Settings**		Unsupported
Email Client	Email Drafts	Unsupported
Workspaces	CSM Configurable Workspace	Unsupported **Note:** All aspects of the workspace experience remain inaccessible to external location agents.

Other notable limitations:

- The Launch Interactive Analysis option in the Case list form context menu isn't functional.
- Related cases can't be accessed from the related search results on the Case.

However, with an external business location as a fulfiller, the external location agents can:

- Access Service Model Foundation data, such as internal business location, external business location, service organization members, and responsibilities, on the platform.
- Access customer foundation data, including accounts, contacts, sold products, and install base items on the platform.
- Access the case form on the platform.
- Self-assign and start working on a case.
- View related search results.
- Add comments or work notes.
- View the activity stream, work notes, and case timelines.
- Add resolution notes, propose a solution, and close the case.
- Create and update case tasks.
- View service definitions.

Service Model Foundation business locations

Use the business location entity to create an organizational structure that includes internal and external business locations such as stores, branches, franchises, and dealerships.

A business location is an extension of a service organization. The business location entity enables you to model the internal and external organizational structure involved in supporting customers. It also enables you to give agents the right level of visibility into customer data.

With the business location entity you can:

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- Create internal and external business locations using a hierarchy, with parent and child locations.
- Associate users within a business location, which makes them staff members of that location.
- Provide staff members at a business location with access to the customer cases and information for that location.
- Create teams of staff members to support accounts, consumers, and households.
- Provide the staff members on those teams with access that enables them to manage cases for their accounts, consumers, and households.

Creating a business location

Maintain an organizational structure by creating internal and external business locations. To create a business location, see Create a business location.

Accessing business locations

Managers have access to their business location and to the business locations that are designated as child locations in the hierarchy.

- When a user is added to the **Manager** field, the sn_customerservice.svc_location_manager role is automatically added to that user.
- You can add a user as the manager for multiple business locations.

Staff members with the location agent role or location consumer agent role can perform the following actions:

- Create cases for customers in their business locations.
- Access cases where the location in the **Service Organization** field on the Case form matches their business locations.

Create and manage cases for a business location

As a staff member with the location agent role, create and manage cases for your business locations.

Before you begin

Role required: admin, sn_customerservice.svc_location_agent, and sn_customerservice.svc_location_manager

About this task

Staff members with the location agent role can do the following:

- View information for the customers at their location.
- Create cases for the accounts, contacts, households, and consumers at their location.
- Create consumers.
- Update cases created at their location.

A case belongs to one business location. When a case is created by a location agent or manager, the **Service Organization** field on the Case form is automatically updated with the business location that the agent or manager belongs to. If the case is reassigned, this field is updated to show the new agent or manager.

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If the location agent or manager belongs to multiple locations, the **Service Organization** field may be left empty. When you fill in this field, make your selection carefully because the service organization controls a location agent's access to cases.

The **Service Organization** can be set manually for a new case or changed for an existing case. Changing the **Service Organization** does not change the assigned agent.

Location agents and managers can create cases for business locations without adding an account, contact, or consumer. The location agent or manager who creates the case is added to the **Opened by** field.

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** and click **Create New**.
2. **Optional:** Select the type of case that you want to create.
3. On the form, fill in the fields.
   For a description of the field values, see Case form.
4. Click **Submit**.

Related topics

Service Model Foundation cases

Assign responsibilities

Assign roles

Create a customer service case

Create an account staff relationship

Create a relationship between a staff member at a business location and an account.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

You can assign users who have been added as staff members to a business location to an account relationship.

- Administrators and customer service managers can assign a staff member from any location.
- Location managers can assign staff members from the locations that they have access to.

Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create an account team member relationship, use the Account Manager responsibility.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select either an internal or an external business location.
3. In the Account Staff Relationships related list, click **New**.
   This related list shows the accounts that have a relationship with any staff member at that location.
4. In the **Account** field, select the account to which the staff member is assigned.

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5. In the **Responsibility** field, select **Account Manager**.
6. In the **User** field, select the staff member to fulfill the responsibility.
7. Click **Submit**.
   The relationship is added to the Account Staff Relationships related list.

Create a consumer staff relationship

Create a relationship between a staff member at a business location and a consumer.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

Users who have been added as staff members to a business location can be assigned a consumer relationship.

- Administrators and customer service managers can assign a staff member from any location.
- Location managers can assign staff members from the locations that they have access to.

Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create a consumer relationship, use the Relationship Manager responsibility.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select either an internal or an external business location.
3. In the Consumer Staff Relationships related list, click **New**.
   This related list shows the consumers that have a relationship to any staff member for the location.
4. In the **Consumer** field, select the consumer to which the user is assigned.
5. In the **Responsibility** field, select the **Relationship Manager** responsibility.
6. In the **User** field, select the staff member to fulfill the responsibility.
7. Click **Submit**.
   The relationship is added to the Consumer Staff Relationships related list.

Create a household staff relationship

Create a relationship between a staff member at a business location and a household.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

Users who have been added as staff members to a business location can be assigned a household relationship.

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Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create a household relationship, use the Relationship Manager responsibility.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select either an internal or an external business location.
3. In the Household Staff Relationships related list, click **New**.
   This related list shows the households that have a relationship to any staff member for the location.
4. In the **Household** field, select the consumer to which the user is assigned.
5. In the **Responsibility** field, select the **Relationship Manager** responsibility.
6. In the **User** field, select the staff member to fulfill the responsibility.
7. Click **Submit**.
   The relationship is added to the Household Staff Relationships related list.

Create and manage sold products for a business location

Staff members with the location agent role can manage sold products for their business locations.

Before you begin
Role required: sn_customerservice_manager, sn_customerservice.svc_location_agent, or admin

About this task
Staff members with the sn_customerservice_manager role can create sold products by choosing the appropriate product model. In contrast, staff members with the sn_customerservice.svc_location_agent role can only view the list of sold products installed at any service organization.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select either an internal or an external business location.
3. In the Sold Products related lists, click **New**.
4. On the form, fill in the fields.

Sold Product form

Field	Description
Name	Name of the sold product.
Product	Product model sold to the customer.
Parent Sold Product	If the sold product contains child components, reference to another sold product.
Service Organization	Internal or external entity that is involved in providing service to the customer.

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Field	Description
	Note: The sold products are closely tied to the service organization. As an example, if you select a service organization, all the parent sold products come from the same service organization.

5. Click **Submit**.
   A sold product record is created for the selected business location.

Related topics

Create a sold product

Create and manage install base items for a business location

As a staff member with the location agent role, create and manage install base items for your business locations.

Before you begin

Role required: sn_customerservice_manager, sn_customerservice.svc_location_agent, or admin

About this task

Staff members with the sn_customerservice_manager role create install base items by choosing the correct configuration item, whereas the staff members with the sn_customerservice.svc_location_agent role can view the list of install base items installed at any service organization.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select either an internal or an external business location.
3. In the Install Base Item related lists, click **New**.
4. On the form, fill in the fields.

Install Base Item form

Field	Description
Number	Unique ID of the install base item. The system automatically sets this field value, but you can change it.
Name	Name of the install base item.
Configuration Item	Reference to another sold product if the sold product contains child components.
Service Organization	Internal or external entity that is involved in providing service to the customer.
Owned by	Business manager of the install base item.
Supported by	Configuration item supported by.

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5. Click **Submit**.
   An install base item record is created for the selected business location.

Related topics

Create an install base item

Service organization install base

Extend proactive customer support to the Service Model Foundation by tracking products and services at service organizations.

Business locations are extensions of a service organization and are critical to delivering customer service. They enable support for businesses that interact with customers through physical channels such as stores and branches, franchises, and dealerships. Business locations are often considered the face of a business, where consumers engage for information and purchase, as well as post-sales and ongoing support.

Businesses have multiple products installed at these locations to serve their customers. In the past, there was no easy way for companies to track and manage these products and services. It was only possible to track products and services for accounts and consumers, often resulting in broken equipment, delayed service, and lower customer satisfaction.

By extending proactive customer support to the Service Model Foundation, you can track sold products and install base items installed at service organizations.

Starting with the Yokohama release, service organizations can:

- Track and manage products and services installed at a business location.
- Enable contributors at a business location to submit cases and request help.
- Create and resolve cases for sold products and install base items deployed at a business location.

Related topics

Sold products and install base plugins for service organizations

Assign roles

Sold products and install base plugins for service organizations

Track sold products & install base items for service organizations.

Sold Products and install base plugins for service organizations

Plugins are used by service organizations to track sold products and install base items.

Plugins for sold products and install base

Plugin Name	Description
Business Location [com.snc.business_location]	This plugin supports the Service Model Foundation where the corporation does business with customers through physical channels such as stores and branches.
Customer Service Install Base Management [com.snc.install_base]	This plugin enables customers to capture the current state of their install base and establish the relationship to any downstream entities that might impact their functioning.

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Related topics

- Assign roles
- Create and manage sold products for a business location
- Create and manage install base items for a business location

Activating plugins for Customer Service Management (CSM)

In the Customer Service Management (CSM) application, you must activate the Business Location (com.snc.business_location) and Customer Service Household (com.snc.household) plugins to enable the Service Model Foundation feature.

Activate plugins to enable the Service Model Foundation feature

Plugin	Description
Activate business locations	Activate this plugin to manage customer service for business locations. This plugin enables support for businesses that interact with customers through physical channels such as stores, branches, franchises, and dealerships.
Activate customer service household	Activate this plugin to manage customer service for households. This plugin enables you to create households, define the members of a household, and identify relationships between household members.

Related topics

- Activate business locations
- Activate customer service household

Activate business locations

Activate the Business Location plugin to manage customer service for business locations.

Before you begin

Role required: admin

About this task

The Business Location plugin (com.snc.business_location) enables support for businesses that interact with customers through physical channels such as stores, branches, franchises, and dealerships. Activating the Business Location plugin (com.snc.business_location) automatically activates the Service Organization plugin (com.snc.service_organization). It enables support for internal and external entities in your customer service structure, such as branches, stores, franchises, and dealerships.

Note:
Starting with the Yokohama release, activating the Business Location (com.snc.business_location) plugin automatically activates the Case types (com.snc.csm_case_types) plugin.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Business Location plugin (com.snc.business_location).
3. Click **Activate**.

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Related topics

Activate customer service household

Activate customer service household

Activate the Customer Service Household plugin to manage customer service for households.

Before you begin
Role required: admin

About this task
The Customer Service Household plugin (com.snc.household) enables you to create households, define the members of a household, and identify relationships between household members. This plugin automatically activates the Customer Service Base Extension Entities plugin (com.snc.cs_base_extension), which provides granular access control through relationships, user profile attributes, and roles.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Customer Service Household plugin (com.snc.household).
3. Click **Activate**.

Related topics

Activate business locations

Activate query rules

Set the query rules system property [sn_cs_queryrules.use_query_rules] value to **true**. For upgrade customers, once set to **true**, you must migrate any changes made in Before Query Business Rules to the Query Rules feature and validate them.

Configure forms and lists

Configure forms to add the fields and related lists that are necessary to support the business location and household data models.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**.
2. In the Service Model Foundation category, select **Get Started**.
3. Select **Configure Forms and List**.
4. Add the following related lists to the Consumer form for these views: Case and Workspace.
    - Current Households
    - Household Member > Consumer (All Households)
    - Consumer Relationships
    - Household Relationships
    - Consumer Team Member > Consumer (Consumer Team)
    - Sold Products

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5. Add the **Service Organization** field to the Case form for these views: Case and Workspace.
6. Add the **Requesting Service Organization** field to the Case form for these views: Case and Workspace.
7. Add the **Updated by** field to the Case form for these views: Case and Workspace.
8. Add the **Household** field to the Case form for these views: Case and Workspace.
9. Add the **Primary Household** (Household) field to the Consumer form for these views: Case and Workspace.

   Note:
   After the **Household** field is added to the Consumer form for both case and workspace views, observe the following behavior: The form for a new consumer doesn't have a **Primary Household** field.

10. Add the following related lists to the Sold Products form for these views: Case and Workspace.
    - All Consumers
    - More Consumers
11. Add the **Household** field to the Entitlement form for these views: Case and Workspace.
12. Add the **Household** field to the Contract form for these views: Case and Workspace.
13. Add the **Household** field to the Sold Product form for these views: Case and Workspace.
14. Add the following related lists to the Service Organization form for these views: Case and Workspace.
    - Members
    - Cases > Service Organization (Cases)
    - Account Staff Relationships
    - Consumer Staff Relationships
    - Household Staff Relationships
15. Add the following related lists to the Household form for these views: Case and Workspace.
    - Current Members
    - Household Member > Household (All Members)
    - Household Member Relationship > Household (Member Relationships)
    - Household Team Member > Household (Household Team)
    - Case > Household (Cases)
    - Entitlement > Household (Entitlements)
    - Contract > Household (Contracts)
    - Sold Product > Household (Sold Products)

Create a business location

Establish internal and external locations so that users and consumers at a business location can create accounts, contacts, consumers, and households.

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Create business locations

Task	Description
Create an internal business location	Create an internal business location.
Create an external business location	Create an external business location.

Create an internal business location

Create an internal business location to enable users and consumers to create accounts, contacts, consumers, and households.

Before you begin
Role required: admin

About this task
A business location has a manager. When you create an internal business location, you add a user to the **Manager** field on the Internal Business Location form. Users then added as internal business location managers are automatically assigned the sn_customerservice.svc_location_manager_contributor role.

However, to assign the sn_customerservice.svc_location_manager role to the internal business location managers, the *sn_bus_loc.int_bus_loc.onboard_location_manager_as_contributor* system property must be set to **false**.

Note:
Only internal users can be added as managers for internal business locations.

The manager of an internal business location can access all the cases for account, household, or consumer in the location hierarchy, including cases for child business locations. The manager can also:

- Add staff members to business locations in the location hierarchy.
- Create account team or consumer team relationships with staff members from the location hierarchy.
- View customer information.
- Update cases created in the location hierarchy.
- Create cases for customers in the location hierarchy.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal Business Locations**.
2. Click **New** on the Internal Business Locations list.
3. Fill in the fields on the Internal Business Location form.
4. Click **Submit**.
   The location is added to the Internal Business Locations list.

   After creating an internal business location, you can add staff members to the location, create relationships between staff members and accounts, households, and consumers, and track the list of customers serviced by a business location.

Related topics

Create an external business location

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Create an external business location

Create an external business location to enable users and consumers to create accounts, contacts, consumers, and households.

Before you begin
Role required: admin

About this task
Both internal and external users can be added as managers for external business locations.

The manager of an external business location can access all the cases for an account, household, or consumer in the location hierarchy, including cases for child business locations. The manager can also:

- Create staff members for internal and external business location.
- Assign roles and responsibilities to the staff members.
- Assign staff members to the location.
- View and manage cases created in the location hierarchy.
- Submit a case on behalf of the location.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **External Business Locations**.
2. In the External Business Locations list, click **New**.
3. On the form, fill in the fields.
   For a description of the field values, see External Business Location form.
4. Click **Submit**.
   The location is added to the External Business Locations list.

   After creating an external business location, you can add staff members to the location and create relationships between staff members and accounts, households, and consumers, and track the list of customers serviced by a business location.

Related topics

Create an internal business location

Tracking the location details for a service organization

By tracking and capturing the location details for a service organization, you can provide Field Service Management, Walk-up Experience and appointment booking capabilities.

Location tracking details

You can provide Field Service Management, Walk-up Experience, and appointment booking capabilities through the service organization data model by capturing the Location (cmn_location) table details.

Note:
You must activate the service organization (com.snc.service_organization) plugin before you can track the location details for a service organization.

Location field

By going to the service organization form, you can see that there's a **Location** field, where you can add the information about your geographical location, that is, the cmn_location of the

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service organization. The address fields on the cmn_location table is synchronized with the service organization but not the vice versa.

Note:
Changes to the cmn_location record don't update the address fields on the service organization.

The address fields on the service organization record that are synchronized with the location (cmn_location) include:

- Street
- City
- State
- Country
- Zip / Postal Code
- Latitude
- Longitude

Note:
With the base system, the Location fields don't appear on the form or list views. If the location field on the service organization isn't defined, an on-demand script is shipped with the base system. The script generates the cmn_location record from the address fields.

Common attributes of service organizations

By using common attributes to establish a unified reference architecture and data model, you can extend the Customer Service Management data model to support your service organizations.

You can get use cases from industries like Financial Services Operations, Healthcare and Life Sciences, and Public Sector Digital Services, to capture common attributes for your architecture and data model. For example, a service organization may want to capture attributes for bank branches, hospitals, and agencies. By capturing these common attributes across industries, you can create a unified reference architecture and data model that avoids implementing the same attribute across different industries.

The following table lists the common attributes that have been identified across industries for the service organization [sn_customer_service_organization] table.

List of common attributes

Field Name	Description
Email	Primary email address for the service organization.
Identification number	ID that is used to identify the service organization.
Type	Type of primary service organization by industry. For example, branches, agencies, providers, stores, and so on.
Subtype	Organization types within the industry. For example, by using the **Type** and **Subtype** fields, you can select the multiple types to be used for your service organizations.

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Adding and associating company records with a business location

Create a company record and associate it to an internal or an external business location.

Configuration tasks for associating company records with a business location

Task	Description
Add a new company	Create a company record that represents vendors, manufacturers, or customers with whom you do business.
Associate company records with a business location	Associate company records with a business location to indicate that a business location is a company.

Associate company records with a business location

Associate your company records with a business location to enhance service organization data model adoption across different industry verticals.

Before you begin

Add the **Company** field to an internal or an external business location form using the form layout. For more information, see Add fields to a form layout in Table Builder.

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select the internal or external business location from the list that you want to associate a company record to.
3. Select the company record previously created from the Company field.
4. Select and hold (or right-click) in the header and select **Save**.

Result

The company record is successfully associated with a business location.

Virtual Agent support for business locations

Customer service agents receive chat requests from your business location staff members on the CSM Agent Workspace. These agents can assist your staff members to resolve issues and manage the cases more efficiently if your staff members fill out a pre-chat survey first.

Overview

Before your staff members can use a pre-chat survey to initiate a chat, your administrator must activate the pre-chat configuration for the Business Location Service Portal. The preconfigured surveys are activated by default in the base system. If your business location has upgraded the system to manually activate the pre-chat configuration, then staff members can fill in the pre-survey before the chat. To learn more about the pre-chat survey, see Pre-chat surveys.

You must also assign the service organization contributor (sn_customerservice.service_organization_contributor) and location manager (sn_customerservice.svc_location_manager_core) roles to the staff members who will be using the pre-survey chat feature.

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Let's say that a staff member with the correct role fills out a pre-chat survey on the Business Location Service Portal (BLSP). The chat is then assigned to a customer service agent or Virtual Agent via the advanced work assignment (AWA) routing. To learn more about AWA, see Exploring Advanced Work Assignment.

Before entering into a chat conversation with the staff member, the assigned agent reviews the context of the case so that the agent has a better understanding on how to handle the case.

Pre-chat survey

The pre-chat survey helps your staff members to fill in the details of the location and support requirements before a chat so that an agent has context about the case and can better assist your staff members. The pre-chat survey makes the chat more efficient and helpful to your staff. To learn more about how a chat is initiated from the BLSP, see Chat with Virtual Agent from the Business Location Service Portal.

The pre-chat survey isn't displayed for service organization contributors who are associated to a single business location. The location is picked by default.

The business locations that are listed in the pre-chat configuration are limited to the locations that are assigned to the business location manager. You can't select a child business location.

To learn more about the configuration of the pre-chat surveys, see Define pre-chat survey configurations.

Related topics

Chat with Virtual Agent from the Business Location Service Portal

Chat with Virtual Agent from the Business Location Service Portal

Get the information that you need about a case and a case resolution by filling out a pre-survey on the Business Location Service Portal. The pre-survey lets the customer service agent or Virtual Agent know your location and some details about your case so that you don't have to spend more time repeating this information.

Before you begin

Role required: Service Organization Contributor (sn_customerservice.service_organization_contributor) or Location Manager (sn_customerservice.svc_location_manager_core)

Procedure

1. In the Business Location Service Portal, select the Chat icon ( ) to start a conversation.

   Note:
   The agent chat configuration (sp_agent_chat_config) must be active for the Business Location Service Portal.

2. From the list of locations in the pre-chat survey, select the business location that you're directly associated to and select **Submit**.
   A virtual agent or a customer service agent responds to your chat request.
3. When you're finished with the chat, select **End Conversation**.

What to do next

If the agent creates a case or links the discussion to an existing case, you can view these cases from the Business Location Service Portal by selecting **Cases**.

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Related topics

Virtual Agent support for business locations

Create customer projects

Create customer projects at internal or external business locations to manage location openings, renovations, closings, or other location-specific initiatives.

Before you begin

To access customer projects and to enable required roles, make sure you enable the Customer Project Management (com.snc.csm_ppm) plugin.

Role required: admin, it_project_manager, sn_service_org.project_manager

About this task

A customer project can be initiated by applying templates, or by importing and exporting projects. Furthermore, cases can be created to address issues either at the project or project task level.

Procedure

1. Navigate to **Workspaces** > **Project Workspace**.
2. Initiate a project by selecting **New**.
   Under **My projects**, a list of projects associated with your role is displayed. Under **All projects**, a list of all projects is displayed.
3. On the form, fill in the fields.
   The following table outlines the unique fields of the form. To learn more about other fields, refer Starting a project.

Create Project form

Field	Description
Project class	Class of the project. Select **Customer Project**.
Project template	Template of a project. To create a project from template, select a template from the list displayed. Based on the template, project tasks are created.
Project name	Name for the project.

4. Select **Confirm**.
5. Select a project to see all the related tabs.

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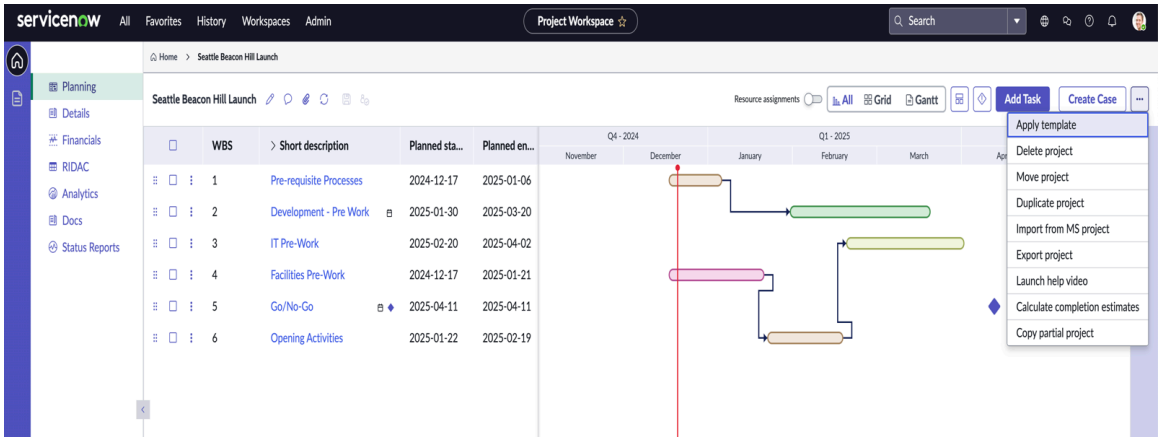

Customer Project related tabs

Related tabs	Description
Planning	In this section, you can: ○ create or add tasks ○ update task details ○ create case for the project and project tasks ○ set deadlines using graph ○ apply template ○ delete, move, import, and export project ○ launch help videos ○ calculate completion estimates ○ copy partial project
Details	In this section, you can view and update all project tasks and details of the project.
Financials	Displays cost plans of the project
RIDAC	Displays risks of the project
Analytics	Enables you to track project phases, plans, assignments, issues, time elapsed, resources, benefits, and other details of the project graphically.
Docs	Docs of the project
Status Reports	Reports of the project

6. Under the **Details** tab, fill in the other fields.
   The following table outlines the unique fields of the customer project. To learn more about other fields, see Starting a project.

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Customer Project form

Fields	Description
Account	Account for the project. Select an account from the displayed list. **Note:** ○ On selecting an account, the **Service Organization** field disappears. ○ The customer project manager can't access projects or project tasks associated with service organization project manager.
Service Organization	Service organization for the project. Select an IBL or EBL from the displayed list. **Note:** ○ On selecting a service organization, the **Account** field disappears. ○ The service organization project manager can't access projects or project tasks associated with customer project manager.

What to do next

Create a project task from a project

Add staff members to a business location

Add users as staff members to a business location so that they can support accounts, contacts, consumers, and households.

Add staff members to internal and external business locations

Task	Description
Add staff members to an internal business location	Add internal users with the snc_internal role as staff members to an internal business location.
Add staff members to an external business location	Add both internal users with the snc_internal role and external users with the snc_external role as staff members to an external business location.

Related topics

- Add staff members to an internal business location
- Add staff members to an external business location

Add staff members to an internal business location

Add users as staff members to an internal business location to support accounts, contacts, consumers, and households.

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Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

You can add internal users with the snc_internal role as staff members to an internal business location.

- Administrators and customer service managers can add staff members to any business location.
- Location managers can add staff members to the business locations that they have access to.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **Internal Business Locations**.
2. Select the desired internal business locations record.
3. Click the **Register Member** related link to open the Register Member at Internal Business Location record.
   You can use the record to register new location staff or move existing internal or external staff between locations managed by the Location manager, and assign responsibilities to staff accordingly.
4. On the form, fill in the fields.

Register Member at Internal Business Location form

Field	Description
Internal Business Location	The automatically generated internal business location.
Member	Field used to select an internal staff member from the list of service organization internal staff record.
Member Type	Field used to assign responsibility for the member selected at the business location. To learn more about responsibilities, see Assign responsibilities.

5. Select **Submit**.

   A member record with the selected member, member type, and business location is created. After a member type is selected, the member is assigned a responsibility automatically.

Add staff members to an external business location

Add users as staff members to an external business location to support accounts, contacts, consumers, and households.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

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About this task

You can add both internal users with the snc_internal role and external users with the snc_external role as staff members to an external business location.

- Administrators and customer service managers can add staff members to any business location.
- Location managers can add staff members to the business locations that they have access to.

Note:
Adding new external staff members to the external business locations must be done using the service organization external staff module.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **External Business Locations**.
2. Select the desired external business locations record.
3. Click the **Register Member** related link to open the Register Member at External Business Location record.
   You can use the record to register new location staff or move existing staff between locations managed by the Location manager, and assign responsibilities to staff accordingly.
4. On the form, fill in the fields.

Register Member at External Business Location form

Field	Description
External Business Location	The automatically generated external business locations.
Register Staff	Field used to register new location staff or move existing staff from external business location hierarchy between locations. ○ **New Staff**: Create a user in Service Organization External Staff (sn_csm_service_organization_external_staff) table with (snc_external) role. ○ **Existing Staff**: List of staff members already working under the service organization hierarchy.
First Name	First name of the staff member.
Last Name	Last name of the staff member.
User ID	User ID of the staff member.
Email	Email address of the staff member.
Member	Field used to select an external staff member from the list of service organization external staff record.

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Field	Description
	Note: This field appears only when **Existing Staff** is selected from the **Register** staff field.
Member Type	Field used to assign responsibility for the selected business location. ○ **None**: Creates a member record. ○ **Listed Member**: Creates a member record. With the member record, a responsibility record is created with the type as Listed Member and the responsibility is empty. ○ **Location Contributor**: Creates a member record and along with the member record, a responsibility record is created with the type as Location Contributor and the responsibility as Location Contributor. **Note:** Assigning responsibility is applicable to both existing and new staff members.

5. Click **Submit**.
   A new external staff member record is created for the selected external business location. The admin must assign responsibilities to the staff members. However, if you've selected **None** as a member type, then you must not create a responsibility record.

Assign responsibilities

Use the responsibility data model to assign responsibilities to a service organization (SO) member.

Before you begin

Role required: admin

About this task

Businesses often need staff to work at more than one business location, and they can have different responsibilities at different locations. Using the responsibility data model, an SO member can be assigned multiple responsibilities.

The responsibility data model maintains the relationship between the SO member and the type of responsibility within the Service Organization Member Responsibilities [sn_csm_svc_org_member_responsibility] table.

Note:
If the business location plugin is active, this feature is enabled by default. However, for upgrade customers, the data in the [sn_csm_svc_org_member_responsibility] table will be auto-populated for existing SO members to ensure that they retain as much access after the upgrade. Any new records created after the Yokohama release must be created using the following steps.

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Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Open the business location (internal or external) record.
3. Open the SO Member record from the Members related list.
4. Select **New** to create a record in the SO Member Responsibilities [sn_csm_svc_org_member_responsibility] table.
   The Service Organization Member Responsibility record shows the following fields: **Member**, **Type**, and **Order**.

Note:
The **Member** field refers to the [sn_csm_service_organization_member] table. This field is auto-populated if the record is initiated from the SO Member related list, the **Type** field refers to the [sn_customerservice_related_party_configuration] table, and the **Order** field specifies the sequence in which records are displayed, organized according to business preferences.

With the base system, users with a specific role can be assigned a particular type.

User roles and associated types

Role	Description
sn_customerservice.svc_location_agent	Location Agent **Note:** This role only applies to the internal business location.
sn_customerservice.svc_location_consumer_agent	Location Consumer Agent **Note:** This role only applies to the internal business location.
sn_customerservice.service_organization_contributor	Location Contributor
sn_customerservice.svc_location_manager_contributor	Location Manager Contributor
sn_customerservice.svc_location_manager	Location Manager Fulfiller **Note:** This role only applies to the internal business location.
sn_bus_loc.location_relationship_manager	Location Relationship Manager **Note:** This role only applies to the external business location.
sn_bus_loc.svc_location_support_agent	Location Support Agent

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5. After you assign the required related party type, select **Submit**.
   A new responsibility is added to the SO member.

Assign roles

Assign roles to internal and external users to facilitate proper access to service organizations, business locations, and households. By assigning required roles, you can enable each user to have the necessary permissions to perform their tasks effectively.

Before you begin

Role required: admin

About this task

The Service Model Foundation plugins add the following roles to Customer Service Management.

Service Model Foundation roles

Role	Description	Contains roles
Location manager contributor [sn_customerservice.svc_location_manager_contributor]	A location manager contributor is employed at the business location and manages a business location in the location hierarchy along with all its child business locations. A location manager contributor performs the following tasks: • Manage service organization. • Manages staff at the business locations. • Track products and services at the business locations. • Report cases for any account, household, or consumer created at the parent or any child business locations.	• sn_customerservice.consumer_contributor • sn_customerservice.svc_location_manager_c • sn_customerservice.service_organization_co • sn_customerservice.account_contributor
Location relationship manager [sn_bus_loc.location_relationship_manager] **Note:** This role only applies to the external business locations.	A location relationship manager is employed by the parent business and acts as a point of contact for one or more external business locations. A location relationship manager performs the following tasks:	sn_customerservice.svc_location_manager_co

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Service Model Foundation roles (continued)

Role	Description	Contains roles
	• Manage and monitor all activities related to products and services at an external business location. • Monitor the performance of external business locations. • Respond to queries on case status from external business location stakeholders.	
Location agent [sn_customerservice.svc_location_agent] **Note:** This role only applies to the internal business location.	A location agent performs the following tasks: • View all customer service management (CSM) entities. • Create cases for any account, household, consumer, or service organization. • Fulfill cases for any account, household, consumer, or service organization created at the agent's location.	• sn_fsm_servicedesk_agent • sn_esm_location_agent
Location consumer agent [sn_customerservice.svc_location_consumer_agent] **Note:** This role only applies to the internal business location.	A location consumer agent performs the following tasks: • View all CSM entities. • Create cases for any account, household, consumer, or service organization. • Fulfill cases for any account, household, consumer, or service organization created at the service organization or any child service organization. • Assign related staff to any account, household, or consumer.	• sn_fsm_servicedesk_agent • sn_esm_location_agent

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Service Model Foundation roles (continued)

Role	Description	Contains roles
Location manager [sn_customerservice.svc_location_manager] **Note:** This role only applies to the internal business locations.	A location manager performs the following tasks: • View all CSM entities for a related account, household, consumer, or service organization. • Create, update, and close cases for any related account, household, consumer, or service organization created at the consumer's location.	• sn_fsm_servicedesk_agent • sn_customerservice.svc_location_agent • email_client_quick_message_author • sn_templated_snip.template_snippet_writer • sn_customerservice.svc_location_manager_c • sn_shn.admin • approver_user • sn_customerservice.svc_location_consumer_
Relationship agent [sn_customerservice.relationship_agent]	Manage cases for the accounts, contacts, consumers, and households that the agent has relationships with. It includes the following relationships that are provided with the Service Model Foundation plugins: • Account Manager: Creates a relationship between an internal user and an account. • Relationship Manager: Creates a relationship between an internal user and a consumer or a household.	• agent_workspace_user • sn_fsm_servicedesk_agent • snc_internal • sn_templated_snip.template_snippet_reader • sn_customerservice.csm_workspace_user • sn_shn.editor • email_composer
Service Management location agent [sn_esm_location_agent]	A service management location agent is an agent for a business location.	• sn_lookup_verify_user • assignment_workbench • knowledge • agent_workspace_user • actsub_user • template_editor • chat_admin • cmdb_read • agent_schedule_user • interaction_agent • sn_templated_snip.template_snippet_reader

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Service Model Foundation roles (continued)

Role	Description	Contains roles
		• sn_customerservice.csm_workspace_user • sn_shn.editor • email_composer • template_editor_global
Location support agent [sn_bus_loc.svc_location_support_agent]	A location support agent is a service organization member who acts as a fulfiller and can perform the following tasks: • View all CSM entities. • Create and resolve cases. • Access the CSM Configurable Workspace. • Use business location 360 to view details of internal and external business locations that they support, sold products, location members, install base items, and available services. **Note:** The role of location support agent is not supported for external business locations since case fulfillment isn't enabled for these locations.	• sn_esm_location_agent • sn_csm_case_types.service_definition_viewe

Note: If contributor users, like relationship contributors, account contributors, or consumer contributors associated with business locations, have a location contributor (sn_customerservice.service_organization_contributor) role, they can access the business locations.

Procedure

- You can assign roles to users using the Service Model Foundation guided setup.
- You can also assign roles to users using the *ServiceNow AI Platform* user administration feature: Assign a role to a user.

Setting up assignment groups

Associate your assignment groups with an internal or an external business location. This association forms a one-to-many (1:M) relationship, which means, one or more groups can be associated with a service organization. This process makes it easier to route cases to the appropriate team member using the inter-organization support capability.

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Lets look at the following example to understand the one-to-many relationship.

When you're assigned to a group within your organization, you get access to specific roles and features associated with that group. The Admin sets up these groups and assigns roles via Access Control Lists (ACLs) that control what you can do. You can belong to multiple groups based on your function, and each group can have subgroups with additional roles. For example, if you join Group A, which has subgroups A-1 and A-2, you get the roles from Group A and its subgroups. If you join the Service Desk group as well, you get additional permissions from that group.

For details on creating groups, see Creating groups.

The following table outlines some typical configuration tasks required for setting up assignment groups at your business organization.

Configuration tasks for setting up assignment groups at a business location

Task	Description
Create a group	Create a group to associate it with a service organization.
Configuring a group	Configure a group that includes adding group members and assigning them required roles.
Associate a group to a business location	Establish a one-to-many (1:M) relationship between a group and a business location.
Add group members to a business location	Enroll group members to a business location and have a dedicated group working on cases.

Create a group

Create groups to assign work to team members based on specific requirements such as skills, location, and product models. This approach enables you to route cases to the appropriate team members.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. On the Group form, fill in the fields.

Group form

Field	Description
Name	The name of the group.
Group email	The group email address or the distribution list for the point of contact, such as the group manager.

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Field	Description
	Note: By default, the group email address overrides the individual email addresses of the members.
Manager	The group manager or lead associated with the group.
Parent	The larger group to which this group belongs. If a group has a parent, the child group inherits the roles of the parent group. The members of the child group aren't members of the parent group.
Hourly rate	The amount charged per hour to calculate costs for the tasks assigned to the group.
Description	The detailed information about the group.

4. Select **Submit**.

What to do next
Configure a group by adding members and assigning them appropriate roles. For more information, see Configuring a group.

Configuring a group

Set up the group by adding members and assigning them the necessary roles. The group members inherit the roles of the group, so you don't have to assign roles to each member separately. This setup enables members within a group to perform specific field service tasks, filtered by location, skills, product models, and so on.

Add members to a group

Add a member to a group so that the member inherits all the roles assigned to the group.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select the group from the list that you want to add members to.
3. In the Group Members related list, select **Edit**.
4. Select and add one or more names to the Group Members List.
5. Select **Save**.

What to do next
Assign the required roles to the members of the group. For more information, see Assign required roles.

Assign required roles

You can assign one or more roles to a group to grant required access to the group members.

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Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select the group from the list that you want to add roles to.
3. In the Roles related list, select **Edit**.
4. Select and add the required roles to the Roles List.
5. Select **Save**.

Result
The roles are successfully added to the assignment group. You can now start associating these groups to a business location. For more information, see Associate a group to a business location.

Associate a group to a business location

Associate a group with the desired business location by establishing a one-to-many (1:M) relationship. This association helps you assign cases directly to the appropriate assignment groups.

Before you begin
Note:
A group can only be associated with a single business location, but a business location can have multiple groups.

Role required: admin

Procedure
1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **Internal/ External Business Locations**.
2. Select the internal or external business location from the list that you want to associate an assignment group to.
3. In the Assignment Groups related list, select **New**.
4. On the Service Organization Assignment Group form, fill in the fields.

Service Organization Assignment Group form

Field	Description
Service organization	Auto-populated with the name of the business location to which you're adding an assignment group.
Assignment group	Name of the assignment group that is to be added.

5. Select **Submit**.

What to do next
Add group members to a business location. For more information, see Add group members to a business location.

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Add group members to a business location

Enroll or add group members to a business location to create a dedicated group or team focused on specific cases.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **Internal Business Locations**.
2. Select the internal business location from the list that you want to add group members to.
3. In the Members related list, select **Edit**.
4. Add the users from the associated group to the Members List.
5. Select **Save**.

Result

The member is successfully added to the assignment group. Based on your requirement, you can keep adding more members to the group and assign them a dedicated task.

Setting up products and available services at a business location

By setting up the relationships between organizations and users in the Customer Service Management (CSM) application, your organization can associate the products and services with the service organization (SO). The SO staff can then address the customer queries about the products and services at a business location and even raise a case on the behalf of their customers.

Configuration tasks for setting up the products and available services at a business location

Task	Description
Create a service definition	Create a service definition record.
Service Definition form	Specify how a service organization provides its services by configuring the **Service Organizations offering Service** field in the sn_case_type_selection table.
Associate a product with a service definition	Associate one or more products with a service definition.
Associate service organizations with a service	Establish an association between products and available services to service organizations by defining the service organization criteria.

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Setting up inter-organization support

Provide your agents at a business location with the visibility into other business locations that they support using the inter-organization support capability. This way, you can enable location support agents to resolve cases raised by other business location.

Overview

The Service Model Foundation enables business locations to request help from others and fulfill such requests. Besides supporting customers, business locations can also support other service organizations.

Currently, there is no easy way for agents who are assigned to a specific business location to access the details they need about other business locations they support, such as contact information, install base items, or existing cases.

With the inter-organization support capabilities, you can enable your business location agents to access additional details about the other business locations they serve, facilitating quicker and more efficient support for the requesting service organization.

Note:
You can activate this capability by enabling the business location (com.snc.business_location) plugin.

Use case

Streamlined support for national retail chains: In the retail segment, store and central support teams assist with day-to-day store operations at the market, country, or segment level. The retailers aim to structure these teams to support only the stores or franchises within their countries. For effective customer support, store agents need full access to the stores, but currently, regional support agents lack full access to the service organizations, limiting their effectiveness.

For example, the ABC retail operates with more than 150 stores nationwide. Each store has its own dedicated support team for daily operations, while regional support teams provide additional assistance. However, the regional location support agents currently lack full access to the service organizations, resulting in delays and inefficiencies in addressing store issues.

With the inter-organization capability, ABC retail can:

- Set up inter-organization support for their stores by associating each store with its regional service organization.
- Enable regional location support agents to view context about the stores they support, including contact information, install base, and existing cases.

This way, the regional support agents can quickly access necessary information and other details, coordinate efficiently with store agents, and resolve issues more effectively. This improves overall store performance and customer satisfaction.

Key benefits

Inter-organization support offers the following benefits:

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- Improve agent experience: Provide agents at a business location with visibility into the other business locations that they support.
- Reduce resolution time: Minimize back-and-forth communication by providing key context alongside cases for service organizations.
- Increase operational efficiency: Define support structures for service organizations through hierarchy or relationship-based criteria.

Configuring business locations serviced by a business location

You can track the relationship between requesting and fulfilling service organizations. You can set hierarchy or relationship-based support criteria for your business locations.

Configuration tasks for setting up business locations serviced by a business location

Task	Description
Define the configuration type for customers or business locations	Define the configuration type for the business location served to provide access to the location support agents.
Associate customers or business locations to a service organization	Associate business locations to service organizations using the service organization customer criteria [service_organization_customer_criteria] table.

Define the configuration type for customers or business locations

Define the configuration type to provide service to customers or business locations within any service organization (SO) using the Customer Service Management (CSM) application.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **Internal or External Business Locations**.
2. Select the desired internal or external business locations record and go to the **Configurations** tab.
3. Select the configuration type based on whether you intend to provide service to customers or business locations within any service organization.
4. Select **Update**.

What to do next

Once the configuration is defined, you can associate your customers or business locations to a service organization. For more information, see Associate customers or business locations to a service organization.

Associate customers or business locations to a service organization

Associate your customers or business locations with a service organization (SO) using the Customer Service Management (CSM) application. By establishing a relationship between your

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customers or business locations and the SO, your service organization staff can create or resolve cases for the customers and business locations raised by other business location.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

You can associate customers (accounts, consumers, and households) and business locations (both internal and external) by using the service organization criteria [service_organization_criteria] table. This association helps your organization to gain access to all customers and business locations associated with a service organization.

For more information about defining service organization criteria, see Create the criteria for a service organization.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **Internal or External Business Locations**.
2. Select the desired internal or external business locations record.
3. From the Service Organization Customer Criteria related list, select **New**.
4. On the form, fill in the fields.

Service Organization Customer Criteria form

Field	Description
Service Organization Criteria	Criteria that define the customers at a service organization.
Service Organization	Service organization that serves the customers that match the criteria.
Active	Check box to activate or deactivate the service organization customer criteria. By default, the active field is set to **True**. **Note:** Only one active criterion is enabled per table to be associated with a service organization.

5. Select **Submit**.

Result

A service organization criterion is successfully defined for a business location.

Tracking the customers serviced by a business location

You can track the customers that are serviced by the business location in the Customer Service Management (CSM) application. Your organization can associate your customers, accounts,

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and households with business locations and even create or resolve cases on the behalf of customers.

Configuration tasks for tracking the customers that are serviced by a business location

Task	Description
Create the criteria for a service organization	Create the records for the service organization criteria that define the list of matching customers to be associated with service organizations.
Define the configuration type for customers or business locations	Define the configuration type for the customers served to provide your service organization staff with the access needed to help resolve cases.
Associate customers or business locations to a service organization	Associate customers to service organizations through the service organization customer criteria [service_organization_customer_criteria] table.

Create the criteria for a service organization

Define the criteria in the service organization criteria [service_organization_criteria] table so that you can later associate your service organizations to a service or your customers to a service organization. You do this task in the Customer Service Management (CSM) application.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Administration** > **Service Organization Criteria**.
2. Select **New**.
3. On the form, fill in the fields.

Service Organization Criteria form

Field	Data type	Description
Name	String	Name of the criteria.
Table	Table Name	Table where you must define the criteria. To establish customer associations, you must select **Account**, **Consumer**, or

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Field	Data type	Description
		Household from the drop-down list in the **Table** field. Similarly, for associating products and services, you must choose **Internal Business Location** from the drop-down list in the **Table** field. Selecting **Business Location** or **Service Organization** from the drop-down list in the **Table** field leads to an error because the system currently doesn't support fulfillment capabilities for external business locations when resolving a case. **Note:** Support can be extended to other tables by configuring them in the `SOCriteriaTableScript` script include.
Criteria	Conditions	Condition or query filter that matches a list of records in the table.

4. Select **Submit**.

Create relationships

Use relationships to provide internal and external users with additional access to customer data.

Before you begin

Role required: admin

About this task

With the Service Model Foundation feature, you can create relationships between the following users:

- Between an internal user and an account, household, or consumer.
- Between two consumers.

Relationships are based on responsibility definitions. These definitions describe a role or a function that supports a customer. When you create a relationship, you select the users involved in the relationship and the responsibility that one user performs on behalf of another.

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- Relationships that you can create between users.
- Responsibility definitions that you can assign to a user in a relationship.

Responsibility and relationship description

Responsibility	Used in relationship	Description
Account Manager	Account Team Member	Use the Account Manager responsibility to create a relationship between an internal user and an account. With this relationship, the internal user can: • Create and manage cases for their accounts. • View account information, including the related entities for an account. • Create and manage contacts and additional addresses for their accounts.

Relationship Manager	• Consumer Team Member
	• Household Team Member
		Use the Relationship Manager responsibility to create a relationship between:
		• An internal user and a consumer.
		• An internal user and a household.
		With this relationship, the internal user can do the following:
		• For a consumer:
		  ○ Create and manage cases for the consumer.
		  ○ View household information, including the related entities for that consumer.
		• For a household:
		  ○ Create and manage cases for the household.
		  ○ View household information, including the related entities for that household.
		  ○ Create and manage household members.

Authorized Representative	• Consumer to Consumer Relationship
	• Household Member Relationship
		Use the Authorized Representative responsibility to create a relationship between two consumers, regardless of household, or between two consumers within the same household.
		With this relationship, a consumer can:
		• Create and manage cases for another consumer.
		• View the information of another consumer.
		• View the install base information of another consumer and create cases for:
		  ○ Sold products
		  ○ Install base items

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Procedure

1. Navigate to **All** > **Customer Service** > **Customer Relationships**.
2. Select the desired relationship.

Option	Description
Account Team Members	Create a relationship between an internal user and an account.
Consumer Team Members	Create a relationship between an internal user and a consumer.
Household Team Members	Create a relationship between an internal user and a household.
Consumer Relationships	Create a relationship between two con sumers, regardless of household.
Household Relationships	Create a relationship between two con sumers within a household.

3. From the selected relationship list, select **New**.
4. Fill in the following fields for the selected relationship.

Relationship list form descriptions

Form	Fields
Account Team Member	○ **Account**: Select the account to which the internal user is assigned. ○ **Responsibility**: Select the **Account Manager** responsibility. ○ **User**: Select the internal user to fulfill the responsibility. ○ **Type**: Select the type from the list of related party configurations. ○ **Order**: Select the order that specifies the sequence in which records are displayed, organized according to business preferences.
Consumer Team Member	○ **Consumer**: Select the consumer to which the internal user is assigned. ○ **Responsibility**: Select the **Relationship Manager** responsibility. ○ **User**: Select the internal user to fulfill the responsibility. ○ **Order**: Select the order that specifies the sequence in which records are displayed, organized according to business preferences.

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Form	Fields
Household Team Member	○ **Household**: Select the household to which the internal user is assigned. ○ **Responsibility**: Select the **Relationship Manager** responsibility. ○ **User**: Select the internal user to fulfill the responsibility. ○ **Order**: Select the order that specifies the sequence in which records are displayed, organized according to business preferences.
Consumer to Consumer Relationship	○ **Consumer is**: Select the consumer to fulfill the responsibility on behalf of another consumer. ○ **Responsibility**: Select the **Authorized Representative** responsibility. ○ **of Consumer**: Select the consumer who is being represented by the consumer in the **Consumer is** field.
Household Member Relationship	○ **Household**; select the desired household. ○ **Consumer is**: Select the consumer in the household to fulfill the responsibility on behalf of another consumer within the same household. ○ **Responsibility**: Select the **Authorized Representative** responsibility. ○ **of Consumer**: Select the consumer who is being represented by the consumer in the **Consumer is** field. ○ **Type**: Select the type from the list of related party configurations. ○ **Order**: Select the order that specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   The relationship is added to the relationship list.

   Account, Consumer, and Household Team Member relationships are also added to the corresponding related lists on the Business Location form.

   - Account Staff Relationships
   - Consumer Staff Relationships
   - Household Staff Relationships

   Consumer to Consumer and Household Member relationships are added to the following related lists:

   - Household form > Member Relationships
   - Consumer form > Consumer Relationships

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Related topics

- Service Model Foundation responsibilities
- Create a responsibility definition

Household-member relationship for an install base item

Your customer service managers can set up a household-member relationship among the members of one household by using the Customer Service Management application. The established relationship between the consumers in that household means that only the household members can access the install base items.

The household relationship can be used to assign responsibilities between two consumers within the same household with the Household Member Relationship table [sn_customer_rel_household_member_relationship]. This relationship gives household members additional access to edit and update an install base item. To learn more about how to create a household relationship, see Create a relationship between household members.

Setting up a household-member relationship limits the access to the household members. Only the household members can access the household install bases.

After a household-member relationship is established between two consumers, the consumer with the authorized representative responsibility gains access to all the household install bases only when the primary consumer is the other member in the established household-member relationship.

Note:
The authorized representative gains access to the household install bases of the consumer that belongs to the same household.

Related topics

- Create relationships
- Create related party configurations

Consumer relationship for an install base item

Your customer service managers can set up a relationship between two consumers, even if the consumers belong to different households. This relationship can be set up with the Customer Service Management application. An authorized representative can access all the consumer install base items that don't belong to any particular household.

A relationship can be established between two consumers by using the Consumer relationship table [sn_customer_rel_consumer_to_consumer]. To create a relationship, see Create a relationship between two consumers.

Authorized contacts, consumers, accounts, and members all have the Authorized Representative responsibility and can access all the details associated to an install base item. For information on authorized roles and responsibilities, see Create related party configurations.

After a relationship is created, all the install base items with a consumer-to-consumer relationship are visible to the consumer on the Consumer Service Portal. This relationship between the two consumers restricts all access to the household install base items to only those two consumers. This relationship also gives consumers additional access to edit and update the information that is related to an install base item.

Related topics

- Create related party configurations

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Configure Customer Data Models for B2B2C

Configure the Customer Data Models for B2B2C application to enable business customers to support their end consumers by creating cases and tracking the services for products and services consumers use.

Role required: admin

The business-to-business (B2B) model supports customer accounts and the contacts within those accounts. The business-to-consumer (B2C) model supports individual consumers.

With the business-to-business-to-consumer (B2B2C) model, you can support business customers and third-party channel partners who, in turn, support the end consumers. This model can be used to support:

- Employees of a business customer.
- End consumers of a business customer.

Related topics

Customer service business models

Customer service business models

Customer Service Management provides different business models that you can use to support your business needs. Select a business model based on the type of services and support that you provide to your customers.

Business-to-business (B2B) model

In the business-to-business (B2B) model, an account is a supported external customer and a contact is an employee of that account. With the B2B model, you can support accounts and contacts and also set up:

- Customer relationships
- Account teams

Business-to-consumer (B2C) model

With the business-to-consumer (B2C) model, you can support individual consumers.

Service Model Foundation

The Service Model Foundation framework expands the business-to-business (B2B) and business-to-consumer (B2C) models and provides the flexibility and security needed to support:

- Business organizations with internal and external locations
- Households and consumers
- The relationships that exist between these entities

Contributor users

The contributor user model provides unified customer support for internal and external customers. With this model, you can engage middle office teams resolve customer issues and requests.

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- Enable employees to request support for themselves and external customers.
- Enable service organizations to serve one another and external customers.
- Assign tasks to middle office agents who work on specific tasks that are required to resolve a case.

Customer Data Models for B2B2C

The Customer Data Models for B2B2C supports complex business models with multi-level customer relationships. This model can be used to support employees of a business customer or end consumers of a business customer.

Request apps on the Store

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

Overview

Organizations have complex business models with multi-level relationships. These complex structures often exist between an organization and the end consumers. In the B2B model, while organizations do business directly with other organizations (business customers), the users of the service provided can be different. A user can be a direct customer (B2C), or a business customers' customer (B2B2C), or a business customer's employee (B2B2E).

With the business-to-business-to-consumer (B2B2C) model, you can support business customers and third-party channel partners who, in turn, support the end consumers. This model can be used to support:

- Employees of a business customer.
- End consumers of a business customer.

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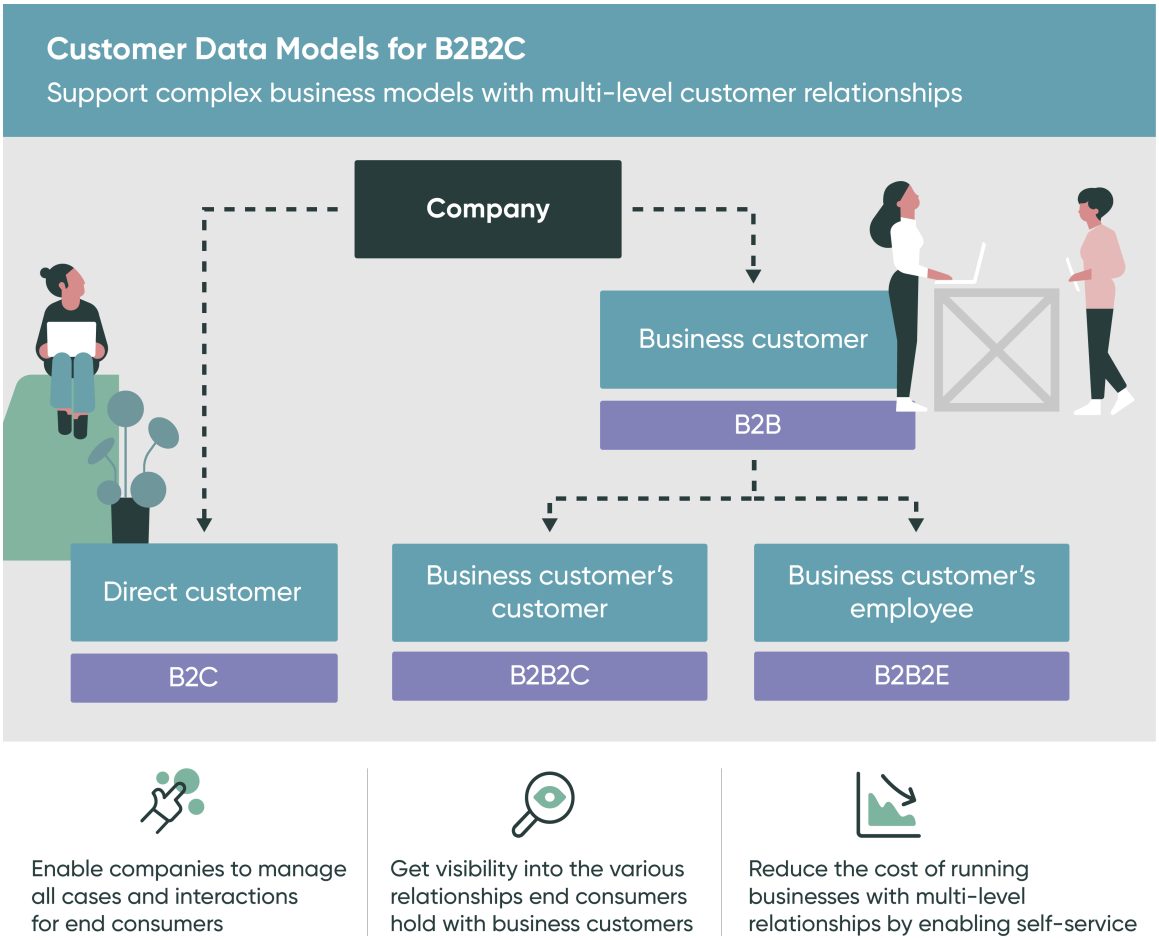

The business-to-business-to-consumer (B2B2C) data model supports different multi-level relationships between a company and the following types of customers:

- Direct customer: B2C
- Business customer: B2B
  - Business customer's customer: B2B2C
  - Business customer's employee: B2B2E

For details on the advantages of using the B2B2C Data Model application, see the text that follows in the Benefits section.

Benefits

- Enable service providers to manage all interactions and cases when the end consumer needs customer service.
- Enable service provider to have a complete view of the end consumers where they hold the relationship as direct customers (B2C) or through a business customer (B2B2C).
- Reduce costs by enabling self-service for various relationships (B2C, B2B2C, B2B2E).

To get started with this application, see Configure Customer Data Models for B2B2C.

To use this application, see Using Customer Data Models for B2B2C.

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Activate Customer Data Models for B2B2C

You can activate the Customer Data Models for B2B2C plugin (com.sn_csm_b2b_consumers) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

Role required: admin

You must activate the Customer Service Install Base Management (com.snc.install_base) plugin before installing Customer Data Models for B2B2C.

The Customer Data Models for B2B2C plugin provides the following roles:

- Account consumer (sn_acct_consumer.consumer)
- Account consumer agent (sn_acct_consumer.agent)

When the plugin is activated, customer service agents inherit the account consumer agent role. Consumers who are added as account consumers are given the account consumer role.

About this task

The following items are installed with Customer Data Models for B2B2C:

- Business rules: Required account or consumer
- UI policies
  - Table: Case
  - Table: Interaction
  - Table: Sold Product
  - Table: Install Base Items
- Reference qualifiers
  - Table: Case
  - Table: Interaction
  - Table: Sold Produce
  - Table: Install Base Items

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Data Models for B2B2C plugin (com.sn_csm_b2b_consumers) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

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

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

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Configure the Account and Consumer forms for B2B2C

Enable account consumers to view the Account Consumers related list for the Case and Workspace views.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** and click an account.
2. Add the **Account Consumer>Account** related list to the Account form for the Case and Workspace views.
   a. Select **View** > **Case** from the Additional actions menu ⋮.
   b. Select **Configure** > **Related Lists** from the Additional actions menu ⋮.
   c. Select **Account Consumer>Account** in the **Available** column and move it to the **Selected** column.
   d. Click **Save**.
   e. Select **View** > **Workspace** from the Additional actions menu ⋮.
   f. Repeat steps 2b–2d.
3. Navigate to **Customer Service** > **Consumers** and click a consumer.
4. Add the **Account Consumer>Account** related list to the Consumer form for the Case and Workspace views.
   a. Select **View** > **Case** from the Additional actions menu ⋮.
   b. Select **Configure** > **Related Lists** from the Additional actions menu ⋮.
   c. Select **Account Consumer>Account** in the Available column and move it to the Selected column.
   d. Click **Save**.
   e. Select **View** > **Workspace** from the Additional actions menu ⋮.
   f. Repeat steps 4b–4d.

Configure the Install Base Items and Sold Products lists

Enable account consumers to view the **Account**, **Contact**, and **Consumer** fields for the Self-Service view.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**.
2. Select **View** > **Self-Service** from the Additional Actions menu ⋮.
3. Click the gear icon (⚙).
4. Select the Account, Contact, and Consumer fields in the **Available** column and move them to the **Selected** column.

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5. Click **OK**.
6. Navigate to **Customer Service** > **Products** > **Sold Products**.
7. Repeat steps 2–5.

Configure the Case list for B2B2C

Enable account consumers to view the **Account**, **Contact**, and **Consumer** fields for the Customer Self Service view.

Before you begin
Role required: admin

Procedure

1. Navigate to **Customer Service** > **Cases** > **All**.
2. Select **View** > **Customer Self Service** from the Additional Actions menu ⋮.
3. Click the gear icon (⚙).
4. Select the Account, Contact, and Consumer fields in the **Available** column and move them to the **Selected** column.
5. Click **OK**.

Organize agent workspaces

Configure agent workspaces and boost efficiency by optimizing interfaces, setting up case management and routing, and integrating tools for smooth case handling.

Case management

Configure your case management tools to optimize case handling.

Case routing and assignment

Use Advanced Work Assignment (AWA) to automatically route cases to the appropriate customer service agents in CSM Configurable Workspace.

CSM Configurable Workspace

Set up the CSM Configurable Workspace to provide agents with the tools they need to answer customer questions and resolve issues efficiently.

Agent tools

Configure organizational tools for agents, including Customer Central, dynamic related records, mobile application, guided decisions, and playbooks.

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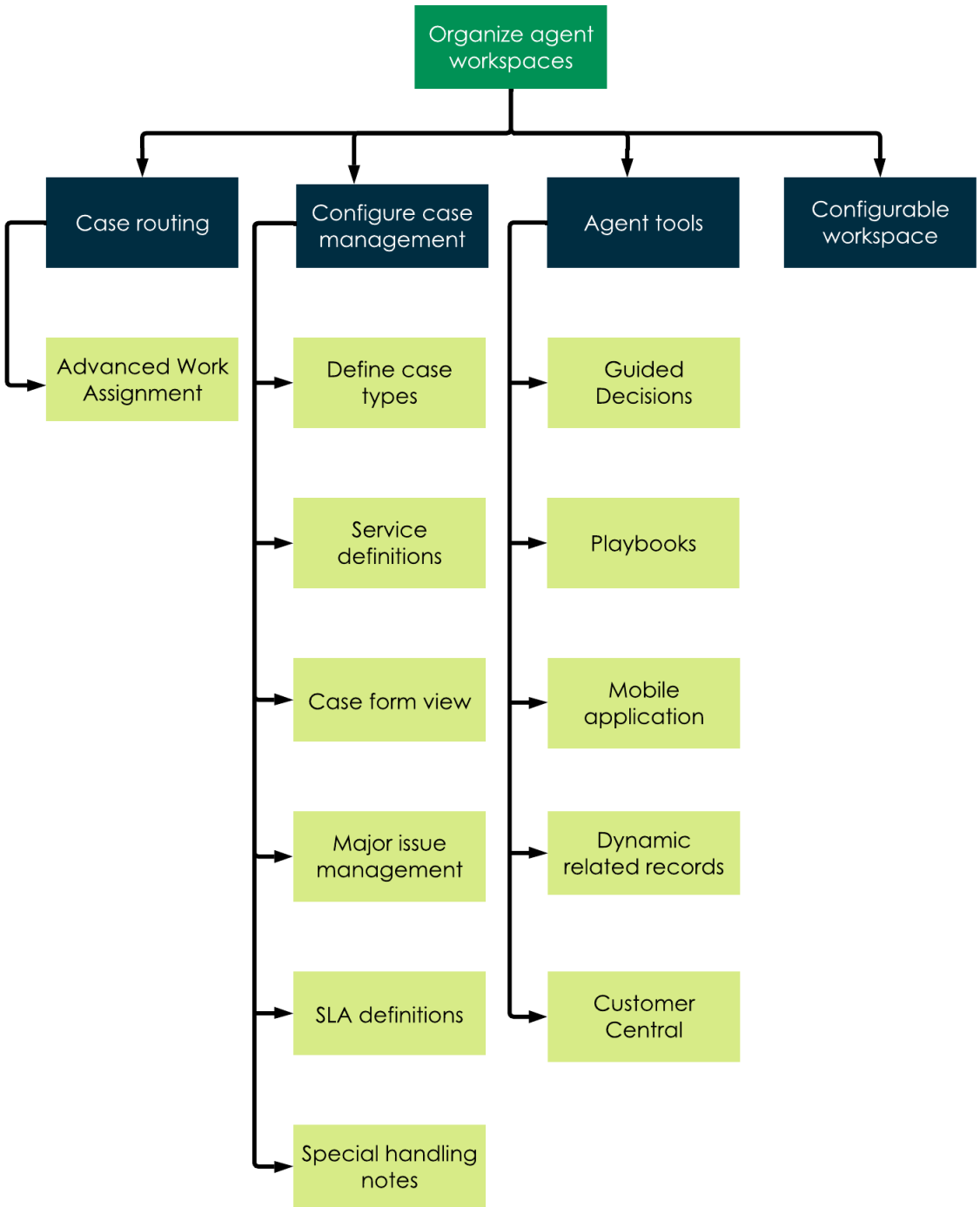
Agent workspaces overview



Case management

Configure your case management tools to manage cases efficiently by setting up features that permit you and your customers to create, resolve, and categorize cases. Define case types for different customer issues and configure service definitions to link products, services, and case types. This setup enhances case handling efficiency, improves customer satisfaction, and ensures accurate tracking and resolution.

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CSM Configurable Workspace

Set up the CSM Configurable Workspace and expand the Workspace UI to optimize agent customer service processes. This user interface provides agents with the tools they need to answer customer questions and resolve issues efficiently.

Case routing and assignment

Set up Advanced Work Assignment in the CSM Configurable Workspace to route and assign cases automatically to the appropriate agents based on their availability, capacity, and skills. This setup helps to improve efficiency and response times.

Agent tools

Configure organizational tools for agents such as Customer Central, dynamic related records, mobile application, Guided Decisions, and playbooks. These tools enable agents to resolve cases quickly and efficiently.

Case management

Set up case management features to enable agents and customers to create cases as needed and work to resolve those cases. Create the necessary case types to handle specific types of customer issues. Configure service definitions to create connections between products, services, and case types.

Setting up case management, case types, and service definitions

Task	Description
Configure case management	Configure the case management features that enable agents and customers to create cases for issues and questions, track the activities related to resolving issues, and provide communication between the agent and customer. Some of the case management features include the following: • Configure a Case form view to display the desired fields and related lists. • Configure SLA definitions for customer service cases to specify the time within which service must be provided. • Configure major issue management to manage the communication and resolution process for issues that impact multiple customers. • Configure special handling notes to bring important case information to an agent's attention.
Customer service case types	Configure case types to handle different types of customer issues. When creating cases, agents can select the case type that corresponds to the customer issue.

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Setting up case management, case types, and service definitions (continued)

Task	Description
Service definitions	Configure service definitions that agents can use to create cases of the right type to support those service requests.

Configure case management

Configure the Customer Service Management features and components that agents and managers use to create and resolve cases.

Before you begin

Role required: admin

About this task

The customer service case is the primary entity of the customer service application. An agent creates a case to identify a customer's question or issue and to track the activities related to resolving the issue. An agent also uses a case to track all of the communication to and from the customer, including the communication channels being used.

Case activities include any action that is taken to resolve an issue. This can include phone calls or emails, knowledge base research, conversations with subject matter experts, and dispatch requests to field service agents, as well as other activities.

From the Case form, an agent can associate and store the related information, such as the customer's name, phone number, and company; account information; product and asset information; service contract and entitlement details, and any associated service level agreements (SLAs).

Note:
These steps may also apply to case type configuration.

To configure case management, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**.
3. In the Case Management category, view the list of tasks to configure the feature.

Case Management configuration tasks

Task	Description
Create the Case Form View	The Case form displays detailed information about a customer issue or problem. Create a Case form view to display the desired fields.
Create SLA Definitions	Customer Service Management uses service level agreements (SLAs) with customer service cases. An SLA can be attached to a service contract, to a company, and to a product and can be configured to start,

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Task	Description
	pause, and stop based on any customer service case attributes. After creating the necessary SLAs, associate them with customer service cases from the SLAs related list on the Case form.
Case Routing and Assignment	The case routing feature uses matching rules and assignment rules to identify cases that meet certain conditions and then route those cases to customer service agents. Create matching rules to identify cases and then create assignment rules to route cases to agents.
Assignment Workbench	The assignment workbench uses configurable criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking. Managers can view these results and click one button to assign a task. To configure the assignment workbench: ○ Create matching criteria. ○ Create an assignment workbench configuration.
Special Handling Notes	Use special handling notes to bring important case information to an agent's attention. Create a configuration for the Case [sn_customerservice_case] table and then configure the form layout to display the notes in a pop-up window or a related list.
Escalation Management	Escalating a case or account raises awareness about important customer issues, facilitates communication, and enables users to track progress toward a resolution. Create escalation templates and severity definitions to control the escalation process.
Major Issue Management	Major issue management enables customer communication for issues that impact a wider audience. Use this feature to proactively identify impacted customers, create cases for these customers, provide information, and manage the resolution process.
Case Action Status	The case action status feature enables customer service agents to easily identify cases that need attention and quickly prioritize their work. Visual indicators in the **Action Status** column on the case list highlight case status.

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Task	Description
Auto Close Resolved Cases	Automatically close cases in the Resolved state if customers do not take any action.
Case Digests	Case digests enable agents to proactively communicate with customers and internal stakeholders about cases. ○ Summaries: while a case is in progress, agents can send periodic case summaries that describe actions taken, next steps, and other case-related information. ○ Post case reviews: when the work on a case has been completed, agents can create a post case review that includes information such as the root cause, mitigation plan, and preventive actions.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Cases and case tasks

Customer service cases store information about customers, their questions and issues, and related information. Case tasks are created and assigned to users to complete the work necessary to resolve cases.

Cases

A case record is the main type of record used by the Customer Service Management application. Case records include detailed information about customers, their reported questions or issues, and the work performed to answer questions and resolve issues. The system stores case records in the Case [sn_customerservice_case] table.

Customer service agents create cases to identify questions or issues, gather information, and track the activities related to resolution. Agents also use cases to communicate with customers and other users.

Key features of a customer service case

Feature	Description
Case details	The Details tab includes the following information: • Customer information such as the customer's name, phone number, and email address. • Product information such as the products, assets, and services owned by the customer. • Case information, such as the priority, assignment group, and assigned agent. • Service contracts, entitlements, and associated service level agreements (SLAs).
Case activities	The Activity pane enables communication between:

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Key features of a customer service case (continued)

Feature	Description
	• Agents and customers. • Agents and other employees within the organization. The Activity pane also shows the communication history, case notes and updates, and attachments.
Related tasks	Related tasks include tasks that result from the case, such as case tasks, work orders, and requests. These tasks may be internal to the organization or they may involve the customer.
Information	Information that is gathered as part of resolving a case can be included in the knowledge base and used to help resolve similar cases. Agents can also search knowledge bases and attach useful articles.

For more information about cases and case records, see the following topics:

- Create a customer service case
- Create a customer service case of a specific type
- Customer service case form

Case tasks

Case tasks are created for additional work that must be completed as part of resolving a customer service case. These tasks are frequently assigned to users such as middle or back-office agents. Case tasks are stored in the Case Task [sn_customerservice_task] table.

Case tasks can be manually created from cases or automatically from case playbooks. When a case task is created, the system uses information from the case to automatically fill in some of the fields on the case task record. This includes the case number in the **Parent case** field. It also includes customer information in the **Account**, **Contact**, or **Consumer** fields, if this information is present in the case record.

Note:
Case tasks can also be created from other records. If a task is created from a non-case record, such as an incident, problem, change, or request, the **Parent** field is updated with the number of the parent record. The **Account**, **Contact**, or **Consumer** fields aren't updated.

If the value in the **Parent case** or **Parent** fields is updated, the customer information in the **Account**, **Contact**, or **Consumer** fields is also updated.

Depending on a user's assigned roles, case tasks appear in a number of different Case Task list in the application navigator in CSM Configurable Workspace, including:

- My Case Task
- My Open
- Unassigned for my groups
- All

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- My Contributing Tasks
- My Accessible Tasks

For more information about case tasks and case task records, see the following topics:

- Create a task for a customer service case
- Case task form

Cases, case tasks and related parties

The Customer Service Management application enables you to support multiple contacts and consumers on cases and sold products and provide these contacts with varying levels of case access. These additional contacts and consumers are called related parties. Related parties are added to the Related Parties related list on the case record.

Customer service agents can also add related parties to case tasks. Customers that can be added to a case task are limited to the following:

- Customers that are related parties on the parent case.
- Customers that the agent has access to.

Users with the admin role can remove related parties from cases. When an admin attempts to remove a related party from a case, the system checks to see if that related party is associated with any open case tasks.

- If no, the related party is removed from the case.
- If yes, the related party isn't removed from the case and the system displays a message that lists the associated case tasks.

Case task integration with Service Definitions

The service definitions feature enables you to create connections between products, services, and case types.

- Agents can use configured service definitions to quickly create cases of the right type based on the selected product or service.
- Customers can use configured service definitions to quickly discover and request the services they need.

Case task integration with Service Definitions roles

Role	Description
Admin [admin]	When creating and updating case tasks, users with the admin role can select service definitions in the **Service definition** field on case task records.
Case task agent [case_task_agent]	• Contains the service definition viewer role (sn_csm_case_types.service_definition_viewer). This role gives users access to the service definitions that are mapped to case task tables. • Can create case tasks and update the **Service definition** field on the case task record.

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Case task integration with Service Definitions roles (continued)

Role	Description
Case task viewer [case_task_viewer]	• Contains the service definition viewer role (sn_csm_case_types.service_definition_viewer). • Can view case tasks and service definitions.

Case tasks and user roles

User roles and how they interact with case tasks

Role	Description
Admin role	
Admin [admin]	This user can: • Create and assign case tasks. • Update the **Account**, **Contact**, and **Consumer** fields after the case task is created. **Note:** The admin can change the values of these fields to one of the related parties associated with the parent case. • Delete case tasks.
Agent roles	
Customer service agent [sn_customerservice_agent]	This user can do the following for account cases: • Create and assign case tasks. • Update all case task fields. • Delete case tasks.
Consumer service agent [sn_customerservice.consumer_agent]	This user can do the following for consumer and household cases: • Create and assign case tasks. • Update all case task fields. • Delete case tasks.
Case task agent [sn_customerservice.case_task_agent]	This user can work on case tasks that they've created and that are assigned to them or to their assignment groups. Case task agents have read access to the **Account**, **Contact**, **Consumer**, and **Parent case** fields for case tasks that are assigned to them or to their assignment groups. This user can:

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User roles and how they interact with case tasks (continued)

Role	Description
	• View and update assigned tasks. • View and update created case tasks. • Create case tasks and assign those tasks to other users. • Add work notes, comments, and attachments to case tasks. • Update the status of case tasks. • Perform additional actions from case tasks such as sending email.
Relationship agent [sn_customerservice.relationship_agent]	This user can view, create, update, and delete case tasks for the customers they have relationships with.
Location agent [sn_customerservice.svc_location_agent]	This user can view, create, update, and delete case tasks for the business locations they have access to.
Consumer location agent [sn_customerservice.svc_location_consumer_agent]	This user can view, create, update, and delete case tasks for the business locations they have access to.
Outsourced agent [sn_csm_ocs.ext_agent]	This user can view, create, update, and delete case tasks based on the outsourcing criteria for the cases they have access to.
Account consumer [sn_acct_consumer.consumer]	Can view the **Account**, **Contact** and **Consumer** fields for the case tasks they have access to. A user with this role can work on the following case tasks: • Tasks that have been created by the user and tasks that are visible to them based on their access to the case. • Tasks that are assigned to the user or to the user's assignment groups. This user can: • View and update assigned tasks. • Create case tasks and assign those tasks to other users. • View and updated created case tasks. • Add work notes, comments, and attachments to case tasks. • Update the status of case tasks. • Perform additional actions from case tasks such as sending email. **Note:** Available with the Customer Data Models for B2B2C plugin (com.sn_csm_b2b_consumers).
Contributor roles	

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User roles and how they interact with case tasks (continued)

Role	Description
Account contributor [sn_customerservice.account_contributor]	This user can: • View and update case tasks and the fields on the case task record that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields on the case task record
Consumer contributor[sn_customerservice.consumer_contributor]	This user can: • View and update case tasks and the fields on the case task record that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields on the case task record
Service organization contributor [sn_customerservice.service_organization_contributor]	This user can: • View and update case tasks and the fields on the case task record that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields on the case task record
Self contributor [sn_customerservice.self_contributor]	This user can: • View and update case tasks and the fields on the case task record that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields on the case task record
Related parties roles	
Case authorized contact [sn_customerservice.case_authorized_contact]	This user can: • View and update case tasks and the fields that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields.
Case authorized consumer [sn_customerservice.case_authorized_consumer]	This user can: • View and update case tasks and the fields that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields.

Case tasks and external user roles

End users and requesters can access case tasks from the Customer and Consumer Service Portals by selecting **My Lists** > **My Case Tasks**.

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End users and requesters can view and update case tasks and the fields that they have access to (case tasks that have the **Visible to customer** field enabled). You get read access to the **Parent case**, **Account**, **Contact** and **Consumer** fields.

- sn_customerservice.customer
- sn_customerservice.consumer
- customer_case_manager
- sn_customerservice.partner
- sn_customerservice.consumer

The users can see the following fields on the Case Task lists and forms: **Account**, **Contact** and **Consumer**. If an end user is viewing a case task from a list of case tasks, the Case Task form also displays the **Parent case** field.

Scheduled job for case tasks

Case task enhancements in the Yokohama release add several fields to the case task record. After upgrading to the Yokohama release, you can run a scheduled job that populates these fields for active case tasks.

Note:
It is recommended that you run the scheduled job during planned downtime.

If the parent case is an active record in the Case table (sn_customerservice_case) or a table that extends the Case table, the **Update case task fields** scheduled job does the following:

- Copies the parent case number to the **Parent case** field.
- Copies the account and contact or consumer information to the **Account** and **Contact** or **Consumer** fields, if this information is present in the case record.

To run this scheduled job:

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Select **Update case task fields** in the **Name** field.
3. Select **Execute Now**.

Configure a Case form view

The Case form contains detailed information about a customer issue or problem. Configure a Case form view to display the desired fields and related lists.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** > **Create New**.
2. Configure the form layout to add the fields you require.
   For more information about adding fields to a form, see Configuring the form layout.

   Note:
   If you are using Customer Service Install Base Management and Proactive Customer Service Operations, add the **Sold Product** field.

3. Configure the form layout to add the related lists you require.

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For more information about adding a related list to a form, see Configuring the form layout.

Note:
If you are using Customer Service Install Base Management and Proactive Customer Service Operations, add the **Affected Install Base Items** related list.

4. Click **Submit**.

Related topics

Create and delete views

Add the Internal User field to the Case form

Add the **Internal user** field to the Case form for the Case view and the Workspace view.

Before you begin
Role required: admin

About this task
The **Internal User** field displays the name of an internal user. When an agent is creating a case on behalf of someone else, they can use this field to identify the person requesting assistance. This user can be an internal employee asking for help for an account, consumer, or service organization, or for themselves.

With the Customer Service Management plugin (com.sn_customerservice), agents can create cases for internal employees or on behalf of their accounts and consumers. Additional plugins provide additional functionality for the **Internal User** field. For more information, see Contributor users.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Case Management category, click **Get Started**.
3. Click **Add Internal User Field to the Case Form View**.
4. Add the **Internal user** field to the Case form for these views: Case and Workspace.

Related topics

Create and delete views

Configure SLA definitions for customer service cases

A service level agreement (SLA) specifies the time within which service must be provided. Configure SLA definitions that include the necessary information to create and progress SLAs for customer service cases.

Before you begin
Role required: admin

About this task
The Customer Service Management application uses service level agreements with customer service cases. An SLA can be attached to a service contract, to a company, and to a product and can be configured to start, pause, and stop based on any customer service case attributes.

An SLA is automatically associated to a case when the case is created or updated based on the conditions that have been set up in the SLA definition. The specific record that gets attached to

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a case is the Task SLA record, which tracks the SLAs for that particular case. The Task SLA table [task_sla] stores Task SLA records.

Procedure

- For more information about SLAs, see Service Level Management concepts.
- To create an SLA, see Create an SLA definition.

Configure case routing and assignment

The case routing feature uses matching rules and assignment rules to identify cases that meet certain conditions and then route those cases to customer service agents.

Before you begin

Role required: admin

About this task

Matching rules are based on two defined sets of conditions: one that identifies specific case attributes and another that identifies the agent resources best suited to handle cases with these attributes.

Assignment rules automatically assign tasks to users and groups when the conditions in a matching rule are met. Create an assignment rule for a matching rule using the **Create assignment rule** related link on the Matching Rule form.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Case Management category, view the list of tasks to configure the feature.

Case Routing and Assignment

Task	Description
Create matching rules for case routing	Matching rules are based on two defined sets of conditions, one that identifies specific case attributes and another that identifies the agent resources best suited to handle cases with these attributes.
Create assignment rules for case routing	Assignment rules automatically assign tasks to users and groups when the conditions in a matching rule are met.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Routing and assigning customer service cases

Create a matching rule for case routing

Create a matching rule for a customer service case that identifies the case attributes as well as the agent resources.

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Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Routing and Assignment** > **Matching Rules**.
2. Click **New**.
3. Fill in the fields on the Matching Rule form.
   This form contains the following sections:
   - Basic rule information
   - Applies to: use this section to create rule conditions
   - Resource: use this section to create agent and agent group conditions

Matching Rule form

Field	Description
Name	The name of the matching rule.
Execution order	The order in which this matching rule is to be executed. Similar to business rules, matching rules are processed based on execution order, from the lowest to the highest.
Active	Enable this check box to activate the matching rule.
Applies To	
Table	The table that stores the task for which the matching rule is being created. The default is the Case [sn_customerservice_case] table.
Conditions	Use the buttons in this field to build one or more conditions on the selected table. A condition is made up of a selected field, an operator, and a value. Add conditions using the **AND** and **OR** buttons. Delete conditions by clicking the **X** to the right of a condition.
Resource	

Matching	The type of resource matching method to use for this rule: Simple, Advanced, Scripted, Selection Criteria.
	
	Select **Simple** to assign a task to a specific user.
	a. Click the lookup icon next to the **Resource** field.
	b. Select a **Table name**.
	c. Select a **Document** from the table.
	d. Click **OK**.
	
	Select **Advanced** to create a specific set of resource conditions. Then use the condition builder in the **Resource** field to identify these conditions.
	
	Select **Scripted** to create a customized script for identifying resources, with the goal of returning a list of users that have the same skills as the task. The task under consideration is set in the context of the script. For example:
	
	`//current has the task record for which the rule is being executed.`
	`var task = current;`
	`var skills = task.getValue("skills");`

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Field	Description

	`var skillUtil = new global.SkillsUtils();`
	`var skilledUsers =`
	`skillUtil.getAllSkilledUserIds(skills);`
	`return skilledUsers;`

Resource	This field changes depending on the resource matching type selected in the **Matching** field. For **Simple** matching, use this field to select a table and a user. For **Advanced** matching, use the condition builder in this field to build one or more conditions to identify a resource. These conditions can be based on user role, agent group, specific skills, work load, or agent availability.
Schedule based filtering	This field applies to **Advanced** matching. Enable this check box to filter resources that are in schedule (work hours) at the time of routing.
Script	For **Scripted** matching. use this field to create a customized script for identifying resources. An example script is included. The expected return from a customized script is an array of resource sys_ids.

4. Click **Submit**.
   The rule appears in the Matching Rules list.
5. Open the newly created rule from the Matching Rules list and add the desired matching criteria.
6. From the **Select Criteria** related list, click **New**.
7. Select a **Criterion**.
8. In the **Use for** field, specify how you want the matching criterion to be used.

Option	Description
Ranking and display	Use the criterion to determine agent ranking and displays it in a column on the workbench.
Display only	Displays the criterion in a column on the work bench but does not use it to determine agent ranking.
Ranking only	Uses the criterion to determine agent ranking but does not display it on the workbench.

9. Select a **Ranking Method**.

Option	Description
More is better	For example, more availability is better when determining the agent ranking.
Less is better	For example, fewer assigned cases are better when determining agent ranking.

10. Click **Submit**.
    The criterion appears on the Matching Rule form in the **Select Criteria** related list.

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11. **Optional:** From the **Select Criteria** related list, set a **Threshold** for the criterion.
    A threshold sets a minimum requirement for a criterion. If necessary, personalize the list and add the **Threshold** field.

Create an assignment rule for case routing

Create a rule that assigns those cases that meet the matching rule criteria to a customer service agent.

Before you begin

Role required: admin

Procedure

1. Open the desired matching rule.
2. Select the **Create assignment rule** related link.
   You can also create an assignment rule by navigating to **Routing and Assignment** > **Assignment Rule** and selecting **New**.
3. Fill in the fields on the Assignment Rule form.

Assignment Rule form

Field	Description
Name	The name of the assignment rule.
Application	The name of the application to which this assignment rule belongs. The default application is **Global**.
Order	The order in which this assignment rule is executed. Similar to business rules, assignment rules are processed based on execution order, from the lowest to the highest.
Active	Enable this check box to activate the matching rule. Only active assignment rules take effect.
Applies To	
Table	The table that stores the task for which the assignment rule is being created. This list shows only those tables and database views that are in the same scope as the assignment rule. If you select a custom table that extends the task table, you must clear the instance cache by navigating to `https://<instance_name>.service-now.com/cache.do` in order for the assignment rule to work. **⚠ Warning:** Clearing the system cache can affect overall performance, and degrade system response times. Don't run cache flushes during business hours, and don't trigger cache flushes automatically.
Conditions	The conditions in which the assignment rule will apply. Use the buttons in this field to build one or more conditions on the selected table. A condition is made up of a selected field, an operator, and a value. Add conditions using the **AND** and **OR** buttons. Delete conditions by selecting the **X** to the right of a condition.
Assign To	

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Field	Description
User	The user to be assigned to the task.
Group	The assignment group to be assigned to the task.
Script	
Script	A script to determine advanced assignment rule functionality. Scripts provide access to current.variable_pool variables.

4. Select **Update**.

Related topics

Define assignment rules

Configure Skills Management

Manage skill data in a central location for customer service agents and work items.

Before you begin

Role required: admin

About this task

To configure skills management, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Skills Management category, view the list of tasks to configure the feature.

Skills Management configuration tasks

Task	Description
Manage skills	Organize skills data of agents and work items in a centralized location.
Assign skills to work items	Create rules to identify skills and automatically associate them with work items.
Assign skills to customer service agents	Identify skills each agent has to work on tasks and assign it to the agent.

Mandatory skills

Use the mandatory skills feature to identify any skills that are required for agents and technicians to work on customer service cases and field service work orders and tasks. Then assign cases and tasks to agents and technicians who have those required skills.

When assigning cases, work orders, and work order tasks, the assignment tools consider the mandatory skills, filter out agents and technicians who don't have these skills, and then rank the remaining agents.

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- If agents with the mandatory skills are available, the cases and tasks are assigned to these agents.
- If agents with the mandatory skills aren't available, then agents with any other, non-mandatory skills identified in the cases and tasks are ranked and assigned.

Field service dispatchers (wm_dispatcher), field service technicians (wm_agent), customer service managers (sn_customerservice_manager), and customer service agents (sn_customerservice_agent) can specify both skills and mandatory skills for cases and tasks.

Mandatory skills are an optional feature. Mandatory skills can be identified on the assignment workbench. In addition to the **Skills** list, the assignment workbench includes a **Mandatory Skills Added** list. Agents are ranked in the workbench based on the number of skills that match the skills identified in the Skills list. If the mandatory skills feature is being used, then the agents displayed are filtered by the skills listed in the Mandatory Skills Added list and then ranked by the other matching criteria.

Related topics

Use the assignment workbench

Configuring the mandatory skills feature

Configure the mandatory skills feature for use with the Customer Service Management and Field Service Management applications.

Mandatory skills is an optional feature included with the Customer Service Management and Field Service Management plugins. Use the steps below to configure this feature with the desired application.

Customer Service Management configuration

To configure the mandatory skills feature for use with Customer Service Management:

- In the Case form:
  - Configure the form layout to use the Task Skills [task_m2m_skill] table.
  - In the Task Skills table, set the **Mandatory** field to **True** to identify skills that are mandatory to complete a task.

    Note:
    The Case form should use either the **Skills** field or the Task Skills table, but not both.

- [Optional] For existing cases that have data populated in the **Skills** field on the Case form, run the **Migrate Skills to Task Skill M2M** script to move this data to the Task Skills table. By default, this fix script migrates the skills from existing entries in the Case, Work Order, and Work Order Task tables to the Task Skills table. For more information, see Migrate skills to the Task Skill table.
- If you are using the assignment workbench, replace the **Matching Skills** matching criteria with the **Matching Skills - Mandatory Skills Support** matching criteria. For more information, see Matching rules for case assignment.

Field Service Management configuration

To configure the mandatory skills feature for use with Field Service Management:

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1. Enable the *work.management.use.mandatory.skills* system property.
2. Configure the Work Order form and the Work Order Task form to use the Task Skills [task_m2m_skill] table.
3. [Optional] For existing work orders and tasks that have data populated in the **Skills** field on the Work Order and Work Order Task forms, run the **Migrate Skills to Task Skill M2M** script to move this data to the Task Skills table. By default, this fix script migrates the skills from existing entries in the Case, Work Order, and Work Order Task tables to the Task Skills table and configures them as optional skills. For more information, see Migrate skills to the Task Skill table.
4. If you are using dynamic scheduling, update the task filter for the dynamic scheduling configuration and replace the **Matching Skills for Dynamic Scheduling** matching criteria with the **Matching Mandatory Skills for Dynamic Scheduling** matching criteria. For more information, see Create a task filter.

For configuring optional skills, navigate to **Field Service** > **Administration** > **Configuration**, click the **Assignment** tab and set **Auto-selection of agents for tasks requires them to have skills** to one of the following:

- All - indicates that the agent must have all optional skills listed in the task for task assignment.
- Some - indicates that the agent must have at least one optional skill listed in the task for task assignment.
- None - indicates that the agent is not required to have any optional skill.

Mandatory Skills system properties

The **Migrate Skills to Task Skill M2M** script migrates skills from existing tasks to the Task Skills [task_m2m_skill] table. Configure the task tables included in the migration using the *skills_management.migration* system property.

The mandatory skills feature adds the following system properties.

Note:
To open the System Property [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties installed with Mandatory skills feature

Property name	Description
work.management.use.mandatory.skills	Enables the mandatory skills feature and indicates that the Task Skills [task_m2m_skill] table is being used for work orders and work order tasks. • **Type**: true/false • **Default value**: false
skills_management.migration	Lists the task tables to migrate to the Task Skills [task_m2m_skill] table when an admin runs the **Migrate Skills to Task Skill M2M** script. • **Type**: choice list • **Default value**: wm_task,customerservice_case,wm_order

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Properties installed with Mandatory skills feature (continued)

Property name	Description
com.snc.skills_management.task_skill_migrated_tables	Comma-separated list of tables for which the **Skills** field has already been migrated to the Task Skills [task_m2m_skill] table. If the table name is listed in this property, the data has been migrated and will not be migrated again. • **Type**: choice list • **Default value**: none

Migrate skills to the Task Skill table

Migrate data from the **Skills** field to the Task Skills table to utilize mandatory skills support for executing tasks in a case or work order.

Before you begin

Role required: wm_admin, admin

About this task

The Task Skills [task_m2m_skill] table stores skills and mandatory skills.

In the Customer Service Management application, the assignment workbench uses the Task Skills table instead of the **Skills** field in the Case table to display agents based on the evaluation criteria for task assignments.

In the Field Service Management application, the work order task assignments done using auto-assignment, dynamic scheduling, and Dispatcher Workspace use the Task Skills table instead of the **Skills** field in the Work Order and Work Order Task tables to assign agents for task assignments.

Procedure

1. Add a system property with the following settings.
2. In the **Type** field, set the value to **true**.
3. Click **Update**.
4. Navigate to **System Definition** > **Fix Scripts** and run the **Migrate Skills to Task Skill M2M** fix script.
   The skills are copied to the task_m2m_skill table. The name of the table from which the skills are copied gets appended to the *com.snc.skills_management.task_skill_migrated_tables* system property. When the script is run again, it ignores all tables from which skills have already been migrated.

Configure assignment workbench

The assignment workbench uses configurable criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking. Managers can view these results and click one button to assign a task.

Before you begin

Role required: admin

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About this task

There are three types of matching criteria available for selection:

- Simple match
- Aggregate
- Scripted

After creating matching criteria, create a configuration for the assignment workbench by creating a matching rule of the type **Selection criteria** and selecting the desired matching criteria.

If necessary, set the assignment workbench properties.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Case Management category, view the list of tasks to configure the feature.

Configure Assignment Workbench

Task	Description
Create assignment workbench matching criteria	The assignment workbench uses configurable matching criteria, such as skills and availability, to evaluate agents in a selected group and provide an overall ranking. To create matching criteria, select the type and then use the fields related to that type to build the query.
Create an assignment workbench configuration	After creating matching criteria, create a configuration for the assignment workbench by creating a matching rule of the type **Selection criteria** and selecting the desired matching criteria.
Configure assignment workbench properties	Configure the properties related to the assignment workbench display.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Assignment workbench overview

Matching criteria for case assignment

Matching rules for case assignment

Create assignment workbench matching criteria

Create one or more matching criteria that can be used in an assignment workbench configuration.

Before you begin

Role required: admin

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About this task

The assignment workbench uses configurable matching criteria, such as skills and availability, to evaluate agents in a selected group and provide an overall ranking. The Matching Criteria [matching_dimension] table stores the individual criterion that can be added to a matching rule to create an assignment workbench configuration.

Procedure

1. Navigate to **All** > **Routing and Assignment** > **Criteria**.
2. Click **New**.
3. Enter a **Name** and a **Description** for the criterion.
4. Select the **Type** of matching criterion.

Option	Description
Simple Match	Creates a one-to-one match. For example, match the time zone of an agent with the time zone of a task location.
Aggregate	Takes a simple query as an input and pro vides aggregate results. The query returns a set of users.
Scripted	Includes a scripted query which returns a list of users.

5. To create a **Simple Match** criterion, fill in the following fields.

Simple match criterion fields

Field	Description
Applies to	The type of task that this criterion applies to.
Field	The field from the selected task table that you want to match.
Resource Table	The table that stores the resource to use for this matching criterion.
Resource Matching Field	The field from the resource table that you want to match.
Resource Field	The resource field to be displayed for the task records that match the resource records.

6. To create an **Aggregate** criterion, fill in the following fields.

Aggregate criterion fields

Field	Description
Aggregate Table	The type of task that this criterion applies to.
Aggregate Filter	Use the condition builder to create a query that returns a set of users from the selected task table. For example, create a query that returns customer service cases with the following states: New, Open, Awaiting info.

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Field	Description
Aggregate Field	The field from the selected task table to be displayed for the task records that match the query conditions.

7. To create a **Scripted** criterion, fill in the following fields.

Scripted criterion fields

Field	Description
Script	Create a customized script which returns a list of users. An example script is included. The expected return from a customized script is an array of resource sys_ids.
Aggregate Field	The field from the selected task table to be displayed for the task records that match the query conditions.

8. **Optional:** Enter a **Display Name**.
9. **Optional:** Enable the **Use Reference** field.
   If you use a reference field, fill in the following fields.

Reference fields

Field	Description
Reference Table	The table that stores the referenced information.
Reference Filter	Add filter conditions to return the desired reference information.
Reference Field	The field from the selected reference table to be displayed for the records that match the filter conditions.
UI Filter Label	The label for this field that appears on the assignment workbench

10. Click **Submit**.

Related topics

Matching criteria for case assignment

Create an assignment workbench configuration

Use a matching rule to create a configuration for the assignment workbench.

Before you begin

Role required: admin

About this task

The assignment workbench configuration is stored in a matching rule that is based on the **Selection criteria** matching type. The default configuration uses the **Recommendation for Case Assignment** matching rule, which includes three of the four default matching criteria:

- Availability Today
- Matching Skills
- Assigned Cases

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You can modify or create matching criteria and then modify the **Recommendation for Case Assignment** matching rule as needed or you can create your own configuration.

Procedure

1. Navigate to **All** > **Routing and Assignment** > **Matching Rules** to access the Matching Rules list.
2. Click **New**.
3. Enter a **Name** for the matching rule.
4. If desired, enter an **Execution Order** for the matching rule.
   This is the order in which this matching rule is to be executed. Similar to business rules, matching rules are processed based on execution order, from the lowest to the highest.
5. In the **Applies To** tab, select the **Table** that stores the task for which the matching rule is being created.
6. Use the **Conditions** field to build one or more conditions on the selected table.
   A condition is made up of a selected field, an operator, and a value. Add conditions using the **AND** and **OR** buttons. Delete conditions by clicking the **X** to the right of a condition.
7. In the **Resource** tab, select **Selection Criteria** in the **Matching** field.
8. Click **Submit**.
9. From the Matching Rules list, open the matching rule that you just created.
10. In the **Select Criteria** related list, click **New**.
    This opens the Select Criterion form.
11. Select a **Criterion** from the Matching Criteria list.
12. Select how the criterion is to be used in the **Use for** field.

Option	Description
Ranking and Display	Uses the criterion to determine agent ranking and displays it in a column on the workbench.
Display Only	Displays the criterion in a column on the work bench but does not use it to determine agent ranking.
Ranking and No Display	Uses the criterion to determine agent ranking but does not display it on the workbench.

13. Select a **Ranking Method**.

Option	Description
More is better	A higher value is better. For example, more availability is better when determining the agent ranking.
Less is better	A lower value is better. For example, fewer cases are better when determining the agent ranking.

14. Click **Submit**.
15. Repeat steps 10 through 14 for each criterion to add to the matching rule.
16. If desired, change the weight of a criterion by double-clicking the **Weight** field in the **Select Criteria** related list and entering a new weight.

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Each matching criterion has an assigned weight. By default, the matching criteria in the Recommendation for Case Assignment matching rule have an assigned weight of 10. You can assign a higher weight to the criteria that are more important.

17. If desired, set the threshold for a criterion by double-clicking the **Threshold** field in the **Select Criteria** related list and entering a threshold number.
A threshold sets a minimum requirement for a criterion. It may be necessary to personalize the list and add the **Threshold** column.

18. If desired, set a criterion active or inactive by double-clicking the **Active** field in the **Select Criteria** related list and selecting **true** or **false**.
Changing this setting has an immediate impact on the agent ranking. It may be necessary to personalize the list and add the **Active** column.

Configure assignment workbench properties

Configure the properties related to the assignment workbench display.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Routing and Assignment** > **Properties**.
2. Set the following properties, as needed.

Option	Description
Title for the macro button *assignment_workbench.find.agents.title*	Creates the title for the macro button on the task form. The default is **Find Agents**.
When enabled opens the assign ment workbench in a new window *assignment_workbench.new.window*	Opens the assignment workbench in a new window. The default is **False**.
Number of agents per page *assignment_workbench_no_of_agents*	Set this property to 20, 30, or 50 agents. To get better performance, do not use more than 50 agents per page. The default is **30**.

3. Click **Save**.

Configure major issue management

Major issue management enables customer communication for issues that impact a wider audience. Use this feature to proactively identify impacted customers, provide information to these customers, and manage the resolution process.

Before you begin
Role required: admin

About this task
This feature enables you to efficiently manage the communication and resolution process for issues that impact multiple customers. With major issue management, you can identify impacted customers who have not yet reported an issue and proactively create cases for these customers.

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Case Management category, view the list of tasks to configure the feature.

Major Issue Management

Task	Description
Activate Major Issue Management	Activate the Major Issue Management (com.sn_majorissue_mgt) plugin.
Configure Customer Service Properties	Enable a system property to synchronize data between parent and child cases.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Major issue management overview

Activate Major Issue Management

Activate the Major Issue Management plugin to use the major issue management feature.

Before you begin
Role required: admin

About this task
This plugin requires:

- Customer Service [com.sn_customerservice]
- Targeted Communications [com.sn_publications]
- Task Communications Management [com.snc.task_communication_management]

Major issue management uses the Targeted Communications recipients lists feature to identify impacted customers.

Note:
If you have installed the Proactive Customer Service Operations plugin, the Major Issue Management plugin is activated by default.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.sn_majorissue_mgt.
3. Click **Activate**.

Configure case synchronization

Configure the major issue management system properties to enable synchronization between major cases and associated child cases.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Properties**.
2. Enable the **Synchronize fields from parent to child case** property.
3. In the **Comma separated list of fields that synchronize from parent to child cases** property, add a comma-separated list of fields that synchronize from the major case to each of the associated child cases.
4. **Optional:** Set the **Processes SLA asynchronously during parent to child case creation and synchronization** property to false to process the SLA synchronously.
   This property is enabled by default.
5. Click **Save**.

Targeted communications

The Targeted Communications application provides the ability to create and send articles and emails to internal and external customers.

Users with the publications author (sn_publications.author) and publications administrator (sn_publications.admin) roles can use the Targeted Communications application to author publication articles and emails for employees, customer contacts and accounts, and consumers. Articles are available for viewing from the self-service portals and can also be sent out as email notifications.

Each publication article includes content and a specified list of recipients. Articles can also include optional email notification. Recipients lists can be created dynamically by using a condition builder to identify the desired conditions, by running scripts, or by manual file upload. Recipients can be added to or removed from a list manually and lists can have both dynamically generated and manually added records of the same type.

When creating an article, publication authors specify a publish date and an expiration date. The system uses these dates to automatically publish and expire the article. Authors can also request a review prior to publishing an article. Articles can include an optional email notification that is sent to all recipients in the recipients list when the article is published. In this email notification, all of the recipients are included in a **bcc** list to maintain privacy.

Note:
Delegates of recipient list users do not receive published email notifications.

The process of publishing articles is based on workflows and two default workflows are provided: one to publish articles instantly and one that requires approval prior to publishing. Publication administrators can update workflows and add users with the publications approver (sn_publications.approver) role to perform reviews. Both authors and administrators can monitor publications and see which users have received and viewed the information.

Customer contacts and consumers can view publications by logging in to the Customer Service Portal or the Consumer Service Portal and selecting the **Publications** link in the portal header. Employees can view these publications by navigating to **Targeted Communications** > **Publications** in the application navigator.

Note:
For more info see, Components installed with additional plugins for Customer Service Management

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Publication article stages

Publication articles progress through several stages which are displayed in a process flow formatter on the Publication form.

Publication stages

Stage	Definition
Author	The initial state of the publication creation process.
Review	Publications that are waiting for review. A publication cannot be updated when it is in the **Review** stage.
Ready To Publish	Publications that have been reviewed and are ready to be published.
Published	Publications that have reached their **Publish Date**.
Expired	Publications that have reached their **Expiry Date** or that have been manually expired.
Canceled	Pending publications that have been canceled.

States are shown in a process flow formatter at the top of the Publication form. The current state is indicated by a blue underline. States that have been completed are indicated by a blue check mark.

Publication lists

The Targeted Communications application menu includes several views of publication records.

Publications lists

State	Definition
Active Publications	Includes publications in the following stages: • Author • Review • Ready to Publish • Published
Draft Publications	Includes publications that have been created and sent for review.
Expired Publications	Includes publications that have reached their **Expiry Date** or have been set to **Expired**.

Recipients lists

Create the recipients list for a targeted communications that can include internal users, customer, accounts, contacts, and consumers. You can create the recipient list using the methods of user import, dynamic lists, or scripting.

When an article is published, the recipients on this list can view the article on the Customer or Consumer Service Portal. Recipients can also receive optional email notifications.

Recipients lists are also used by the Major Issue Management application to create child cases for a major case.

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Recipients lists are created in the following ways:

- By creating a list of imported users.
- By creating a dynamic list based on selected conditions.
- By creating a script.

Recipients lists can have both dynamically generated and manually added records of the same type.

The system administrator can manage a scheduled job to refresh recipient lists. This scheduled job, *Targeted Communications Refresh recipient list*, adds new recipients to each of the active published articles. The new recipients receive email notification of the article and are granted access to view the article on the portal.

Create a recipient list by importing contact information

Create a recipient list by importing contact information. For contacts, supported file types include xls and csv.

Multiple files can be imported into the same recipient list, with new recipients appended to the recipient list file. The system checks that the accounts and contacts exist in the system and only imports those that exist. Duplicate entries are not created. At the end of the import process, the system displays a status with the number of records imported and rejected.

The system uses the sys_id and the email address attributes to match contacts. It first looks for a matching sys_id match. If not found, it then looks for a matching email address. If neither are found, the record is rejected.

Create a recipient list by importing account, consumer, or internal user information

Create a recipient list by importing account, consumer, or internal user information. The supported file type is xls.

The system uses the following attributes to match the imported records:

- Account: Uses the sys_id and the account number. Attempts to match the sys_id. If not found, then attempts to match using the account number. If neither are found, the record is rejected.
- Consumer and User: Uses the sys_id or the email address. Attempts to match the sys_id. If not found, then attempts to match the email address. If neither are found, the record is rejected.

Note:
Column names are case sensitive. For example, use **sys_id** and **number** for accounts and **email** for consumers and users.

Create a recipient list using a script

Create a recipient list using a script with these supported entities: contact, company/account, consumer, and internal user. The output of the script is an array of sys_ids of the corresponding entity. After creating the recipient list, the system shows the total number of records identified, added to the list, and rejected.

To create a recipient list using a script, select Dynamic Condition in the **Method** field on the Recipients List form and enable the **Show Script** check box. Then create your script in the **Script** field.

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Add or remove an approver

Facilitate approval process by adding or removing approvers from your publication workflow.

Before you begin

Role required: sn_publications.admin

Procedure

1. Navigate to **All** > **Targeted Communications** > **Publication Workflow**.
2. Select a workflow.
   The approvers assigned to the workflow are displayed in the **Approvers** field.
3. To add an approver, click **Edit Approvers** next to the **Approvers** field and select an approver from the Users list.
   This list includes users with the sn_publications.approver role. The selected user is added to the **Approvers** field. Approvals on workflows is a platform functionality. For more information, see Approval and rollback workflow activities.
4. To remove an approver, click **Edit Approvers** next to the **Approvers** field, select the approver's name, and then click **Remove**.
   The approver's name is removed from the **Approvers** field.
5. Click **Update**.

Create a recipients list

Create and save a list of users to receive targeted communications.

Before you begin

Role required: sn_publications.author, sn_publications.admin, sn_customerservice_agent, sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

A recipient list can include internal users, accounts, contacts, or consumers. Create a recipient list using any of the following methods:

- By importing a list of users.
- By creating a dynamic list based on selected conditions.
- By creating a script.

Recipients lists can have both dynamically generated and manually added records of the same type.

Note:
You must create at least one recipient list before creating a publication.

Procedure

1. Navigate to **All** > **Targeted Communications** > **Recipients Lists**.
2. Select **New**.
3. Fill in the fields on the Recipients List form.

Recipients List form

Field	Description
Name	The name of the list.

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Field	Description
Type	The type of recipients to include in the list. ○ Contacts (customer_contacts) ○ Internal Users (sys_user) ○ Consumers (csm_consumer) ○ Accounts (customer_account)
State	The state of the recipient list. ○ **New**: The list has not yet been generated. Select **Refresh Recipient List**. ○ **In Progress**: The list is being generated. (You may only see this state when generating a large list of recipients.) ○ **Complete**: The list has been generated.
Method	The method used to generate the recipient list. ○ **Upload File**: Create a list by uploading user information from a selected Excel .xlsx file. ○ **Dynamic Condition**: Create a list by selecting conditions in the condition builder or by adding a script. **Note:** To exclude inactive users from receiving emails, use the condition builder to exclude inactive users from the recipients list.
Choose File	If the **Method** is **Upload file**, download an Excel template and then select an .xlsx file that contains the user information. The templates vary based on the entity selected in the **Type** field. For accounts, the template includes columns for sys_id and account number values. For contacts, consumers, and internal users, the template includes columns for sys_id and email values.
Show Script	If the **Method** is **Dynamic Condition**, enable this check box to create a recipients list using a script. Enabling this check box displays the **Script** field.
Script	The script used to create a recipients list.
Table	The table that stores the user information. Depending on the selection in the **Type** field, this field displays: ○ Contact [customer_contact] ○ User [sys_user] ○ Consumer [csm_consumer] ○ Account [customer_account]
User Field	The field that references the user record in the User (sys_user) table. Outlined are the sys_id's for the following types of recipient lists: ○ Contacts (customer_contacts) ○ Internal Users (sys_user) ○ Consumers (csm_consumer)
Account Field	The field in the selected table that stores the account information.

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Field	Description
	This field is displayed for the following types of recipients lists: **Accounts**.
Conditions	Use the buttons in this field to build one or more conditions on the selected table. A condition is made up of a selected field, an operator, and a value. Add conditions using the AND and OR buttons. Delete conditions by selecting the Delete button next to the condition.

4. Select **Submit**.
   For recipients lists created by file upload, selecting **Submit** validates the records in the Excel file. Following validation, the system displays a pop-up window with the upload results, including valid and invalid user records.

Edit a recipients list

Modify targeted communication recipient lists using Dynamically Added column in Recipients related list.

Before you begin

Role required: sn_publications.author, sn_publications.admin, sn_customerservice_agent, sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

The **Recipients** related list includes the **Dynamically Added** column which displays either True or False, depending on how a record was added:

- True for records that are dynamically generated, either by using the condition builder or by running a script.
- False for records that are added manually, either by using the **Edit** button on the **Recipients** related list or by file upload.

The **Active Communication** column is set to True by default for both dynamically and manually added records. This field indicates whether or not the recipient requires active communication.

Procedure

1. Navigate to **All** > **Targeted Communications** > **Recipients Lists**.
2. Select the desired list.
3. In the **Recipients** related list, click **Edit**.
4. Use the arrows to add or remove records.
5. Click **Save**.

Create a publication

Create a publication to send articles or emails to internal or external customers. You can specify the content type and include an optional email.

Before you begin

Role required: sn_publications.author or sn_publications.admin

About this task

Two options to consider when creating a publication:

- Include the optional email notification (default)
- Select the type of content: HTML or Wiki

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After creating an article, there are two publishing options:

- **Submit:** sets the stage to **Author** and saves the publication record.
- **Send for review:** sets the stage to **Review** and sends the publication to the approver.

Procedure

1. Navigate to **All** > **Targeted Communications** > **Create New Publication**.
2. Fill in the fields on the Publication form.

Publication form

Field	Description
Number	The automatically generated publication number.
Content Type	The type of data included in the publication. Select one of the following: ○ HTML: this content can include Rich Text formatted (RTF) text, images, attachments, and links. Enter the publication data in the **Content** field. ○ Wiki: this content can include plain text. Enter the publication data in the **Wiki** field. The default selection is HTML.
Category	If desired, select a category for the publication. The following categories are available: ○ Defect ○ Outage ○ Information
Recipient Lists	Select a predefined list to target specific customers. Recipient lists are created by the publication author or administrator.
Short Description	A brief description or title of the publication.
Publish Date	Select the publication date as any future date. Publications are sent automatically when the publish date and time are reached.
Expiry Date	Select the expiration date. This date must be at least one day after the **Publish Date**. Publications are automatically expired when the expiry date and time are reached.
Include Attach Links	Include links to any attachments in the email notification preview.
Content	This field appears when you select **HTML** as the **Content Type**. Enter the text of the publication in this field. HTML content can include Rich Text formatted (RTF) text, images, attachments, and links.
Wiki	This field appears when you select **Wiki** as the **Content Type**.

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Field	Description
	Click the Wikitext button and enter the text of the publication in this field. Wiki content can include plain text.

3. Click one of the following options.

Option	Description
Submit	The stage is set to **Author** and the publication record is saved.
Send for Review	The stage is set to **Review** and the publication is sent to the approver for review. Approvers can navigate to **Self-Service** > **My Approvals** to see a list of review requests.

Publish a publication

Automatically publish a publication with an optional email notification to send to customers.

Before you begin

Role required: sn_publications.author or sn_publications.admin

About this task

Publications are automatically published at the date and time selected in the **Publish Date** field on the Publication form. When creating a publication, set the **Publish Date** and the **Expiry Date** fields to control when the publication is automatically published and expired.

Note:
A UI action to manually publish a publication is not available out of box. If needed, the system administrator can Create a UI action and add it to the Publication form.

When creating a publication, you can also include an optional email notification that is sent to all recipients in the recipients list when the publication is published. In this email notification, all recipients are included in a **bcc** list to maintain privacy.

Note:
To exclude inactive users from receiving emails, use the condition builder to exclude inactive users from the recipients list.

Procedure

1. Navigate to **All** > **Targeted Communications** > **Active Publications**.
2. Select the desired publication.
3. View the date in the **Publish Date** field.
   The system automatically publishes the publication on this date and time and sends an email notification to the recipients in the recipients list.

Note:

- If the system administrator has configured a UI action, you can use this UI action for manually publishing the publication.
- For more info, see Email templates.

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Create a recurring publication

Review publications to either accept or reject them. You must have the publication's approval role to review the publication. If the publication is not reviewed before the Publish Date, the publication is rejected.

Before you begin

Role required: sn_publications.author or sn_publications.admin

About this task

You can specify the recurrence interval and the recurrence start and end date. The number of copies that are created are based on these settings and appear in the **Publications** related list on the original publication form. Each copy has a different publish date, which is based on the interval. Each copy gets reset to the **Author** state and each one goes through its own workflow.

Procedure

1. Do one of the following:
   - Navigate to **Targeted Communications** > **Active Publications**, open the desired publication, and click the **Setup Recurrence** related link.
   - Navigate to **Targeted Communications** > **Recurrences** and click **New**.
2. Fill in the fields on the Recurrence form.

Recurrence form

Field	Description
Short Description	A brief description or title of the publication.
Publication Template	The number of the publication being used as a template. ○ If you clicked the **Setup Recurrence** related link, this field displays the original publication number. ○ If you clicked **Recurrences** in the Targeted Communications menu, select a publication from the Publications list.
Recurrence Start	Select a date for the first occurrence of the recurring publications.
Recurrence End	Select a date for the last occurrence of the recurring publications.
Recurrence Interval	Select an interval for the recurring publications: ○ Daily ○ Weekly ○ Biweekly ○ Monthly ○ Custom
Custom Interval in Days	This field appears when you select **Custom** as the **Recurrence Interval**. Enter the number of days for the interval.

3. Click **Submit**.
   The recurring publications are created based on the selected dates and the recurrence interval and the stage for each copy is set to **Author**. The copies appear on the **Publications**

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related list on the original publication form, as well as on the Active Publications and the Draft Publications lists. From any of these lists you can open each publication and change the information as necessary. Each copy lists the publication template number in the **Recurrence** field.

A record of the recurrence appears on the Recurrences list.

Preview an email notification

Before sending a publication, authors or administrators can preview the email notifications, reviewing the recipient list, subject information, and publication content.

Before you begin

Role required: sn_publications.author or sn_publications.admin

About this task

Users can preview the following information for an email notification when the Customer Service plugin (com.sn_customerservice) is installed:

- The recipient list
- The subject of the publication
- The text of the publication and any attachments.

Procedure

1. Navigate to one of the following modules:
   - **Targeted Communications** > **Active Publications**
   - **Targeted Communications** > **Draft Publications**
2. Select the desired publication.
3. Click the **Preview Target Email** related link.
4. View the email notification in the Notification Preview window.
5. If desired, view the publication on the customer portal by clicking the link in the body of the email.
6. Close the Notification Preview window.
   Once the publication has been published, the customers in the recipient list should receive the email.

Update a publication

You can make changes to a publication that is in the **Author** or **Review** stages.

Before you begin

Role required: sn_publications.author or sn_publications.admin

Procedure

1. Navigate to one of the following modules:
   - **Targeted Communications** > **Active Publications**
   - **Targeted Communications** > **Draft Publications**
2. Open the desired publication.
   The stage of the publication must be either **Author** or **Review**.

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3. Make the desired changes.
4. Click **Update**.

Send a publication for review

Send publications for review, either the author or administrators, from the Author stage, triggering a transition to the Review stage. Approvers are automatically added to the Approvers related list.

Before you begin
Role required: sn_publications.author or sn_publications.admin

Procedure

1. Navigate to one of the following modules:
   - **Targeted Communications** > **Active Publications**
   - **Targeted Communications** > **Draft Publications**
2. Select a publication in the **Author** stage.
3. Click **Send For Review**.
   The publication stage is set to **Review** and the approvers are added to the **Approvers** related list on the Publication form.

   Approvers can navigate to **Self-Service** > **My Approvals** to see a list of review requests.

Review a publication

Users with the publications approver role that have been added as approvers to the publication workflow can review a publication.

Before you begin
Role required: sn_publications.approver or sn_customerservice_manager

About this task
After reviewing, an approver can either accept or reject a publication. If an approver does not review a publication before the **Publish Date**, the publication cannot be approved. The **Approve** button is not displayed and the approver sees a message that the publish date and time has passed. The approver can only reject the publication, which returns it to the **Author** stage.

The **Approvers** related list displays a list of approval tasks and includes most recent comment from each approver.

Note:
Delegate approval is not available in the Targeted Communications application.

Procedure

1. Navigate to **All** > **Self-Service** > **My Approvals**.
2. Select a publication for review from the Approvals list that has a state of **Requested**.
3. Review the publication summary at the bottom of the approval form.
4. Add review comments to the **Comments** field.
5. Click one of the following options.

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Option	Description
Approve	The review state changes to **Approved** on the Approvals list and the publication stage is set to **Ready To Publish**. For other approvers of this article, the review state changes to **No Longer Required**.
Reject	The review state changes to **Rejected** on the Approvals list and the publication stage is set to **Author**.

View the list of approvers for a publication

Access and review the assigned approvers for a publication sent for review in Targeted Communications.

Before you begin

Role required: sn_publications.author or sn_publications.admin

Procedure

1. Navigate to one of the following modules:
   - **Targeted Communications** > **Active Publications**
   - **Targeted Communications** > **Draft Publications**
2. Open the desired publication.
3. Click the tab for the **Approvers** related list.
   The Approvers list includes the users with the publications approver role that have been added as approvers to the publication workflow.

Track a publication

Access a list of recipients for a publication and see which recipients have viewed the content.

Before you begin

Role required: sn_publications.author or sn_publications.admin

Procedure

1. Navigate to **All** > **Targeted Communications** > **Active Publications**.
2. Open the desired publication.
3. Click the **Publication Recipients** related list.
   For each recipient on this list, you can see if the customer has viewed the article.

Expire a publication

Expire a published article before it reaches the **Expiry Date**.

Before you begin

Role required: sn_publications.author or sn_publications.admin

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Procedure

1. Navigate to **All** > **Targeted Communications** > **Active Publications**.
2. Select an article that has been published.
3. Click **Expire**.
   The publication **Expiry Date** is set to the current date. The publication is removed from the Active Publications list and appears on the Expired Publications list.

Cancel a publication

Cancel a pending publication before it reaches the publish date.

Before you begin
Role required: sn_publications.author or sn_publications.admin

About this task
You can cancel a publication in any of the following stages: **Author**, **Review**, or **Ready to Publish**.

Procedure

1. Navigate to one of the following:
   - **Targeted Communications** > **Active Publications**
   - **Targeted Communications** > **Draft Publications**
2. Select the desired publication.
3. Click **Cancel**.
   The stage of the publication changes to **Cancelled**.

View a publication

Access the details of a publication and review them using the Targeted Communications menu.

Before you begin
Role required: sn_customerservice.customer

Note:
To view a published publication, see View a publication on the Customer Service Portal

Procedure

1. Navigate to **All** > **Targeted Communications** > **Publications**.
2. Select a publication from the Publications list.

Configure special handling notes

Use special handling notes to bring important case information to an agent's attention.

Before you begin
Role required: admin

About this task
Configure the desired entity tables to use special handling notes and then configure the corresponding forms to display either the Special Handling Notes list or pop-up window.

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**.
3. In the Case Management category, select the Special Handling Notes task.
   Configuring special handling notes includes the following steps.

Special Handling Notes configuration steps

Task	Description
Configure an entity table to use special handling notes	Configuring an entity to use special handling notes adds the **Create Special Handling Notes** related link to the corresponding entity form.
Configure a form to show special handling notes in a list or pop-up window	Configure a form to display special handling notes in either a list or a pop-up window.
Configure the necessary properties to display special handling notes	Configure properties that determine the frequency and the number of special handling notes that are displayed.

4. To perform the task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Special handling notes

Configure an entity table to use special handling notes

Configure an entity table to use special handling notes.

Before you begin
Role required: sn_shn.admin

About this task
Configuring an entity to use special handling notes adds the **Create Special Handling Notes** related link to the corresponding form.

Procedure

1. Navigate to **All** > **Special Handling Notes** > **Configuration**.
2. Click **New**.
3. Select a table in the **Table name** field.
4. If desired, select one or more **Related Fields**.
   You can also display notes from related entities by including those fields in the configuration. For example, you can display notes for the account and contact associated with a customer service case by selecting the **Account** and **Contact** fields on the Case form.
5. Click **Submit**.
   The configuration is added to the Special Handling Configuration list.

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Configure a form to show special handling notes

Display special handling notes on a form, such as the Case form, in either a form list or a pop-up window.

Before you begin

Role required: sn_shn.admin

Procedure

1. Navigate to a form such as the Case form.
2. Right-click the form header and select **Configure** > **Form Layout**.
   The system displays a pop-up window that gives you the choice to use Form Builder or continue with the following steps. Selecting **Try Form Builder** opens the Form Builder tool in a new window. For more information, see Accessing Form Builder.
3. Select **Not Now** on the pop-up window.
4. Select one or both of the following choices from the **Available** column and move it to the **Selected** column.
   - **Special Handling Notes List**
   - **Special Handling Notes Pop Up**
5. Select **Save**.

Related topics

Special handling notes

Configure special handling notes properties

Configure the necessary properties to display special handling notes.

Before you begin

Role required: sn_shn.admin

Procedure

1. Navigate to **All** > **Special Handling Notes** > **Properties**.
2. Configure the following properties.

Option	Description
Display special handling notes only once per session	Special handling notes are displayed each time you access a record. Enable this property to display special handling notes only once per session.
Maximum number of notes displayed in the Special Handling Notes pop-up window	Increase or decrease this number as desired. The default is 20 alerts.
Width of the Special Handling Notes pop-up window in pixels	The width of the pop-up window in pixels. The default width is 500. If you specify less that 300, the window automatically uses the default width.

3. Click **Save**.

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Configure case action status

The case action status feature displays the status of cases in the Cases list. Customer service agents can use this feature to easily identify cases that need attention and quickly prioritize their work.

Before you begin
Role required: admin

About this task
Visual indicators in the Action Status column on the case list highlight case status:

- **Needs attention**: A blue indicator highlights cases that require attention, such as cases that have been updated by customers or internal users and are waiting for input or review. A blue indicator highlights cases that need attention.
- **Blocked**: A red indicator highlights cases that are blocked, such as cases that have open related task records or are waiting for customer feedback.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**
3. In the Case Management category, view the list of tasks to configure the feature.

Case Action Status

Task	Description
Activate Case Action Status	Activate the Case Action Status plugin (com.snc.csm_action_status) plugin to enable the case action status feature.
Configure actionable case flows	Enable or disable the actionable case flows that are provided with the Case Action Status plugin.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Case action status

Activate Case Action Status

Activate the Case Action Status plugin to use the case action status feature.

Before you begin
Role required: admin

About this task
Case action status provides a Customer Service-specific application of the Action Status Automation feature, which tracks blocking tasks created for customer service cases and updates the action status indicators.

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Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.snc.csm_action_status.
3. Click **Activate**.

Related topics

Case action status

Configure actionable case flows

The Case Action Status plugin provides several actionable case flows that create and resolve blocking tasks for different case-related actions.

Before you begin
Role required: admin

About this task
The actionable case flows included with the Case Action Status plugin are enabled by default. If you do not want to create blocking tasks for a specific action, you need to disable the associated flow. For more information about the case flows included with the plugin, see Actionable case flows.

Note:
The Case Action Status plugin provides case flows that create and resolve blocking tasks for problems associated with cases. To get complete functionality, you must also activate the Customer Service with Service Management plugin (com.sn_cs_sm). For more information, see Integrate with Service Management.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Actionable Case Flows**.
2. Review the list of case flows.
3. Set the **Active** field to false for the desired case flows.

Related topics

Case action status

Create cases as a proxy contact

The proxy contact role enables employees to create cases for customer accounts and contacts. Employees can also be proxy case contacts on behalf of customers.

Assign the proxy contact role (sn_customerservice.proxy_contact) to employees in your company who are not fulfillers or do not have other CSM-specific roles.

Note:
This role requires licensing for access to CSM applications. The proxy contact cannot co-exist with the contributor roles.

Employees with the proxy contact role can do the following:

- Create cases on behalf of customers by email, phone, chat, Virtual Agent, and from the Customer Service Portal.
- Create requests on behalf of customers from the Customer Service Portal.

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When creating a case, the employee can select a customer contact or a partner contact as the case contact. The employee is also added to the case as the internal contact.

From the Customer Service Portal, employees can do the following for the cases where they are the internal contact:

- View a list of cases.
- View case details.
- Add comments or attachments to a case.
- Accept or reject a case resolution.
- View a list of related work orders.
- Check the status of a case using Virtual Agent.

Customer service agents can create cases and designate an employee with the proxy contact role as the internal contact.

- From Agent Workspace, agents can create cases for employees from interaction records.
- From connect chat sessions with employees, agents can create cases that add the employee to the **Internal contact** field on the Case form.

Plugin information

Activate the CSM Extension for Proxy Contacts (com.snc.csm_proxy_contacts) plugin to enable this feature. This plugin adds the following to Customer Service Management:

- The sn_customerservice.proxy_contact role.
- The ProxyContactHelper script include.
- The **Internal contact** field on the Case form.
- The **Opened for** field on the Interaction form.

Note:
You need to configure the Interaction form to display the **Opened for** field and the Case form to display the **Internal contact** field.

Configure the Customer 360 ribbon component in Agent Workspace

With the workspace administrator role (workspace_admin), you can configure the Customer 360 ribbon component to display the internal contact for a case.

- If the **Contact** field (the primary field) is populated on the Case form, the Customer 360 component displays the contact information.
- If the **Consumer** field (the secondary field) is populated on the Case form, the Customer 360 component displays the consumer information.
- If the **Internal contact** field (the tertiary field) is populated on the Case form, and the **Contact** and **Consumer** fields do not contain any data, the Customer 360 component displays the internal contact (employee) information.

Internal contact field on Case form

When an employee with the sn_customerservice.proxy_contact role creates a case for a customer account, the **Internal contact** field on the Case form is populated with the employee's name. This field determines case visibility for the employee. From the Customer Service Portal, employees can see cases that they have created and are identified as the internal contact.

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Note:
This field appears on the Case form in both the platform interface and Agent Workspace.

When an agent creates a case, they can select an employee with the sn_customerservice.proxy_contact role in the **Internal contact** field.

Creating a case from the Customer Service Portal

An employee with the proxy contact role can create a case for a customer from the Customer Service Portal. As part of creating a case, the employee:

- Selects an account.
- Selects a contact from the available contacts for the account.
- Selects an asset or product for the account.
- Enters a subject and description for the case.

When the case is created, the employee is added to the **Internal contact** on the Case form.

Creating a case from an interaction record

An agent can create a case for an employee by clicking **Create Case** on the Interaction form. On the resulting Case form, the **Internal contact** field:

- Is set to the value from the **Opened for** field if the employee has the proxy contact role.
- Remains blank if the user in the **Opened for** field does not have the proxy contact role.

Creating a case via email

Employees can create a case by sending an email to the inbound email address. When the email is received, the system checks to see if the user has the proxy contact role.

- If yes, the case is created and the employee is added to the **Internal contact** field. The content of the email is logged in the case activity stream.
- If no, the case is not created.

Initiating a chat from the Customer Service Portal

Employees with the proxy contact role can initiate a chat with an agent directly from the Customer Service Portal or using Virtual Agent. This creates a chat request card with the employee's name in the agent's inbox.

- **Agent Workspace**: when the agent accepts the chat, the interaction record displays the employee name in the **Opened for** field.
- **Platform**: when the agent accepts the chat and creates a case a case from the chat session, the employee name is added to the Case form in the **Internal contact** field.

Check the status of a case using Virtual Agent

Employees with the proxy contact role can use Virtual Agent to check the status of a case where they are the internal contact.

After logging in to the Customer Service Portal and initiating Virtual Agent, use the options available with the **Check Case Status** topic.

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Viewing work orders

From the Customer Service Portal, employees with the sn_customerservice.proxy_contact role can see work orders for the cases where they are the internal contact. Employees can also add attachments to the work orders.

In the portal header, click **Support** > **Work Orders**.

Employee notifications

The system sends an email notification to the employee in the **Internal contact** field on the Case form when:

- The case is opened or closed.
- Comments are added to the case.

Configure auto close resolved cases

Use the auto close resolved cases feature to close cases automatically in the Resolved state if customers choose not to take action.

Before you begin
Role required: admin

About this task
Enable this feature by activating the **Auto Close Resolved Cases** Flow Designer flow. You can also create a configuration that enables both the system and agents to exclude cases from auto closure.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Case Management category, view the list of tasks to configure the feature.

Auto Close Resolved Cases

Task	Description
Activate Auto Close Resolved Case Flow	Activate the Auto Close Resolved Cases Flow Designer Flow, which identifies cases in the Resolved state that are waiting for a customer response and takes the following actions: ○ Sends a reminder notification to the customer after 5 days with no response that the case is pending solution acceptance. ○ Closes the case and sends a reminder notification to the customer after 10 days that the case has been auto closed.
Configure Business Rules for Auto Close Field	Configure the following business rules to enable or disable the **Auto Close** field on the Case form: ○ Mark for Auto Close ○ Clear Auto Close

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Task	Description
Configure Auto Close Flag	The **Auto Close Resolved Cases** Flow Designer flow uses the **Auto Close** flag to exclude cases from auto closure. This flag is hidden by default. To use this flag, configure the Case form to display the **Auto Close** field.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Automatically close customer service cases

Configure escalation management

Escalating a case or account raises awareness about important customer issues, facilitates communication, and enables users to track progress towards a resolution.

Before you begin

Role required: admin

About this task

An escalation provides increased attention to a customer issue and provides a way to track the progress made in resolving the issue. Create escalation templates and severity definitions to control the escalation process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Case Management category, view the list of tasks to configure the feature.

Escalation Management

Task	Description
Create escalation templates	An escalation template determines how an escalation request is processed and includes the type of escalation (case or account), an approval list or workflow (if approval is required), and an escalation watch list.
Create escalation severity definitions	The escalation severity defines the type of escalation and the color used to represent the cases and accounts of this escalation severity in the user interface.

4. To perform a task, click **Configure**.

   The page in your instance where the configuration is completed is opened.

Related topics

Case and account escalation

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Case and account escalation

Use the case and account escalation feature to highlight specific cases or accounts and raise awareness of important customer issues.

Escalating cases or accounts facilitates communication about an issue and enables users to track progress toward a resolution. An escalation provides increased attention to a customer issue and provides a way to track the progress made in resolving the issue. Escalation is an internal process that is not exposed to customers. For more information, see Case and account escalation overview.

Users with the escalation requester role can request and manage case and account escalations. Users with the de-escalator role can de-escalate cases and accounts.

Related topics

Case and account escalation

Escalate a case or an account

Users with the escalation requester role can escalate a case or account.

Before you begin

Role required: sn_customerservice.escalation_requester or sn_customerservice.deescalation_requester

Procedure

1. Navigate to the desired case or account.
2. Click the **Escalate Case** or the **Escalate Account** related link.
3. Fill in the fields on the Escalation form, as needed.

Escalation form fields

Field	Description
Number	The number automatically assigned to the escalation request.
Source Record	The case or account for which escalation is requested.
Request Source	The source of the case escalation request: ○ **Customer** ○ **Internal**
Reason	The reason for requesting the case escalation: ○ **Inactivity** ○ **Lack of Progress** ○ **Customer Imposed Deadline**
Escalation Severity	The escalation severity associated with this escalation, which defines the severity level for the escalation and the color used to highlight the escalated record in the user interface. ○ **High Severity**: escalated records are highlighted in red. ○ **Medium Severity**: escalated records are highlighted in orange.
Escalation Template	The escalation template selected by the user who requested the escalation.

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Field	Description
Watch List	The watch list for this escalation record. The watch list includes users on the escalation template and any users that you add for this record. For account escalations, you can **Add account team members to watch list**.
Assignment group	For account escalations, the assignment group for this account escalation.
Assigned to	For account escalations, the customer service agent assigned to this account.
Request By	The user who requested the escalation.
Escalation Justification	Additional information that explains why this escalation is needed.

4. Click **Submit**.
   If the escalation template includes an approval workflow, the approvers review the escalation request and either approve or deny the request (provide a reason). Once the escalation request is approved, the customer is notified.

Manage an escalated case or account

Manage and document the progress for an escalation using the case or account escalation record.

Before you begin

Role required: sn_customerservice_agent or sn_customerservice.consumer_agent

About this task

Perform tasks such as changing the escalation severity (which may trigger a different SLA), update the escalation trend, add or remove users from the watch list, and add comments.

- **Case escalations**: When managing a case escalation, the customer service agent typically performs most of the problem resolution work directly in the case record and the escalation record is primarily used for status reporting purposes. For example, updating the escalation trend and comments to escalation stakeholders. All updates to the case escalation record are automatically replicated to the case record as work notes. The escalation SLA is also associated with the case record rather than the escalation record because that is where the agent provides regular updates.
- **Account escalations**: For account escalations, the escalation record takes on a more important role because account escalations are more serious and are often associated with multiple underlying cases. An account escalation is typically assigned to an account escalation manager who works closely with multiple case owners to resolve the customer escalation. The account escalation manager can consolidate the status across the underlying cases and provide regular updates using the escalation record. Therefore, the SLA is associated with the escalation record.

Procedure

1. Navigate to the list of case and account escalation records by selecting **All** > **Customer Service** > **Escalations** > **All**.
2. Select the desired case or account escalation record.
   The **Source Record** field provides information about the related case or account.
3. Update the fields on the escalation form as needed.
   For example, you can change the escalation severity, which may trigger a different SLA, and update the escalation trend. You can also add users to the watch list and add comments about

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the progress of the escalation. For more information about these fields, see Case and account escalation form.

4. Click **Update**.

De-escalate a case or an account

The de-escalation requester can de-escalate cases or accounts when the cause of the escalation is resolved.

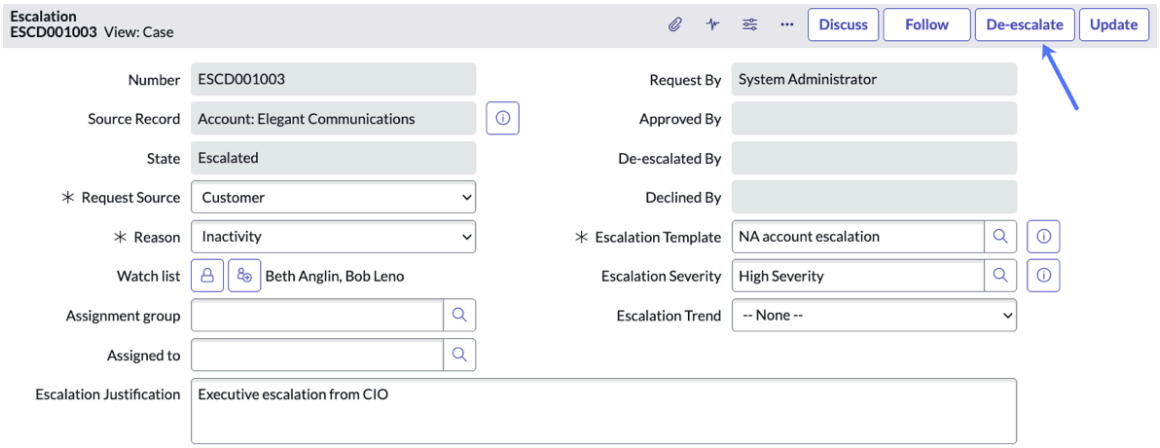
Before you begin

Role required: sn_customerservice.deescalation_requester

About this task

Procedure

1. Navigate to the desired escalation record.
2. Select **De-escalate** in the form header.
   This opens the De-escalate Case pop-up window.



3. Enter the necessary information in the **De-escalation Justification** field.
4. Select **De-escalate** on the window.
   The state of the escalation record changes to **Closed**.

Create a case or account escalation template

Create a template for each type of case or account escalation.

Before you begin

Role required: admin

About this task

An escalation template determines how an escalation request is processed and includes the type of escalation (case or account); an approval list or workflow (if approval is required), and an escalation watch list.

Procedure

1. Navigate to **All** > **Customer Service** > **Escalation Templates**.
2. Click **New**.
3. Fill in the fields on the Escalation Template form, as needed.

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Escalation Template form fields

Field	Description
Name	The name of the escalation template.
Skip Escalation Approval	Enable this check box to skip the need for approval. If skipped, escalations are automatically approved.
Use Default Approval Workflow	Enable this check box to use the default approval workflow (**Escalation - Approval**) provided with the escalation feature. If using the default approval workflow, select an **Approval Group**.
Add Case Assignment Group Manager to Approvers	For case escalation, enable this check box to add the manager of the case assignment group to the list of approvers.
Approval Group	If the **Use Default Approval Workflow** check box is enabled: ○ For the **Case Escalation** type, you can select an additional approval group. ○ For the **Account Escalation** type, you must select an approval group. **Note:** If there are no approvers, escalation requests are automatically approved.
Escalation Approval Workflow	The workflow used to approve escalation requests. Use the default **Escalation-Approval** workflow or select a different workflow.
Type	The type of escalation: ○ Case Escalation ○ Account Escalation
Escalation Watch List	Add users to the escalation template watch list. These users receive notifications for all escalations that use this escalation template. For an account escalation, the account team is automatically added to the watch list. **Note:** Users can also be added to the watch list on the escalation record.

4. Click **Submit**.

Create a case or account escalation severity

The escalation severity defines the type of escalation and the color used to represent the cases and accounts of this escalation severity in the user interface.

Before you begin
Role required: admin

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About this task

The assigned severity allows agents to easily identify escalated cases and accounts on lists and forms. The escalation feature provides two escalation severity definitions:

- **High Severity**: escalated records are highlighted in red.
- **Medium Severity**: escalated records are highlighted in orange.

The user interface determines which fields are highlighted for escalated cases and accounts:

- **Agent Workspace**: Field indicators and field highlights appear on the **Short description** field for escalated cases and on the **Name** field for escalated accounts.

  Note:
  You can move indicators and highlights to any field that is not a hyperlinked field.

- **Platform interface**: Escalated case and account numbers are indicated with a colored dot on a list and a colored background on a form.

Procedure

1. Navigate to **All** > **Customer Service** > **Escalation Severity**.
2. Click **New**.
3. Enter a **Name** for the severity.
4. In the **Style** field, enter a color.
   To configure additional escalation severity records, the system administrator must configure a new style with the desired color. For more information, see Highlight list fields.
5. Click **Submit**.

Configure case digests

The case digests feature enables you to provide periodic updates and resolution information about high priority customer service cases to customers and internal stakeholders.

Before you begin

Role required: admin

About this task

The case digests feature includes two types of case communication:

- **Case action summary**: While a case is in progress, agents can send periodic case updates that describe actions taken, next steps, and other case-related information.
- **Post case review**: When the work on a case has been completed, agents can a post a case review document that captures details about the issue, such as the root cause, mitigation plan, and preventive actions.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Case Management category, view the list of tasks to configure the feature.

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Case Digests

Task	Description
Activate Case Digests	Activate the Case Digests (com.sn_csm_case_digest) plugin.
Create Assignment Rules	Assignment rules automatically assign tasks to users and groups when the rule conditions are met. Two rules are provided with the case digests feature that assigns the post case review and case action summary records to the case agent: ○ Auto- assign the CAS to case agent ○ Auto- assign the PCR to case agent For more information, see Case action summary and post case review assignment rules.
Create Approval Workflows	The case digests feature includes one approval workflow that triggers the approval process for post case reviews. This workflow provides a one-step process that obtains a list of approvers from the **Approval group** and **Approval users** fields on the Post Case Review form.
Create Document Templates	Document templates identify, organize, and format the content from the case digest record that is included in generated documents. Two document templates are provided with the case digests feature, one for post case reviews and one for case action summaries.
Create a Case Digest Configuration	Case digest configurations handle different types of case review processes based on business needs.
Create Mapping for Case Types	Create the mapping that identifies the case type fields that are copied to post case reviews and case action summaries.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Customer Service case digests

Customer Service case digests

Use the case digests feature to provide periodic updates and resolution information about high priority customer service cases to customers and internal stakeholders.

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With this feature, you can send periodic case updates while a case is in progress using a case action summary. Once a case has been resolved, you can provide a post case review document that captures details about the issue, root cause, resolution, and preventive measures.

The case digests feature uses a configuration for case action summaries and post case reviews. The configuration determines the information from a customer service case that is captured as part of the case action summary or the post case review document. The configuration also identifies the template that is used to create the summaries and review documents.

Case action summaries

Use a case action summary to provide updates to customers and internal stakeholders while a case is in progress.

Customer service agents typically use case action summaries to communicate information about high priority cases and mass outage cases. Case action summaries can include both internal content and customer-visible information. The summaries available to customers include only the customer-visible information. The summaries available to internal users include both customer-visible information and internal content.

Customer service agents can:

- Create case action summaries for cases that are in progress.
- Preview summaries prior to publishing.
- Publish summaries to customers and internal stakeholders or publish to customers and send email notifications to internal stakeholders.
- Update and re-send summaries as needed.

Customer service agents use the **Send Case Action Summary** UI action to create a case action summary. This action creates a case action summary record and adds the record to the Related Records section on the Case form in the **Case Action Summary** field.

Customer service agents can preview a case action summary before publishing it to a case. In the preview, internal content appears after the customer-visible information and is identified with a message: **The following content is not visible to customers.**

When publishing a case action summary, agents have two options.

- When an agent clicks **Publish to Case**, the system takes the following actions:
  - Adds the information from the customer-visible fields to the **Additional comments** field.
  - Adds the information from all fields to the **Work notes** field.
- When an agent clicks **Publish to Case & Notify**, the system also sends an email notification with the case action summary to the internal users included in the recipient list selected in the **Additional internal recipients** field.

> **Note:**
> The **Publish to Case & Notify** UI action is available when a list has been selected in the **Additional internal recipients** field.

Closing a case automatically closes the corresponding case action summary.

Related topics

Create a case action summary

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Post case reviews

Use a post case review document to capture details about a resolved case, including a summary of the issue, affected assets, root cause, resolution, and any preventive measures.

Customer service agents use the **Create Post Case Review** UI action to create a post case review document. This action creates a case action summary record and adds the record to the Related Records section on the Case form in the **Post Case Review** field.

The configuration selected for post case review documents identifies the information from the customer service case that is captured and populated in post case review record. The configuration also specifies the template that the system uses to create the post case review document.

Before publishing a post case review document to a case, agents can preview the document and, if necessary, have it reviewed and approved. Agents can add an approval group or approval users to the Post Case Review record and then request approval. The system sends an email notification to the approvers with a link to the post case review document. The approvers can either approve the document or suggest changes by adding them to the **Work notes** field on the Post Case Review record.

When an agent publishes a post case review document, the system adds a link to a PDF of the document in the **Additional comments** field on the Case form. The system also adds the record to the Related Records section on the Case form in the **Post Case Review** field. If the document is available to customers, the link is visible from the Customer and Consumer Service Portals.

If a case is closed while the post case review document is in progress, agents can still update the **Additional comments** on the Case form with the post case review document link. Once a case is closed, the Post Case Review form displays a message that the associated case has been closed.

Customer service roles can perform the following actions for post case review documents.

Post case review actions by the Customer service roles

Role	Action
Customer service agent	• Create and preview one post case review document for a resolved case. • Request approval using an optional approval workflow. • Publish a post case review document to a case. • Reopen and edit a published post case review document.
Customer service manager	Review, approve, and suggest changes to post case review documents.
Major issue manager	• Create and publish post case review documents for resolved major cases. • Copy the documents to the associated child cases.

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Post case review actions by the Customer service roles (continued)

Role	Action
Customer	View post case review documents from the Customer and Consumer Service Portals.

Post case reviews for major cases

Customer service managers and major issue managers can create and publish post case review documents for resolved major cases. These documents capture the case data specified in the configuration but do not include account-specific information. The customer service manager can also copy a post case review document to the associated child cases. The system adds the account-specific information when it generates the document for each child case.

The system administrator can enable post case review documents for major cases by setting the **sn_customerservice.parent_child_case_sync** system property to true.

Note:
Setting this property to true disables the **Create Post Case Review** UI action for child cases.

Related topics

Create a post case review

Create a post case review for a major case

Post case review record states

Post case review records can be in a number of different states as they are created, approved, and published.

Different states of post case review records

State	Description
New	A case review record has been created but is not yet assigned to an agent.
In Progress	A case review record has been created and is assigned to an agent.
Awaiting Approval	An agent created a case review document from the case review record and sent it to one or more approvers.
Approved	The case review document has been approved by one or more approvers.
Closed	The case review record has been closed.

Post case review approvals

Enable an optional approval process for post case review documents.

In the case digest configuration, the system administrator can:

- Enable the approval process by selecting an approval workflow.
- Use a condition builder to define the conditions that determine the post case review documents that require approval.

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One approval workflow, **Post Case Review - Default Approval**, is provided with the Case Digests plugin. This workflow reads the approvers from the **Approval group** and **Approval Users** fields on the Post Case Review form and sends an approval request notification to each user.

Approvers receive an email notification with a link to the post case review document. Approvers can either approve the document or suggest changes by adding them to the **Work notes** field on the Post Case Review form. The agent receives a notification when an approver approves the case review document or suggests changes.

- If the approver suggests changes, the agent can see the changes in the **Work notes** field.
- If the approver approves the document, the status of the post case review record changes to **Approved**.

Case action summary and post case review assignment rules

Use assignment rules to assign case action summaries and post case review documents to customer service agents.

The Case Digests plugin includes two assignment rules:

- **Auto assign the CAS to case agent**
- **Auto assign the PCR to case agent**

When an agent clicks either **Send Case Action Summary** or **Create Post Case Review** on a case record, the system creates the corresponding record and automatically assigns it to that agent.

The system administrator can modify these assignment rules or define different rules to assign case action summary and post case review records. The system populates the **Assigned to** field on the Case Action Summary or Post Case Review form with the user determined by the assignment rule. If there are no active assignment rules, the **Assigned to** field remains blank and the record can be assigned manually.

If using the provided assignment rules that auto assign the records to the same agent:

- The agent clicks **Send Case Action Summary** or **Create Post Case Review** on the Case form.
- The corresponding record opens with the agent's name in the **Assigned to** field.
- The record state is **In Progress**.

If using assignment rules that do not auto-assign the records to the same agent:

- The agent clicks **Send Case Action Summary** or **Create Post Case Review** on the Case form.
- The corresponding records are created but are not displayed.
- If assigned to another agent, the **Assigned to** field displays the agent's name and the state updates to **In Progress**.
- If unassigned, the record remains in the **New** state.

Create a case action summary

Create a case action summary for a customer service case.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

You can send case action summaries for customer service cases that are in any states other than **New** or **Closed**.

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After creating a case action summary, the record is added to the Case form in the Related Records form section. Closing a case automatically closes the corresponding case action summary.

Procedure

1. Open a customer service case.
2. To create a case action summary, do one of the following.
   - Agent Workspace: Click the More UI Actions icon (•••) and select **Send Case Action Summary**.
   - Platform interface: Click the form context menu icon and select **Send Case Action Summary**.

   This opens a new Case Action Summary form with a status of **In progress**. Depending on the table map configuration defined for the case action summary, some of the information from the case is copied to the Case Action Summary form. With the CAS Configuration, this includes the information from the **Short description** field.

   Note:
   The **Short description** field on the Case Action Summary form can be edited in the platform interface but cannot be edited in Agent Workspace.

3. In the Case Action Summary form, enter any necessary information in the following fields.

Case action summary form

Field	Description
Additional internal recipients	Select a recipient list. When an agent clicks **Publish to Case & Notify**, the system sends an email notification to the internal users in the selected list.
Short description	The short description from the case.
Case summary	A brief summary of the case.
Actions taken	Details about actions taken so far to resolve the case.
Next steps	The steps that the agent is planning to take in order to resolve the case. This field is not customer visible.
Internal notes	Other internal information that the agent wants to share regarding the case. This field is not customer visible.

4. Click **Preview** to generate the case action summary and view it in the Preview Document pop-up window.
5. **Optional:** Make any desired changes to the fields on the Case Action Summary form and click **Preview** again.
6. Click **Update** to save the changes to the case action summary.
7. Publish the case action summary using one of the following actions.

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Create a post case review

Create a post case review document for a resolved case that captures the configured case information.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

You can create post case review documents for customer service product cases that are in the **Resolved** state. Creating a review document is a multi-step process that involves:

- Creating a post case review record from a case.
- Previewing the generated review document and making any corrections.
- Requesting approval, if necessary.
- Publishing the review document so that it is available to customers, internal stake holders, or both.

You can create one post case review document per case. If this document has already been created, the **Create Post Case Review** menu option is not available. You can view and edit the post case review document from the Related Records form section.

If a case is closed while the post case review is in progress, you can still update the **Additional comments** field on the Case form with the Post Case Review document link. When the case is closed, the system displays a message about the case closure on the Post Case Review form.

Procedure

1. Open a customer service case in the **Resolved** state.
2. To create a post case review record, do one of the following:
   - Agent Workspace: Click the More UI Actions icon (•••) and select **Create Post Case Review**.
   - Platform interface: Click the form context menu icon and select **Create Post Case Review**.
3. In the Post Case Review form, enter any necessary information in the following fields.

   Some information is copied from the Case form to the Post Case Review form, such as the short description and the resolution information.

Post Case Review form

Field	Description
Number	The automatically assigned post case review record number.
Case number	The case number from which this post case review record was created.
Assigned to	The agent assigned to the post case review record.
Commitment Date	The expected completion date of the post case review.
Assignment group	The group assigned to the post case review record.
Approval group	The group assigned to review and approve the post case review record.

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Field	Description
	This field is visible if an approval workflow is selected in the case digest configuration.
Approval users	The users assigned to review and approve the post case review record. This field is visible if an approval workflow is selected in the case digest configuration.
Short description	Copied from the **Short description** field on the Case form.
Summary	A summary of the issue.
Symptoms	Specific symptoms or problems created by the issue.
Root Cause Analysis	Copied from the **Cause** field in the Resolution Information section on the Case form.
Solution Provided	Copied from the **Resolution notes** field in the Resolution Information section on the Case form.
Preventive Measures Taken	Any measures taken to prevent the issue from happening.
Work notes list	Internal users who receive a notification about this case when work notes are added.
Work notes	Information about how to resolve a customer service case, or steps taken to resolve it, if applicable.
Activities	Records all activity associated with this record.

4. Click **Preview** to generate the review document and view it in the Preview Document pop-up window.
5. **Optional:** Make any desired changes to the fields on the Post Case Review record and click **Preview** again.
   You can edit the content in the Post Case Review record if the state is **New** or **In Progress**. Clicking **Preview** creates a preview of the document with the latest record information.
6. **Optional:** If approval is required, complete the following steps:
   a. Add an **Approval group**.
   b. Add one or more **Approval users**.
   c. Click **Request Approval**.

   (Optional) You can request approval for a post case review document before sharing it with customers or internal stake holders. When approval is requested, the status of the post case review moves to **Awaiting Approval** and the record is locked for edits.

   An email is sent to the approvers with a link to the post case review document. The approvers can either approve the document or suggest changes by adding them to the **Work notes** field on the Post Case Review record. The agent receives a notification when an approver approves the case review document or suggests changes.

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- If the approver suggests changes, the agent can see the changes in the **Work notes** field.
- If the approver approves the document, the status of the post case review record changes to **Approved**.

7. Click **Save**.
8. Click **Publish to Case** to update the case with the Post Case Review document.
   The document is included as a link in the **Additional comments** field on the Case form. If the document is available to customers, the link is visible from the Customer and Consumer Service Portals.

Create a post case review for a major case

Create a post case review document for a resolved major case that captures the configured case information.

Before you begin

Role required: sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager, or admin

About this task

You can create a post case review document for a resolved major case if the **sn_customerservice.parent_child_case_sync** is set to true.

> **Note:**
> Setting this property to true disables the **Create Post Case Review** UI action for child cases.

Procedure

1. Open a major case in the **Resolved** state.
2. Complete steps 2 through 7 in the Create a post case review topic.
3. Select one of the following options.

Review and approve a post case review document

Review and approve a post case review document for a resolved case.

Before you begin

Role required: sn_customerservice_manager or admin

About this task

When a customer service agent creates a post case review document that requires an approval, the system sends an email notification to the list of approvers. This email contains the following information:

- A short description of the case and the agent assigned to the case.
- Links to the post case review and case records.
- A link to download the post case review document.
- Links to approve the document or suggest changes.

When a post case review record is in the **Awaiting Approval** state, approvers can access the **Approve** and **Suggest Changes** UI actions.

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Procedure

1. Click the link in the email to download the post case review document.
2. Review the document.
3. To suggest changes to the document:

   a. Click the link in the email to suggest changes.
   Alternately, click the link to open the post case review record and then click **Suggest Changes**.

   b. Add the information in the **Work notes** field on the Post Case Review record.

4. To approve the document:
   - Click the link in the email to approve the document.
   - Click the link to open the post case review record and then click **Approve**.

   The state of the post case review record changes to **Approved**.

Re-open a post case review document

Re-open an approved post case review document if you need to make changes or update information.

Before you begin
Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

Procedure

1. Open a customer service case.
2. In the Related Records form section, access the record in the **Post Case Review** field.
3. Click **Re-open** on the Post Case Review form.
   The status of the record reverts to **In Progress**.
4. Make the necessary changes to the fields on the Post Case Review form.
5. Click **Preview** to generate the review document and view it in the Preview Document pop-up window.
6. **Optional:** Click **Request Approval**.
7. Click **Publish to Case**.

Withdraw post case review approval

Withdraw a post case review document after sending it for approval.

Before you begin
Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **Case Digest** > **My Post Case Reviews**.
2. Click and open a post case review which is in **Awaiting Approval** state.

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3. Click **Withdraw**.
   The post case review document is now in **In Progress** state and approvers are notified by email that the request for approval is no longer required. You can edit the post case review document and resend it for approval.

Cancel post case review

Cancel a post case review that hasn't been approved, rejected, or no longer requested state.

Before you begin

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **Case Digest** > **My Post Case Reviews**.
2. Select and open a post case review that you want to cancel.
3. Select **Cancel**.

Note:
If the post case review state was awaiting approval, approvers are notified by email that the post case review has been canceled and approval is no longer required.

The post case review document is now in **Canceled** state.

Related topics

Re-open a post case review document

Components installed with case digests

Several types of components are installed with the Case Digests plugin.

Tables

The Case Digests plugin adds the following tables:

- Case Digest Configuration (sn_csm_case_digest_config)
- Case Digest (sn_csm_case_digest_task)
- Post Case Review (sn_csm_case_digest_pcr)
- Case Action Summary (sn_csm_case_digest_cas)

The Customer Service Document Template plugin adds the CS Document Template (sn_csm_doctemplate_template) table.

Extension points

The Case Digests plugin includes the following extension points. Customers can use these extension points to customize the publish action.

Case digests extension points

Extension point	Description
sn_csm_case_digest.CASPublish	Use this extension point to alter the functionality of publishing a case action summary to a case.

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Case digests extension points (continued)

Extension point	Description
sn_csm_case_digest.PCRPublish	Use this extension point to alter the functionality of publishing a post case review document to a case.
sn_csm_case_digest.MajorPCRPublish	Use this extension point to alter the functionality of publishing a post case review document to a major case.

Activate Case Digests

Activate the Case Digests plugin to use the case digests feature.

Before you begin
Role required: admin

About this task
The Case Digests plugin automatically activates the following plugins:

- Customer Service (com.sn_customerservice)
- Customer Service Document Template (com.sn_csm_doc_template)
- ServiceNow Document Viewer (com.snc.documentviewer)
- Targeted Communications (com.sn_publications)

The Case Digests feature uses the recipient lists feature from the Targeted Communications plugin (sn_publications).

When creating a case action summary record, users with the sn_esm_agent role can select a recipient list of the type Internal Users. Selecting the **Publish to Case & Notify** UI action on the Case Action Summary form sends an email notification to the users included in the selected recipient list.

Note:
The **Publish to Case & Notify** UI action is available when a list has been selected in the **Additional internal recipients** field.

For more information, see Recipient lists.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.sn_csm_case_digest.
3. Click **Activate**.

Create a document template

Create a template to use for generating case action summaries or post case review documents.

Before you begin
Role required: admin

About this task
Document templates identify the information to be included in case action summaries and post case review documents. Create a document template to select, organize, and format the content

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included in the generated documents. You can create a new template or modify an existing template. Two document templates, **CAS Template** and **PCR Template**, are included with the Case Digests plugin.

Procedure

1. Navigate to **All** > **Case Digest** > **Administration** > **Document Templates**.
2. Click **New** to create a template.
   You can also modify an existing template by clicking the template name and opening the template form.
3. Fill in the following fields on the CS Document Template form.

CS Document Template field description

Field	Description
Name	The template name.
Table Name	The table that contains the fields to include in the document template. ○ Case Action Summary [sn_csm_case_digest_cas] ○ Post Case Review [sn_csm_case_digest_pcr]
Header Image	Click to add an image file to use in the document header.
Footer Text	Text to include in the document footer.
Header Position	The position of the image within the header: ○ Left ○ Center ○ Right
Body	The content to include in the generated case action summary or post case review document. Add content by selecting fields from the table identified in the **Table Name** field. Selected fields are added to the text editor.
Internal content	The content in the case action summary that is for internal users only. This field is available if the Case Action Summary table is selected in the **Table name** field.

4. Click **Submit** or **Update**.

Create a case digest configuration

Create case digest configurations to handle different types of case review processes.

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Before you begin
Role required: admin

About this task
As part of creating a case digest configuration, you can define the specific information from a customer service case that needs to be captured as part of the review. Two configurations are included with the Case Digests plugin:

- CAS Configuration
- PCR Configuration

Procedure
1. Navigate to **All** > **Case Digest** > **Administration** > **Configuration**.
2. Click **New** to create a new configuration.
   You can also modify an existing configuration by clicking the configuration name and opening the configuration form.
3. Fill in the following fields on the Case Digest Configuration form.

Case Digest Configuration form fields

Field	Description
Name	The configuration name.
Table name	The table that contains the fields to include in the configuration. ○ Case Action Summary [sn_csm_case_digest_cas] ○ Post Case Review [sn_csm_case_digest_pcr]
Order	Determine the order for the configuration. When multiple configurations match for a case, the configuration with the lowest order number is used.
Document template	Select a template to use when creating a case action summary from the Case Action Summary form or a post case review document from the Post Case Review form. You can select from a list of templates that have been defined for the table selected in the **Table name** field.
Case table	A read-only field that displays the Case [sn_customerservice_case] table.
Approval workflow	If using an optional approval workflow, select the workflow from the Workflow list.
Case condition	Use the condition builder to select the case conditions to which this configuration applies.

4. Click **Submit** or **Update**.

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Create a case digest table map

Create a table map to configure the fields that are copied from the case record to the post case review or the case action summary records.

Before you begin

Role required: admin

About this task

Two table maps are included with the Case Digests plugin. The **PCR Map** uses the Case (sn_customerservice_case) table as the source table and the Post Case Review (sn_csm_case_digest_pcr) table as the target table. The **PCR Map** maps the following fields.

Case fields and Post Case Review fields on the PCR Map

Case field	Post Case Review field
sys_id	Case number
Short description	Short description
Cause	Root Cause Analysis
Close notes	Solution provided

The **CAS Map** uses the Case (sn_customerservice_case) table as the source table and the Case Action Summary (sn_csm_case_digest_cas) table as the target table. The **CAS Map** maps the following fields.

CAS MAP case fields

Case field	Case Action Summary field
sys_id	Case number
Short description	Short description

Procedure

1. To access the CSM Table Map list, navigate to **csm_table_map_list.do**.
2. Click **New** to create a new table map.
   You can also modify an existing table map by clicking the map name to open the map form.
3. Fill in the following fields on the CSM Table Map form.

CSM Table Map form fields

Field	Description
Mapping name	The table map name.
Application	Read only. The application for this table map.
API Name	Read only. The API for this table map.
Advanced Field Mapping	Enables advanced field mapping.
Source Table	The source table for the map.
Target Table	The target table for the map.

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Field	Description
Active	Enables the mapping from the source to the target tables.
Use Advanced Condition	Enables advanced condition mapping, which uses a script. If enabled, add a script in the **Advanced Condition** field.
Advanced Condition	The script to use if the **Use Advanced Condition** field is enabled.
Conditions	Use the condition builder to select the conditions that apply to the table map.
Order	Order of priority for processing multiple matching map definitions simultaneously to resolve dependencies. ○ If there is only one matching table map, the system uses that map. ○ If there are multiple matching table maps with the same order, the system uses the map with the older created date. ○ If there are multiple matching table maps with different orders, the system uses the map with the highest order.

4. Click **Submit**.
5. From the CSM Table Map list, select the table map created in step 2.
6. In the Basic Field Mapping form section, click **New**.
7. Select a **Source Field** and a **Target Field**.
8. Enable the **Active** check box.
9. Enter a number in the **Order** field
10. Click **Submit**.
11. Repeat steps 7 through10 for each field to be mapped.
12. Click **Update** on the CSM Table Map form.

Create a table map for case types

Create table maps to configure the case type fields that are copied from a case record to the post case review or the case action summary records.

Before you begin
Role required: admin

About this task
Case Type tables extend from the Case table but do not inherit the table mappings.

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Procedure

1. Access the CSM Table Map list by navigating to **csm_table_map_list.do**.
2. Create two new table map records in the Case Digest scope, one for the post case review mapping and one for the case action summary mapping.
3. In the first record:
   a. Select the desired Case Type table in the **Source Table** field.
   b. Select the Post Case Review (sn_csm_case_digest_pcr) table in the **Target Table** field.
   c. Click **Submit**.
4. In the second record:
   a. Select the desired Case Type table in the **Source Table** field.
   b. Select the Case Action Summary (sn_csm_case_digest_cas) table in the **Target Table** field.
   c. Click **Submit**.
5. For the two new case type table map records, map the fields from the source table to the target table in the Basic Field Mapping form section.
   For details, see Create a case digest table map.
6. Click **Update**.

Customer service case types

A case type represents the processes and the data that are needed to resolve a specific type of customer issue. Use the case types feature to create and configure the different types of customer service cases that your organization needs.

Customers can use case types to support a wide variety of end user needs, including:

- Diverse industries and products
- Complex processes, events, and systems
- Collaboration with multiple users

A good example of an industry that benefits from multiple case types is the banking industry. Within a bank, customer service agents can use this feature to create case types for different customer needs such as loan processing, credit card processing, or managing complaints.

Case types overview

Configuring case types

System administrators configure the case types feature by creating a table for the new case type that extends the Case table and then setting up a number of different processes and components for the case type.

- The Case Types Guided Setup section below provides an overview of these setup steps.
- For details about the case type guided setup tasks, see Configure customer service case types.

Managing case types

After a case type has been created, system administrators can view the case types, manage settings, and update the configuration. For more information, see Manage customer service case types.

Using case types

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Agents can use the case types feature when creating cases for customers by selecting from a list of configured case types. For more information, see the Using case types to create cases section below.

Customer service case types plugin

Users with the system administrator role can activate the Customer Service Case Types plugin (com.snc.csm_case_types).

Activating this plugin adds the **Customer Service** > **Case Types** module to the application navigator. The system administrator can use this module to create and manage case types.

Product Model and Catalog Items Relationship plugin deprecation

The Customer Service Case Types plugin replaces the Product Model and Catalog Items Relationship plugin (com.snc.product_catalog_relationship), which is being prepared for future deprecation. Use the Service definitions feature, available with the Customer Service Case Types plugin, to create definitions for the services that are offered to support your products. Then configure the service definitions to associate them with the appropriate products and catalog items.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Customer service case types applications

The following applications for specific case types are available from the ServiceNow® Store.

Application	Description
Case Playbook for Onboarding (sn_csm_onboarding)	Provides an onboarding case type to capture the details when onboarding customers for a product or service and a playbook that provides step-by-step guidance through the lifecycle of the onboarding process.
Case Playbook for Complaints (sn_csm_complaint)	Provides a complaint case type to capture the details for a customer complaint and a playbook that provides step-by-step guidance through the lifecycle of the complaint.

For more information, see Install a ServiceNow Store application.

Note:
These applications have dependencies on the following plugins:

- Customer Service Case Types (com.snc.csm_case_types)
- Customer Service Case Action Status (com.snc.csm_action_status)

Case Types Guided Setup

Activating the Customer Service Case Types plugin adds the Case Types section to the Customer Service Management Guided Setup. Navigate to **Customer Service** > **Administration** > **Guided Setup** > **Case Types** and use the tasks in this section to create and configure a case type.

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You can configure a number of different processes and components for a customer service case type, including client scripts and business rules; views, roles, and ACLs; and notifications and record producers.

To create and configure a new case type:

- Create a table for the new case type that extends the Case table (sn_customerservice_case).
- Configure UI actions, UI policies, and client scripts for the new case type.
- Configure views and view rules, roles and ACLs, and business rules for the new case type.
- Set up processes for the case type, including record producers, state flows, and special handling notes.
- Create a case type definition record for the new case type and add it to the Case Type table (sn_case_type).
- Configure the **Get Case Types** flow and modify the conditions that determine visibility for a case type.

For more information, see Configure customer service case types.

Using case types to create cases

Customers can extend the Case table to handle different types of cases. Each extended case type can support multiple types of requests. For example, if a customer creates a case type for Credit Card Services, this case type can support requests such as applying for a new card and reporting a lost or stolen card.

When creating cases, customer service agents select the case type that corresponds to the customer issue.

- In CSM Configurable Workspace and CSM Agent Workspace, agents select a case type from the case type selector.
- In the platform interface, agents select a case type from an interceptor.

In CSM Configurable Workspace, there are several versions of the case type selector that can be configured for agents to use when creating cases of a specific type. These versions include multi-select, single-select, and Product Service Select. The multi-select version is the default functionality. In CSM Agent Workspace, agents can use the multi-select version of the case type selector.

- Create a customer service case of a specific type
- Create a case task of a specific type for a customer service case

Configuring customer service case types

Configure case types to handle different types of customer issues. A case type identifies the processes and the data needed to resolve a specific type of issue.

Before you begin

Role required: admin

About this task

For each case type, you create a table that extends the Case table and configure a number of items, such as business rules and client scripts, that drive customer issues of this type from creation to resolution. When creating cases, agents can select the case type that corresponds to the customer issue.

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There are a sequence of tasks that enable you to configure case types for Customer Service Management. To configure Proactive Customer Service Operations, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**
3. In the Case Types category, view the list of tasks to configure the feature.

Case types configuration tasks

Task	Description
Create Case Types	The first step in creating a case type is to create a table for the case type that extends the Case table (sn_customerservice_case). **Note:** This table should be created in a scope other than global. You can create a table for the case type using one of these methods: ○ Guided Application Creator ○ Platform table creation feature (navigate to **System Definition** > **Table** and click **New**) The extended table for the case type inherits most of the functionality of the Case table.
Set Up View Rules	View rules determine the form views that are available to users. Create view rules that determine the conditions for when the system displays the Case Type table in a specified view.
Set Up States for State Flows	State flows enable you to customize transitions from one state to another in tables derived from the Task [task] table, including the Case [sn_customerservice_case] table and tables extended from Case. You can configure the system to perform work during transitions to specific states. Create choice records for each of the states to be used in state flows for the case type. When creating your desired states, set the **Table** field to the table for the case type and the **Element** field to State.
Set Up UI Policies	UI policies dynamically change the behavior of information on a form, such as setting a field to read-only or making a field mandatory. The case type inherits the following UI policies from the Case table:

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Task	Description
	○ Show or hide major case information section ○ Make Partner Contact Read only If Partner is empty You can configure additional UI policies for the Case Type form.
Set Up Client Scripts	Client scripts allow the system to run JavaScript on the client when client-based events occur, such as when a form loads or when a field changes value. The case type inherits the following client scripts from the Case table: ○ Empty Partner Contact on Partner Change ○ Empty Case Form on Account Change ○ Hide Request Related List ○ Hide SM section and list if no plugin ○ Hide Related Records Section You can configure additional client scripts for the case type.
Set Up Business Rules	A business rule is a server-side script that runs when a record is displayed, inserted, updated, or deleted, or when a table is queried. Use business rules to accomplish tasks like automatically changing values in form fields when certain conditions are met, or to create events for email notifications and script actions. You can set up the desired business rules for the Case Type table.
Set Up Case Type UI Actions	UI actions include the buttons, links, and context menu items that appear on lists and forms. A case type inherits the UI actions from the Case table. You have the following options when setting up UI actions for a case type: ○ Create new UI actions for the case type. If you create a new UI action, select the Case Type table in the **Table** field on the UI Action form. ○ Use any of the inherited case UI actions. ○ Use a combination of the two. You can also block any inherited case UI actions that you do not want. To block an action, update the **CSUIActionsimpl** script include.

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Task	Description
Enable the **Create Case** UI action for case type selection	This procedure adds the **Create Case** UI action to records in the configured table. Selecting this UI action displays the case type selector. **Note:** For CSM Configurable Workspace, the **Create Case** UI action for case type selection is disabled out of box.
Set Up Case Types	Register a newly created case type by creating a case type definition record. This record is stored in the Case Type table (sn_case_type) and includes the following information: ○ The name of the case type ○ The table created for the case type ○ An optional category ○ An optional subtype ○ A short description ○ A field for setting the case type to active The Case Type table extends the Application File table (sys_metadata). This table includes a **Domain** column that customers can use to add their own logic. To create a case type definition record, navigate to **Customer Service** > **Manage Case Types** and click **New**. After creating and saving the case type definition record, you can configure the following process information for the case type using the related lists on the Case Type form: ○ State flows ○ Special handling notes ○ SLAs ○ Email templates ○ Quick messages ○ Reports For more information, see Manage customer service case types. **Note:** These related lists only display information for the new case type. They do not include information for the base case.

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Task	Description
Set Up Notifications	Notifications keep users informed about different activities and events. You can determine the conditions when a notification appears by creating a record in the Notification table.
Set Up Roles	Create one or more roles to control access to the case type features and capabilities. Then grant these roles access to the desired applications and modules. For agents to work on a case type, configure the case type role to contain the sn_customerservice_agent role.
Set Up ACLs	Use Access Control List rules (ACLs) to restrict access to data. These rules require users to pass a set of requirements before they can interact with data. For external customers to see a case type, add ACLs that provide read or create access for external users.
Set Up Case Type Selection Conditions	When creating a case of a specific type, an agent clicks **Create Case** and then selects from a list of available case types. The system presents the case types that have been configured for the agent's role. To set up case type selection conditions, use Flow Designer to configure the **Get Case Types** flow and modify the conditions that determine visibility for a case type. There are two different implementations of the **Create Case** UI action: ○ The Customer Service plugin provides a **Create Case** UI action that agents can use as follows: ▪ To create a base case. ▪ To create a case for one specific case type. For example, if your organization always creates the same type of case and you have created only one extension of the Case table, you can modify this UI action to create a case of that specific case type. ○ The Customer Service Case Types plugin also provides a **Create Case** UI action that agents can use to create a case based on a selected case type. After clicking this UI action to create a case, the agent selects the desired case type from a list of multiple available case types.

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Task	Description
	Note: It is recommended that you configure one of the **Create Case** UI actions but not both to avoid confusion.
Set Up Record Producers	A record producer is a specific type of catalog item that enables users to create task-based records, such as case records, from the service catalog. Create a record producer that exposes the new case type on the Customer Service Portal.
Set Up Case Digest for Case Types	The case digest feature enables agents to proactively communicate with customers and internal stakeholders about cases. While a case is in progress, agents can send periodic case summaries that describe actions taken, next steps, and other case-related information. When the work on a case has been completed, agents can create a post case review that includes information such as the root cause, mitigation plan, and preventive actions. **Note:** Using case types with the case digest feature requires the Customer Service Case Types plugin (com.snc.csm_case_types) and the Case Digests plugin (com.sn_csm_case_digest). Cases that are created from a selected case type can use Case Action Summaries and Post Case Reviews. To create the mapping that identifies the case type fields that are copied to Post Case Review and Case Action Summary records: ○ Create a configuration for the desired case type. Navigate to **Case Digests** > **Configuration** and click **New**. ○ Create new records in the CSM Table Map table (csm_table_map) to map the **Send Case Action Summary** and **Create Post Case Review** UI actions. The Case Digests related list on the Case Type form shows the case action summaries and post case review configurations for a case type.
Set Up Contextual Search for Case Types	Navigate to **Contextual Search** > **Table Configuration** and create a table configuration record to add contextual search

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Task	Description
	to the case type. In this record, configure the **Table** field as the case type and the **Search Context** field as Case Knowledge Base Search.
Set Up Agent Workspace for Case Types	To configure Agent Workspace differently for each case type, follow the Agent Workspace Guided Setup. You can configure the following features specific to each case type: ○ Workspace lists ○ Notifications ○ Highlighted values ○ Ribbon settings ○ Form headers ○ Action assignments
Set Up Portal View for Case Types	Configure the fields that a customer can see when they view a case on the Customer or Consumer Service Portals. Create a new record to configure the fields for each case type. For more information about the Ticket Configuration form, see Configure the standard ticket page.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Enable the case type single select property

Create a configuration for case type single-select

Configure ribbon settings for case types

Create a ribbon configuration for a case type or enable ribbon configurations to be inherited by the case type.

Before you begin

Role required: admin

About this task

In the Customer Service Management application, a case type represents the data and processes that are needed to resolve a specific type of customer issue. The administrator can create a table for a new case type that extends the Case table (sn_customerservice_case). The extended table for the case type inherits most of the functionality of the Case table.

As part of configuring forms, you can configure ribbon settings for case types. The ribbon appears at the top of the form and includes components that display customer and case information, such as Customer 360, Timeline, and Active SLA. Each component has a ribbon setting that stores configuration information about that component.

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Case types that are extended from the Case table can display these components in the ribbon on the Case form. For case types, you can do the following:

- Create ribbon settings for case extensions, or
- Modify existing ribbon settings so that the case extensions inherit the ribbon component behavior.

To create ribbon settings, see Set up ribbons in workspace.

To modify ribbon component behavior, use the following procedure.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Forms** > **Ribbon Settings**.
2. Select the component name in the Ribbon Settings list.
   For example, you can select Customer 360.
3. On the Ribbon Setting form for the selected component, enable the **Inherit** check box.
4. Select **Update**.
5. Repeat steps 2–4 for each component to be displayed in the ribbon.

Configure case type and case task type declarative actions

Configure declarative actions that enable agents to create cases and case tasks from different locations within CSM Configurable Workspace.

Before you begin
Role required: admin

About this task
The Customer Service Case Types plugin includes declarative actions that enable agents to create cases and case tasks using the case type selector and case task type selector. These declarative actions are disabled by default.

Declarative actions, locations, and actions

Action label	Location	Action
Create Case	Appears on the Case Task list views.	Displays the case task type selector.
Create Case	Appears on the Tasks related list tab on case and case type records.	Displays the case task type selector.
Create Case	Appears on the Case and Case Type list views.	Displays the case type selector.

Declarative actions are stored in the Action Assignment [sys_declarative_action_assignment] table.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Declarative Actions** > **Form Actions**.
   The system displays the Action Assignments list.
2. Filter the list to display the actions for the CSM Case Types application.
   If necessary, configure the list to display the **Application** column.
3. For each of the desired declarative actions, set the **Active** field to true.

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Enable the case type single select property

Enable the case type single select property so that customer service agents can use the case type single select version of the case type selector and create cases of a specific type with one click.

Before you begin
Role required: admin

About this task
In CSM Configurable Workspace, there are three versions of the case type selector available to agents when creating cases of a specific type.

- With the multi-select version, the agent selects a case type and optionally selects a category and subtype to narrow the available choices before creating a case. This is the default functionality.
- With the single-select version, the agent selects a case type and creates a case. The system populates some of the fields on the Case form with values that have been predefined in the selection configuration.
- With the Product Service Select version, the agent selects a product and a service to create a case. For more information, see Product Service select version of the case type selector.

To use the single-select version, enable the *sn_csm_case_types.case_type_single_field_select* property. You must also create a configuration.

Procedure

1. Navigate to **sys_properties.list**.
2. Click the *sn_csm_case_types.case_type_single_field_select* property in the **Name** field.
3. Set the **Value** to true.
4. Click **Update**.

Create a configuration for case type single-select

Create a configuration for the single-select version of the case type selector and define the fields and values that the system uses to auto-populate the Case form.

Before you begin
Role required: admin

About this task
In CSM Configurable Workspace, there are three versions of the case type selector available to agents when creating cases of a specific type.

- With the multi-select version, the agent selects a case type and optionally selects a category and subtype to narrow the available choices before creating a case. This is the default functionality.
- With the single-select version, the agent selects a case type and creates a case. The system populates some of the fields on the Case form with values that have been predefined in the selection configuration.
- With the Product Service Select version, the agent selects a product and a service to create a case. For more information, see Product Service select version of the case type selector.

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To use the single-select version, follow the procedure below to configure one or more selections that are available to agents when creating a case. You must also enable the case type single select property.

Procedure

1. Navigate to **All** > **Customer Service** > **Case Types** > **Manage Case Types**.
2. Select a case type.
3. In the Case Type Selections related list, click **New**.
4. In the **Name** field, enter a descriptive name for the case type selection.
   This is the name that agents see in the **Case Type** field on the Select Case Type pop-up window.
5. In the **Default case type field values** fields, select the desired fields and the corresponding values.
   The system uses this field and value configuration to auto-populate those fields on the Case form when an agent creates a case of this type.
6. Click **Submit**.
   The system saves the configuration in the Service Definition (sn_case_type_selection) table and adds it to the Case Type Selections related list.

Manage customer service case types

Manage the settings and the configuration for a case type from the Case Type form.

After using the Customer Service Management Guided Setup to create and configure a case type, you can view and manage the settings and configuration for the case type from the Case Type form. To access a Case Type form, navigate to **Customer Service** > **Case Types** > **Manage Case Types** and select a case type from the list.

Case Type form related links

The Case Type form includes the following related links.

Case Type form related links

Related link	Description
View Case Type Configuration	Displays the current configuration for this case type, including: • Business rules • Client scripts • Dictionary entries and overrides • Notifications • UI actions • Access controls • UI policies • Data policies • Styles

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Case Type form related links (continued)

Related link	Description
	• View rules • Flows
Launch Guided Setup for Case Types	Goes to the Case Types setup tasks in Customer Service Management Guided Setup.
Launch Guided Setup for AWA	Goes to the Advanced Work Assignment (AWA) setup tasks in Agent Workspace Guided Setup.
Launch Guided Setup for Agent Workspace	Goes to the Agent Workspace for CSM setup tasks in Customer Service Management Guided Setup.

Case Type form related lists

The Case Type form related lists display items configured for the case type table. Use the related lists to create additional configurations.

- Record Producers
- State Flows
- Special Handling Notes
- SLAs
- Email Templates
- Quick Messages
- Reports
- Case Type Selections

Select a category and subtype for a case type

The system administrator can assign an optional category and a subtype to a case type. When creating a case, agents can filter the available case types by category and subtype in the case type selector. If an agent selects a category, the list of case types displayed is filtered by that category. If an agent selects a subtype, the list is further filtered by that subtype.

The Customer Service Case Types plugin includes several categories that the system administrator can select for a case type. These categories include:

- Onboarding
- Complaint
- Orders
- General

The **Subtype** field displays fields from the Case Type table that are of the following type:

- Choice list
- Reference

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To select a category and a subtype for a case type:

1. Navigate to **Customer Service** > **Case Types** > **Manage Case Types** and select a case type.
2. Select a category in the **Category** field.
3. Select a field in the **Subtype** field.
4. Select **Update**.

Case types and major cases

The system administrator can enable the **Propose Major Case** UI action for different case types. If this UI action is available, an agent can propose a major case from the selected case type record. If the major case candidate is accepted, a major case is created and the case type record is added as a child case on the major case.

The major case is created on the base Case table. Updates to the major case are synchronized to the child case types. Multiple case type records can be added to the same major case.

Case type selector

The case type selector enables customer service agents to quickly and easily create the right kind of case for a contact or consumer by selecting from a list of available case types or services.

Overview

The case type selector is a component that provides agents with the ability to select the appropriate case type or service when creating a case. For example, an agent can use the case type selector to do the following:

- Select a case type and create a case of that type.
- Select a product from a list of products owned by the customer and create a case for that product.
- Select a service and create a case for that specific service.

The selections that an agent can make is determined by the case type selector configuration. The system administrator can configure different versions of the case type selector by setting properties. The different versions include:

- Multi-select (default)
- single-select
- Product Service select

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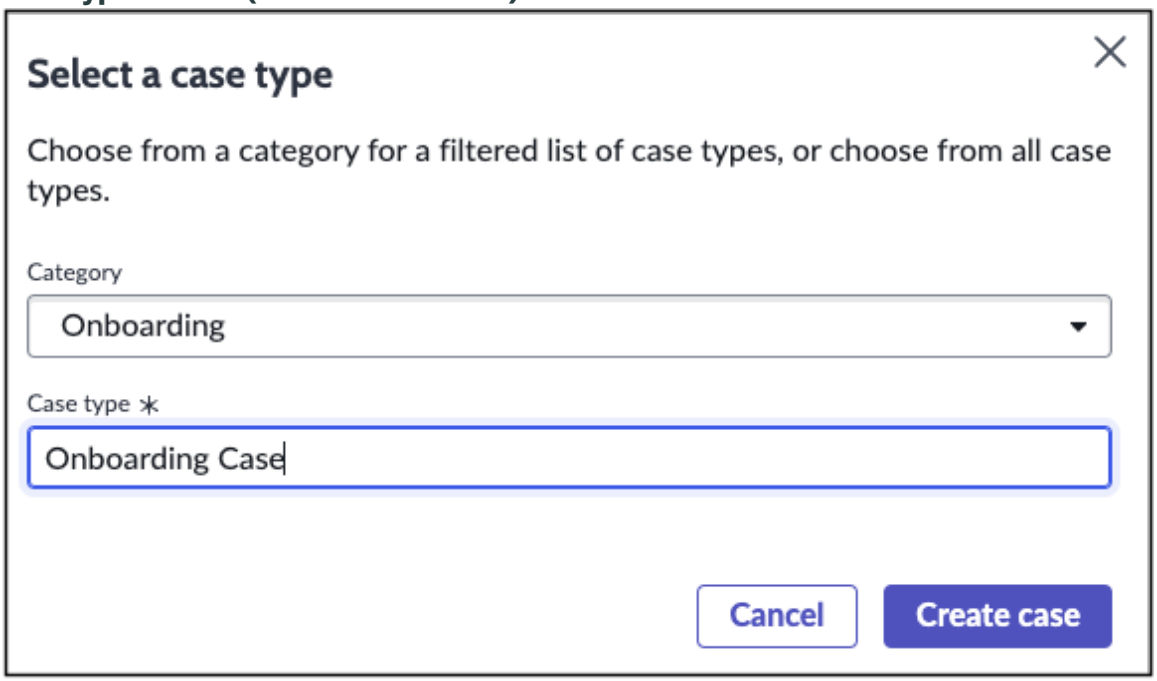
Case type selector (multi-select version)



Using the case type selector

The system displays the case type selector when an agent creates a case from a list or a record.

Agent actions that display the case type selector

Agent action	Description
Select **New**	Select this action from case lists and case type lists such as My Cases or My Complaint Cases.
Select **Create Case**	Select this action from the following records: • Interaction • Account • Contact • Consumer • Sold Product • Install Base Item • Case • Child Case

Some declarative actions available with the Customer Service Case Types plugin are disabled by default. For more information, see Configure case type and case task type declarative actions.

Case type selector versions

Different versions of the case type selector are available for agents to use. The system administrator can configure system properties to determine the version of the case type selector that is presented to agents.

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Versions of the case type selector component

Version	Description
Multi-select	With the multi-select version, the agent selects a case type and optionally selects a category to narrow the available choices before creating a case. A category subtype field can also be configured. This field can be a choice list field or a reference field from the Case Type table. **Note:** If a subtype has not been configured for a case type, the subtype field is not displayed. The multi-select version of the case type selector is the default functionality. For more information, see Select a category and subtype for a case type.
Single-select	With the single-select version, the agent selects a case type from a list of available case types and creates a case with one click. The system uses configured field mapping to fill in some of the fields on the Case form. The display of the single-select version is controlled by the *sn_csm_case_types.case_type_single_field_select* system property. • When enabled, the system displays the single-select version. • When disabled, the system displays the multi-select version. **Note:** The single-select version is only available in CSM Configurable Workspace. For more information, see the following topics: • Enable the case type single select property • Create a configuration for case type single-select
Product Service Select	With the Product Service Select version, the agent selects a product and/or a service to create a case. For more information, see Product Service select version of the case type selector. The display of the Product Service Select version is controlled by the *sn_csm_case_types.service_definition_select* system property.

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Versions of the case type selector component (continued)

Version	Description
	• When enabled, the system displays the Product Service Select version of the case type selector. • When disabled, the system uses the value of the *sn_csm_case_types.case_type_single_field_select* property.

Case type select properties

The following properties determine which version of the case type selector is presented to agents.

Version properties of a case type selector

Property	Description
sn_csm_case_types.case_type_single_field_select	Set this property to true to enable the case type single select feature in CSM Configurable Workspace. When enabled, an agent can use this feature to create a case of a specific type with a single selection in the case type selector. • **Type:** true | false • **Default value:** false • **Location:** System Property [sys_properties] table
sn_csm_case_types.service_definition_select	Set this property to true to enable the Product Service Select version of the case type selector in CSM Configurable Workspace. When enabled, an agent can use this version to create a record based on the selected product or service. • **Type:** true | false • **Default value:** true • **Location:** System Property [sys_properties] table This property overrides the *sn_csm_case_types.case_type_single_field_se* property. • When set to true, the system displays the Product Service Select version of the case type selector. • When set to false, the system uses the value of the

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Version properties of a case type selector (continued)

Property	Description
	sn_csm_case_types.case_type_single_field_s property. • If both properties are set to true, the *sn_csm_case_types.service_definition_selec* property takes precedence. • If both properties are set to false, the system displays the multi-select version of the case type selector.
sn_csm_case_types.service_definition_select_count	Determines the number of the products and services displayed in the Product Service Select version of the case type selector. • **Type:** integer • **Default value:** 25 • **Location:** System Property [sys_properties] table

Configuring service definitions for cases and case tasks

The system administrator creates the service definitions for cases and case tasks, along with their relationships. The service definition manager and service definition admin can also create these service definitions and relationships.

For case task service definitions, the system administrator can include logic and default field values that the system uses when creating the case tasks. For more information, see Configuring service definitions.

Product Service select version of the case type selector

With the Product Service select version of the case type selector, agents can create cases of the correct type based on the selected product or service.

The Product Service select version of the case type selector supports services as well as case types. This version of the case type selector makes it easier for agents to find the available services for a product. This version of the case type selector enables the agent to do the following:

- Select a product from a list of products owned by the account or consumer and see the available services for that product. This list includes sold products and install base items.
- Select a category of services and see the available services within that category.
- Search for a service by entering keywords in the search box.
- Browse the available services using scroll bars and pagination.
- Select a service and create a case based on the service or case type.

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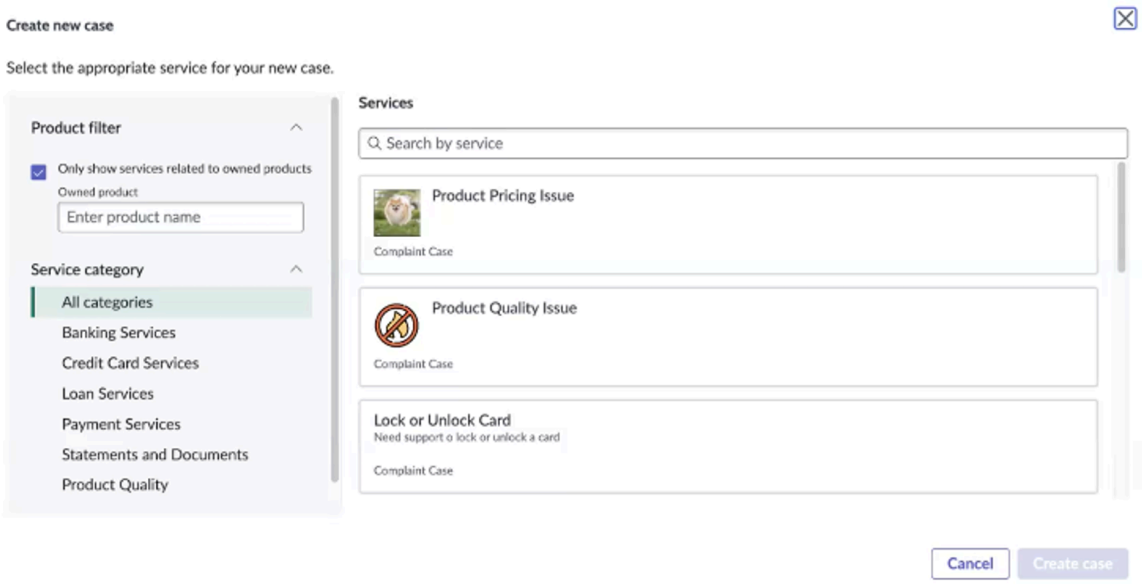
Case type selector (Product Service select version)



Creating cases using the Product Service select version

The system displays the case type selector when an agent creates a case from a list or a record. The fields that are available in the Product Service select version of the case type selector are context-driven based on how an agent creates a case.

Agent actions that display the case type selector

Agent action	Description
Select **New**	Select this action from case lists and case type lists such as My Cases or My Complaint Cases.
Select **Create Case**	Select this action from the following records: • Interaction • Account • Contact • Consumer • Sold Product • Install Base Item • Case • Child Case

Creating cases from a record

When creating a case from a record, the Product Service select version of the case type selector includes the following sections and fields:

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Product Service Select fields

Field	Description
Product filter	Use the fields in this section to select a product
Only show services related to owned products	This check box controls the display of the **Owned product** field and determines the services included in the Services section. • If checked, the system lists the services categorized as post-sales that are relevant to the product selected in the **Owned product** field. • If cleared, the system lists the services categorized as pre-sales and general.
Owned product	Use the **Owned product** field to select a product. This field uses typeahead search. Place the cursor in the field and start typing to display a list of products. Selecting a product filters the available services in the Services section. For sold products and install base items, the first line of an entry in the **Product** drop-down list displays the name of the product from the Product Model record. The second line displays the name of the sold product or install base item associated with the product model.
Service category	Select a category to see the available services within that category or select **All categories** to see all available services.
Services	Select a service in the Services section. • Services are displayed in a card format that show the service name, description, and image or icon. • Use a keyword search to narrow the list of available services. • Use the scroll bars and pagination to view the available services.

Agents can select **Create Case** from the following records, which provide context about their owned products and services.

Record types with the Create Case action

Record	Description
Interaction	Applicable services are based on products owned by the contact or consumer.
Account	Applicable services are based on products owned by the account.
Contact	Applicable services are based on products owned by the contact and products that the contact has access to based on related party access.

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Record types with the Create Case action (continued)

Record	Description
Consumer	Applicable services are based on products owned by the consumer.
Sold Product	The **Owned product** field is auto-filled with the product model from the Sold Product record.
Install Base Item	The **Owned product** field is auto-filled with the product model if the install base item is mapped to the product model. If there's no product model associated with the install base item, the **Owed product** field lists the products for the account and contact.
Case	
Child Case	

Creating cases from a list

Agents can select **New** from a case list or case type. Because there's no customer context, the services listed include all available services (pre-sale, post-sale, and general).

Service categories

The administrator can group services into categories so that it's easier for agents to find the services the need. Categories are displayed in the Service categories section. Agents can select a specific category to see the available services within that group or **All categories** to see all available services.

Service cards

The Product Service select version of the case type selector displays the available services in a card view. Each card can include the following information for a service, depending on the configuration:

- Name
- Description
- Image

When an administrator creates a service definition, they can provide a name for the service. They can also provide a description of the service and add an image to represent the service. For more information, see Create a service definition.

Browsing services in the case type selector

Agents can browse the available services for a selected category or for all categories. These services are displayed in a card view.

The Product Service select version of the case type selector can display multiple pages of services. It can display 24 services at a time and a total of 200 services.

The agent can perform the following actions:

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- Use the scroll bars to view all the displayed services.
- Select **Show more** to see the next set of services (up to a maximum of 200) if more than 24 services are available.
- Filter the displayed services by selecting a category.
- View a count of the available services after applying a filter.

Note:
The system displays the services that the logged-in agent has access to.

When the agent reaches the limit of 200 services, the system directs the agent to refine the results.

Searching for a service

Agents can search for a service by entering keywords in the search box.

- A list of recent searches appears below the search box
- Search results include the services with names or descriptions that contain the keywords.
- Results are displayed in a card view.

Creating a case for a service

Agents can create cases from lists and from records.

Agents can create cases by selecting a service from the Product Service select version of the case type selector and then selecting **Create Case**.

Agents see the Product Service select version with the Product filter when they create a case from the following records.

- Interaction
- Account
- Contact
- Consumer
- Sold Product
- Install Base
- Case
- Child Case

The **Only show services related to owned products** check box is selected by default.

- When selected, the agent can see Post-sales services.
- When cleared, the agent can see Pre-sales, Post-sales, and General services.

If the agent is on a Sold Product or Install Base record, the **Owned product** field is auto-populated.

If a customer hasn't activated the install base:

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- The Product Service Select version displays the **Service** and **Case type** fields.
- The **Service** field lists all services, including pre-sales and post-sales.
- Agents can select **Create Case** from an interaction, account, contact, or consumer record and select a case type in the **Case type** field.

Case type selector configuration

The Product Service select version of the case type selector includes a product filter. If you have the administrator role, you can configure the case type selector to hide this filter.

By default, this configuration setting is false. The case type selector displays the product filter, the **Only show services related to owned products** check box is empty, and the case type selector shows all available service definitions.

To hide the filter:

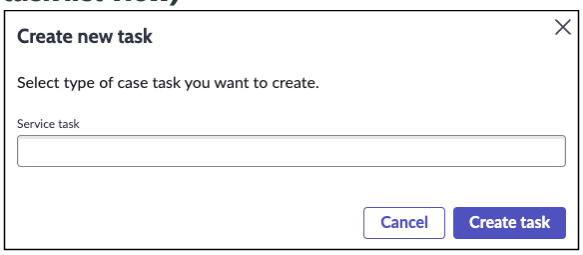
1. In the application navigator, **sys_declarative_action_payload_definition.list** and press **Enter**.
2. In the Key column, select **CREATE_CASE_TYPE**.
3. In the **Payload** field, locate the **hideProductFilter** setting.
4. Change the value of the setting from false to true and select **Update**.

When this configuration setting is true, the case type selector doesn't display the product filter. The case type selector shows all available service definitions.

Case task type selector

The case task type selector is a component that provides customer service agents with a way to create the right types of tasks while working on cases.

Using the case task type selector, agents can select services and create case tasks specifically for those services. The selections that an agent can make within the case task type selector depends on where they create a case task from.

Case Type Task Selector Options	
When an agent creates a case task from a case task list, they can select a service in the case task type selector.	**Case task type selector (case task list view)** 

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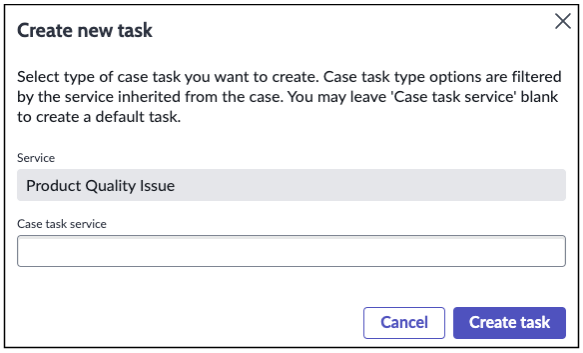
Case Type Task Selector Options (continued)

When an agent creates a case task from a case record, the case task type selector shows related services based on the case type.

Case task type selector (case record view)



An agent working on a case or a case type can create case tasks in the following ways.

How to create case tasks

Select **New** from a case task list	The **Service task** field on the case task type selector shows all of the related services where the target table is Case Task [sn_customerservice_task] and extensions of Case Task.
Select **New** from the Tasks related list tab on a case record	The **Service** field is auto-filled with the case service. The **Case task service** field lists the task services related to the case service. If the case has no service, the **Service task** field shows all of the related services where the target table is Case Task [sn_customerservice_task] and extensions of Case Task.
Select the **+** icon on the related records task list in the Dynamic Related Records component	The **Case task service** field on the case task type selector shows the following services: • The task services related to the case service. • The related services where the service target table is Case Task and extensions of Case Task.
Select **Create Task** in a case playbook stage	The **Service** field is auto-filled with the case service. The **Case task service** field lists the task services related to the case service.
Select **Create Task** in the activity viewer	The **Service** field is auto-filled with the case service. The **Case task service** field lists the task services related to the case service.

Some declarative actions available with the Customer Service Case Types plugin are disabled by default. For more information, see Configure case type and case task type declarative actions.

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Configuring service definitions for cases and case tasks

The system administrator creates the service definitions for cases and case tasks, along with their relationships. The service definition manager and service definition admin can also create these service definitions and relationships.

For case task service definitions, the system administrator can include logic and default field values that the system uses when creating the case tasks. For more information, see Configuring service definitions.

Onboarding case type

Agents can use the onboarding case type to capture the details when onboarding customers for a product or service.

The onboarding case type includes a playbook that provides step-by-step guidance through the lifecycle of the onboarding process.

Onboarding cases use the ONB prefix in the case number. For example, ONB0001007. Onboarding cases appear in the Onboarding Cases module in the following lists:

- My Onboarding Cases
- All Onboarding Cases
- Unassigned Onboarding Cases
- Escalated Onboarding Cases

When creating a case, agents can select **Customer Onboarding** from the list of available case types.

Creating onboarding cases for new or existing customers

Customer service agents can create cases to onboard new customers or to onboard existing customers for new products.

The onboarding case form includes the **New customer** check box. Agents can enable this check box to display the New Customer Information section on the Case form. This form section includes fields that you can use to collect information and create a customer record.

Note:
A new customer doesn't have an existing account, contact, or consumer record.

If an existing case already has the **Account** and **Contact** or **Consumer** fields populated, then the **New customer** check box is turned off.

When saving an onboarding case:

- If the **New customer** check box is enabled, the **Account** and **Contact** or **Consumer** fields aren't required to save the case.
- If the **New customer** check box is inactive, the **Account** and **Contact** or **Consumer** fields are required to save the case.

New Customer Information form section

The New Customer Information form section includes fields that agents can use to collect information. This information is then used to create a customer record. These fields include:

- Customer Type: either Business or Individual
- Business Name: Required when the customer type is Business

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- User Name: Required when the customer type is Individual
- Phone number
- Email

Additional members

The onboarding case type includes the **Additional Members** related list on the Case form. Agents can use this related list to create the users or business entities that should be included in the onboarding case.

Additional members can be any of the following:

- Accounts
- Contacts
- Consumers

Agents select information from the following fields when adding a member to an onboarding case:

- Type: the type of user to be added. For example, a joint owner or a beneficiary or a sub-account.
- Name: the name of the contact or consumer or account.

Note:
If using the onboarding playbook, the user is also added to the Member Information card in the Add additional members step of the Initiate stage.

Onboarding case type stages and states

An onboarding case moves through several stages and states as the agent works to case resolution.

An onboarding case has six stages:

- Initiate
- Pre approval
- Data capture
- Due diligence
- Resolve
- Close

As an onboarding case moves through the stages listed earlier and toward a resolution, the case status is updated. Stage and status are related to each other as described in the following table.

Onboarding case stages and status

Stage	Status	Description
Initiate	New	An onboarding case is created in the **Initiate** stage with a status of **New**. An onboarding case can only be in the **New** state during the Initiate stage.

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Onboarding case stages and status (continued)

Stage	Status	Description
Initiate	Open	The state of an onboarding case state changes to **Open** when the case is assigned to an agent.
Pre approval	• Open • Awaiting Info	In the Pre-Approval stage, an onboarding case can be in either the **Open** or **Awaiting Info** states. The case moves to the **Awaiting Info** state when an agent selects **Request Info**.
Data capture	• Open • Awaiting Info	In the Data Capture stage, an onboarding case can be in either the **Open** or **Awaiting Info** states. The case moves to the **Awaiting Info** state when an agent clicks **Request Info**.
Due diligence	• Awaiting Info • Under Review	In the Due Diligence stage, an onboarding case can be in the **Awaiting Info** or **Under Review** states. The case moves to the **Awaiting Info** state when an agent selects **Request Info**. The case moves to the **Under Review** state when an agent selects **Submit for Review**.
Resolve	• Review Complete • Resolved	In the Resolve stage, an onboarding case can be in either the **Review Complete** or **Resolved** states. The case moves to the **Review Complete** state when an agent clicks **Review Complete**. The case moves to the **Resolved** state when an agent selects **Propose Solution**.
Close	Closed	The case is closed.

Components installed with case types

Several types of components are installed with the Customer Service Case Types plugin (com.snc.csm_case_types), including components that support the service definitions feature.

Tables installed with case types

The following tables are installed with the Customer Service Case Types (com.snc.csm_case_types) plugin.

Tables added with case types

Table	Description
Case Type [sn_case_type]	This table stores the defined case types. For more information, see Customer Service case types.
Service Definition	This table stores the defined service definitions.

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Tables added with case types (continued)

Table	Description
[sn_case_type_selection]	The service definition feature adds the following fields to the Service Definition table: • Domain Path • Playbook Record Generator • Active • Number For more information, see Service definitions.
Service Definition Category [sn_csm_case_types_service_category]	This table stores the categories that are created for service definitions.
Service Definition Category Relationships [sn_csm_case_types_service_category_rel]	This table stores the service definitions that are associated with a service definition category.
Product Service Relationship [sn_csm_case_types_product_service_rel]	This table stores the products that are linked to a service definition. For more information about these relationships, see Associate a product with a service definition.
Service to Service Relationship [sn_csm_case_types_service_to_service_rel]	This table stores relationships that have been configured between services. For example, related services that have been added to a service definition. For more information about these relationships, see .
Catalog Service Relationship [sn_csm_case_types_catalog_service_rel]	This table stores the catalog items that are linked to a service definition. For more information, see Configure catalog items for a service definition.

Roles installed with case types

The following service definition roles are installed with the Customer Service Case Types (com.snc.csm_case_types) plugin.

Roles installed with case types

Role	Description	Contains roles
Service definition admin [sn_csm_case_types.service_definition_admin]	Administrator role for the Customer Service case types tables. Users with this role can view, create, update, and delete service definitions, service definition categories,	• sn_csm_case_types.service_definition_mana • sn_service_org.service_criteria_delete

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Roles installed with case types (continued)

Role	Description	Contains roles
	and service definition category relationships.	
Service definition manager [sn_csm_case_types.service_definition_manager]	Manager role for the Customer Service case types tables. Users with this role can view, create, and update service definitions, service definition categories, and service definition category relationships.	• sn_csm_case_types.service_definition_repor • sn_csm_case_types.service_definition_all_ta • sn_service_org.service_criteria_write • sn_service_org.service_criteria_create • sn_service_org.service_criteria_read
Service definition viewer [sn_csm_case_types.service_definition_viewer]	Users with this role can view service definitions, service definition categories, and service definition category relationships.	sn_service_org.service_criteria_read
Service definition report viewer [sn_csm_case_types.service_definition_report_view]	Provides report view access to service definition related tables.	None
Service definition all table viewer [sn_csm_case_types.service_definition_all_table_viewer]	Provides view access to the service definition tables. Users with this role can view service definitions, service definition categories, and service definition category relationships.	None

Properties installed with case types

The following properties are added with the Customer Service Case Types plugin. These properties control the version of the case type selector screen that is displayed to agents. For more information, see Case type selector screen.

Properties installed with case types

Property	Description
sn_csm_case_types.case_type_single_field_select	Set this property to true to enable the case type single select feature in CSM Configurable Workspace. When enabled, an agent can use this feature to create a case of a specific type with a single selection in the case type selector screen. • **Type:** true | false • **Default value:** false • **Location:** System Property [sys_properties] table

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Properties installed with case types (continued)

Property	Description
sn_csm_case_types.service_definition_select	Set this property to true to enable the Product Service Select version of the case type selector screen. When enabled, an agent can use this screen to create a record based on the selected product or service. • **Type:** true | false • **Default value:** true • **Location:** System Property [sys_properties] table This property overrides the *sn_csm_case_types.case_type_single_field_se* property. • When set to true, the system displays the Product Service Select screen. • When set to false, the system uses the value of the *sn_csm_case_types.case_type_single_field_s* property. • If both properties are set to true, the *sn_csm_case_types.service_definition_selec* property takes precedence. • If both properties are set to false, the system displays the multi-select screen.
sn_csm_case_types.service_definition_select_count	Determines the number of the products and services displayed in the Product Service Select screen. • **Type:** integer • **Default value:** 25 • **Location:** System Property [sys_properties] table
sn_csm_case_types.get_case_types_roles	Stores the admin and agent roles that can access the Case Type Selector and getCaseTypes API. Roles are listed in the **Value** field in a comma-separated list. To add a role, append the role at the end of the list. • **Type:** string • **Default value:** itil,admin,sn_customerservice_agent,sn_customerservice.cor • **Location:** System Property [sys_properties] table

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Extension points installed with case types

Extension points enable you to extend the functionality of an application and integrate customizations without altering the application code. Extension points are stored in the Extension Point [sys_extension_point] table.

The CSMServiceDefinitionIntegrations extension point returns a list of products that is available to agents in the **Product** field on Product Service Select version of the case type selector screen. Out of box, this list is based on customer context and displays the sold products and install base items owned by the customer.

To access this extension point, navigate to **All** > **System Extension Points** > **Scripted Extension Points** and select **CSMServiceDefinitionIntegrations**.

To modify this extension point:

1. Select the **Create implementation** related link on the extension point record.
2. Modify the **Script** field and add an API to return product information.
3. Select **Update**.

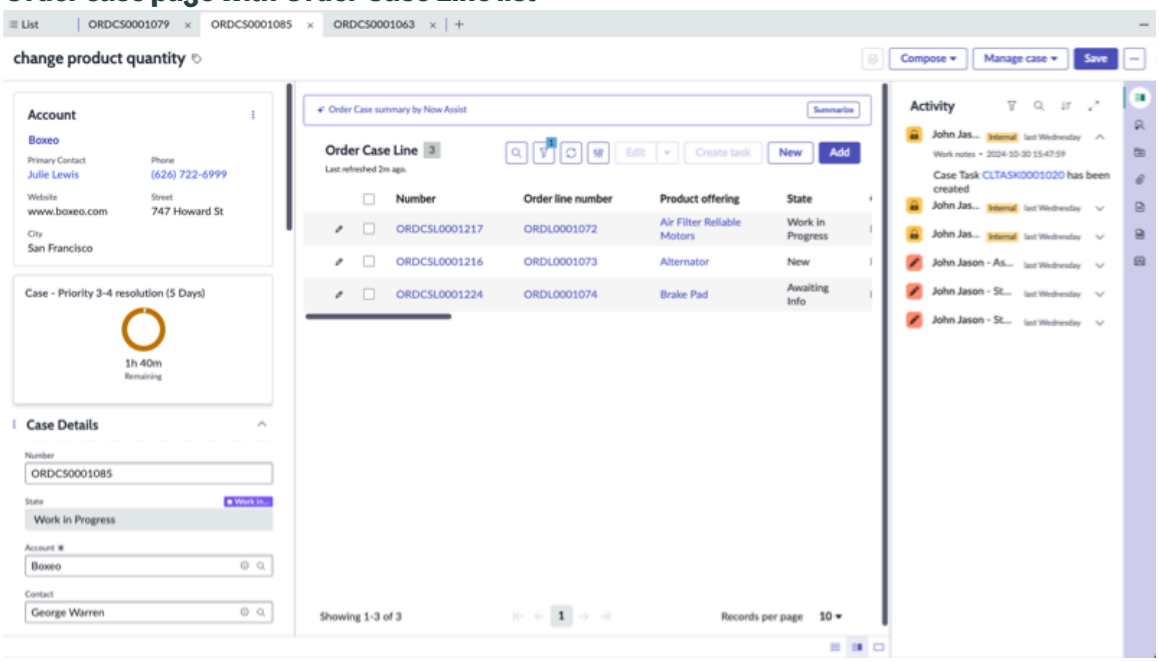
   The system adds the implementation to the Implementations related list on the extension point record.

Note:
The implementation with the lowest **Order** number is used to return the list of products.

Order Operations Case Management

The Order Operations Case Management application enables customer service agents to create cases for multiple customer orders or for specific products within an order.

Order case page with Order Case Line list



The Order Operations Case Management application includes the Orders case type. This case type provides the ability to reference multiple orders or order lines as case line items on an order case record. By using case line items, agents can track multiple issues for the same order case and resolve the issues in each case line item independently before resolving and closing the order case.

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Use order cases to handle issues such as change order requests, including changes in ordered quantities or expedited shipping requests, or other order-related issues. With this application, agents can:

- Create new order cases and add the requested orders or order lines to the case as case line items.
- Add or remove orders or order lines from existing order cases.
- Edit existing case line items or create new case line items for order cases.
- Review the changes that have been requested on case line items.
- Create tasks for case line items and assign them to other agents or team members.
- Manage and track the requests and the actions taken to fulfill orders.
- Resolve the individual case line items before resolving the case.

Benefits of using order cases

Businesses can encounter order issues for many reasons such as inventory discrepancies, payment processing problems, or shipping and delivery errors. Order issues can also result from customer input mistakes or changes in customer needs, such as faster shipping or quantity changes. The following table provides some examples of these issues and the resulting order cases.

Order case examples

Reason	Request/Issue	Order case example
Change in quantity	A customer wants to increase or decrease the quantity of an item in their order.	An order case is created to document the request and confirm stock availability.
Change in delivery date	A customer requests to change the delivery date for their order.	An order case is created to coordinate with logistics and confirm the new delivery schedule.
Change in address	A customer needs to update the shipping address after placing the order.	An order case is created to ensure the change is processed before shipping.
Price discrepancy	A customer notices that the price charged differs from the agreed price.	An order case is created to investigate and correct the billing.
Incorrect item ordered	A customer received the wrong product.	An order case is created to initiate the return process and ensure the correct item is sent.
Cancellation of order lines	A customer wants to cancel specific items in their order.	An order case is created to confirm which items can be canceled and update the order accordingly.

Overview of creating an order case

The following table provides an overview of the process for creating an order case. For detailed steps, see Create an order case.

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Steps for creating an order case

Step	Description
Creating an order case	An agent can create an order case in the following ways: • Selecting **Create case** from a customer order. • Selecting **Create case** from the Order Line Items list on a customer order (after selecting one or more order lines). • Selecting **Create case** from an interaction record. • Selecting **New** from the Order Cases list view.
Selecting a service	After initiating an order case, the agent selects an order-related service from the case type selector modal. This modal displays the services that are available for order cases, such as Sales Order Change Request or Sales Order Dispute.
Filling in details on the Create New Order Case intake form	Selecting **Create case** from the case type selector modal displays the intake form where the agent can enter the following order case details: • **Account**: the account for the order. • **Scope of request**: the agent can create a case for order lines from a single order or for multiple complete orders. • **Order number**: the order number associated with the order case. • **Short description**: a brief description of the order case. Depending on where the agent creates the order case from, some of these fields are auto filled.
Viewing the order case record	Selecting **Save** on the intake form creates the Order case record in Draft state. From this record, agents can: • Add orders or order lines to the order case. • Delete orders or order lines from the order case. • Create new order case line items. • Edit the details of order case line items.

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Steps for creating an order case (continued)

Step	Description
	• Assign order case line items to themselves. • Create tasks for order case line items.
Submitting the order case record	Selecting **Submit** on the Order case record moves the order case and the order case line items to the New state. Once in the New state, agents can begin working to resolve the order case. This includes creating tasks for order case line items, assigning them to other agents or team members, and monitoring case progress.

Order Operations Case Management plugin

Order Operations Case Management (com.sn_order_case) is a case management application for handling support requests on orders or order lines. This application enables customers to process order-related services such as inflight order changes, order inquiries, and order dispute requests. It provides an order case type that includes order line items that need changes, workflows, and agent and customer experiences.

The Order Operations Case Management application includes list views for CSM Configurable Workspace and Core UI.

- In CSM Configurable Workspace, expand the **Order Cases** list category in the Lists tab.
- In Core UI, navigate to **All** > **Customer Order Management** > **Order Cases**.

The Order Operations Case Management application also includes tables, roles, service definitions and other components. For more information, see Components installed with Order Operations Case Management.

The Order Operations Case Management application is available from the ServiceNow Store.

Request apps on the Store

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

Related topics

Case lines and workflows

Order case pages

The Order Operations Case Management application includes record pages that display order cases and order case line items in CSM Configurable Workspace.

The Order Operations Case Management application enables agents to create order cases that reference customer orders and order lines. Using order cases, agents can manage and track customer requests and the actions taken to fulfill these requests.

Order cases contain order case line items, which represent either multiple complete orders or multiple order lines from a single order. The Order Operations Case Management application includes the following record pages to display this information in the workspace.

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Order case record pages

Page	Description
Create New Order Case intake page	When an agent initiates an order case and selects a service from the case type selector modal, the system displays the Create New Order Case intake page. The agent uses this page to enter basic information about the order case, such as the account, order number, and scope of request, and then create the case.
Order case record page	The Order case record page displays the order case and a list of the order case line items. The agent uses this page to do the following: • View details about the order case and the order case line items. • Add or remove orders or order lines to the order case as order case line items. • Create new order case line items. • Edit order case line item details. • Create tasks for order case line items.
Order case line item record page	The Order case line item record page displays information about an order case line item. The agent uses this page to view and edit information about the order case line item, including case line item details, ordered and requested quantities, and shipping information.

Order case record page

The Order case record page displays information about order cases and the associated list of order case line items in CSM Configurable Workspace.

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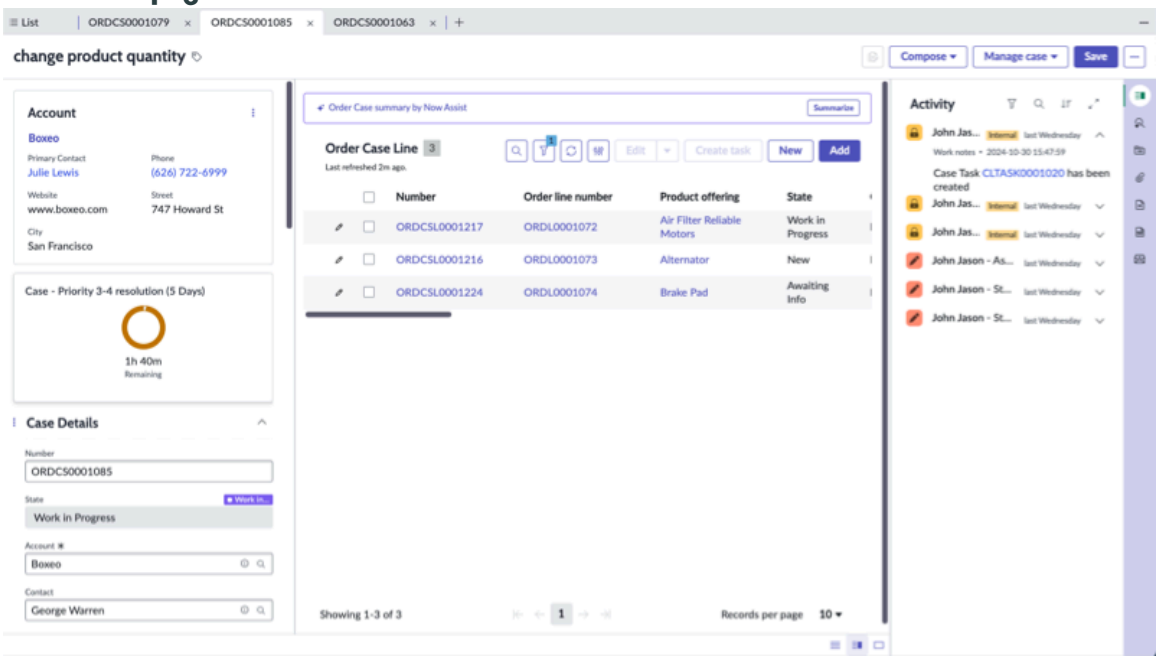
Order case page with Order Case Line list



Customer service agents use this page to do the following:

- View details about the order case and the order case line items.
- Add or remove orders or order lines to the order case as order case line items.
- Create new order case line items.
- Edit order case line item details.
- Create tasks for order case line items.

Order case record page components

The Order case record page includes the following components:

Component	Description
Order case form heading	The form heading displays the order case short description. If there's no short description, it displays the order case number. The form heading also includes the action bar and record tags.
Order case action bar	The action bar contains the actions available to users while working on order case records. The specific actions are determined by factors such as the user role, order case state, and other attributes. • **In-progress Actions**: This icon provides a list of minimized modeless dialogs. It includes a badge that displays the number of items in the list. From this list, an agent can select an item to open the minimized comment, work note, or email. • **Compose**: Compose comments, work notes, and emails in modeless dialogs. • **Manage case**: Perform case management actions such as requesting information or proposing a solution.

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Component	Description
	• **Save**: Save changes to the order case record. • **More Actions**: Perform additional actions such as proposing a major case or reporting a knowledge gap.
Account lookup	Agents can use the account lookup component to do the following: • Search for an account. • Link or unlink an account. • Select a reference field on a lookup card, such as a contact name, to open the reference in a subtab. • Select a phone number on a lookup card to call. The account lookup component displays information in record cards. These cards display contact information and provide quick access to customer details such name, address, and phone.
SLA	Displays active SLAs for the order case, including time remaining, the SLA state, and any breaches.
Case details	The case details component includes collapsible sections for: • Case Details • Notes • Closure Information • Related Records This component also includes a menu with additional form actions, such as personalizing the form, exporting data, and copying the URL.
Case summarization	The case summarization component appears above the Order Case Line list. When an agent opens an order case, the component is collapsed and in the default state. Agents can use this component to do the following: • Summarize order case details. • Generate order case resolution notes. • Generate knowledge articles. • Generate email reply recommendation. **Note:** The case summarization component requires the Now Assist for Customer Service Management (CSM) application to be activated and configured.
Order Case Line list	The Order Case Line list component displays the order case line items associated with the order case. Order case line items can be created for orders or order lines.

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Component	Description
	• If an order case is created for one or more orders, the system converts each customer order's header into a case line item. • If an order case is created for one or more order lines from a single order, the system converts the selected order lines from the customer order to case line items on that order case.

Order Case Line action bar	The Order Case Line action bar contains the actions available to users while working on order case line records.
	• **New**: Opens a Create New Order Case Line record in a separate tab. Fill in the fields and select **Save** to add the order case line item to the list.
	• **Add**: Displays one of the following modals depending on the origin of the order case:
	  ○ Add order lines to case
	  ○ Add orders to case
	Select one or more orders or order lines and then select **Add** to add the selected orders or order lines to the Order Case Line list.
	• **Create task**: Creates a task for the selected order case line item in a separate tab. Fill in the fields on the Create New Case Line Task record and select **Save**.
	
	After selecting an order case line item, agents can edit its details, assign it to themselves, or delete the line item.
	• **Edit**: Displays the details for the selected order case line item in a panel. Make the necessary changes and select **Update** at the bottom of the panel.
	• **Assign to me**: Assigns the selected order case line item to the current user.
	• **Delete**: Deletes the selected order case line item. Select **Delete all** in the confirmation pop-up window.

Activity stream	The activity stream component displays a list of activities occurring on an order case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. The Order case record page uses modeless dialogs for composing comments, work notes, and emails. For more information, see the Composing emails, comments, and work notes section.
Contextual side panel	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Order case record page includes the following tabs.

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Component	Description
	• Activity stream • Attachments • Recommended Actions search • Related Lists • Email Templates • Response Templates • Form Templates For more information about related lists, see the Order case record page related lists section. **Note:** The Order Operations Case Management application does not include response templates. To configure a response template, see Create or modify a response template.

Order case record page settings

The Order case record page includes the following settings.

Order case record page settings

Setting	Description
Active	Enabling the **Active** check box makes the page available to the selected audience. The Order case record page is active by default. The active setting combined with the page order determines the page that CSM Configurable Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority. The default order for the Order case record page is -1000.
Conditions	Conditions determine when a page variant is displayed. The Order case record page has the following condition: **table=sn_order_case** This condition limits the use of the Order case record page to records from the Order Case [sn_order_case] table and tables that extend the Order Case table.
Audience	The audience determines who can see a record page. The Order case record page does not have a specified audience. For more information, see Learn about audiences.

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To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. In the Record section of the Pages and variants list, select **Front-line case page**.
4. Select **Settings** at the top of the page.

Order case record page related lists

Related lists appear in the Related Lists tab in the contextual side panel.

The related lists component provides access to the order case related lists. This component uses an expandable accordion format. Agents can expand the desired lists to see the related items. This component also displays an icon with the number of items in a list.

1. Case Tasks
2. Order Case Lines
3. Order Tasks
4. SLAs
5. Emails
6. Draft Emails
7. Knowledge
8. Knowledge Gaps
9. Child Cases

The items in an expanded list are displayed as cards. An expanded list shows one card for each item in the list, up to a maximum of 8 cards.

- Agents can open an item in a subtab.
- If a list has more than five items, it includes a Show more option.

Related lists include the following actions:

- **Refresh**: refreshes the items in the list.
- **Create**: opens a blank record in a subtab that the agent can use to create a new item.
- **View all**: opens a list of records in a subtab.
- **Show more**: is displayed for lists that have more than five items.

Composing emails, comments, and work notes

The Order case record page uses modeless dialogs to create and post comments and work notes to the activity stream and to compose and send emails.

A modeless dialog is a window that appears in a workspace as an overlay on top of the main window content. This overlay enables users to interact with the window content and the overlay content at the same time.

The Compose group of actions on the Order case record page includes:

- Compose Comments
- Compose Email
- Compose Work Notes(Private)

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These actions launch the corresponding modeless dialogs (the behavior is the same as the Front-line case page).

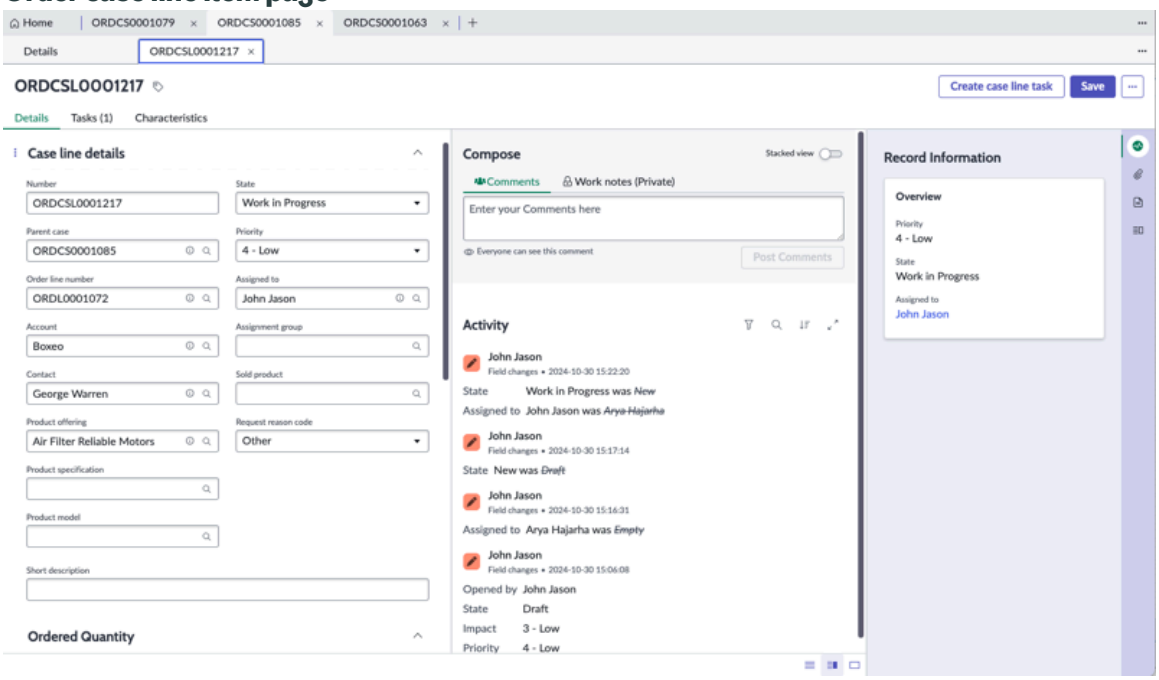
The email templates should be accessed from email dialog.

For more information about composing emails, comments, and work notes, see Modeless dialogs.

Order case line item page

The Order case line item page displays information about an order case line item associated with an order case in CSM Configurable Workspace.

Order case line item page



The order case line item record shows the details of an order case line item, including customer and product information, the requested change to the ordered quantity, the shipping location, and estimated dates. This record also includes the following components:

- Details tab: Displays the case line item details, including order and account information, ordered and requested quantities, and shipping information.
- Tasks tab: Displays the tasks created for the case line item.
- Characteristics tab: Displays the specific characteristics of the case line item.
- Contextual side panel: The contextual side panel includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Order case line record page includes the following tabs.
  - Record Information
  - Attachments
  - Templates

Order case intake page

Customer service agents use the Order case intake page to capture the initial information when creating a new order case.

The agent initiates an order case in one of the following ways:

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- Selecting **Create case** from a customer order.
- Selecting **Create case** from the Order Line Items list on a customer order.
- Selecting **Create case** from an interaction record.
- Selecting **New** from the Order Cases list view.

The system displays the Order case intake page after the agent selects an order-related service from the case type selector modal. The agent can enter the following order case details:

- **Account**: the account for the order.
- **Scope of request**: the agent can create a case for order lines from a single order or for multiple complete orders.
- **Order number**: the order number associated with the order case. This field is mandatory for cases created from the Order Line Items list on a customer order.
- **Short description**: a brief description of the order case.

Depending on where the agent creates the order case from, some of these fields are auto filled. For example, the **Scope of request** displays the following:

- **Specific line items, Single order**: If the agent selects **Create case** from the Order Line Items list on a customer order.
- **Multiple orders**: If the agent selects **Create case** from a customer order.

After saving the intake record, the agent can see the Order case record page with the case line items created either from customer orders or customer order lines.

Order case and order case line item states

Order cases and order case line items move through several different states as agents work to resolve the individual case lines in order cases.

Order case states

Order cases can be in the states listed in the following table. Actions available on the order case record enable agents to move cases from one state to another.

Order case states

State	Description
Draft	The order case is in the Draft state. Select **Submit** on the order case record page to move the order case and all of the order case line items that are currently in the Draft state to New.
New	The order case has been submitted and is in the New state. Select **Assign to me** on the record page to assign the case to the logged-in user and move the order case and all of the order case line items currently in the New state to Work in Progress.
Work in Progress	The assigned agent is working on the order case. Select the following actions:

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Order case states (continued)

State	Description
	• **Request Information**: use this action to request additional information from the contact or consumer. The state moves to Awaiting Information. • **Resolve Case**: use this action to propose a resolution to the contact or consumer. The state moves from Work in Progress to Resolved.
Awaiting Info	The agent is waiting for the contact to provide the requested information for the order case. Select **Information Received** to move the order case back to Work in Progress.
Resolved	The agent has proposed a resolution for the order case to the contact. Select **Close Case** on the record page to move the order case to Closed.
Closed	The order case has been resolved and the resolution has been accepted by the contact. When all of the case line items for an order case are in a terminal state, the case can be set to Closed. Terminal states include: • Resolved - Accepted • Resolved - Denied • Canceled
Canceled	The order case has been canceled. Select **Cancel** to cancel an order case. **Note:** You can only cancel order cases in the Draft state.

Order case line item states

Order case line items can be in the states listed in the following table. The case line items in an order case can be in different states as the agent works to resolve each issue.

Order case line item states

State	Description
Draft	The order case line item is in the Draft state. When an order case is created and is in the Draft state, the associated order case line items are also in the Draft state.
New	The order case line item is in the New state.

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Order case line item states (continued)

State	Description
	When an order case is submitted and moved to the New state, the associated order case line items that are currently in Draft state are also moved to the New state.
Work in Progress	The assigned agent is working on the order case line item.
Awaiting Info	The assigned agent has requested additional information about the order case line item and is waiting for a response.
Resolved - Accepted	The change to the order case line item has been accepted.
Resolved - Denied	The change to the order case line item has been denied.
Canceled	The order case line item has been canceled.

Syncing the state of an order case with the order case line items

State changes for an order case can result in state changes for the associated order case line items. These changes are detailed in the following table.

Order case and order case line item states

Order case state	Order case line item tate
Draft	Saving a new order case creates the case in the Draft state. Order case line items for the order case are also created in the Draft state.
New	When an agent submits an order case, the state is updated from Draft to New. The states of the associated order case line items that are currently in Draft state are also set to New.
Work in Progress	When an agent selects **Assign to me** on an order case in the New state, the state is updated from New to Work in Progress. The states of the associated order case line items are also set to Work in Progress. If any of the case line items are set to Work in Progress, then the case is also set to Work in Progress.
Resolved	If a case is set to Resolved, the status of each of the case line items is also set to Resolved. If all of the case line items are Resolved, then the case is set to Resolved.
Closed	When all of the case line items for an order case are in a terminal state, the case can be set to Closed. Terminal states include: • Resolved - Accepted • Resolved - Denied • Canceled

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Order case and order case line item states (continued)

Order case state	Order case line item tate
	When an agent selects **Close Case** on an order case in the Solution Proposed state, the system updates the state to Closed.
Canceled	When a user selects **Cancel** on an order case in the Draft state, the system updates the state to canceled. States for the order case line items associated with the order case are also set to canceled. **Note:** You can only cancel order cases in the Draft state.

Creating an order case

Agents can create order cases from a customer order, from an interaction record, or from the Order Cases list view in CSM Configurable Workspace.

Agents can create order cases in the following ways:

- Selecting **Create case** from a customer order.
- Selecting **Create case** from the Order Line Items list on a customer order. (This action is enabled if one or more order lines are selected.)
- Selecting **Create case** from an interaction record.
- Selecting **New** from the Order Cases list view.

After initiating an order case, the agent can select an order-related service from the case type selector modal. This modal displays the services that are available for order cases, such as Sales Order Change Request or Sales Order Dispute.

Selecting **Create case** from the case type selector modal displays the Create New Order Case intake form where the agent can enter the following order case details:

- **Account**: the account for the order.
- **Scope of request**: the agent can create a case for order lines from a single order or for multiple complete orders.
- **Order number**: the order number associated with the order case.
- **Short description**: a brief description of the order case.

Note:
Depending on where the agent creates the order case from, some of these fields are auto filled.

Selecting **Save** on the intake form displays the Order case record page. From this record, agents can:

- Add order lines to the order case.
- Delete order lines from the order case.
- Create new order case line items.
- Edit the details of order case line items.
- Assign order case line items to themselves.

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Selecting **Submit** on the Order case record moves the order case and the order case line items currently in the Draft state to the New state. Once in the New state, agents can begin working to resolve the order case. This can include creating tasks for order case line items and assigning them to team members.

Scope of request

An agent can create the following types of order cases:

- Cases that reference one or more order lines from a single customer order.
- Cases that reference multiple complete customer orders.

The Order case record includes the **Scope of request** field. Depending on where the agent initiates the creation of an order case, this field is auto-filled with one of the following values:

- **Specific line items, Single order**: The system creates an order case and converts the selected order lines from the customer order to case line items on that order case.
- **Multiple orders**: The system creates an order case and converts the order header from each customer order to a case line item on that order case.

For example, if an agent creates an order case by selecting **Create case** on a customer order, the scope of request is **Multiple orders**. If an agent selects one or more order lines and then selects **Create case** from the Order Line Items list on a customer order, the scope of request is **Specific line items, Single order**.

Add orders and order line items to an order case

Order cases include a list of order case line items. Depending on how the order case is created, these case line items represent either customer orders or order lines from a single order.

Once an order case has been created, agents can add additional orders or order lines to that case by selecting **Add** on the Order Case Line action bar. Selecting this action displays a modal that shows information based on the values in the **Origin table** field and **Order number** field on the case record.

- If the **Origin table** is set to Customer Order and the **Order number** field is empty, the case type selector modal shows a list of orders associated with the account selected in the **Account** field. The case type selector modal displays "Add orders to case".
- If the **Origin table** is set to Customer Order and the **Order number** field includes an order, the case type selector modal shows a list of order lines associated with that order. The case type selector modal header is "Add order lines to case".

The agent can select a line item from the modal and then select **Add** to add it to the order case as an order case line item.

Create an order case

Create an order case for a customer order or for selected order lines.

Before you begin
Role required: sn_order_case.creator, sn_order_case.agent, sn_customerservice_agent, admin

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Procedure

1. In CSM Configurable Workspace, create an order case in one of the following ways.
   - Select **Create case** from a customer order.
   - Select **Create case** from the Order Line Items list on a customer order. (This UI action is enabled if one or more order lines are selected.)
   - Select **Create case** from an interaction record.
   - Select **New** from the Order Cases list view.
2. Select an order-related service from the case type selector modal and then select **Create case**. This modal displays the services that are available for order cases, such as Sales Order Change Request or Sales Order Dispute.
3. Fill in the following details on the Create New Order Case intake form.
   - **Account**: the account for the order.
   - **Scope of request**: the agent can create a case for order lines from a single order or for multiple complete orders.
   - **Order number**: the order number associated with the order case.
   - **Short description**: a brief description of the order case.

   Depending on where you create the order case from, some of these fields are auto filled with information from the customer order or interaction records.

   Note:
   Default values that have been configured for a service definition record can auto populate fields on the order case record. If the **Account**, **Contact**, or **Contract** field values are also defined in the selected service definition record, those values take priority over the values from the customer order record.

4. Select **Save**.
   Saving the Create New Order Case intake form creates the order case record in Draft state.
5. View the order case record details and the order case line items and make any necessary changes.

   You can perform the following tasks while the order case is in Draft state:
   - Add orders or order lines to the order case.
   - Delete orders or order lines from the order case.
   - Create new order case line items.
   - Edit the details of order case line items.
   - Assign order case line items to yourself.
6. Select **Submit**.
   Submitting the order case record moves the order case and the order case line items currently in the Draft state to the New state and enables you to begin working to resolve the order case.

What to do next

After submitting an order case, you can:

- Add or delete orders or order lines to an order case
- Create new order case lines for an order case

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- Edit the information in order case line records
- Create tasks for order case lines and assign them to other users

Add orders or order lines to an order case

Add orders or order lines to an existing order case. You can also delete orders or order lines from an existing order case.

About this task

Adding orders or order lines to an existing case is determined by the value in the **Scope of request** field on the order case record.

- If the value is **Specific line items, Single order**, you can add order lines to the case.
- If the value is **Multiple orders**, you can add orders to the case.

Before you begin

Role required: sn_order_case.creator, sn_order_case.agent, sn_customerservice_agent, admin

Procedure

1. Open an order case record in CSM Configurable Workspace.
2. Select **Add** in the Order Case Line list.
3. Select the desired orders or order lines in the resulting modal.
   - **Add orders to case**: displays the available orders.
   - **Add order lines to case**: displays the available order lines.
4. Select **Add** in the modal.
   The system adds the selected orders or order lines to the Order Case Line list.

Create a new order case line item for an order case

Create a new order case line item for an existing order case.

Before you begin

Role required: sn_order_case.creator, sn_order_case.agent, sn_customerservice_agent, admin

Procedure

1. Open an order case record in CSM Configurable Workspace.
2. Select **New** in the Order Case Line list.
   This opens a Create New Order Case Line record in a separate sub tab.
3. Fill in the details for the new order case line item.
4. Select **Save**.
   The system adds the new order case line to the Order Case Line list.

Edit an order case line item

Edit one or more order case line items for an order case.

Before you begin

Role required: sn_order_case.creator, sn_order_case.agent, sn_customerservice_agent, admin

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Procedure

1. Open an order case record in CSM Configurable Workspace.
2. Select an order case line item in the Order Case Line list.
3. Select **Edit** to display the Edit item panel.
4. Edit the desired fields.

> **Note:**
> For cases created for multiple complete orders, agents can only make changes to the order header, such as changes to shipping dates and locations.

5. Select **Update** at the bottom of the Edit item panel.

Create a task for an order case line item

Create a task for an order case line item.

Before you begin

Role required: sn_order_case.creator, sn_order_case.agent, sn_customerservice_agent, admin

Procedure

1. Open an order case record in CSM Configurable Workspace.
2. Select an order case line item in the Order Case Line list.
3. Select **Create task** to display the Create New Case Line Task form.
4. Enter information in the fields on the form.
5. Select **Save**.
   The system displays the new case line task record.

Order case form

The order case form displays details about an order case.

Order case form fields

Field	Description
Number	The automatically generated record number. The prefix for numbers from the Order Case table is ORDCS.
Account	The name of the company that the order case is opened for.
Contact	The name of the customer contact for the order case.
Scope of request	Identifies the scope of the change for an order case Agents can use this field to select the type of change for an order case. • **Specific line items, Single order**: Sets one or more order line items as the source for case line items. • **Multiple orders**: Sets one or more complete orders as the source for case line items.

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Order case form fields (continued)

Field	Description
	Selecting **Specific line items, Single order** sets the **Origin table** field to "Order Line Item" and makes the **Order number** field mandatory. When the user selects the order number in the **Order number** field and selects **Add** on the Order Case form, the system displays the Add order lines to case modal. This modal lists the order lines for the specified order number. Selecting **Multiple orders** sets the **Origin table** field to "Customer Order".
Order number	Reference to the customer order. If the **Scope of request** field is set to "Specific Line Items, Single Order" then this field becomes mandatory.
Channel	The method by which the customer initiated contact and the case was opened. • Web (default) • Phone • Email • Chat • Social
Service	The service that was selected from the service selector when the order case was created.
Product	The product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro). If you select an asset in the **Asset** field and the asset has an associated product, the **Product** field is automatically updated. A product can be associated with multiple assets.
Asset	The asset tag number or the serial number of the asset involved in this case.
Install Base	The Install base field helps you track which products and services have been purchased by a customer, how they have been installed or provisioned, along with the detailed configuration for each installed item.
Origin table	Displays the table where the order case was initiated.
Short description	A brief description of the issue or request.
Needs attention	When checked, the system sends a notification to the agent in the **Assigned to** field. The notification includes the case number, state, priority, and short description.
Opened	The date and time that the case was opened.
Priority	The assigned priority:

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Order case form fields (continued)

Field	Description
	• 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Assignment group	The assigned customer service agent group.
Assigned to	The assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Contract	The contract number associated with the order case.
Entitlement	The entitlement associated with this case. The entitlements available for selection in the reference list channel matches the case creation channel. The available entitlements are filtered by the settings in the **Account**, **Contract**, **Product**, and **Asset** fields. If only one entitlement is available for this case, it is automatically added to the **Entitlement** field.
Partner contact	The name of the partner contact.
Partner	The name of the partner company.
Parent	The parent record for the order case.
Resolution code	Choice list indicating the resolution states for the case. This field is mandatory when an agent proposes a solution for a case. The Order Operations Case Management application adds the following resolution codes to the **Resolution code** field: • Change approved • Added replacement product
Request reason code	• Increase Demand • Change in Contract • Initial input incorrect • Other

Order case line item form

The order case line item form displays details about an order case line on a case record.

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Order case line item form fields

Field	Description
Number	The automatically generated record number. The prefix for numbers from the Order Case Line table is ORDCSL.
Parent case	Displays the related order line.
Order line number	The parent case for the order line item record.
Account	The name of the company that the order case is opened for.
Contact	The name of the customer contact for the order case.
Product offering	The product offering for the order case line item.
Product specification	The product specification for the order case line item.
Product model	
Short description	A brief description of the order case line item record.
State	The state of the order case line item record: • Draft • New • Work in Progress • Awaiting Info • Resolved - Accepted • Resolved - Denied • Canceled
Priority	The priority of the order case line item record: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low • 5 - Planning
Assigned to	The assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Assignment group	The assigned customer service agent group.
Sold product	A product, component, or service that has been sold to an account or a consumer.
Request reason code	The reason that the customer is requesting a change to the order case line item. • Increase Demand • Change in Contract

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Order case line item form fields (continued)

Field	Description
	• Initial input incorrect • Other
Ordered quantity	Stores the original ordered quantity.
Requested quantity	Stores the quantity change requested.
Approved quantity	Stores the quantity change approved by the agent.
Expected start date	
Requested expected date	
Approved expected date	
Current shipping location	Stores the original shipping location.
Requested shipping location	Stores the requested change in shipping location.
Resolution code	Choice list indicating the resolution states for the case.
Close notes	Details about how the case was closed.
Additional comments	Customer-viewable comments added to the activity stream.
Work notes	Comments and information added to the activity stream that are available only to internal users.

Components installed with Order Operations Case Management

Several types of components are installed with the Order Operations Case Management application, including tables, roles, and service definitions.

Tables

The Order Operations Case Management application adds the following tables.

Order Operations Case Management tables

Table	Description
Order Case [sn_order_case]	Stores order case records. This table extends the Case [sn_customerservice_case] table. Records in the Order Case table use the prefix **ORDCS**.
Order Case Line [sn_order_case_line]	Stores the case line items created for order cases. This table extends the Case Line [sn_case_line] table. Requesters and fulfillers can use this table to capture the orders and order lines as line items on an order case for which they want to request order changes, resolve disputes, or make inquiries.

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Order Operations Case Management tables (continued)

Table	Description
	Records in the Order Case Line table use the prefix **ORDCSL**.

The Order Operations Case Management application also uses the following tables from the Case lines and workflows application.

Case lines and workflows tables

Table	Description
Case Line [sn_case_line]	The Case Line table stores case line item records. This table extends the Task table. The prefix for case line records is **CSL**.
Case Line Characteristic [sn_case_line_characteristic]	The Case Line Characteristic form displays details about a case line item on a case record. The prefix for case line characteristic records is **CSLC**.
Case Line Task [sn_case_line_task]	The Case Line Task table stores the tasks related to case line items. This table extends the Case Task table. The prefix for case line task records is **CSLTASK**.

Roles

The Order Operations Case Management application includes roles that provide access to order cases and order case line items. It also updates some existing roles to provide this same access.

Order Operations Case Management roles

Role	Description	Includes roles
Order case agent [sn_order_case.agent]	Provides create, read, and update access to: • Order cases • Order case line items • Case line characteristics • Order case tasks • Order case line tasks Provides read access to:	• sn_customerservice_agent • sn_order_case.creator • sn_order_case.writer • sn_order.navigation_menu • sn_order_case.delete

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Order Operations Case Management roles (continued)

Role	Description	Includes roles
	• Orders • Order line items • Order line characteristics	
Order case agent manager [sn_order_case.agent_manager]	Provides create, read, and update access to: • Order cases • Order case line items • Case line characteristics • Order case tasks • Order case line tasks This role can also override agent actions.	• sn_customerservice_manager • sn_order_case.agent • sn_order_case.report_viewer
Order case viewer [sn_order_case.viewer]	Provides read access to the following records: • Order cases • Order case line item s • Case line characteristics	sn_case_line.characteristic_viewer
Order case creator [sn_order_case.creator]	Provides create access to the following records: • Order cases • Order case line items • Case line characteristics	• sn_order_case.viewer • sn_case_line.characteristic_creator
Order case writer [sn_order_case.writer]	Provides write access to the following records: • Order cases • Order case line items • Case line characteristics	• sn_order_case.viewer • sn_case_line.characteristic_writer
sn_order_case.delete	Provides delete access to order cases and case line items.	• sn_order_case.viewer • sn_case_line.characteristic_delete

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Order Operations Case Management roles (continued)

Role	Description	Includes roles
	Note: Once a case has been submitted, only users with the admin role can delete an order case or case line items.	
Order case report viewer [sn_order_case.report_viewer]	Report viewer role for the Order Case and Order Case Line tables. This role can view reports for order cases.	
sn_order_case.navigation_menu	Provides access to Order case navigation menus.	
sn_caseline_characteristic.viewer	Provides read access to case line characteristic records if the user has access to the case line items.	
sn_caseline_characteristic.creator	Provides create access to case line characteristic records if the user has access to the case line items.	sn_caseline_characteristic.viewer
sn_caseline_characteristic.writer	Provides update access to case line characteristic records if the user has access to the case line items.	sn_caseline_characteristic.viewer
sn_caseline_characteristic.delete	Provides delete access to case line characteristic records if the user has access to the case line items.	sn_caseline_characteristic.viewer
sn_caseline_characteristic.report_viewer	Report viewer role for the Case Line Characteristic table.	
Case task agent [sn_customerservice.case_task_agent]	This role provides access to case tasks and related case information. For the Order Operations Case Management application, when a case line task is assigned to a case task agent, that agent has read access to the following records: • Order case • Order case line item • Case line characteristic	• sn_customerservice.customer_data_viewer • sn_customerservice.csm_workspace_user • sn_customerservice.case_contributor_editor

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Order Operations Case Management roles (continued)

Role	Description	Includes roles
	When a case line task is assigned to a case task agent, the agent's name and assignment group are added to the **Contributor Users** and **Contributor Groups** fields on the Order case record. If the **Assigned to** field on the case line task record changes, these fields are updated.	

Service definitions and service definition categories

The Order Operations Case Management application provides the following order case service definitions. These service definitions belong to the Orders service definition category, which stores services for order-related issues. When creating a case, agents can select the desired service definition in the case type selector.

Note:
The system administrator needs to activate these service definitions. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions** and filter the list to show service definitions from the Order Case [sn_order_case] table.

For more information about service definitions and categories, see the following topics:

- Service definitions
- Service definition categories

Order case service definitions

Service definition	Description
Sales Order Change Request	Request a change to sales order lines on a single order or multiple sales orders. • Type: Post Sales • Table: Order Case [sn_order_case] • Products: All • Service definition category: Orders
Sales Order Dispute	Dispute an entire order or specific order lines on an order. • Type: Post Sales • Table: Order Case [sn_order_case] • Products: All • Service Definition Category: Orders

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Special handling notes configuration

The Order Operations Case Management application includes a configuration for special handling notes on the Order Case table [sn_order_case]. To view this record, navigate to **Special Handling Notes** > **Configuration**.

The configuration for the Order Case table includes the following related fields:

- Account
- Contact
- Product Model
- Sold Product
- Install Base
- Assigned to

This configuration includes a condition that creates special handling notes for order cases that have a priority of P1 - Critical. It also includes the following information:

- **Short description**: Urgent issue reported.
- **Message**: This case is set as critical. Follow up immediately.

For more information, see Special handling notes.

Order case archive rules

The Order Operations Case Management application includes archive rules that archive older order cases.

Order Operations Case Management archive rules

Archive rule	Description
Archive Order Case	This rule archives order case records that have been closed for more than 2 years. Archiving these order case records also archives the following records: • Order case tasks • Order case lines • Case line characteristics • Order case line tasks
Archive Order Case Line	This rule archives order case line records that have been closed for more than 2 years. Archiving these order case records also archives the following records: • Case line characteristics • Order case line tasks

Order case records that have been archived for more than 5 years are deleted. Deleting these records also deletes the following records:

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- Order case tasks
- Order case line items
- Case line characteristics
- Order case line tasks

Order case workflows

The Order Operations Case Management application includes subflows that provide the mapping between a customer order and an order case. These subflows are used when an agent creates an order case from a customer order.

These subflows create the data mapping between two different entities: 1) the customer order and 2) the order case. For example, when mapping a customer order to order case line items, the entities share some fields such as **Account**, **Contact**, and **Contract**. The data mapping copies these field values from the customer order to the order case line items on the order case.

- If an order case is created by selecting **Create case** from a customer order:
  - The **Scope of request** is set to **Multiple orders**.
  - The mapping copies the data from the selected order headers to create order case line items.
- If an order case is created by selecting **Create case** from the Order Line Items list on a customer order.
  - The **Scope of request** is set to **Specific line items, Single order**.
  - The mapping copies the data from selected order lines to create case line items as well as copies the order line characteristics to case line item characteristics.

Subflows:

- **Primitives - Order to order case for multiple request**
  - Inputs: Order IDs, Order Case ID
  - Action: Create Case Line Item - Multiple Request

    Creates an order case line item on the order case based on the customer order.
- **Primitives - Order to order case for single request**
  - Inputs: Order ID, Order Case ID, Selected IDs
  - Action: Create Case Line Item - Single Request

    Creates order case line items based on the selected order line items from the customer order.

To view these subflows, navigate to **All** > **Process Automation** > **Workflow Studio** and select **Subflows** on the Workflow Studio homepage.

Case lines and workflows

The Case lines and workflows application provides the ability to reference multiple line items on a case record. Agents can use these line items to capture, track, and resolve multiple related issues in a single case.

The Case lines and workflows application provides the framework for a case type to handle multiple related issues. One example is the Orders case type available with the Order

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Operations Case Management application. This case type enables agents to create cases with case line items for multiple orders or for multiple order lines within a single order.

Case line items enable agents to track multiple issues for the same case. Agents can resolve these different issues, represented by case line items, independently before resolving and closing the case. Agents can take different actions on different case line items depending on the need.

This application supports different types of line items based on the source of the case. These line items can include entities such as orders or order lines, invoices or invoices lines, contracts, and sold products. Each case line item maps to an entity line (for example, an order line) and has its own resolution process.

Benefits of using case line items

Using the Case lines and workflows application provides the following benefits:

- Identify when an order cannot be filled completely and recommend alternative items.
- Process inflight order changes and customer-initiated changes, such as changes to items, quantities, or requested ship dates.
- Process order exceptions and manage the approval and fulfillment process.
- Manage suppliers by creating supplier cases for order-related questions, such as increasing or decreasing quantity, quality issues, or status tracking.

Case lines and workflows plugin

The Case lines and workflows application (com.sn_case_line) enables the Case table to store multiple line items on a case record. These line items are product instances and can be extended for various entities such as orders, order lines, invoices, invoice lines, and contracts.

The case lines and workflows application includes a Case Line Items list view in the Core UI. To access the Case Line Items list, navigate to **All** > **Customer Service** > **Cases** > **All Line Items**.

The Case lines and workflows application application also includes tables and roles. For more information, see Components installed with Case lines and workflows.

The Case lines and workflows application is available from the ServiceNow Store.

Request apps on the Store

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

Related topics

Order case pages

Case line record pages

The Case lines and workflows application includes record pages that display case line items, case line characteristics, and case line tasks in CSM Configurable Workspace.

The following record pages use the CSM default record page to display case line, case line task, and case line characteristic information in CSM Configurable Workspace.

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Case line record pages

Case line item page	The case line item page shows the details of a case line item, including customer and product information, the requested change to the ordered quantity, the shipping location, and estimated dates.
Case line task page	The case line task page displays information about a task created for a case line item.
Case line characteristic page	The case line characteristic record page displays details about the product offering included in a case line item.

Case line item page

The case line item page displays information about a case line item associated with a case.

The case line item page shows the details of a case line item, including customer and product information, the requested change to the ordered quantity, the shipping location, and estimated dates.

Case line item page tabs

The case line item page includes the following tabs:

- Details: Displays the case line item details, including order and account information, ordered and requested quantities, and shipping information.
- Tasks: Displays the tasks created for the case line item.
- Characteristics: Displays the specific characteristics of the case line item.

Contextual side panel

The contextual side panel on the case line item page includes different tools that agents can use to research and resolve customer issues. The contextual side panel on the case line item page includes the following tabs.

- Record Information
- Attachments
- Templates

Case line item page UI actions

The case line page includes the following actions.

Case line page actions

Action	Description
Create case line task	Appears in the case line item action bar. To create a case line task:

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Case line page actions (continued)

Action	Description
	1. Select **Create case line task** to display a Create New Case Line Task record in a separate tab. 2. Enter information in this record and select **Save** to create the case line task record. Case line tasks are added to the Tasks tab on the case line record.
Save	Appears in the case line item action bar. Selecting this action saves changes to the case line item record.
Delete	Appears in the More actions menu. Selecting this action displays a confirmation pop-up window. Select **OK** to complete the delete action. • Agent role: can delete case line item records in Draft state. • Admin role: can delete case line item records in any state.

Case line task page

The case line task page displays information about a task created for a case line item.

Agents can use the case line task page to view information about a case line task and to assign the task to other users.

Case line task page tabs

The case line task page includes the following tabs:

- Details: Displays the case line task details, including the parent case and case line item, account and contact, and assigned group and user.
- SLAs: Displays the SLAs for the case line task.
- Time Worked: Displays time worked on the case line task.

Contextual side panel

The contextual side panel on the case line page includes different tools that agents can use to research and resolve customer issues. The contextual side panel on the case line task page includes the following tabs.

- Record Information
- Attachments
- Templates

Activity stream

The activity stream on the case line task page displays a list of activities occurring on the case line task record.

The activity stream can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities.

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Agents can use the activity stream to post work notes and comments about the case line task and to view a list of the task activities.

Case line item states

A case line item can be in one of several different states as agents work to resolve a case and the associated case line items. The case line items in a case can be in different states as the agent works to resolve each issue.

Case line item states

State	Description
Draft	The case line item is in the Draft state. When a case is created and is in the Draft state, the associated case line items are also created in the Draft state.
New	The case line item is in the New state. When a case is submitted and moved to the New state, the associated case line items that are currently in the Draft state are also moved to the New state.
Work in Progress	The assigned agent is working on the case line item.
Awaiting Info	The assigned agent has requested additional information about the case line item and is waiting for a response.
Resolved - Accepted	The change to the case line item has been accepted.
Resolved - Denied	The change to the case line item has been denied.
Canceled	The case line item has been canceled.

Syncing the state of a case with the case line items

The Case lines and workflows application syncs the state of the case line items with the parent case.

Case and case line item states

State	Description
Draft	When a case is created for an item with multiple lines, such as an order, new case line items are also created. The case and case line items are created in the Draft state.
New	When a case is submitted, the state is updated from Draft to New. The states of the associated case line items that are currently in the Draft state are also set to New.
Work in Progress	When an agent selects **Assign to me** on a case in the New state, the state is updated from New to Work in Progress. The states of the associated order case line items that are currently in the New state are also set to Work in Progress. If any of the associated case line items are set to Work in Progress, the case is set to Work in Progress.

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Case and case line item states (continued)

State	Description
Resolved	When a case is set to Resolved, the status of each associated case line item is also set to Resolved. If all of the case line items are Resolved, the case is set to Resolved.
Closed	If all of the case line items are in a terminal state, the case can be set to Closed. Terminal states include: • Resolved - Accepted • Resolved - Denied • Canceled
Canceled	When a case in the Draft state is set to canceled, the status of each associated case line item is also set to canceled. **Note:** Agents can only cancel cases in the Draft state.

Creating case line items and case line tasks

Agents can create case line items for cases and create tasks for case line items.

Creating case lines

To create a case line record:

1. Select **New**.
   - CSM Configurable Workspace: Open a case and select **New** on the Case Line list action bar to open a new case line record in the Draft state.
   - Core UI: Open a case and select **New** on the Case Lines related list on the case record to open a new case line record in the Draft state.

   The information in the following fields is copied from the parent case to the Case Line Item form:
   - Account
   - Contact
   - Parent case
   - Priority
   - Assignment group
   - Assigned to
2. Fill in the fields on the Case Line Item form.

   For field descriptions, see Case line item form.
3. Select **Submit**.

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If a bundled product is added to a case line item record, the system creates a case line item for each component in the bundle after the agent saves the new case line item record. The case line characteristics are also created for each component.

Create a case line task

The case line item record includes a **Create case line task** action that agents can use to create tasks for a case line item.

1. Open a case line item record.
2. Select **Create case line task** to open a Create new case line task form.

   Some fields on this form are auto populated with details from the Case line record.
3. Enter additional information as needed.

   For field descriptions, see Case line task form.
4. Select **Save** to create the case line task record.

   Case line tasks appear in the Tasks tab on the case line item record.

Case Line list action bar

In CSM Configurable Workspace, the Case Line list action bar appears at the top of the Case Line list component on a case record.

Agents can add case lines from existing entities, such as orders or invoices, or create new case lines.

- **New**: Opens a Create New Case Line record in a separate tab. Fill in the fields and select **Save** to add the case line to the list.
- **Add**: Displays the Add lines to case modal. Select one or more lines and then select **Add** to add the selected case lines to the list.

After selecting a case line, users can edit the case line details, assign a case line to themselves, or delete a case line.

- **Edit**: Displays the details for the selected case line in a panel. Make the necessary changes and select **Update** at the bottom of the panel.
- **Assign to me**: Assigns the selected case line to the current user.
- **Delete**: Deletes the selected case line. Select **Delete all** in the confirmation pop-up window.

Case line item form

The case line item form displays details about a case line item on a case record.

Agents can use the case line item form to create a new case line item record and to view and edit an existing case line item record. When editing, agents can:

- Change the reason code
- Change the Priority, Assigned to, and Contact

To access a case line item record, navigate to **All** > **Customer Service** > **Cases** > **All Line Items** and select a record. Users with the following roles can access this list: system administrator, customer service agent, and customer service manager.

The case line item form includes the following related lists:

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- Case Line Tasks
- Case Line Characteristics

Case line item form fields

Field	Description
Number	The automatically generated record number. The prefix for numbers from the Case Line table is **CSL**.
Parent case	The parent case for the case line item record. This field is mandatory.
Parent case line	The parent case line for the case line item record. This field supports the case lines hierarchy.
Top case line	The top case line for the case line item record. This field supports the case lines hierarchy.
Account	The name of the company that the case is opened for.
Contact	The name of the customer contact for the case.
Product offering	This field is a reference to the Product Offering table [sn_prd_pm_product_offering].
Product specification	This field is a reference to the Product Specification table [sn_prd_pm_product_specification].
Product model	This field is a reference to the Product Model table [cmdb_model].
Short description	A brief description of the case line item record.
State	A case line item record can be in any of the following states: • Draft • New • Work in Progress • Awaiting Info • Resolved - Accepted • Resolved - Denied • Canceled If all of the case line items on a record are in one of the following terminal states, the system syncs the record state to the case line item state: • Resolved - Accepted • Resolved - Denied • Canceled Actions such as **Submit Case** and **Assign to me** change the state of the case and the case lines.
Priority	The priority of the case line record:

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Case line item form fields (continued)

Field	Description
	• 1 - Critical • 2 - High • 3 - Moderate • 4 - Low • 5 - Planning
Assigned to	The agent assigned to the case line item record.
Request reason code	The reason for the requested change. Can be different for each case line item. • Increase Demand • Change in Contract • Initial input incorrect • None
Sold product	This field is a reference to the Sold Product table [sn_install_base_sold_product].
Install base	This field is a reference to the Install Base Item table [sn_install_base_item]. If the **Account** field is populated, this field displays the install base items for the selected account.
Asset	This field is a reference to the Asset table [asset]. If the **Account** field is populated, this field displays the assets for the selected account. If the **Product model** field is populated, this field displays the assets associated to the selected product model. If both the **Account** and **Product model** fields are populated, this field displays the assets associated with selected account and product model.
Resolution code	A code that indicates the resolution state of the case line item record. • Change approved • Added replacement product
Resolution Notes	The agent can use this field to specify how they reached the decision to either accept or deny a change to a case line item.
Contributor Users	This field is populated when a case line task is assigned to a case task agent.

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Case line item form fields (continued)

Field	Description
Contributor Groups	This field is populated when a case line task is assigned to a case task agent.
Work notes	Enables users to post work notes to the record.

Case line task form

The case line task form displays details about a case line task associated with a case line item on a case record.

Case line task form fields

Field	Description
Number	The automatically generated record number. The prefix for numbers from the Case Line Task table is CSLTASK.
Parent case	The parent case of the case line item.
Account	The name of the company that the parent case is opened for.
Contact	The name of the customer contact for the parent case.
Case line	The number of the case line item that the task is created for.
State	The state of the case line task: • Open • Closed
Priority	The priority of the case line task: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low
Assignment group	The assigned customer service agent group.
Assigned to	The agent assigned to the case line task.
Subject	The subject of the case line task.
Description	A longer, more detailed description of the case line task.
Work notes list	A list of users who are interested in the case task. These users receive a notification when work notes are added to the case task.
Work notes	Information about the case task and the steps taken to resolve it. Work notes are posted to the activity stream and are visible only to internal users.

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Case line task form fields (continued)

Field	Description
Additional comments	Customer-viewable comments and information about the case task. Additional comments are posted to the activity stream.

Case line characteristic form

The case line characteristic form displays details about the product offering included in a case line item.

Case line characteristic form fields

Field	Description
Number	The automatically generated record number. The prefix for numbers from the Case Line Characteristics table is **CSLC**.
Case line	The case line item that this characteristic belongs to. This field is a reference to the Case Line table.
Characteristic	This field is a reference to the Characteristic table [sn_prd_pm_characteristic].
Characteristic option	This field is a reference to the Characteristic Option table [sn_prd_pm_characteristic_option].
Characteristic value	The value of a characteristic.

Components installed with Case lines and workflows

Several types of components are installed with the Case lines and workflows application, including tables and roles.

Tables installed with Case lines and workflows

Case Lines and workflows tables

Case Line [sn_case_line]	The Case Line table stores case line item records that are created for parent cases. This table extends the Case table. The prefix for case line records is **CSL**.
Case Line Task [sn_case_line_task]	The Case Line Task table stores the tasks related to case line items. This table extends the Case Task table. The prefix for case line task records is **CSLTASK**.
Case Line Characteristic [sn_case_line_characteristic]	The Case Line Characteristic form displays details about the product offering included in a case line. The prefix for case line characteristic records is **CSLC**.

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Roles

The Case Lines and workflows application includes roles that provide access to case line item and case line characteristic records. It also updates some existing roles to provide this same access.

Case lines and workflows roles

Role	Description	Includes roles
sn_case_line.characteristic_creator	This user can create case line characteristic records if they have access to the parent case line item record.	sn_case_characteristic_viewer
sn_case_line.characteristic_writer	This user can update case line characteristic records if they have access to the parent case line item record.	sn_case_characteristic_viewer
sn_case_line.characteristic_deleter	This user can delete case line characteristic records if they have access to the parent case line item record.	sn_case_characteristic_viewer
sn_case_line.characteristic_viewer	This user can view case line characteristic records if they have access to the parent case line item record.	
sn_case_line.characteristic_report_viewer	This user can view reports for the case line characteristic table if they have access to the parent case line item record.	
Case task agent [sn_customerservice.case_task_agent]	This is an existing role. The case task agent has read, write, and create access for case line tasks: • If the case task agent is the assigned user on the case task (assigned_to). • If the case task agent belongs to the same assignment group as the assigned user. The case task agent has read access to the following: • The parent order case and the case line items. • The case line characteristic if they have read access to	• sn_customerservice.csm_workspace_user • sn_customerservice.customer_data_viewer • sn_customerservice.case_contributor_editor • sn_csm_case_types.service_definition_viewe

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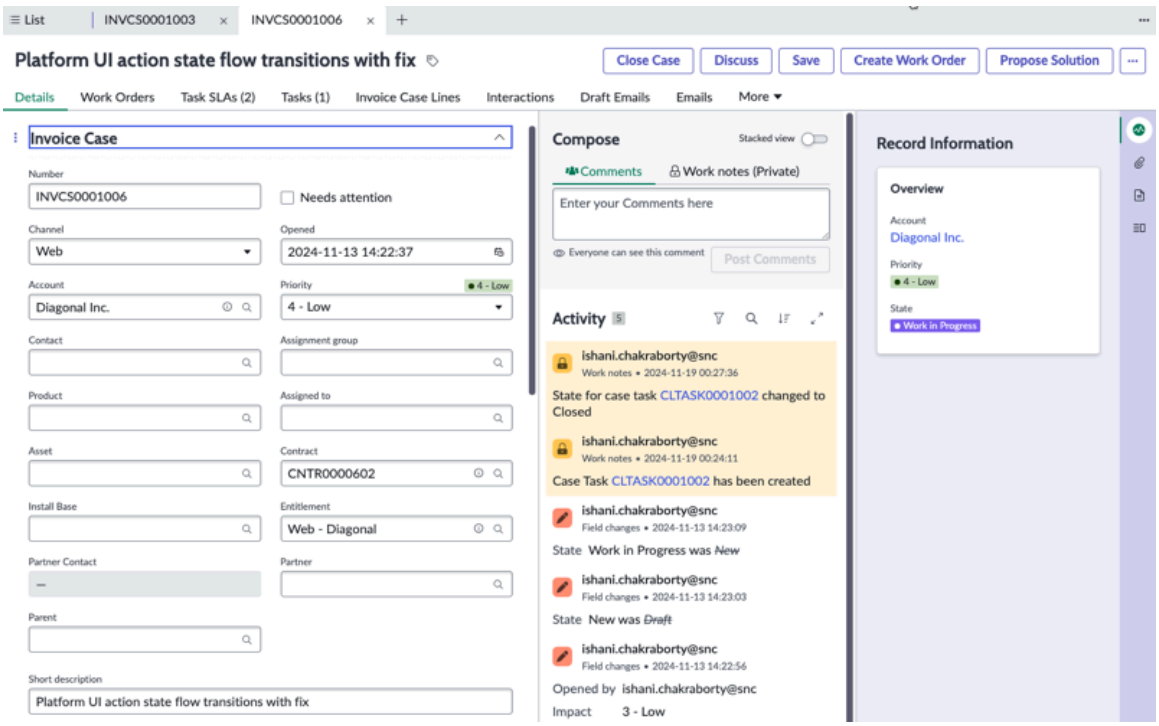
Case lines and workflows roles (continued)

Role	Description	Includes roles
	the associated case line item. • Account and contact records for the parent order case. The case task agent can update the work notes, comments, attachments, and watch list of the parent order case and the case line items.	
Customer service agent [sn_customerservice_agent]	This is an existing role. The customer service agent role has read, write, and update permissions for the following tables: • Case Line • Case Line Task • Case Line Characteristic	For more information, see Roles installed with Customer Service Management.

Case Management for Invoice Operations

The Case Management for Invoice Operations application enables customer service agents to create cases for specific lines from a single invoice or for multiple invoices.

Invoice case record



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The Case Management for Invoice Operations application includes the Invoice case type. This case type provides the ability to reference multiple invoices or invoice lines as case lines on an invoice case record. By using case lines, agents can track multiple issues for the same invoice case and resolve the issues in each case line independently before resolving and closing the invoice case.

Use invoice cases to handle issues such as invoice disputes or requested corrections. With this application, agents can create an invoice case and add the invoices or invoice lines that are being disputed or that must be corrected. Agents can work through the case, create case tasks for other team members as needed, or assign case lines to other agents.

Benefits of using invoice cases

Businesses can encounter invoice issues for many reasons including price or quantity discrepancies or incorrect products or services. Invoice issues can also result from incorrect customer details such as incorrect billing or shipping locations. The following table provides some examples of these issues and the resulting invoice cases.

Invoice case examples

Reason	Case example
Price adjustments	The quantity of items invoiced does not match what was ordered or delivered, leading to either underbilling or overbilling.
Price discrepancies	The amount billed does not match the agreed-upon price or contract terms, such as incorrect discounts, tax calculations, or unit prices.
Incorrect customer information	The invoice contains errors in the customer's name, address, or billing information, which can affect payment processing.
Missing or incorrect items	An invoice includes products or services that were not delivered, or omits items that were delivered but not invoiced.
Part number or SKU errors	The part numbers or SKUs listed on the invoice do not match the products that were ordered or delivered, causing confusion or errors in inventory and payment processing.
Currency issues	An invoice is issued in the wrong currency or without proper conversion rates, creating discrepancies in the payment amount.
Incorrect unit of measure (UOM)	The unit of measure (for example, quantity per box, per meter, per kilogram) on the invoice is incorrect, causing confusion or errors in pricing and quantity calculations.
Dispute on negotiated price, discounts, or promotions	The invoice reflects a different price than what was negotiated, or discounts and promotions are not applied, leading to a dispute over the final amount due.
Incorrect invoice number	The invoice number does not follow the correct sequence, leading to accounting or tracking problems.

Overview of creating an invoice case

The following table provides an overview of the process for creating an invoice case. For detailed steps, see Create an invoice case.

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Steps for creating an invoice case

Step	Description
Creating an invoice case	An agent can create an invoice case from CSM Configurable Workspace or from the Core UI by selecting **New** from the Invoice Cases list view.
Viewing the invoice case record	After creating an invoice case record, agents can: • Add invoices or invoice lines to the case. • Delete invoices or invoice lines from the case. • Create new invoice case lines. • Edit the details of invoice case lines. • Assign invoice case lines to themselves. • Create tasks for invoice case lines.
Submitting the invoice case record	Selecting **Save** on the Invoice case record moves the invoice case to the Draft state. After reviewing the record details, the agent can select **Submit** on the Invoice case record to move the invoice case and the invoice case lines to the New state. Once in the New state, agents can begin working to resolve the invoice case. This includes creating tasks for invoice case lines, assigning them to other agents or team members, and monitoring case progress.

Case Management for Invoice Operations plugin

Case Management for Invoice Operations (com.sn_csm_invoice) is a case management application for handling support requests on invoices or invoice lines. This application enables customers to process invoice service requests such as invoice disputes or invoice inquiries.

Note:
The Case Management for Invoice Operations application has a dependency on the Case lines and workflows application (com.sn_case_line).

The Case Management for Invoice Operations application includes list views for CSM Configurable Workspace and Core UI.

- In CSM Configurable Workspace, expand the **Invoice Cases** list category in the Lists tab.
- In Core UI, navigate to **All** > **Invoice Case**.

The Case Management for Invoice Operations application also includes tables, roles, service definitions, the Invoice case type, and other components. For more information, see Components installed with Case Management for Invoice Operations.

The Case Management for Invoice Operations application is available from the ServiceNow Store.

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Invoice case pages

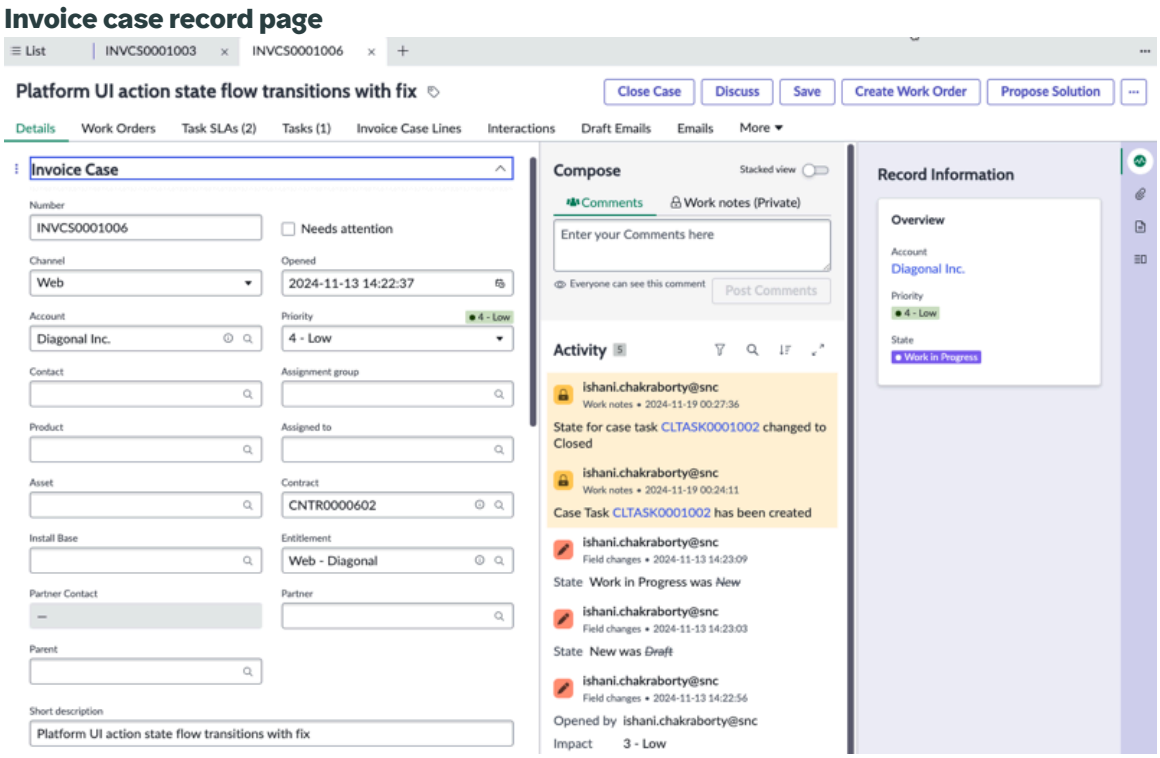
The Case Management for Invoice Operations application includes record pages that display invoice cases and invoice case lines in CSM Configurable Workspace.

The Case Management for Invoice Operations application enables agents to create invoice cases that reference customer invoices and invoice lines. Using invoice cases, agents can manage and track customer requests and the actions taken to fulfill these requests.

Invoice cases contain invoice case lines, which represent either invoice lines from a single invoice or multiple invoices. The Case Management for Invoice Operations application includes the following record pages to display this information in CSM Configurable Workspace.

Invoice case record page

The Invoice case record page displays information about invoice cases and the associated list of invoice case lines.



Customer service agents use this page to do the following:

- Add invoices or invoice lines to the invoice case.
- Delete invoices or invoice lines from the invoice case.
- Create new invoice case lines.
- Edit the details of invoice case lines.
- Assign invoice case lines to themselves.

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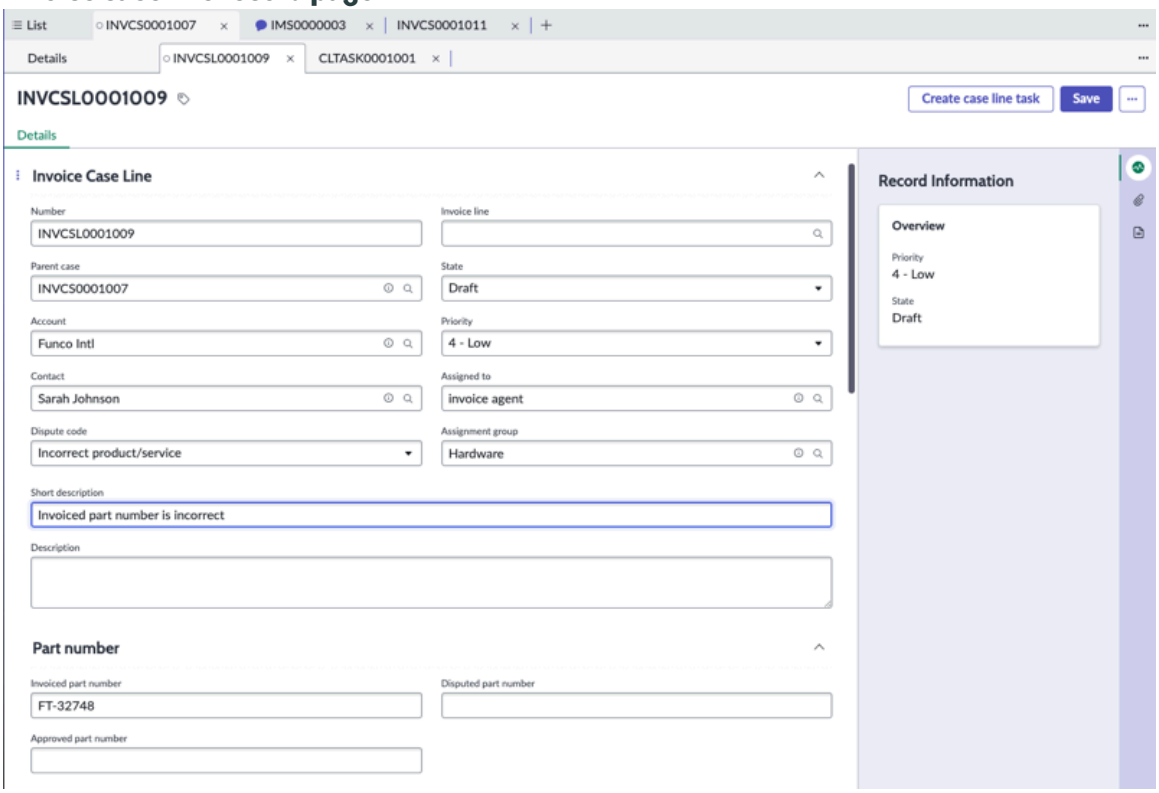
The Case Management for Invoice Operations application uses the CSM default record page to display Invoice case records in CSM Configurable Workspace.

Invoice case line record page

The Invoice case line record page displays information about an invoice case line associated with an invoice case.

Invoice case line record page



The Invoice case line record shows the details of an invoice case line, including customer and product information, the invoiced quantity, invoice discounts, and the billing and shipping locations. From this page, agents can select **Create case line task** to create tasks for invoice case lines.

Invoice case and invoice case line states

Invoice cases and invoice case lines move through several different states as agents work to resolve the individual case lines in invoice cases.

Invoice case states

Invoice cases can be in the states listed in the following table. Actions available on the invoice case record enable agents to move cases from one state to another.

Invoice case states

State	Description
Draft	The invoice case is in the Draft state. Select **Submit Case** on the invoice case record page to move the invoice case and all of the invoice case lines that are currently in the Draft state to New.

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Invoice case states (continued)

State	Description
New	The invoice case has been submitted and is in the New state. Select **Assign to me** on the record page to assign the case to the logged-in user and move the invoice case and all of the invoice case lines currently in the New state to Work in Progress.
Work in Progress	The assigned agent is working on the invoice case. Select the following actions: • **Request Information**: Use this action to request additional information from the contact or consumer. The state moves to Awaiting Information. • **Propose solution**: Use this action to propose a resolution to the contact or consumer. The state moves from Work in Progress to Resolved.
Awaiting Info	The agent is waiting for the contact to provide the requested information for the invoice case. Select **Information Received** to move the invoice case back to Work in Progress.
Resolved	The agent has proposed a resolution for the invoice case to the contact. Select **Close Case** on the record page to move the invoice case to Closed.
Closed	The invoice case has been resolved and the resolution has been accepted by the contact. When all of the case lines for an invoice case are in a Final state, the case can be set to Closed. Final states include: • Resolved - Accepted • Resolved - Denied • Canceled
Canceled	The invoice case has been canceled. Select **Cancel** to cancel an invoice case. **Note:** You can only cancel invoice cases in the Draft state.

Invoice case line states

Invoice case lines can be in the states listed in the following table. The case lines in an invoice case can be in different states as the agent works to resolve each issue.

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Invoice case line states

State	Description
Draft	The invoice case line is in the Draft state. When an invoice case is created and is in the Draft state, the associated invoice case lines are also in the Draft state.
New	The invoice case line is in the New state. When an invoice case is submitted and moved to the New state, the associated invoice case lines that are currently in Draft state are also moved to the New state.
Work in Progress	The assigned agent is working on the invoice case line.
Awaiting Info	The assigned agent has requested additional information about the invoice case line and is waiting for a response.
Resolved - Accepted	The change to the invoice case line has been accepted.
Resolved - Denied	The change to the invoice case line has been denied.
Canceled	The invoice case line has been canceled.

Note:
An agent can manually change the state of each invoice case line to Resolved - Accepted, Resolved - Denied, or Canceled. When all of the invoice case lines are in one of these states, the state of the invoice case changes to Resolved.

Syncing the state of an invoice case with the invoice case lines

State changes for an invoice case can result in state changes for the associated invoice case lines. These changes are detailed in the following table.

Invoice case and invoice case line states

Invoice case state	Invoice case line state
Draft	Saving a new invoice case creates the case in the Draft state. Invoice case lines for the invoice case are also created in the Draft state.
New	When an agent submits an invoice case, the state is updated from Draft to New. The states of the associated invoice case lines that are currently in Draft state are also set to New.
Work in Progress	When an agent selects **Assign to me** on an invoice case in the New state, the state is updated from New to Work in Progress. The states of the associated invoice case lines are also set to Work in Progress. If any of the case lines are set to Work in Progress, then the case is also set to Work in Progress.
Resolved	If a case is set to Resolved, the status of each of the case lines is also set to Resolved.

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Invoice case and invoice case line states (continued)

Invoice case state	Invoice case line state
	If all of the case lines are Resolved, then the case is set to Resolved.
Closed	When all of the case lines for an invoice case are in a final state, the case can be set to Closed. Final states include: • Resolved - Accepted • Resolved - Denied • Canceled When an agent selects **Close Case** on an invoice case in the Solution Proposed state, the system updates the state to Closed.
Canceled	When a user selects **Cancel** on an invoice case in the Draft state, the system updates the state to canceled. States for the invoice case lines associated with the invoice case are also set to canceled. **Note:** You can only cancel invoice cases in the Draft state.

Components installed with Case Management for Invoice Operations

Several types of components are installed with the Case Management for Invoice Operations application, including tables, roles, and service definitions.

Tables

The Case Management for Invoice Operations application adds the following tables.

Case Management for Invoice Operations tables

Table	Description
Invoice Case [sn_csm_invoice_case]	Stores invoice case records. This table extends the Case [sn_customerservice_case] table. Records in the Invoice Case table use the prefix **INVCS**.
Invoice Case Line [sn_csm_invoice_case_line]	Stores the case line items created for invoice cases. This table extends the Case Line [sn_case_line] table. Requesters and fulfillers can use this table to capture the invoices and invoice lines as line items on an invoice case for which they want to resolve disputes, or make inquiries.

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Case Management for Invoice Operations tables (continued)

Table	Description
	Records in the Order Case Line table use the prefix **INVCSL**.

The Case Management for Invoice Operations application also uses the following tables from the Case lines and workflows application.

Case lines and workflows tables

Table	Description
Case Line [sn_case_line]	The Case Line table stores case line item records. This table extends the Task table. The prefix for case line records is **CSL**.
Case Line Characteristic [sn_case_line_characteristic]	The Case Line Characteristic form displays details about a case line item on a case record. The prefix for case line characteristic records is **CSLC**.
Case Line Task [sn_case_line_task]	The Case Line Task table stores the tasks related to case line items. This table extends the Case Task table. The prefix for case line task records is **CSLTASK**.

Roles

The Case Management for Invoice Operations application includes roles that provide access to invoice cases and invoice case line items. It also updates some existing roles to provide this same access.

Invoice Operations roles

Role	Description	Includes roles
Invoice case agent [sn_csm_invoice.agent]	The invoice case agent should have CRUD access to the invoice case header, invoice case line items, read-only access to invoices and invoice lines, products and product characteristics, accounts and contacts and assignment of invoice cases	• sn_customerservice_agent • sn_case_line.characteristic_delete • sn_csm_invoice.creator • sn_csm_invoice.writer • sn_otc.ar_invoice_viewer • sn_csm_invoice.navigation_menu
Invoice case manager [sn_csm_invoice.manager]	The invoice case manager should have all the access that invoice case agent has +	• sn_csm_invoice.agent • sn_csm_invoice.report_viewer

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Invoice Operations roles (continued)

Role	Description	Includes roles
	manages agents + manager reports	• sn_customerservice_manager • sn_case_line.characteristic_report_viewer
Invoice case task agent [sn_csm_invoice.invoice_case_task_agent]	The invoice case task should have all the access to the case tasks assigned to the agent as well as read-only access to view the invoice case/invoice case lines, invoices/invoice lines that case task is associated with and also be able to update worknotes and comments	• sn_otc.ar_invoice_viewer • sn_customerservice.case_task_agent

In addition to the persona roles, granular roles on invoice case header and invoice case lines are also needed.

Invoice Operations granular roles

Role	Description	Includes roles
Invoice case viewer [sn_csm_invoice.viewer]	Read only access to invoice case, invoice case lines if access to invoice case, invoice case line characteristics if access to case line. Read access to invoice cases.	sn_case_line.characteristic_viewer
Invoice case creator [sn_csm_invoice.creator]	Creating an invoice case with invoice case lines and invoice case line characteristics. Create access to invoice cases.	• sn_case_line.characteristic_creator • sn_csm_invoice.viewer
Invoice case writer [sn_csm_invoice.writer]	Editing an invoice case with invoice case lines if access to invoice case and invoice case line characteristics if access to case line. Write access to invoice cases.	• sn_case_line.characteristic_writer • sn_csm_invoice.viewer
Invoice case navigation menu [sn_csm_invoice.navigation_menu]	Access the invoice case navigation menu item. Role to access the invoice case navigation menus.	

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Invoice Operations granular roles (continued)

Role	Description	Includes roles
Invoice case report viewer [sn_csm_invoice.report_viewer]	Access to invoice case reports. Report viewer access to invoice cases.	

Service definitions and service definition categories

The Case Management for Invoice Operations application provides the following invoice case service definition: **Invoice Disputes**.

- Type: Post-Sale
- Table: Invoice Case [sn_csm_invoice_case]
- Products: All
- Service definition category: Invoice

Agents can use this service definition to raise a dispute for one or more invoices or for specific lines on a single invoice.

This service definition belongs to the Invoice service definition category, which stores services for invoice-related issues. When creating an invoice case, agents can select this service definition in the case type selector.

Note:
The **Invoice Disputes** service definition is not active by default. To activate this service definition, the system administrator can:

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Filter the list to show service definitions from the Invoice Case [sn_invoice_case] table.
3. Select **Invoice Disputes**.
4. Enable the **Active** check box.

For more information about service definitions and categories, see the following topics:

- Service definitions
- Service definition categories

Service level agreements (SLAs)

The Case Management for Invoice Operations application includes the following SLAs for the Invoice Case table (sn_csm_invoice_case).

SLA	Description
Initial Response Time for P1 and P2 cases	• Start condition: State of the case is New and Priority is P1 or P2. • Stop condition: State is not New or Draft.

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SLA	Description
	• Schedule: None (24x7). • Duration: 4 hours.
Initial Response Time for P3 and P4 cases	• Start condition: State of the case is New and Priority is P3 or P4. • Stop condition: State is not New or Draft. • Schedule: 8am-5pm weekdays excluding holidays. • Duration: 8 hours. Duration: 8 hours.
Resolution SLA for P1 and P2 cases	• Start condition: State of the case is New and Priority is P1 or P2. • Pause condition: State of the case is Awaiting information. • Resume condition: State of the case is not Awaiting information. • Stop condition: State of the case is Resolved. • Schedule: None (24x7) • Duration: 2 days.
Resolution SLA for P3 and P4 cases	• Start condition: State of the case is New and Priority is P3 or P4. • Pause condition: State of the case is Awaiting information. • Resume condition: State of the case is not Awaiting information. • Stop condition: State of the case is Resolved. • Schedule: 8am-5pm weekdays excluding holidays. • Duration: ???.

Invoice case type

The Case Management for Invoice Operations application includes the **Invoice** case type. This case type captures the case information for invoice-related issues.

In addition to the fields on the customer service case record, the Invoice Case table [sn_csm_invoice_case] includes the following fields:

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- **Invoice number**: The invoice number that the invoice case has been opened for.
- **Request source**: The source of the invoice case. Invoice cases can be created from the following sources:
  - Specific invoice lines, single invoice
  - Invoice header details, multiple invoices

For more information about case types, see Customer service case types.

To view the Invoice case type, navigate to **All** > **Customer Service** > **Case Types** > **Manage Case Types** and select **Invoice**.

Invoice case form views

The Case Management for Invoice Operations application includes form views to display invoice cases in CSM Configurable Workspace and in the Core UI.

This application uses the CSM default record page to display Invoice case records in CSM Configurable Workspace.

Invoice cases include the following related lists:

- Invoice Case Lines: Includes the individual case line records for this invoice case.
- Tasks: Includes tasks that have been created for this invoice case.
- Case Line Tasks: Includes tasks that have been created for individual case lines.

For more information, see the following topics:

- Invoice case form
- Invoice case line form

Invoice case archive rules

The Case Management for Invoice Operations application includes archive rules that archive older invoice cases.

Case Management for Invoice Operations archive rules

Archive rule	Description
Archive Invoice Case	This rule archives invoice case records that have been closed for more than 2 years. Archiving these invoice case records also archives the following records: • Invoice case tasks • Invoice case lines • Case line characteristics • Invoice case line tasks
Archive Invoice Case Line	This rule archives invoice case line records that have been closed for more than 2 years. Archiving these invoice case line records also archives the following records:

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Case Management for Invoice Operations archive rules (continued)

Archive rule	Description
	• Case line characteristics • Invoice case line tasks

Invoice case records that have been archived for more than five years are deleted. Deleting these records also deletes the following records:

- Invoice case tasks
- Invoice case line items
- Case line characteristics
- Invoice case line tasks

Invoice case workflows

The Case Management for Invoice Operations application includes a subflow that provides the mapping between a customer invoice and an invoice case. The subflow **Primitives - AR Invoice to CSM Invoice case request** creates the data mapping between two different entities: 1) the customer invoice and 2) the invoice case.

For example, when mapping a customer invoice to an invoice case, the entities share some fields such as **Account** and **Contact**. The data mapping copies these field values from the customer invoice to the invoice case record.

To view this subflow, navigate to **All** > **Process Automation** > **Workflow Studio** and select **Subflows** on the Workflow Studio homepage.

Invoice case form

The invoice case form displays details about an invoice case.

Invoice case form fields

Field	Description
Invoice Case	
Number	The automatically generated record number. The prefix for numbers from the Invoice Case table is **INVCS**.
Channel	The method by which the customer initiated contact and the case was opened. • Web (default) • Phone • Email • Chat • Social • Community

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Invoice case form fields (continued)

Field	Description
	• Alert • Virtual Agent
Account	The name of the company that the invoice case is opened for.
Contact	The name of the customer contact for the invoice case.
Product	The product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro). If you select an asset in the **Asset** field and the asset has an associated product, the **Product** field is automatically updated. A product can be associated with multiple assets.
Asset	The asset tag number or the serial number of the asset involved in this case.
Install Base	The Install base field helps you track which products and services have been purchased by a customer, how they have been installed or provisioned, along with the detailed configuration for each installed item.
Partner Contact	The name of the partner contact for this invoice case.
Parent	The parent record for the invoice case.
Short description	A brief description of the issue or request.
Needs attention	When checked, the system sends a notification to the agent in the **Assigned to** field. The notification includes the case number, state, priority, and short description.
Opened	The date and time that the invoice case was opened.
Priority	The assigned priority: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Assignment group	The assigned customer service agent group.
Assigned to	The assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Contract	The contract number associated with the invoice case.
Entitlement	The entitlement associated with the invoice case. The entitlements available for selection in the reference list channel matches the case creation channel. The available entitlements are filtered by the settings in the **Account**, **Contract**, **Product**, and **Asset** fields.

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Invoice case form fields (continued)

Field	Description
	If only one entitlement is available for this case, it is automatically added to the **Entitlement** field.
Partner	The name of the partner company.
Request source	The source of the invoice case. Invoice cases can be created from the following sources: • Specific invoice lines, single invoice • Invoice header details, multiple invoices
Invoice	The invoice that the invoice case is created for.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to Resolved or Closed.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list.
Additional comments (Customer visible)	Customer-viewable comments. Each comment is inserted into the Activity field when the user saves the record.
Work notes (Private)	Information about how to resolve the case, or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive notifications when work notes are added to the invoice case.
Closure Information	
Closed by	The name of the user who closed the case.
Closed	
Resolution code	The resolution provided for the invoice case:
Cause	Details about the cause of the issue or problem.
Resolution notes	Details about how the case was resolved.
Add resolution notes to comments	A check box to determine if the resolution notes are added to customer-viewable comments when the case is resolved. If selected, the resolution notes are added to the **Additional comments** (customer-visible) field. By default, the check box is cleared.
Related Records	
Incident	Displays the number of the incident record associated with this invoice record.

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Invoice case form fields (continued)

Field	Description
Problem	Displays the number of the problem record associated with this invoice record.
Change Request	Displays the number of the change request record associated with this invoice record.
Caused by Change	If a case is the result of a change, this field displays the associated change request record.

Invoice case line form

The invoice case line form displays details about an invoice case line.

Invoice case line form fields

Field	Description
Invoice Case Line	
Number	The automatically generated record number. The prefix for numbers from the Invoice Case Line table is **INVCSL**.
Parent case	The parent invoice case for this invoice case line record.
Account	The name of the company that the invoice case is opened for.
Contact	The name of the customer contact for the invoice case.
Dispute code	Indicates the type of dispute for which the invoice case line has been created. • Incorrect product/service • Pricing discrepancy • Incorrect quantity • Incorrect customer details • Other
Short description	A brief description of the issue or request.
Description	A more detailed description of the issue or request.
Invoice line	A reference field that displays the invoice line that is being disputed.
State	The current state of the invoice case line record: • Draft • New • Work in Progress • Awaiting Info • Resolved - Accepted

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Invoice case line form fields (continued)

Field	Description
	• Resolved - Denied • Canceled
Priority	The assigned priority: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Assigned to	The agent assigned to the invoice case.
Assignment group	The group assigned to the invoice case.
Part number	
Invoiced part number	The original part number of the invoiced good or service.
Disputed part number	The disputed part number of the invoiced good or service.
Approved part number	The approved part number of the invoiced good or service.
Quantity	
Invoiced quantity	The original invoiced quantity of the invoiced good or service billed.
Disputed quantity	The disputed quantity of the invoiced good or service billed.
Approved quantity	The approved quantity of the invoiced good or service billed.
Amount	
Invoiced amount	The amount of the invoiced good or service.
Disputed amount	The disputed amount of the invoiced good or service.
Approved amount	The approved amount of the invoiced good or service.
Discount amount	
Invoiced discount amount	The invoiced discount amount of the invoiced good or service.
Disputed discount amount	The disputed discount amount of the invoiced good or service.
Approved discount amount	The approved discount amount of the invoiced good or service.
Billing location	
Invoiced billing location	The invoiced billing location of the invoice.
Requested billing location	The requested billing location of the invoice.
Shipping location	
Invoiced shipping location	The original shipping location of the invoiced good or service.
Requested shipping location	The requested shipping location of the invoiced good or service.

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Invoice case line form fields (continued)

Field	Description
Resolution	
Resolution code	The resolution provided for the disputed invoice line item. • None • Solved - Credit • Solved - Write Off • Solved - Settlement • Solved - Invalid Dispute
Close notes	Additional notes made by the user who closes the case.
Notes	
Additional comments (Customer visible)	Customer-viewable comments. Each comment is inserted into the Activity field when the user saves the record.
Work notes (Private)	Information about how to resolve the case, or steps taken to resolve it, if applicable.

Accounts Receivable (AR) invoice table

The AR invoice (sn_otc_invoice) table stores the invoice data.

Accounts Receivable invoice table

The following table lists the fields for AR invoice [sn_otc_invoice] table.

Accounts Receivable invoice table

Field	Data type	Description
Account	Reference to Account	Customer in the business-to-business (B2B) business model.
Amount invoiced with tax (Reporting currency)	FX Currency	Total amount to be paid to the supplier including tax and shipping charges. This amount is displayed in reporting currency.
Amount invoiced with tax (Transaction currency)	FX Currency	Total amount to be paid to the supplier including tax and shipping charges. This amount is displayed in transactional currency.
Amount invoiced without tax (Reporting currency)	FX Currency	Total amount to be paid to the supplier excluding tax and shipping charges. This amount is displayed in reporting currency.

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Accounts Receivable invoice table (continued)

Field	Data type	Description
Amount invoiced without tax (Transaction currency)	FX Currency	Total amount to be paid to the supplier excluding tax and shipping charges. This amount is displayed in transactional currency.
Billing Contact	Reference to Account Contact	The account contact to which the invoice is sent.
Billing Location	Reference Location	Reference to the location to which the invoice is sent.
Bill to city	String	The city to which the invoice is sent.
Bill to country	Reference to Country	The country to which the invoice is sent.
Bill to state/ province	String	The state to which the invoice is sent.
Bill to street	String	The street address to which the invoice is sent.
Bill to ZIP/postal code	String	The zip code to which this invoice is sent.
Business owner	Reference to User	A group who owns the invoice.
Consumer	Reference to Consumer	Customer in the business-to-consumer (B2C) business model.
Created	Date/Time	Date on which this invoice is created.
Created by	String	Person who created the invoice.
Tax Code	Reference to Tax Code	The tax code levied on the total invoice amount.
Tax Jurisdiction Code	String	The tax code jurisdiction to which you must pay the tax.
Discount (%)	Decimal	Discount % for the discounts amount.
Discount due date	Date	Date by which you must make payment for the discounts to be applicable.
Discounts Amount	FX Currency	The discount applied on the invoice amount.
Due date	Date	Date by when you must make the payment.
Early payment discount amount	FX Currency	The discount applied on the total invoice amount on early payment.
ERP number	String	Unique number generated within the ERP system for the invoice.This field is applicable when there's an ERP integration. The value is populated after the invoice is posted in the ERP system through the integration.

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Accounts Receivable invoice table (continued)

Field	Data type	Description
ERP posting date	Date	Date on which the invoice is posted in the ERP system.
Has changed	True/ False	Denotes if the invoice has changed.
Invoice date	Date	Date on which this invoice is created.
Invoice source	String	Name of the application associated with the invoice from where it is sourced.
Number	String	An auto-generated number that uniquely identifies the invoice.
Other charges	FX Currency	Additional charges incurred on the invoice.
Parent invoice	Reference to AR Invoice	Original invoice
Payment date	Date	The date by when you must make the payment.
Payment terms	Reference to payment terms	Conditions applied on the payment
Remit to Contact	Reference to Account Contact	The account contacted to which the payment is made.
Remit to Location	Reference to Location	Reference to the location to which the payment is made.
Remit to city	String	The city to which the payment is made.
Remit to country	Reference to Country	The country to which the payment is made.
Remit to state/ province	String	The state to which the payment is made.
Remit to street	String	The street address to which the payment is made.
Remit to zip/ postal code	String	The zip code to which this payment is made.
Requires acknowledgment	True/ False	Invoice requires acknowledgment of receipt from recipient
Sales Order	Reference to Order	Sales order associated with the invoice.
Sales order number	String	Sales order associated with the invoice.
Customer tax id	String	The tax ID of the customer
Customer Contact	Reference to	The account contact of the customer for the invoice.

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Accounts Receivable invoice table (continued)

Field	Data type	Description
	Account Contact	
Customer Location	Reference to Location	Reference to the customer location for the invoice.
Customer city	String	The city of the customer for the invoice.
Customer country	Reference to Country	The country of the customer for the invoice.
Customer state/ province	String	The country of the customer for the invoice.
Customer street	String	The street address of the customer for the invoice.
Customer zip/ postal code	String	The zip code of the customer for the invoice.
Shipping from Location	Reference to Location	Reference to the location from which the order on the invoice is shipped.
Ship from city	String	The city from which the order on the invoice is shipped.
Ship from country	Reference to Country	The country from which the order on the invoice is shipped.
Ship from state/ province	String	The state from which the order on the invoice is shipped.
Ship from street	String	The street address from which the order on the invoice is shipped.
Ship from zip/ postal code	String	The zip code from which this order is shipped.
Shipping to Contact	Reference to Account Contact	The account contacted to which the order on the invoice is shipped.
Shipping to Location	Reference to Location	Reference to the location to which the order on the invoice is shipped.
Ship to city	String	The city to which the order on the invoice is shipped.
Ship to country	Reference to Country	The country to which the order on the invoice is shipped.
Ship to state/ province	String	The state to which the order on the invoice is shipped.
Ship to street	String	The street address to which the order on the invoice is shipped.
Ship to zip/ postal code	String	The zip code to which this order is shipped.

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Accounts Receivable invoice table (continued)

Field	Data type	Description
Shipping Charges	FX Currency	Shipping charges incurred for the invoice.
Short description	String	Brief description about the invoice.
Status	String	Current state of the invoice.
Submitted by	Reference to User	Person who submitted the invoice.
Subtotal	FX Currency	The total amount from all the invoice lines without tax and shipping charges.
Supplier	Reference to Supplier	Supplier who delivers the product or service.
Supplier tax id	String	The tax ID of the supplier.
Tax amount	FX Currency	Tax applied on the invoice amount.
Tax rate decimal	Decimal	Tax rate % applied on the invoice - Tax rate in decimal if tax code is not used.
Tax Rate String	String	Tax rate % applied on the invoice - Tax rate in string if tax code and decimal is not used
Type	String	The type of invoice debit or credit.

Accounts Receivable (AR) invoice line table

The AR invoice line (sn_otc_invoice_line) table stores the invoice line data.

Accounts Receivable invoice line table

The following table lists the fields for AR invoice line [sn_otc_invoice_line] table.

Accounts Receivable invoice line table

Field	Data type	Description
Invoice Number	Reference to AR Invoice	Parent invoice number containing the invoice lines.
Invoice line quantity	Decimal	The number of items that have been invoiced in the line.
Line item invoice with tax	FX Currency	The total cost which is being billed for this good or service with tax.
Line item invoice without tax	FX Currency	The total cost which is being billed for this good or service without tax.
Description	String	Brief description of the invoice line.
Line unit price	Decimal	Unit price of the line item in the invoice.
Part Number	String	SKU number from the product catalog

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Accounts Receivable invoice line table (continued)

Field	Data type	Description
Line Item Number	String	Invoice line number
Sales Order	Reference to Order	Sales order associated with the invoice
Sales Order Number	String	Sales order associated with the invoice
Sales Order line	Reference to Order Line Item	Sales order line associated with the invoice line.
Sales Order line Number	String	Sales order line associated with the invoice line
Shipping to Contact	Reference to Account Contact	The account contact to which the order on the invoice is shipped.
Shipping to Location	Reference to Location	Reference to the location to which the order on the invoice is shipped.
Ship to city	String	The city to which the order on the invoice is shipped.
Ship to country	Reference to Country	The country to which the order on the invoice is shipped.
Ship to state/ province	String	The state to which the order on the invoice is shipped.
Ship to street	String	The street address to which the order on the invoice is shipped.
Ship to zip/ postal code	String	The zip code to which this order is shipped.
Status	String	Status of the invoice line.
Tax amount	FX Currency	Tax amount for the invoice line item.
Tax code	Reference to Tax Code	Tax code of the invoice line.
Tax jurisdiction code	String	Tax jurisdiction code of the invoice line.
Tax rate decimal	Decimal	Tax rate % applied on the invoice line - Tax rate in decimal if tax code is not used.
Tax rate string	String	Tax rate % applied on the invoice line - Tax rate in string if tax code and decimal is not used.
Unit of Measure	Reference to Unit	Unit of Measure for the invoice line item quantity.

Creating an invoice case

Agents can create invoice cases from the Invoice Cases list view in CSM Configurable Workspace or the Core UI.

Agents can create invoice cases by selecting **New** from the Invoice Cases list view. From the Invoice case record, agents can:

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- Add invoices or invoice lines to the invoice case.
- Delete invoices or invoice lines from the invoice case.
- Create new invoice case lines.
- Edit the details of invoice case lines.
- Assign invoice case lines to themselves.
- Create tasks for invoice case lines.

Selecting **Save** on the Invoice case record moves the invoice case and the invoice case lines currently in the Draft state to the New state. Once in the New state, agents can begin working to resolve the invoice case. This can include creating tasks for invoice case lines, assigning them to other agents or team members, and monitoring case progress.

Request source

An agent can create the following types of invoice cases:

- Cases that reference one or more invoice lines from a single customer invoice.
- Cases that reference multiple customer invoices.

The Invoice case record includes the **Request source** field. An agent can select the following values in this field:

- **Specific invoice lines, single invoice**: The invoice case is for a single customer invoice. The agent can select the invoice in the **Invoice** field.
- **Invoice header details, multiple invoices**: The invoice case is for multiple customer invoices.

Add invoices and invoice lines to an invoice case

Invoice cases can include a list of invoice case lines. These case lines represent either customer invoices or invoice lines from a single customer invoice.

Once an invoice case has been created, agents can add invoices or invoice lines to the case by selecting **New** from the Invoice Case Lines related list. Selecting this action displays a new Invoice Case Line record.

The agent can select an invoice line or invoice for the Invoice Case Line record and then select **Save** to add it to the invoice case as an invoice case line.

Create an invoice case

Create an invoice case for a customer invoice or for selected invoice lines.

Before you begin

Role required: sn_csm_invoice.agent, sn_csm_invoice.manager, admin

Procedure

1. In CSM Configurable Workspace, select **New** from the Invoice Cases list view.
2. Add information to the Invoice Case form, such as **Account** and **Contact** and **Short description**.
3. Select an invoice number in the **Invoice** field.
   This field is displayed if the **Request source** field is set to Specific invoice lines, single invoice.
4. Select **Save**.
   Saving the Invoice Case form to creates the invoice case record in the Draft state.

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5. View the invoice case record details and make any necessary changes.

   You can perform the following tasks while the order case is in Draft state:

   - Add invoices or invoice lines to the invoice case.
   - Delete invoices or invoice lines from the invoice case.
   - Create new invoice case lines.
   - Edit the details of invoice case lines.
   - Assign invoice case lines to yourself.

6. Select **Submit**.
   Submitting the invoice case record moves the invoice case and the invoice case lines currently in the Draft state to the New state and enables you to begin working to resolve the invoice case.

What to do next

After submitting an invoice case, you can:

- Add an invoice case line to an invoice case
- Create a task for an invoice case line

Add an invoice case line to an invoice case

Add an invoice case line to an invoice case.

Before you begin

Role required: sn_csm_invoice.agent, sn_csm_invoice.manager, admin

Procedure

1. Open an invoice case In CSM Configurable Workspace.
2. Select the Invoice Case Lines tab and then select **New**.
   This opens a new Invoice Case Line form in a separate sub tab.
3. Add information to the Invoice Case Line form.
4. Select **Save**.

   The system adds the new record to the Invoice Case Lines tab on the invoice case record.

Create a task for an invoice case line

Create a case line task for an invoice case line.

Before you begin

Role required: sn_csm_invoice.agent, sn_csm_invoice.manager, admin

Procedure

1. Open an invoice case In CSM Configurable Workspace.
2. Select the Invoice Case Lines tab and then select an invoice case line.
3. Select **Create case line task**.
   The system opens a Create New Case Line Task form in a separate sub tab.
4. Add information to the Create New Case Line Task form.

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5. Select **Save**.

   The system adds the new task record to the Tasks tab on the Invoice Case Line record.

Service definitions

Use service definitions to create connections between products, services, and case types. Customers can use these definitions to quickly discover and request the services they need. Agents can use these definitions to create cases of the right type to support those service requests.

Overview

The service definitions feature is available with the Customer Service Case Types plugin (com.snc.csm_case_types). Case types enable you to address specific types of customer requests. A case type extends the base customer service case and includes the processes, attributes, and data required to resolve a specific type of case, such as onboarding a customer or resolving a complaint.

A service definition describes a service that a business or organization offers to support a product or service that they sell. Service definitions work with case types to provide different types of service requests.

- You can create connections between products and services and the case types that support those services. These connections streamline the case management process for requesting and executing services and simplify service requests based on the customer's context.
- You can also create service definitions for case task types and then create parent-child relationships between case type definitions and case task type definitions. This enables agents to easily create case tasks of the right type.
- You can create categories of services and then organize service definitions into logical groupings. Agents can use these categories to quickly find the services they need.

Service definition benefits

When you create service definitions for each of the services that you offer, agents can use the defined services to create cases and cases tasks of the right type for customer issues and requests. When creating these cases and case tasks, agents can do the following:

- Select from a list of available services.
- Select a category and view the available services within that category.
- Filter the applicable services based on the products owned by a customer.
- Create a case of the right type based on the service requested or for the products owned by a customer.

Customers can use service definitions to discover and request services to support their products from the Customer and Consumer Service Portals.

Service definition categories

Service definition categories enable you to organize service definitions into logical groupings. A category can have multiple service definitions and a service definition can belong to one or more categories.

These categories appear on the case service selector and case task service selector. When an agent is creating a case or case task, they can select a category and then view and select from the available services within that category to create a case or case task.

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The service definition ID field

In the Washington DC release, the **ID** field replaces the **Number** field.

- For upgrade customers, the **Number** field is relabeled to show that it is deprecated.
- For new customers, the **Number** field is not present.

For customers upgrading from Utah or Vancouver, a fix script runs automatically that adds the ID field to records in the Service Definition [sn_case_type_selection] table. The fix script copies the value from the **Name** field and adds it to the **ID** field, replacing white space characters with underscores. This field has a maximum length of 40 characters.

System administrator experience

The system administrator defines the services that are offered to customers for the products and services in the product catalog. For each service definition, the admin can complete the following configuration tasks.

Service definition configuration tasks

Task	Description
Create a service definition	The service definition record stores details about a service that is provided to customers. This information includes a name for the service definition, the target table, and the service category.
Associate one or more products	Services can be product-specific or general services can be created and made available for all products.
Associate a case type	A case type provides the processes and data that an agent needs to resolve a case for a specific type of service.
Associate a playbook	A playbook provides agents with step-by-step guidance for resolving a specific type of case.
Configure default field values	Configure default values for fields in a service definition's target table. When a record is created for this table, the system uses these values to auto-populate record fields.
Associate a record producer	Record producers enable end users to request services from the Customer and Consumer Portals.
Configure related services for a service definition	Associate one or more related services with a service definition to create parent-child relationships between service definitions. For example, you can create service definitions for case tasks and associate them with a service definition for a case type.
Create a service definition category	Create a category for service definitions. You can use these categories to create logical groupings of service definitions.
Associate service definitions with a category	Add service definitions to a category. A category can have one or more associated service definitions and a service definition can belong to multiple categories.
Add a case type to the Case interceptor	To configure this feature for use in the Core UI, add case types to the Case interceptor.

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Agent experience

Associating a case type with a service definition automates the case type selection process for agents. From CSM Configurable Workspace, agents can quickly create cases of the right case type based on customer context.

When creating cases, agents can select the appropriate service for a customer based on the products that the customer owns. The Product Service Select version of the case type selector enables agents to do the following:

- Create cases from case and case type list views.
- Create cases from several types of records:
- Select a product. The case type selector includes a **This case is for an owned product** check box.
  - If checked: Lists services relevant to the selected product.
  - If cleared: Lists all available services.
- Select a category of services and view the services within that category.
- Select a service from the list of available services.
- Select **Create Case** to create a case of the case type associated with the service.

The system automatically determines the case type based on the selected service and creates a case of that type. If the service definition has an associated playbook, the agent can use the playbook in a tab on the case record.

Note:
From the Core UI, the Case interceptor enables agents to select a service definition for case type creation.

Associating a case task type with a service definition enables agents to create case tasks of the right type based on the case context. The Product Service Select version of the case task type selector enables agents to create tasks from case task lists, case records, playbook stages, and the Dynamic Related Records tab in the contextual side panel.

Customer experience

End users can use the service definitions feature to request available services from the Customer and Consumer Service Portals based on the products they have purchased.

- Use the portal to view the sold products or the install base items that they own.
- Select a product or an install base item and see the available services in the Services portal widget. This widget can display product-specific services, requests for new products, and general services.
- Select a service and launch a record producer to create a service request. When submitted, the system automatically creates a case of the correct type.
- View a case that was created for a service request and see the **Service definition** field on the case record.

Services portal widget

End users can view a list of available services for their sold products and install base items from the Customer and Consumer Service Portals.

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From the portal, an end user can navigate to a list of their sold products or install base items. After selecting a product, the Services portal widget lists the available services. These can include:

- Services based on a sold product or install base item
- General services
- Services for requesting new products

Selecting a service from the widget displays the record producer associated with the service definition. Depending on the record producer configuration, some of the fields are auto-filled such as the product model or install base item and the selected service. Submitting the record producer creates a case of the correct case type.

Note:
Cases that have been created from a case type associated with a service definition display the service definition in the **Service definition** field. End users can see this information on the case records that they can access from the portal.

Related topics

Configuring service definitions

Customer service case types

Manage customer service case types

Create a customer service case of a specific type

Service definition roles

Service definition roles included with the Customer Service Case Types plugin enable users to view, create, and update service definitions, service definition categories, and service definition category relationships. Agents and end users can use these definitions and categories to view and create cases based on the selected service.

Service definition roles

The following service definition roles are installed with the Customer Service Case Types (com.snc.csm_case_types) plugin.

Roles installed with case types

Role	Description	Contains roles
Service definition admin [sn_csm_case_types.service_definition_admin]	Administrator role for the Customer Service case types tables. Users with this role can view, create, update, and delete service definitions, service definition categories, and service definition category relationships.	• sn_csm_case_types.service_definition_mana • sn_service_org.service_criteria_delete
Service definition manager [sn_csm_case_types.service_definition_manager]	Manager role for the Customer Service case types tables. Users with this role can view, create, and update service definitions, service	• sn_csm_case_types.service_definition_repor • sn_csm_case_types.service_definition_all_ta • sn_service_org.service_criteria_write

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Roles installed with case types (continued)

Role	Description	Contains roles
	definition categories, and service definition category relationships.	• sn_service_org.service_criteria_create • sn_service_org.service_criteria_read
Service definition viewer [sn_csm_case_types.service_definition_viewer]	Users with this role can view service definitions, service definition categories, and service definition category relationships.	sn_service_org.service_criteria_read
Service definition report viewer [sn_csm_case_types.service_definition_report_view]	Provides report view access to service definition related tables.	None
Service definition all table viewer [sn_csm_case_types.service_definition_all_table_viewer]	Provides view access to the service definition tables. Users with this role can view service definitions, service definition categories, and service definition category relationships.	None

How users can use service definitions

In CSM Configurable Workspace, users with the admin role or one of the following agent roles can access the **Service** field for cases and case tasks.

- Customer service agent (sn_customerservice_agent)
- Consumer service agent (sn_customerservice.consumer_agent)
- Customer service manager (sn_customerservice_manager)

The admin and agent roles can do the following:

- See the **Service** column on Case Task lists. For example, My Case Task and My Contributing Tasks.
- See the **Service** field on the Case Task form.
- Select a service in the **Service** field and save the Case Task form.
- Create a case task and see the **Service** field on the Case Task form.

In the Core UI, users with the admin role or one of the agent roles listed above can do the following:

- See the **Service** column on Task list.
- See the **Service** field on the Task form.
- Select a service in the **Service** field and save the Case Task form.

From the Customer and Consumer Service Portals, users with the admin role or an end user role can see the **Service** field on case tasks that the user has access to. See the following table for the end user roles that can see this field.

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End users and roles that can see the Service field on case tasks

Users and Roles	Description
B2B user roles	
Customer service agent [sn_customerservice.customer]	An agent who assists customers and partners with questions, issues, and problems.
Customer administrator [sn_customerservice.customer_admin]	An administrator role for a customer account. This user has access to all of the data within the account.
Customer case manager [sn_customerservice.customer_case_manager]	A customer role for managing the cases in an account and any related child accounts.
Partner [sn_customerservice.partner]	A partner who is serving customer accounts.
Partner administrator [sn_customerservice.partner_admin]	An administrator role for a partner account.
Case task agent [sn_customerservice.case_task_agent]	A role that provides access to case tasks and related case information.
Case task viewer [sn_customerservice.case_task_viewer]	A role that provides read-only access to all case task records.
Customer contacts with configured contact relationships	For more information, see Contact Relationships.
B2C user roles	
Consumer service agent [sn_customerservice.consumer_agent]	An agent who assists consumers with questions, issues, and problems.
Consumers with configured consumer relationships	Use relationships to provide internal and external users with additional access to customer data. For more information, see Create relationships.
Consumers who are designated as head of household	A household is made up of a group of consumers who live at a common address and share products and services. A household can have a designated head of household and multiple current members. For more information, see Create or update a household.
Contributor roles	
Account contributor [sn_customerservice.account_contributor]	This role enables users to create cases and case tasks for any account.

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End users and roles that can see the Service field on case tasks (continued)

Users and Roles	Description
Consumer contributor [sn_customerservice.consumer_contributor]	This role enables users to create cases and case tasks for any consumer.
Self contributor [sn_customerservice.self_contributor]	This role enables users with snc_internal role to create cases and case tasks for themselves.
Location manager contributor [sn_customerservice.svc_location_manager_contributor]	A location manager contributor is employed at the business location and manages a business location in the location hierarchy along with all its child business locations.
Location agent [sn_customerservice.svc_location_agent]	• View all CSM entities. • Create cases for any account, household, consumer, or service organization. • Fulfill cases for any account, household, consumer, or service organization created at the agent's location.
Location consumer agent [sn_customerservice.svc_location_consumer_agent]	• View all CSM entities. • Create cases for any household or consumer. • Fulfill cases for any household or consumer created at the agent's location. • Assign related staff to any account, household, or consumer.
Relationship contributor [sn_customerservice.relationship_contributor]	This role enables users to create cases for customers with which they have an established relationship.
Relationship agent [sn_customerservice.relationship_agent]	Manage cases for the accounts, contacts, consumers, and households that the agent has relationships with. This includes the following relationships that are provided with the Service Model Foundation plugins: • Account Manager: Creates a relationship between an internal user and an account. • Relationship Manager: Creates a relationship between an internal user and a consumer or a household.
Location relationship manager [sn_bus_loc.location_relationship_manager]	A location relationship manager is employed by the parent business and acts as a point of contact for one or more external business locations.

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End users and roles that can see the Service field on case tasks (continued)

Users and Roles	Description
Service organization contributor [sn_customerservice.service_organization_contributor]	This role enables users to create cases for their service organization (business location)
Case Authorized Contributor [sn_customerservice.case_authorized_contributor]	This role provides access to add additional comments and attachments, accept or reject a solution, receive notifications on case updates, close a case, and update case tasks.
Outsourced external agent [sn_csm_ocs.ext_agent]	An Outsourced Service Provider (OSP) role. Users with this role can fulfill the cases and case tasks belonging to the service provider organization they belong to.

For more information about these roles, see the following topics:

- Roles installed with Customer Service Management
- Contributor user roles
- Service Model Foundation - Assign roles
- Roles installed with customer access management
- Roles for Outsourced Customer Service

Related topics

Configuring service definitions

Customer service case types

Manage customer service case types

Create a customer service case of a specific type

Configuring service definitions

Create service definitions for the types of services required to support your products. Associate different features such as case types, playbooks, and record producers with service definitions so that customers can request the services they need and agents can create cases of the right type to support those services.

System administrators can use the service definitions feature to define the services that are offered to customers and connect those services to products, case types, playbooks, and catalog items.

Service definition configuration tasks

Task	Description
Create a service definition	Create a definition for a service that's offered to support a product.
Associate a product with a service definition	Configure the relationship between a product and service.
Associate a case type with a service definition	A case type defines the case resolution process for a service definition.

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Service definition configuration tasks (continued)

Task	Description
Associate a playbook with a service definition	A playbook provides step-by-step guidance for resolving a specific type of case. Defining a playbook record generator view enables case creation for a requested service.
Configure default field values for a service definition	Configure default values for fields in a service definition's target table. When a record is created for this table, the system uses these values to auto populate record fields.
Configure catalog items for a service definition	End users can select a catalog item from the service portal and use the record producer to create the service request.
Configure related services for a service definition	Associate one or more related services with a service definition to create parent-child relationships between service definitions. For example, you can create service definitions for case tasks and associate them with a service definition for a case type.
Associate service organizations with a service	After creating a service definition, you can associate service organizations offering service with a service organization.
Create a service definition category	Create a category for service definitions. You can use these categories to create logical groupings of service definitions.
Associate service definitions with a category	Add service definitions to a category. A category can have one or more associated service definitions and a service definition can belong to multiple categories.
Add a case type to the Case interceptor	In the Core UI, the Case interceptor lists the types of customer service cases that an agent can create. If you create a case type and you want that case type to appear in the Case interceptor, you need to add it to the Case interceptor configuration.

Create a service definition

Create a service definition record in the Customer Service Management (CSM) application to establish connections between products, services, and case types.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

A service definition record stores the details about a service that is provided to customers. You can create service definitions for the types of services that are required to support your products and for cases, case types, and case tasks.

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After creating a service definition, you can associate the service definition with a product. By associating one or more related services with a service definition, you can create parent-child relationships between the service definitions.

You can also create relationships between the service definition and other related services. For example, you can create a service definition for a case and then create one or more service definitions for your case tasks. Afterward, you can establish a relationship between the case service definition and the case task service definitions.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select **New**.
3. In the **Name** field, enter a name for the service definition.
4. If necessary, modify the information in the **ID** field.
   The system auto-populates the **ID** field with the name of the service definition and replaces the spaces with underscores. The ID can contain alphanumeric characters and underscores and can be up to 40 characters in length.

   Note:
   The value in this field must be unique.

5. In the **Table** field, select the table that the service definition is available for.
   For example, if the service is available for the onboarding case type, select the Onboarding Case [sn_onboarding_case] table.
6. **Optional:** In the **Customer service type** field, select a service type for the service definition.

   A service type enables the system to show the following type of services based on the context:

   - Pre-sale
   - Post-sale
   - General

7. **Optional:** In the **Playbook record generator** field, select a playbook record generator.
   If a service definition has an associated playbook, the agent can use the playbook in a tab on the case record. For more information, see Associate a playbook with a service definition.
8. **Optional:** In the **Image** field, select an image for the service definition.
   Service definitions appear in the case type selector in a card view. The image appears in the card for a service definition along with the name and description.
9. **Optional:** In the **Default table field values** field, select one or more fields and values.
   Configure the default values for the fields in the target table for service definitions. When a record is created for this table, the system uses these values to automatically fill in the record fields. For more information, see Configure default field values for a service definition.
10. **Optional:** In the **Order** field, add an order value for the service definition.
    This value determines the order in which the services are displayed in the case type selector or other workflows. Service definitions with the lowest order value are displayed first. The default value is 100.

    - Service definitions with no order value appear after the ordered service definitions. These service definitions have the lowest priority.
    - If one or more service definitions have the same order value, the system displays the service definitions in alphabetical order.

11. **Optional:** Enable the **Active** check box.

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12. **Optional:** In the **Description** field, add a description of the service definition.
    Service definitions appear in the case type selector in a card view. The card includes the name, description, and image for a service definition. Customer service agents can search for services by entering keywords found in the service definition name and description.
13. Select **Submit**.
    The service definition is added to the Service Definitions list.

    Upon save, the service definition record includes the following related lists:

    - Product Service Relationships
    - Catalog Service Relationships
    - Service to Service Relationships
    - Service Definition Category Relationships
    - Reports

Result

After creating a service definition, you can perform the following configuration tasks:

- Associate one or more products with a service definition
- Create a service definition category
- Associate a product with a service definition
- Associate a case type with a service definition
- Associate a playbook record generator with a service definition
- Associate a service definitions to a service definition category
- Configure default field values for a service definition
- Configure catalog items for a service definition
- Configure related services for a service definition.
- Associate service organizations with a service.
- Add a case type to the Case interceptor.

Create a service definition category

Create a service definition category record in the Customer Service Management (CSM) application. Then use the category to create logical groupings of service definitions.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

A category can have one or more associated service definitions and a service definition can belong to multiple categories.

When an agent is using the case type selector to create a case, they can select a category before selecting a service. The category acts as a filtering mechanism and reduces the number of available services.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definition Categories**.
2. From the Service Definition Categories list, select **New**.

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3. In the **Name** field, enter a name for the category.
   The category name can be up to 60 characters in length.
4. **Optional:** In the **Description** field, add a description of the category.
   The description can be up to 4000 characters in length.
5. **Optional:** In the **Order** field, add an order number for the category.
   The order value determines the order in which the categories are displayed in the case type selector and case task type selector. The category with the lowest value is displayed first.

   (Optional) The default value is 100. You do not have to set an order value for a category. If a category does not have a value, the system displays the category in the case type selector in alphabetical order.
6. **Optional:** Enable the **Active** check box.
   This field is enabled by default.
7. Select **Submit**.
   The category is added to the Service Definition Categories list.

   Upon save, the new category record includes the Service Definition Category Relationships related list, which shows the service definitions associated with the category.

Result

After creating a service definition category, you can associate service definitions with the category. These associated service definitions are stored in the Service Definition Category Relationships related list.

Associate a product with a service definition

After creating a service definition, you can associate one or more product models or sold products with the definition.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

A product model or a sold product can have multiple services associated with it.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the Product Service Relationships related list, select **New**.
   The system displays a new Product Service Relationship record. The **Service definition** field is auto-filled with the name of the selected service definition.
4. Determine if this service definition is available for all products or for a specific product.

   - If it is available for all products, enable the **All products** check box and go to step 6.
   - If it is available for a specific product, leave the check box empty and go to the next step.
5. Select the product in the **Product** field.
6. Select **Submit**.
   The relationship record is added to the Product Service Relationships related list. If the relationship is for a specific product, the name is displayed in the **Product** column.

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Associate a case type with a service definition

After creating a service definition, you can associate a case type with the definition.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

A case type can be associated with one or more service definitions.

To see the service definitions associated with a case type, navigate to **All** > **Customer Service** > **Case Types** > **Manage Case Types** and select a case type from the list. This information is displayed in the Service Definitions related list.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the **Table** field, select the table for the case type that extends the Case table (sn_customerservice_case).
   For example, to associate the service definition with the complaint case type, select the Complaint Case table (sn_complaint_case).
4. Select **Update**.

Associate a playbook with a service definition

After creating a service definition, you can associate a playbook with the definition.

Before you begin

Role required: (playbook_experience.admin + sn_csm_case_types.service_definition_manager) or admin

About this task

Note:
To see the playbook record generator field and values on the list and form view, the service def manager needs the playbook_experience.admin role in addition to sn_csm_case_types.service_definition_manager. Please add this role to associate a playbook with a service definition.

A playbook provides agents with step-by-step guidance for resolving a specific type of case. If a service definition has an associated playbook, the agent can use the playbook in a tab on the case record.

When the agent selects **Create Case** on the case type selector screen, the system displays the new case record and launches the playbook associated with the service in a tab on the record page.

Note:
This is an optional task.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. Select a playbook record generator in the **Playbook record generator** field.

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This field is a reference to the Playbook Experience Record Generator table (sys_playbook_experience_record_generator). For more information, see Playbook record generator

4. Select **Update**.

Associate a service definition with a service definition category

After creating a service definition category, you can associate one or more service definitions with the category.

Before you begin
Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task
Service definition categories enable you to organize service definitions into logical groupings. A category can have multiple service definitions and a service definition can belong to one or more categories.

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definition Categories**.
2. Select a category from the Service Definition Categories list.
3. In the Service Definition Category Relationships related list, select **New**.
4. Select a service definition in the **Service Definition** field.
5. Select **Submit**.
   The service definition is added to the Service Definition Category Relationships related list.

Configure default field values for a service definition

Configure default values for fields in a service definition's target table. When a record is created for this table, the system uses these values to auto populate record fields.

Before you begin
Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task
The target table for a service definition is stored in the **Table** field. The table selected in this field is the Case table or a table that extends the Case table. When a record is created for the target table, the system auto populates fields with the default values.

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the **Default table field values** field, select a field and a value.
   Each time you select a field, an additional selection option becomes available.
4. **Optional:** To remove a field, select the Delete button next to the field value.
5. When you are finished selecting fields and values, select **Update**.

Configure catalog items for a service definition

After creating a service definition, you can associate one or more catalog items with the definition.

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Before you begin
Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task
A catalog item is a product or service that is available within a service catalog. A record producer is a specific type of catalog item that enables users to create task-based records.

From the Customer and Consumer Portals, end users can select available services from the Services portal widget. Selecting a service displays the record producer associated with the service definition. Submitting the record producer creates a case of the correct case type.

A variable set for service definitions is available with the Customer Service Case Types plugin (com.snc.csm_case_types). This variable set populates the service definition based on the product and/or service selected on the record producer.

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the Catalog Service Relationships related list, select **New**.
   The system displays a new Catalog Service Relationship record. The **Service definition** field is auto-filled with the name of the selected service definition.
4. Select a catalog item in the **Catalog Item** field.
5. Select **Submit**.
   The catalog item is added to the to the Catalog Service Relationships related list.

Related topics
Service Catalog items

Create or edit a catalog item

Configure related services for a service definition

After creating a service definition, you can associate one or more related services with the service definition. This creates a parent-child relationship between service definitions.

Before you begin
Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task
When creating relationships between services on the Service to Service Relationship record, only one relationship between the related service definition and the service definition can exist.

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the Service to Service Relationships related list, select **New**.
   The system displays a new Service to Service Relationship record. The **Service definition** field is auto-filled with the name of the selected service definition.
4. Select a related service in the **Related service definition** field.
   From the Service Definitions pop-up window, you can select the target table in the **Table** field and then select from the list of related services for that table.

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Note:
You cannot relate the same service to a parent service more than once.

5. Select **Submit**.
   The related service is added to the to the Service to Service Relationships related list. The **Table** column displays the name of the target table for the related service.

Associate service organizations with a service

Associate your service organizations with a service by using the Customer Service Management (CSM) application. With this association, your service organization (SO) staff can address customer queries for products and services offered at the business location and can raise a case on the behalf of the customer.

Before you begin
Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task
An SO can have multiple services associated with it. A service-to-service organization criteria association is contained in the Service Organizations offering Service [service_organizations_offering_service] table.

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the Service Organizations offering Service related list, select **New**.
4. On the form, fill in the fields.

Service Organizations offering Service form

Field	Data type	Description
Service organization criteria	Reference	Criteria to define the service organizations that provide the service. **Note:** For more information about the criteria for the service organization, see Create the criteria for a service organization.
Service definition	Reference	Service that the service organizations provide.

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Field	Data type	Description
		Note: The **Service definition** field is automatically filled in with the name of the selected service definition.
Active	True/False	Check box to activate or deactivate the service organization criteria. By default, the active field is set to **True**. **Note:** Only one active criterion is enabled per table to be associated to a service definition.

5. Select **Submit**.
   The service organization criteria are added to the Service Organizations offering Service related list.

Add a case type to the Case interceptor

In the Core UI, the Case interceptor lists the types of customer service cases that an agent can create. If you create a case type and you want that case type to appear in the Case interceptor, you need to add it to the Case interceptor configuration.

Before you begin
Role required: sn_csm_case_types.service_definition_admin or admin

About this task
When an agent creates a case, they can select the case type from the Case interceptor.

Procedure
1. Navigate to **All** > **System Definition** > **Interceptors**.
2. Select the Case interceptor from the Interceptors list.
3. In the Answers related list, select **New**.
4. Select **Simple questions to redirect the URL**.
5. Fill in the fields on the Answer form.

Answer form fields and descriptions

Field	Description
Name	Enter a unique name for the case type. For example, Complaint.

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Field	Description
User Prompt	The description that the agent sees in the interceptor when they create a case.
Target URL	The target URL of the form view that should open for the selected case type.
Order	The order in which the case type appears in the interceptor.

6. Select **Submit**.

CSM Configurable Workspace

CSM Configurable Workspace is a user interface that provides agents with the tools they need to answer customer questions and resolve customer issues.

Workspace UI

The Workspace UI is built to improve agent efficiency and facilitate resolutions. From a single view, agents can:

- Work on multiple issues concurrently in an optimized, intuitive layout.
- Resolve issues faster with automated suggestions powered by machine learning.
- Get notified of potential major incidents based on issue frequency and impact.
- Keep informed of updates and surface important insights with a live activity feed and analytics.

CSM Configurable Workspace overview

A workspace is a suite of tools in a single focused work area that enables a user to efficiently complete an entire job. It provides users such as customer service agents, managers, and help desk professionals with tools to help answer customer questions and resolve issues.

A workspace also includes features that enable a user to be more efficient, including a multi-tab interface for managing multiple cases and a contextual display that provides quick orientation to the current task. For more information about the key features that make up a workspace, see Exploring Workspace.

Workspaces use pages and page variants to display table and record information. Some pages are provided with the CSM Configurable Workspace application. For more information, see CSM Configurable Workspace record pages.

You can also create pages, either from a template or from scratch, or you can duplicate and customize an existing page variant. You can create and customize pages and variants using UI Builder, a web user interface builder. For more information, see Creating pages and page variants.

UI Builder

UI Builder is a web user interface builder that enables you to build pages for workspaces. With UI Builder, you can:

- Configure page layouts and components.
- Extend and deploy custom components in a workspace.
- Leverage UI Builder components to build additional solutions.

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For more information about working with pages and components, see the following topics:

- For more information about working with components in UI Builder, see Work with components.
- For more information about available components, see Next Experience Components documentation.

Workspace tutorials

The following tutorials describe the different parts of a workspace and give you an overview of how a workspace works.

- Workspace tutorial for agents starting with a record
- Workspace tutorial for agents starting with a chat

Application information

The CSM Configurable Workspace application (com.snc.uib.csm_agent_workspace) is activated with the Customer Service plugin (com.sn_customerservice).

Starting with the Yokohama release, CSM Configurable Workspace has a dependency on the Customer Central plugin. For more information, see Customer Central plugin.

The CSM Configurable Workspace application is available from the ServiceNow Store.

Request apps on the Store

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

Related topics

List of workspaces

CSM Configurable Workspace features

Agents can use several different features available in CSM Configurable Workspace to assist customers and resolve cases.

CSM Configurable Workspace interface features

Use these topics to get an overview of the CSM Configurable Workspace interface, landing pages, and forms.

Overview of CSM Configurable Workspace features

Feature overview	Description
CSM workspace landing pages	Provides customer service agents with an overview of their new, assigned, and high priority cases, plus the cases assigned to their groups.
CSM workspace form headers	Provides an overview of configurable form headers, the primary and secondary values included in the headers, and where this information appears.

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Overview of CSM Configurable Workspace features (continued)

Feature overview	Description
CSM workspace form features	Provides an overview of agent actions, account hierarchy, special handling notes, related lists, and Agent Assist.
CSM workspace form ribbon and components	Provides agents with a quick overview of the case details. Components in the form ribbon display relevant information about the case, including a contact or consumer summary, a timeline, and SLA details.

Additional features

A number of additional features are available for use with CSM Configurable Workspace.

Additional features for CSM Configurable Workspace

Feature	Description
AWA for CSM	Use Advanced Work Assignment (AWA) to automatically assign work items to agents based on their availability, capacity, and skills.
Chat summarization	Use chat summarization to automatically create summaries of chat conversations.
Workforce Optimization for Customer Service	Use Workforce Optimization to manage and maintain the productivity of your workforce. Efficiently route work to your team, manage your team's skills and schedules, and monitor their performance.
Customer Central	Use Customer Central to provide agents with all of the information about a customer in one central location. This feature enables agents to quickly zoom in on the customer issue and provide efficient and supportive service.
Customer Service Case Types	Use case types to handle different types of customer issues. A case type identifies the processes and the data needed to resolve a specific type of issue, such as a lost or missing credit card.
Proactive Customer Service Operations	Use this feature to track the digital services used by your customers and to proactively create cases for service disruptions.
Playbooks for Customer Service Management	Use playbooks to provide step-by-step guidance for completing the tasks needed to resolve specific types of customer service cases.
Guided Decisions for Customer Service Management	Use guided decisions to resolve complex cases faster and more efficiently by guiding customer service agents through a structured troubleshooting process.

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Additional features for CSM Configurable Workspace (continued)

Feature	Description
Lookup and verify	Use this feature to enable agents to quickly look up contacts or consumers using information such as the name, phone number, or record number.
Case action status	Use the case action status feature so that agents can easily identify cases that need attention.
Estimated time to resolve a case	Use machine learning to predict the estimated time to resolve a case (ETTR) based on case attributes such as the short description, category, priority, and assignment group.

CSM Configurable Workspace landing pages

A landing page is an initial view of your workspace. Landing pages present content tailored to a user's assigned role and provide the information they must get started with their work.

Landing pages can include filtered lists, KPIs, and other features that enables you to access information from one location. CSM workspace landing pages provide customer service agents and managers with lists of assigned cases and case tasks as well as agent, group, and organization metrics.

Agents use landing pages as a starting point to get into their work, where they can quickly scan and prioritize cases and case tasks, access records, and track their performance.

CSM Configurable Workspace landing pages

Several landing pages are available for CSM Configurable Workspace.

CSM Landing Page and CSM Landing Page - Premium

These landing pages use components to display lists and metrics. The admin configures this information in UI Builder and can create different landing pages for different audiences.

Two versions of the landing page are available based on plugin activation. For more information, see CSM workspace landing page plugins.

CSM Dashboards

This landing page uses dashboards to display information. You can duplicate the provided dashboards and modify them as desired or create dashboards and then share these dashboards with other users.

CSM workspace landing page plugins

The following table describes the plugin requirements for the CSM workspace landing pages.

CSM landing page plugin requirements

Landing Page	Plugin requirements
CSM Landing Page	Available with the CSM Configurable Workspace plugin (sn_csm_wrkspc).

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CSM landing page plugin requirements (continued)

Landing Page	Plugin requirements
CSM Landing Page - Premium	Available with the following plugins: • CSM Configurable Workspace (sn_csm_wrkspc) • Performance Analytics - Content Pack - Customer Service Management - Advanced (com.snc.pa.customer_service_advanced)
CSM Dashboards	Available with the CSM Configurable Workspace plugin (sn_csm_wrkspc).

CSM Landing Page

The CSM Landing Page provides users with lists of assigned cases and case tasks as well as agent, group, and organization metrics.

Customer service agents and managers can use the CSM Landing Page to quickly scan and prioritize work, access records, and track performance. Administrators can customize landing pages in UI Builder to meet their unique business needs.

The CSM Landing Page includes components that display case information, plus visualizations that further break down the component data. Each of the visualizations is connected to a data source. For example, the **High priority cases** component includes visualizations for P1 and escalated cases, plus cases that need attention.

Note:
To ensure the High priority cases component filters correctly, install the Customer Service Case Action Status (com.snc.csm_action_status) plugin. This plugin adds the missing **action_status** field, which isn't included with the CSM plugin by default. Also, ensure your instance is on Xanadu Patch 7 or later.

The CSM Landing Page is available with the CSM Configurable Workspace (sn_csm_wrkspc) plugin. This landing page is the default landing page for CSM Configurable Workspace.

Note:
Upgrade customers who haven't customized the existing CSM Configurable Workspace landing page are automatically upgraded to the landing page available with the Yokohama release. Upgrade customers who have customized the existing CSM Configurable Workspace landing page must manually accept the Yokohama landing page.

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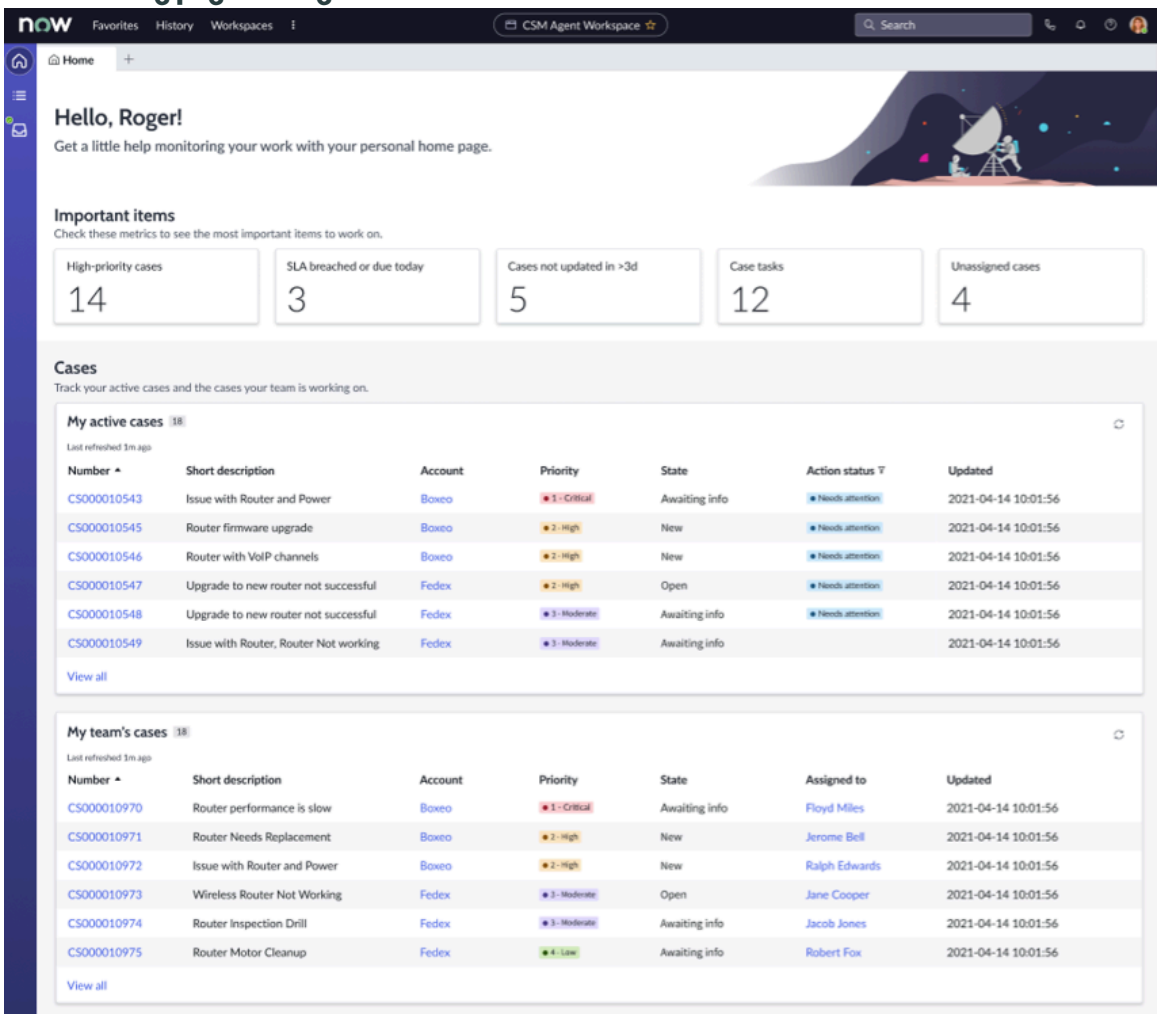
CSM landing page - Assigned cases and case tasks



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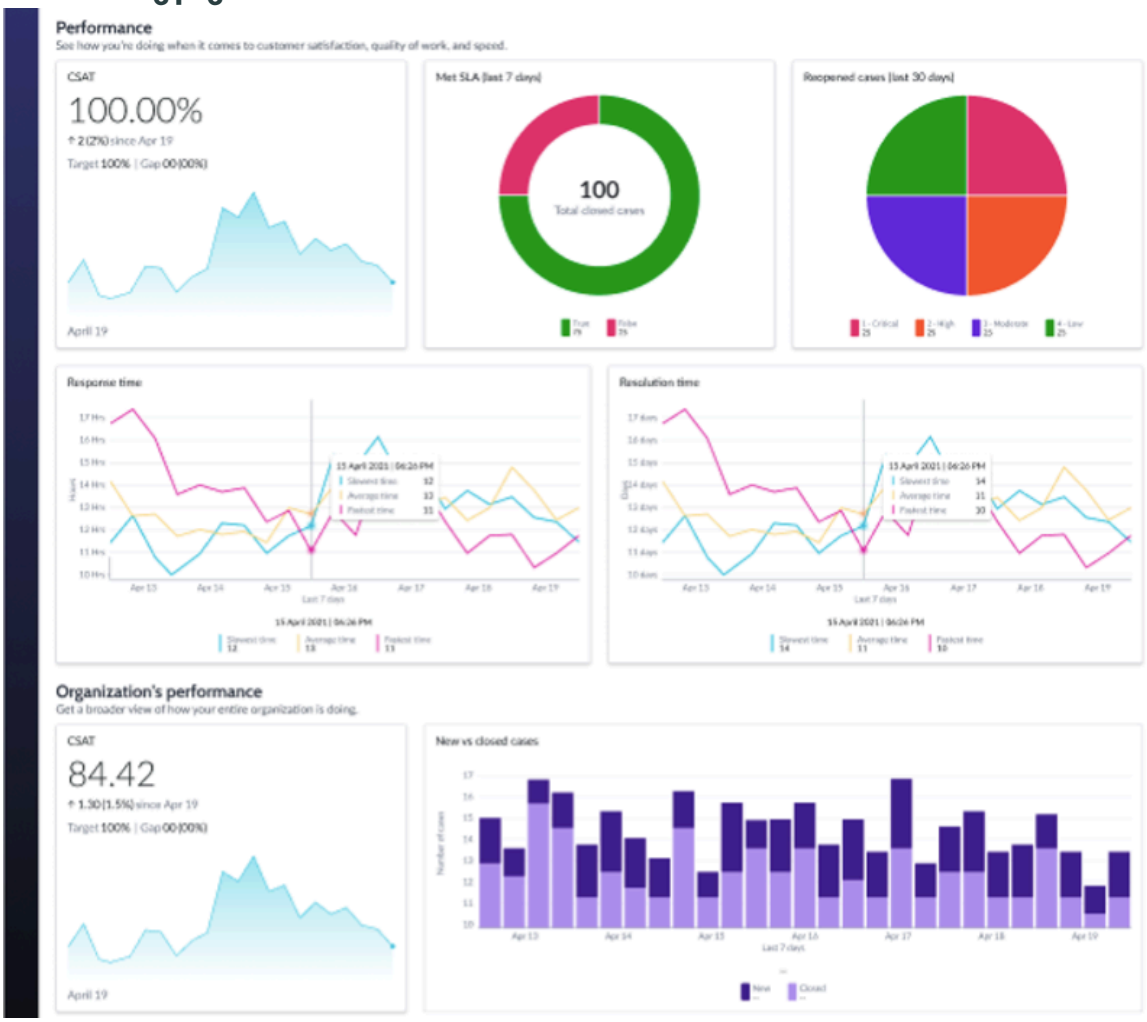
CSM landing page - Performance metrics



CSM Landing Page sections and components

The CSM Landing Page includes different sections and components that display important items, record lists, and performance data.

CSM Landing Page and CSM Landing Page - Premium sections and components

Section	Description
Important Items	This section includes single score cards that display an agent's most important items to work on. • **High priority cases**: Includes P1 cases, escalated cases, and cases that need attention. • **SLA breached or due today** • **Cases not updated in >3d** • **Case tasks** • **Unassigned cases**: Cases that are unassigned and belong to one of the agent's assignment groups. Selecting a score card displays a list of records with the appropriate filter conditions.

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CSM Landing Page and CSM Landing Page - Premium sections and components (continued)

Section	Description
Cases	This section includes two lists of records: • **My active cases** • **My team's cases** Selecting a case number opens a new tab and displays the case record.
Performance	This section includes indicators that track the agent's performance. • **Met SLA (last 7 days)** • **Reopened cases (last 30 days)** The following indicators are available in the Performance section with activation of the Performance Analytics - Content Pack - Customer Service Management - Advanced plugin: • **CSAT**: Customer satisfaction score based on cases assigned to the agent for the last 7 days. • **Response time** • **Resolution time** Select an indicator to display either a filtered list of records or a KPI details page.
Organization's Performance	This section includes indicators that track the organization's performance. • **CSAT**: Customer satisfaction score for the last 7 days. • **New vs closed cases**: Daily aggregation of new and closed cases for the last 7 days. Select an indicator to view a KPI details page. **Note:** This section is available for the CSM Landing Page - Premium, which requires activation of the Performance Analytics - Content Pack - Customer Service Management - Advanced plugin.

Create a landing page for CSM Configurable Workspace

Use UI Builder to create landing pages for your agents. For more information, see the following topics:

- Create a CSM Configurable Workspace landing page
- Creating custom landing pages for workspaces
- Create a custom landing page in UI Builder

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Create multiple landing pages

You can create multiple landing pages. However, only a single landing page is displayed for a user. The landing page that is displayed depends on the following settings:

- The setting of the **Active** field. This field must be set to true for a landing page to be displayed.
- The **Order** of the landing page. Pages with a lower-order value take precedence over pages with a higher-order value. The active page with the lowest order number is displayed.
- If permissions are defined, users can see a landing page if they have the required role or are a member of the required assignment group. Multiple roles and assignment group conditions are treated as OR conditions.

CSM Landing Page - Premium

The CSM Landing Page - Premium provides users with lists of assigned cases and case tasks as well as agent, group, and organization metrics.

Customer service agents and managers can use the CSM Landing Page - Premium to quickly scan and prioritize work, access records, and track performance. Administrators can customize landing pages in UI Builder to meet their unique business needs.

The CSM Landing Page - Premium includes components that display case information, plus visualizations that further break down the component data. For example, the **High priority cases** component includes visualizations for P1 and escalated cases, plus cases that need attention. It also includes additional indicators and visualizations in the **Performance** and **Organization's Performance** sections. Each of the visualizations is connected to a data source.

The CSM Landing Page - Premium is available with the following plugins:

- CSM Configurable Workspace (sn_csm_wrkspc)
- Performance Analytics - Content Pack - Customer Service Management - Advanced (com.snc.pa.customer_service_advanced)

Note:
Upgrade customers who haven't customized the existing CSM Configurable Workspace landing page are automatically upgraded to the landing page available with the Yokohama release. Upgrade customers who have customized the existing CSM Configurable Workspace landing page must manually accept the Yokohama landing page.

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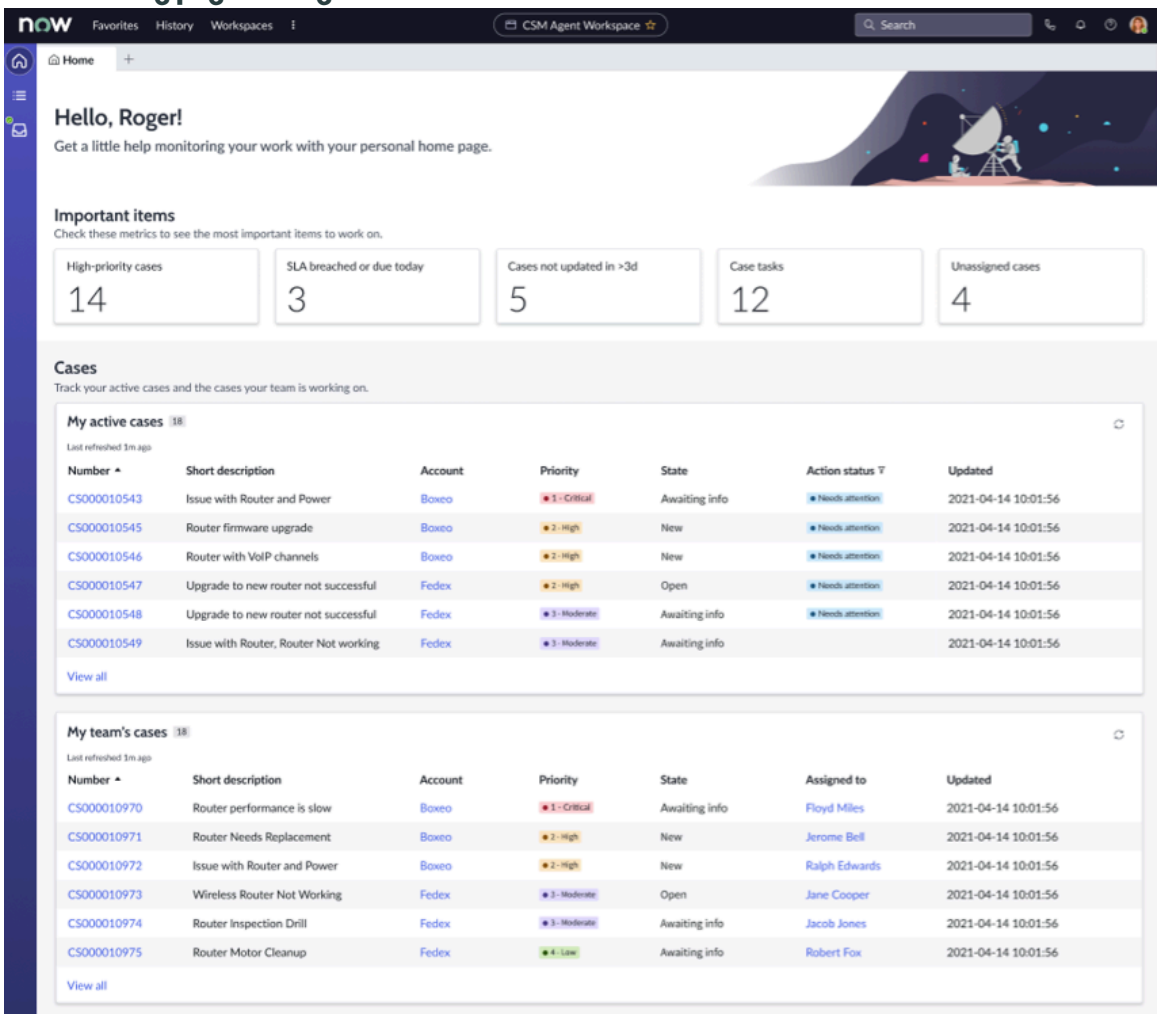
CSM landing page - Assigned cases and case tasks



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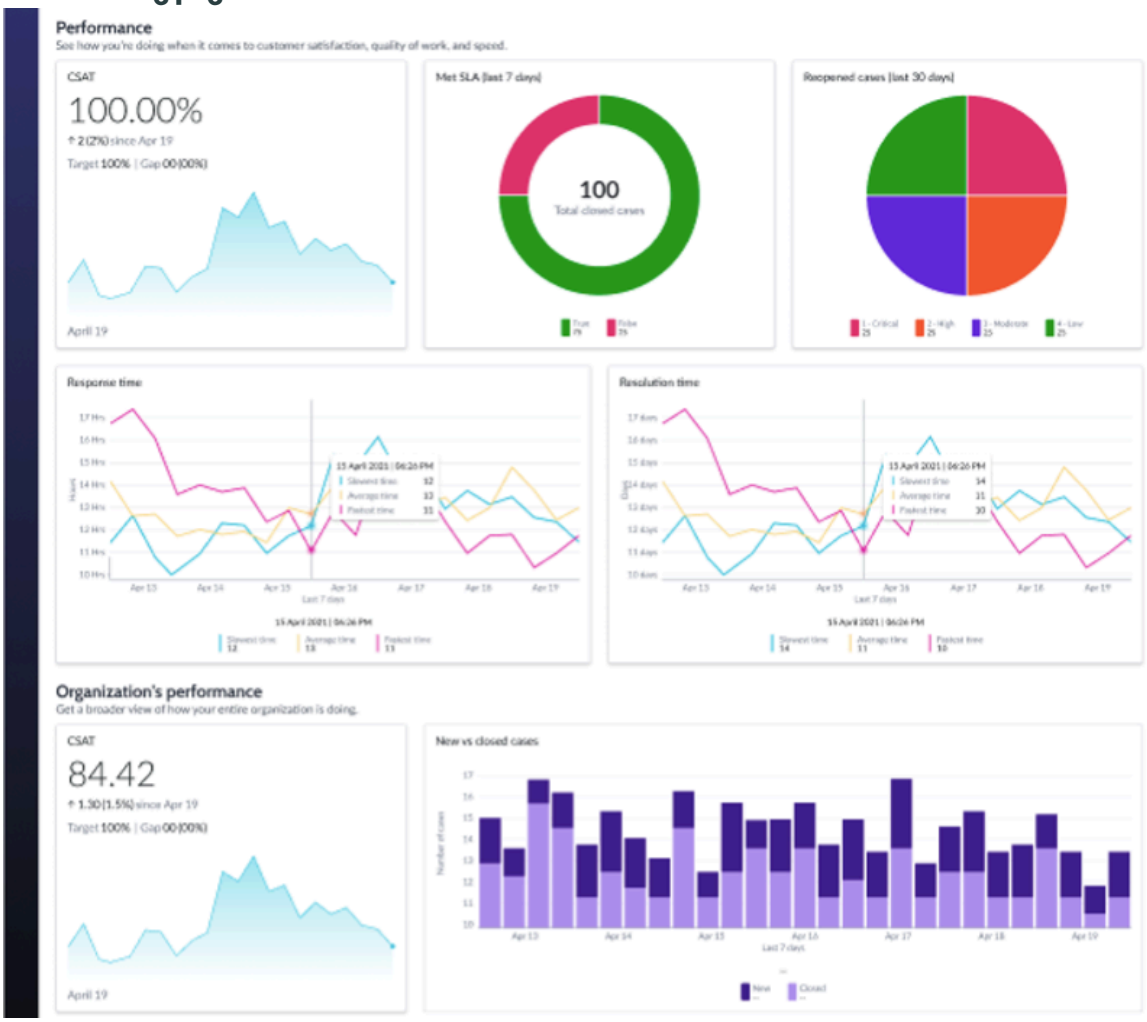
CSM landing page - Performance metrics



CSM Landing Page - Premium sections and components

The CSM Landing Page includes different sections and components that display important items, record lists, and performance data.

CSM Landing Page and CSM Landing Page - Premium sections and components

Section	Description
Important Items	This section includes single score cards that display an agent's most important items to work on. • **High priority cases**: Includes P1 cases, escalated cases, and cases that need attention. • **SLA breached or due today** • **Cases not updated in >3d** • **Case tasks** • **Unassigned cases**: Cases that are unassigned and belong to one of the agent's assignment groups. Selecting a score card displays a list of records with the appropriate filter conditions.

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CSM Landing Page and CSM Landing Page - Premium sections and components (continued)

Section	Description
Cases	This section includes two lists of records: • **My active cases** • **My team's cases** Selecting a case number opens a new tab and displays the case record.
Performance	This section includes indicators that track the agent's performance. • **Met SLA (last 7 days)** • **Reopened cases (last 30 days)** The following indicators are available in the Performance section with activation of the Performance Analytics - Content Pack - Customer Service Management - Advanced plugin: • **CSAT**: Customer satisfaction score based on cases assigned to the agent for the last 7 days. • **Response time** • **Resolution time** Select an indicator to display either a filtered list of records or a KPI details page.
Organization's Performance	This section includes indicators that track the organization's performance. • **CSAT**: Customer satisfaction score for the last 7 days. • **New vs closed cases**: Daily aggregation of new and closed cases for the last 7 days. Select an indicator to view a KPI details page. **Note:** This section is available for the CSM Landing Page - Premium, which requires activation of the Performance Analytics - Content Pack - Customer Service Management - Advanced plugin.

Create a landing page for CSM Configurable Workspace

Use UI Builder to create landing pages for your agents. For more information, see the following topics:

- Create a CSM Configurable Workspace landing page
- Creating custom landing pages for workspaces
- Create a custom landing page in UI Builder

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Create multiple landing pages

You can create multiple landing pages. However, only a single landing page is displayed for a user. The landing page that is displayed for you depends on the following settings:

- The setting of the **Active** field. This field must be set to true for a landing page to be displayed.
- The **Order** of the landing page. Pages with a lower-order value take precedence over pages with a higher-order value.
- If permissions are defined, you can see a landing page if you have the required role or are a member of the required assignment group. Multiple roles and assignment group conditions are treated as OR conditions.

Dashboard landing pages

Enable your users to display, customize, and share dashboards in CSM Configurable Workspace and use these dashboards as landing pages.

Workspace dashboards enable users such as agents and managers to configure and customize their own metrics. These users can switch between available dashboards and modify dashboard lists and metrics to track important information. They can also share dashboards with coworkers and across teams.

To display workspace dashboards, system administrators activate the CSM Dashboards landing page variant and configure user privileges. When configured, users included in the page audience see the Dashboard Overview landing page in CSM Configurable Workspace and the default dashboards included with that page.

The dashboards are represented by tiles on the Dashboard Overview landing page. The individual tiles show the title, the creator, whether the dashboard is certified, and an indication that the logged in user has bookmarked the dashboard.

Benefits of dashboard landing pages

Using a dashboard as a landing page gives your users more flexibility. Being able to easily customize a dashboard makes the page much more usable. Users can create their own lists and metrics to display the information they need and then share these dashboards with other users. As an example, teams can share a single dashboard or new agents can modify a shared dashboard to create their own. It is much faster to create dashboards because they do not require configuration by a system administrator.

Application information

The **CSM Dashboards** landing page variant is included with the CSM and FSM Configurable Workspace Foundation plugin (com.snc.uib.cwf_workspace).

The CSM Configurable Workspace application, which includes the CSM and FSM Configurable Workspace plugin, is available from the ServiceNow® Store.

The default dashboards available with this landing page variant are available depending on user role. Some of these dashboards require additional plugins to see all of the dashboard information. These plugins include:

- Performance Analytics - Content Pack - Customer Service (com.snc.pa.customer_service)
- Performance Analytics – Content Pack – Customer Service Management – Advanced (com.snc.pa.customer_service_advanced)
- Performance Analytics Premium for Customer Service (com.snc.pa.premium.cs)
- Performance Analytics - Content Pack – Advanced Work Assignment (com.snc.pa.awa)

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Request apps on the Store

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

Activating the CSM Dashboards landing page variant

The **CSM Dashboards** landing page variant is an optional page variant for the **CSM/FSM Configurable Workspace experience**. By default, this page variant is marked as inactive and has an order value of 0. When activated and set to the lowest order number, the system uses the **CSM Dashboards** landing page in place of the default CSM Landing Page for the users included in the page audience.

Note:
The default landing page, Dashboard Overview, and the default dashboards included with that page are available in read-only mode and are provided as examples. It is recommended that you create and customize duplicates of the landing page and dashboards.

For more information about activating a page variant and setting the order, see Set record page order.

User roles for the Dashboard Overview landing page

By default, the Dashboard Overview landing page is available to users with the following roles:

- admin
- sn_customerservice_agent
- sn_customerservice.consumer_agent
- sn_customerservice_manager

Note:
Users with other roles, such as location agents or relationship agents, continue to see the **CSM Landing Page**.

The system administrator can change these default roles by configuring the page audience. For more information, see the following topics:

- Learn about audiences
- Add an audience to your UI Builder page

Roles determine view access for the dashboards available with the Dashboard Overview landing page. For details, see Default dashboards.

The service management agent role (sn_esm_agent) contains the data visualizations creator role (viz_creator), which is a role associated with the Visualization Designer and Visualization Library. Users with the viz_creator role can create visualizations. The customer service agent (sn_customerservice_agent) and consumer service agent (sn_customerservice.consumer_agent) roles contain the sn_esm_agent role. For more information, see Data visualizations in Platform Analytics.

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Dashboard Overview landing page default dashboards

Four dashboards are available with the Dashboard Overview landing page. These dashboards are available in read-only mode for all users, including the admin role. Users can duplicate these dashboards and make the desired changes to the duplicate dashboards.

Note:
These dashboards are also available from Platform Analytics experience.

The Dashboard Overview landing page includes the following dashboards for agents.

- Customer Service Agent
- Customer Service Agent – Advanced

The Dashboard Overview landing page includes the following dashboards for managers and admins.

- Customer Service Agent
- Customer Service Agent – Advanced
- Customer Service Manager
- Customer Service Manager – Advanced

CSM Configurable Workspace landing page dashboards

Landing page	Details
Customer Service Agent	Available with the CSM Configurable Workspace (com.snc.uib.csm_agent_workspace) plugin. Out of box, the Customer Service Agent dashboard includes the widgets on the **My Work** tab. **Note:** The tab is not visible because it is the only tab on the dashboard. Activating the Performance Analytics - Content Pack - Customer Service (com.snc.pa.customer_service) plugin provides the complete Customer Service Agent dashboard with all tabs.
Customer Service Agent - Advanced	Available with the following plugins: • CSM Configurable Workspace (com.snc.uib.csm_agent_workspace) • Performance Analytics – Content Pack – Customer Service Management – Advanced (com.snc.pa.customer_service_advanced) Activating the Performance Analytics - Content Pack – Advanced Work Assignment (com.snc.pa.awa) plugin adds two additional widgets to the Organizational Trends tab:

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CSM Configurable Workspace landing page dashboards (continued)

Landing page	Details
	• My Cases with Problems • My KBs Created
Customer Service Manager	Available with the following plugins: • CSM Configurable Workspace (com.snc.uib.csm_agent_workspace) • Performance Analytics - Content Pack - Customer Service (com.snc.pa.customer_service) Activating the Performance Analytics - Content Pack - Customer Service (com.snc.pa.customer_service) plugin provides the complete Customer Service Manager dashboard with all tabs.
Customer Service Manager - Advanced	Available with the following plugins: • CSM Configurable Workspace (com.snc.uib.csm_agent_workspace) • Performance Analytics – Content Pack – Customer Service Management – Advanced (com.snc.pa.customer_service_advanced) Activating the Performance Analytics - Content Pack – Advanced Work Assignment (com.snc.pa.awa) plugin adds the Work Assignment Analytics tab to the Customer Service Manager - Advanced dashboard.

Certifying a dashboard

Users with the admin role can certify a dashboard to indicate that it is company-approved and recommended for use. The default dashboards available from the Dashboard Overview landing page are certified and admins cannot change this setting. Admins can only certify new dashboards. For more information, see Certify a Platform Analytics dashboard.

Working with dashboards

Agents can create their own dashboards and share those dashboards with other agents or assignment groups. For example, agents can create dashboards with metrics and lists that support specific assignments, such as a temporary weekend assignment.

From the Dashboard Overview landing page, managers and agents can do the following:

- View the default dashboards available for their role.
- Filter the available dashboards.
- Select a dashboard tile to display the dashboard in a new tab. If more than one dashboard is available, the user can switch between the available dashboards by making a selection from the dashboard picker.
- Duplicate and customize the default dashboards.
- View dashboard details such as the dashboard name, description, and visibility.

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- Edit dashboards using a configuration panel.
- Share dashboards with other users or groups and grant edit or view-only rights.
- Create new dashboards.
- Create and share visualization elements from the Platform Analytics Workspace.

See the task descriptions in the following table for more information.

Dashboard landing page user tasks

Task	Description
View the default dashboards available for your role	1. Select **Workspaces** > **CSM/FSM Configurable Workspace**. The Dashboard Overview landing page displays the available dashboards. 2. Select a dashboard tile to display the dashboard in a new tab.
View dashboard details	1. Select a dashboard. 2. Select the info icon ( ) to open the Details panel.
Filter dashboards	Several filter options are available on the Dashboard Overview landing page. Users can filter the available dashboards in the following ways: • By name or owner (in the search bar) • Recent: shows recently created dashboards • Bookmarked: shows only your bookmarked dashboards. • Certified: shows only the dashboards that have been certified by an administrator. • Created by me: shows only the dashboards that you have created. • Shared with me: shows only the dashboards that have been shared with you. • All: shows all dashboards that you have access to.
Duplicate a dashboard	1. Select the More actions menu ( ). 2. Select **Duplicate**. 3. In the Duplicating dashboard pop-up window, enter a **New name** and a **Description**. 4. Select **Duplicate** on the pop-up window. 5. To access the duplicated dashboard:

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Dashboard landing page user tasks (continued)

Task	Description
	○ Select **Open it** in the information message. ○ Select the dashboard tile on the Dashboard Overview landing page. For more information, see Duplicate a Platform Analytics dashboard.
Edit a dashboard	**1.** Select **Edit**. **2.** Select the desired dashboard tab. **3.** Edit an existing element or add a new element. For more information about these tasks, see Edit Platform Analytics dashboards.
Share a dashboard	**1.** Select the More actions menu ( ). **2.** Select **Share**. **3.** In the Share Dashboard pop-up window, add users, groups, or roles in the **Grant access to** field. **4.** If desired, enable the check box that enables permissions for the dashboard. **5.** Select either **Add as viewer** or **Add as editor**. **6.** The selected users, groups, or roles are added to the Manage Access section. From here, you can change the permissions. **7.** Click **Confirm**. For more information, see Share a Platform Analytics dashboard.
Create a dashboard	**1.** From the Dashboard Overview landing page, select **Create new dashboard**. **2.** From the New dashboard pop-up window, select **In-line editor**. **3.** Provide a **Name** and a **Description** and select **Create new dashboard**. The new dashboard opens in the editing mode. **4.** Add new elements to the dashboard. For more information about this step, see see Create a dashboard with the in-line editor. When you create a dashboard with the in-line editor, several elements are available to help you organize and populate the information on your dashboard. For more information, see Exploring Platform Analytics dashboards.

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Dashboard landing page user tasks (continued)

Task	Description
Print a dashboard	**1.** Select the More actions menu ( ). **2.** Select **Printer friendly**. For more information, see Print a Platform Analytics dashboard.
Bookmark a dashboard	**1.** Select the More actions menu ( ). **2.** Select **Add to bookmarks**. For more information, see Bookmark a Platform Analytics dashboard.

CSM Configurable Workspace form headers

Form headers in CSM Configurable Workspace provide a quick glance of case, account, or contact information.

Form headers include a primary value and several secondary values. You can configure the information included in the form header for the Case, Account, and Contact forms.

Form header values

Form	Primary Value	Secondary Values
Case	Short description	• Account and contact (B2B) • Consumer (B2C) • Priority • State
Account	Account	Primary contact
Contact	Contact	Account

Displaying form header secondary values

You can configure the form header to display secondary values either below the primary value or in the Contextual side panel. The *record_secondary_values_location* property controls this setting.

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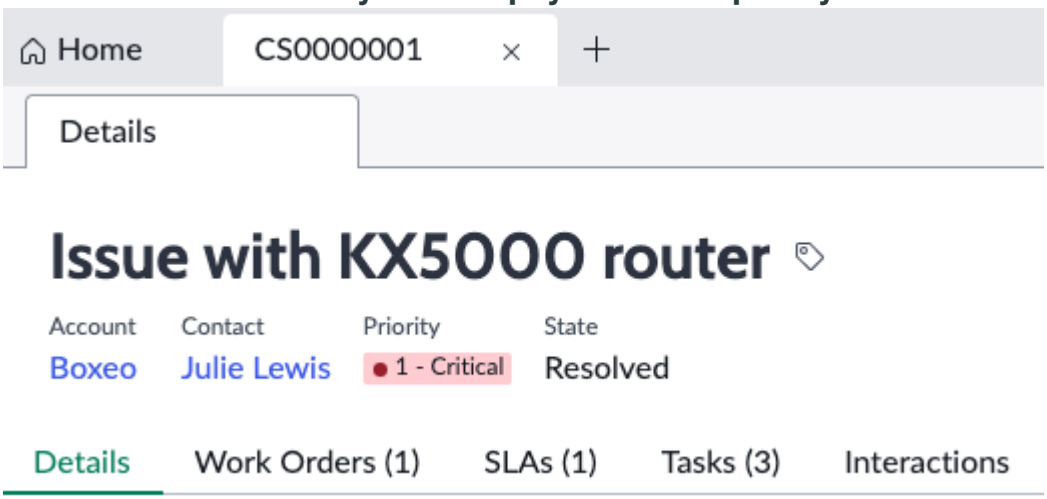
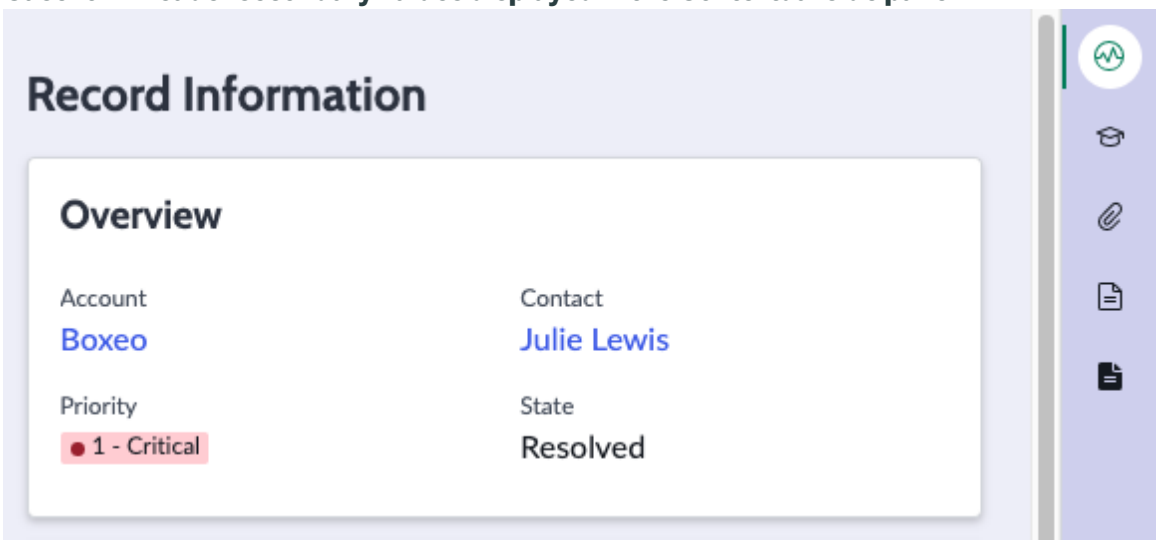
Case form header secondary values displayed below the primary value



Case form header secondary values displayed in the Contextual side panel



See the following topics for more information about configuring form headers in CSM Configurable Workspace:

- Set up a form header in CSM Configurable Workspace
- Display the form ribbon and form header secondary values in the Contextual side panel

Note:
One form header configuration, **CSM/FSM Configurable Workspace Header Config**, is included with CSM Configurable Workspace.

Form header components

For CSM Configurable Workspace, the form header is made up of individual components that can be configured with UI Builder.

Individual components provide customers with flexible and granular configuration options. Customers can control the placement, size and spacing of these components, giving them the ability to show additional information that agents may need.

The Data Value Block component is used to display secondary values in the form header and the Contextual side panel. .

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CSM Configurable Workspace form ribbon and components

The form ribbon provides includes components that display relevant information about a case and provide agents with a quick overview of the case details. These components can include a contact or consumer summary, a timeline, and SLA details.

In addition to viewing case information, agents can use links in the ribbon components to place phone calls or create email messages. Agents can also show or hide the ribbon as needed by clicking a button at the top of the ribbon.

Customer Service Management ribbon components

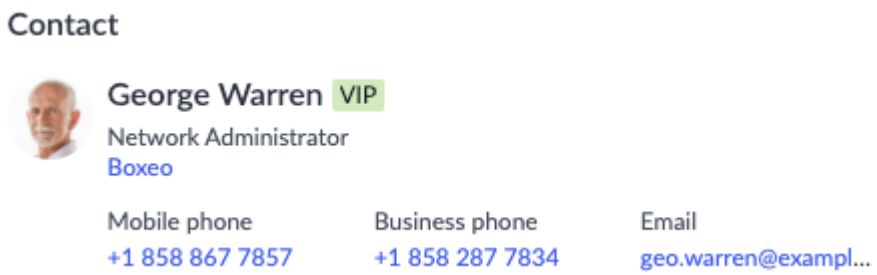
For Customer Service Management, you can configure the ribbon for the Case form to include one or more of the available ribbon components:

- Customer 360
- Timeline
- Active SLAs
- Time to resolve component

Customer 360 ribbon component

The Customer 360 component displays customer information such as the contact or consumer name, email address, and phone numbers.

Customer 360 ribbon component



You can configure the Customer 360 component to display different fields, such as the fields described in the following table.

Field	Description
Header	The header includes customer information. • For B2B customers: Displays either the **Primary Contact** or **Contact**. • For B2C customers: Displays the **Consumer**. • For internal contacts with the proxy contact role (sn_customerservice.proxy_contact): Displays the **Internal contact**. **Note:** Requires the CSM Extension for Proxy Contacts (com.snc.csm_proxy_contacts) plugin.

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Field	Description
Avatar	A graphic representation of the customer's identity, such as an image or icon.
Name	The customer's name.
Title	The customer's title.
Account	For B2B customers, the account associated with the contact.
Phone numbers	• For contacts: **Mobile phone** and **Business phone** • For consumers: **Mobile phone** and **Home phone**
Email address	The customer's email address.

The Customer 360 component supports dot walking on selected reference tables. You can display fields from these tables:

- User [sys_user]
- Contact [customer_contact]
- Consumer [csm_consumer]

If you configure the Customer 360 component to display information from a dot-walked field, the label for that field shows the `Column` name instead of the `Table.Column` name.

Note:
For B2B customers, the Customer 360 component can also include colored tags that indicate Very Important Person (VIP) accounts and escalated accounts.

From the Customer 360 component, agents can perform the following actions.

Action	Description
Email a contact or consumer	Agents click the address in the **Email** field to send an email to the contact or consumer. This action opens a new email in the email editor with the following fields auto-populated: • **To**: the contact or consumer email address • **Subject**: the case number and short description
Call a contact or consumer	If phone integration is enabled, agents click a number in one of the phone number fields to call the contact or consumer. The OpenFrame window displays information about the contact or consumer name and the account.
View the account record	Agents click the **Account** link to open the account record.

Timeline ribbon component

The timeline component displays a chronological summary of case activities, including case state changes and interactions between the agent and the requester (typically the customer). It also shows how much time that the fulfiller and requester spent on the case.

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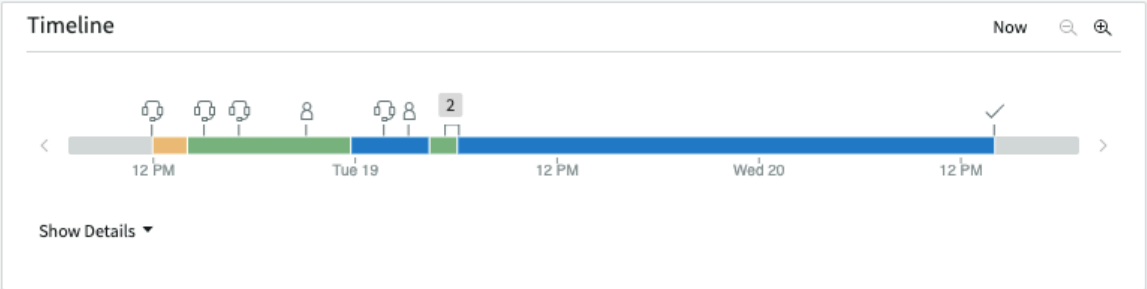
Note:
The workspace administrator can select the agent role when configuring the timeline component attributes.

Timeline ribbon component



The timeline uses icons to display events and colors to show ranges of time, such as when the case is with the agent or the customer. Agents can point to event icons in the timeline to display tooltips with additional information.

Note:
The timeline component uses the resolution shaper configuration for the selected entity table, for example, the Case table.

The timeline includes the following features:

Timeline features

Timeline feature	Description
Global start and end dates	The global start date is the date that the case was created. The global end date is the date that the case was closed.
Start and end dates	The start and end dates that identify a specific window of time on the timeline. The default window is one week. • The default end date is the current date. • The default start date is the current date minus 7 days.
Header	A configurable title for the timeline. With the system administrator role, you can add a title in the **Name** field on the Ribbon Setting form.
Legend	Click **Show Details** to display event and range summary information.

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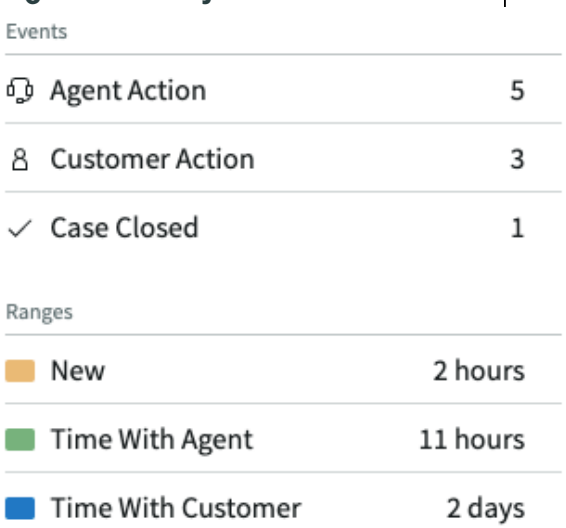
Timeline features (continued)

Timeline feature	Description
	Legend summary information 
Events	Events are represented on the timeline using icons. Each type of event has a corresponding unique icon. The time that an event occurred is also captured so that events are displayed on the timeline in chronological order.
Grouped events	Events that occur close together can be grouped and represented using a group icon. When events are grouped, the timeline displays a badge icon with the number of events in the group.
Event summaries	Event summaries appear in the timeline legend. Each summary lists the event and the number of times it occurred. **Note:** An event summary includes occurrences of the event over the life of the object visualized on the timeline.
Time ranges	Time ranges are represented on the timeline using colors. Each range has a corresponding unique color and a start and end time. The following default ranges include: • Green: with the agent • Blue: with the customer
Time range summaries	Time range summaries appear in the timeline legend. Each summary lists the range, the corresponding color, and the total duration.

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Timeline features (continued)

Timeline feature	Description
	Note: A range summary includes occurrences of the range over the life of the object visualized on the timeline.
Tooltips	Point to event icons to display additional information.
Zoom	Zoom in on the timeline to see more details in a smaller time window or zoom out to see more events in a larger time window. • Click the zoom in or zoom out icons on the timeline. • Use the zoom in and zoom out features on the keyboard (**Ctrl** + **+** and **Ctrl** + **-**). • Use the zoom in and zoom out features on the cursor.
Pan	Pan left and right to view newer or older events. • Pan left in the timeline to view older events by clicking the left caret icon (**<**). Panning to the left stops when the timeline reaches the specified global start date. • Pan right in the timeline to view newer events by clicking the right caret icon (**>**). Panning to the right stops when the timeline reaches the specified global end date.
Reset the timeline	Click **Now** to reset the timeline to the default view after panning or zooming. The timeline resets using the time that the button was clicked as the end date and time.
Messages	The timeline displays messages for the following events: • There is no data to be displayed. • The timeline experiences a loading error.

Active SLA component

The Active SLA component displays active SLAs for the case, including time remaining, the SLA state, and any breaches. If a case has multiple SLAs, the SLA with the most imminent deadline is shown first. Pointing to the SLA component displays left and right navigation arrows that agents can use to view the other SLAs.

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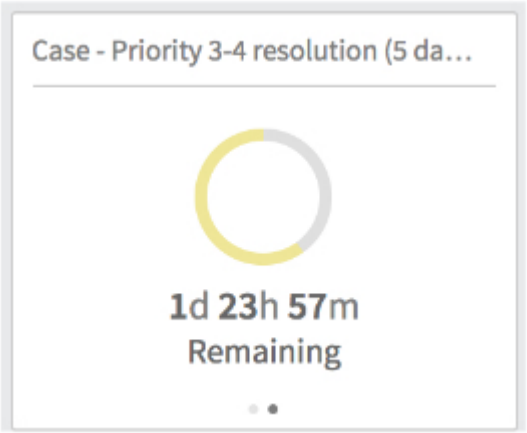
SLA ribbon component



Color coding within the component indicates the time remaining for the SLA:

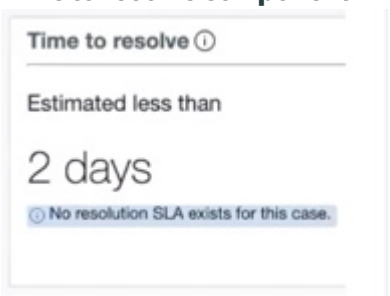
- Green: 0–50%
- Yellow: 50–75%
- Orange: 75–99%
- Red: 100% or breached

Time to resolve component

The time to resolve component displays the estimated time required for an agent to resolve the case.

Note:
The time to resolve component requires the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Estimated time to resolve a case.

Time to resolve component



In this image, the estimated time that the agent will need to resolve the opened case is 0 to 2 days. Hence, the upper bound value is displayed. The estimated time is calculated from the time the case was created. If the range for example, is between 2 to 4 days, both the lower and upper bound values are displayed.

The **Time to resolve** component also displays the prediction for SLA breach if the case is attached to an SLA.

Following are a list of SLA messages displayed and the action required when they appear.

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SLA messages	Task
No resolution SLA exists for this case	Set the value in the **Target** field to **Resolution** in the **SLA Definition** form.
Repair resolution SLA to add breach time	Click **Repair** on the Task SLA form.
Highly likely to breach resolution SLA	None
Highly unlikely to breach resolution SLA	None
Likely to breach resolution SLA	None
Unlikely to breach resolution SLA	None

Configuring ribbon components

You can configure ribbon components as follows:

- For CSM Agent Workspace, you can configure the ribbon layout if you have the workspace administrator role (workspace_admin). This includes the components to display in the ribbon, the order in which the components appear, and the component width. You can also configure display attributes for some of the components. For more information about ribbon configuration, see Set up ribbons in workspace.

  For some of the components, you can also configure attributes, such as the fields to include in the Customer 360 component.

- For CSM Configurable Workspace, you can create a ribbon setting and add that setting to a ribbon configuration. For more information, see Set up a ribbon configuration in CSM Configurable Workspace.

  Note:
  One ribbon configuration, **CSM/FSM Configurable Workspace Ribbon Config**, is included with CSM Configurable Workspace.

You can also display the form ribbon in the Contextual side panel. For more information, see Display the form ribbon and form header secondary values in the Contextual side panel.

Ribbon configurations in CSM workspaces support domain separation.

CSM Configurable Workspace form features

CSM Configurable Workspace form features include account hierarchy, special handling notes, and agent actions.

Account hierarchy

From the Account form, customer service agents can click the open hierarchy icon ( ) in the **Name** field to see the parent-child account relationships in the Account Hierarchy pop-up window. The account hierarchy is available for accounts that have a parent or child account.

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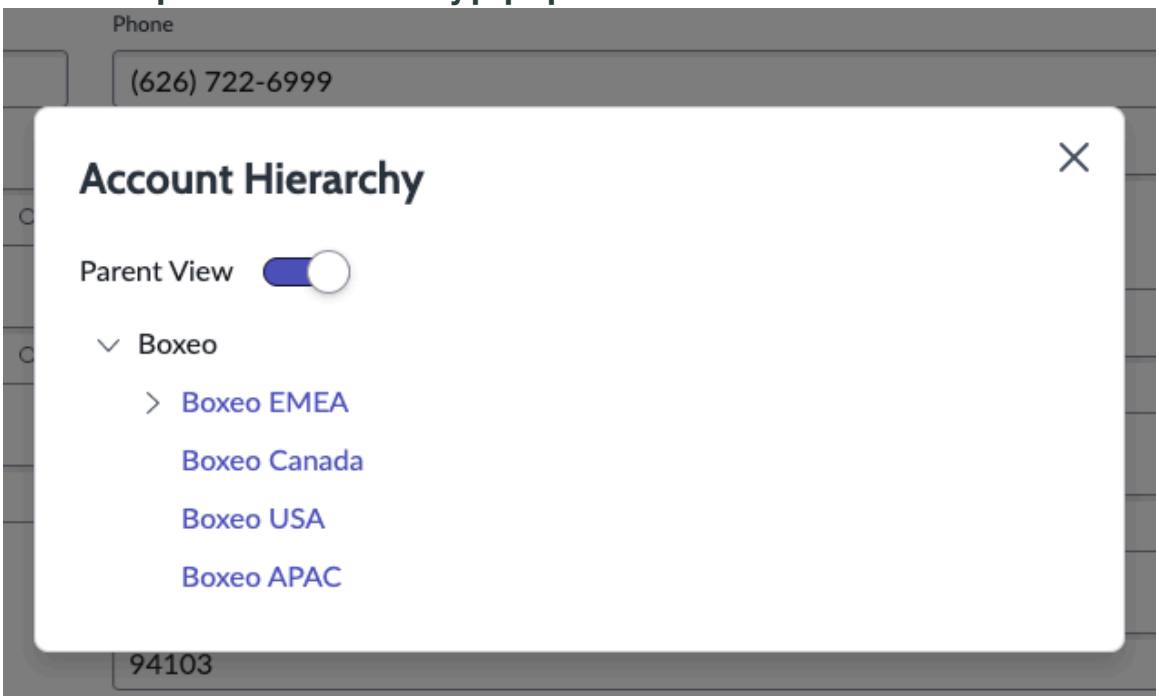
CSM Workspace Account Hierarchy pop-up window



The account hierarchy uses a tree structure to show the parent, child, and sibling accounts. The parent view displays the current account, the parent account (if applicable), and any child or sibling accounts. The full view displays the entire structure of the organization from the root account. The current account is highlighted in the account structure.

Customer service agents can:

- Expand and collapse the tree structure.
- Switch between the parent view and the full view of the account hierarchy.
- Click an account to open the Account form in a sub tab.

For information about creating an account hierarchy, see Account hierarchy.

Special handling notes

Special handling notes bring important information about individual records to the attention of the customer service agent. If special handling notes are available for a record, these notes are displayed in a pop-up window when the record is opened in a CSM workspace. Notes can also be displayed in an embedded list or a related list on a record form. Notes are ordered by priority in the pop-up window and in lists.

Agents can see the priority, short description, and message for each note. A note can be assigned one of the following priorities, which also have associated colors.

- Priority 1 — red
- Priority 2 — orange
- Priority 3 — purple
- Priority 4 — gray

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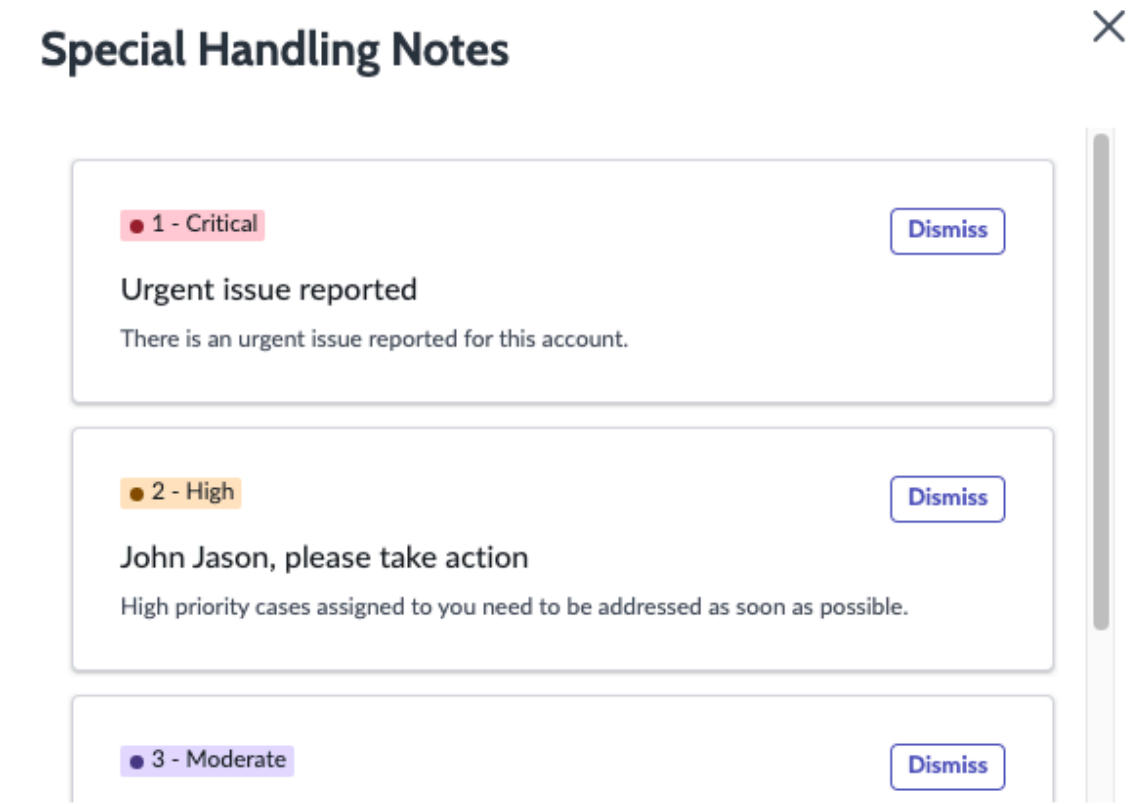
Special handling notes pop-up window



Agents can:

- Dismiss individual notes. When all notes are dismissed, the pop-up window closes.
- Close the window.

In the Special Handling Notes module on the platform interface:

- Users with the sn_shn.admin role can configure special handling notes and specify properties.
- Users with the sn_shn.admin or sn_customerservice_manager roles can create special handling notes.

For more information about configuring the special handling notes feature, see Special handling notes overview.

Agent actions

Actions available to customer service agents appear in the form header as buttons or menu items.

- For CSM Agent Workspace, actions must be enabled for each form by the workspace administrator. For more information, see Set up custom UI actions in legacy workspace.
- For CSM Configurable Workspace, you can link UI actions to form actions. For more information, see Set up a form action in CSM Configurable Workspace.

The **Create Knowledge** action requires the following setup:

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- Activate the Knowledge Management Advanced Installer plugin (com.snc.knowledge_advanced.installer).
- Set the **sn_customerservice.enable_knowledge_kcs** property to true.
- Set the KCS Article template to true (navigate to **Knowledge** > **Administration** > **Article Templates**).

Agent assist

Agent assist is available on the Interaction form in CSM Configurable Workspace. Users with the customer service agent role (sn_customerservice_agent) can use Agent assist to search for information from an interaction. By default, the available search sources include Knowledge articles, Service Catalog, and ServiceNow Community blogs and posts. For more information, see Set up Agent assist.

For more information on how to enable Recommended Actions - AI search and disable Agent Assist, see Enable AI search in Recommended Actions.

CSM Configurable Workspace chat session tabs

Use visual indicators on chat session tabs, such as colors and icons, to alert agents to unread chat messages and SLA threshold timers.

The chat session tabs feature helps agents to manage multiple interactions efficiently. Agents can use visual indicators to reduce the risk of threshold timer breaches, improve chat prioritization, and optimize response times. This feature enables agents to multitask effectively while maintaining service level commitments.

The chat session tabs feature introduces a color-coded system for chat session tabs in CSM Configurable Workspace based on configured Service Level Agreement (SLA) thresholds. Additional visual indicators alert agents about unread messages, chat status, and unsaved changes. These visual cues help agents to prioritize their interactions by tracking chat duration and alerting them when conversations require immediate attention.

Benefits

The chat session tabs feature provides customers with the following benefits.

- Improved prioritization: Agents can visually track the SLA status of each chat by glancing at the tab color and use that information to prioritize customer responses.
- Agent multitasking: Tab color changes and real time notifications help agents to handle multiple interactions simultaneously, minimizing the risk of missing crucial chats.
- Agent productivity: The system helps agents respond more efficiently by highlighting conversations based on urgency, improving customer engagement and satisfaction.

Key features

Chat session tabs provide the following key features.

Chat session tab features

Feature	Description
Real-time duration tracking for chat sessions	This feature actively tracks the duration of a chat and alerts the agent when predefined SLA thresholds are reached.

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Chat session tab features (continued)

Feature	Description
	• The timer begins when a customer sends a message to an agent and the tab for that chat interaction is inactive. • The inactive tab cycles through different colors to alert the agent to the unread message and the approaching SLA thresholds. • The timer resets once the agent engages with the tab.
SLA threshold timers	System administrators can configure a minimum of one and a maximum of three levels of SLA threshold timers. When the admin selects a workspace and enables the **Session Tab Enabled** button, the system adds the first level automatically. Then they can add one or two additional levels if desired. For each level, the admin can select a timer value and tab color.
Tab colors	Tab colors indicate the status of a chat with one or more unread messages. Inactive tabs with unread messages change color to highlight critical wait times. System administrators can select a different color for each configured SLA threshold level.
Unread message counters	Inactive tabs display a counter that shows the number of unread chat messages. The counter uses a background color that is a darker shade of the configured tab color.
Tab messages	Messages on the chat session tabs appear below the customer name and notify the agent of the following chat conditions: • Chat is in wrap-up • Chat has ended Agents see the appropriate message on the tab depending on the condition of the chat.
Unsaved changes indicator	A gray circle on a chat session tab indicates that there are unsaved changes on the tab. The circle disappears once the changes are saved.

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SLA threshold timers

System administrators can configure up to three levels of SLA threshold timers for inactive chat session tabs. For each level, admins can set a timer and select a unique tab color.

These timers alert agents to unread messages in inactive chats by changing the tab color. If an agent leaves a customer's chat unanswered beyond the length of time defined in these threshold timers, the system changes the tab color.

Chat session tab SLA threshold levels

Level	Description
Level 1: warning	This timer alerts the agent to an SLA breach by changing the color of an inactive tab when it reaches the selected duration. Default setting: 30 seconds after the first new message is received.
Level 2: critical	This timer alerts the agent to a critical SLA breach by changing the color of an inactive tab when it reaches the selected duration. The default setting is 1 minute after the first new message is received. **Note:** The length of time for the Level 2 timer must be greater than the Level 1 timer.
Level 3: severe	This timer alerts the agent to a severe SLA breach by changing the color of an inactive tab when it reaches the selected duration. The default setting is 2 minutes after the first new message is received. **Note:** The length of time for the Level 3 timer must be greater than the Level 2 timer.

For more information, see Configure chat session tabs.

Tab colors

The chat session tabs feature uses tab background colors to provide information at a glance. Colors indicate tab status such as the active tab and inactive tabs that have one or more unread messages.

- **Active tab**: A white background indicates the active tab. This is the tab where the agent is currently working.
- **Inactive tabs**: A colored background indicates an inactive tab that has one or more unread messages. Tabs transition to different colors to highlight chats that have reached the configured SLA thresholds.

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System administrators can configure up to three SLA threshold levels for chat session tabs. For each level, the admin can set a timer for the threshold level and select a background tab color. Agents see different colors in the chat session tabs based on the threshold timer value.

The background tab color changes when an inactive tab with unread messages reaches the first SLA threshold level. The tab maintains the current color until the timer reaches the next configured SLA threshold level.

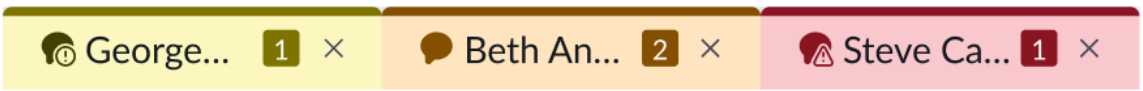
For more information, see Configure chat session tabs.

Unread message counters

Each inactive tab includes a counter that displays the number of unread chat messages.

The counter uses a background color that is a darker shade of the configured tab color.

Chat session tab unread message counters



When a chat message is received, the counter updates to display the total number of unread messages. After selecting the tab, an agent can see the unread messages in the chat window.

Selecting an inactive tab clears the tab color and resets the unread messages counter. The threshold timer and counter restart when the agent navigates away from the tab.

When a customer ends a conversation or a chat session times out, the tab color changes to blue and the unread messages counter disappears.

Viewing unread messages

When an agent selects an inactive tab and returns to a chat conversation, they can see the unread messages in the chat window. This window uses a separator between the older messages and the unread messages and displays the time when the first unread message was sent. This separator appears if there is a time difference greater than 30 seconds between the first new message and the last previous message.

Maximum number of tabs

An agent can have a maximum of 10 tabs open at one time. If an agent attempts to open additional tabs, the system displays a message that advises to close one or more tabs before opening a new tab.

Transferring chats

There are two ways to transfer a chat from one agent to another: manual transfer and automatic transfer.

Chat session tabs for transferred chats

Transfer type	Description
Manual transfer	When an agent manually transfers a chat to another agent and the new agent accepts the chat:

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Chat session tabs for transferred chats (continued)

Transfer type	Description
	• The unread messages counter is not displayed on the chat session tab. • The separator is not displayed between new and older messages. The interaction is treated as new for the receiving agent. • The new agent experiences the tab color changes as configured by the admin when new messages arrive from the customer. • The new agent sees the unread messages counter update when new messages arrive.
Automatic transfer	When a chat is automatically transferred to another agent or to a queue: • The unread messages counter is not displayed on the chat session tab. All messages in the chat are in an unread state for the new agent. • The separator is not displayed between new and older messages. The interaction is treated as new for the receiving agent. • The new agent experiences the tab color changes as configured by the admin when new messages arrive from the customer. • The new agent sees the unread messages counter update when new messages arrive.

If a chat is transferred to a queue, SLA threshold timers and tab colors are applicable to the next agent who picks up the case.

When an agent seeks help from a colleague or manager using the Agent Whisper feature, the SLA threshold timers and tab behavior are applicable only for the owner agent and not for anyone else participating in the interaction.

Configuring the chat session tabs feature

Users with the system administrator role can enable the chat sessions tab feature and configure SLA threshold timers for chat sessions from the Conversational Interfaces (CI) Admin console.

When this feature is enabled, chat session tabs display colors to indicate the chat status. These colors are determined by SLA threshold timers that alert agents to impending SLA breaches.

For more information, see Configure chat session tabs.

Configure chat session tabs

Configure settings such as duration and color for the chat SLA threshold timers for a selected workspace in the Conversational interfaces (CI) Admin Console. These timers alert agents to unread messages in inactive chats.

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Before you begin
Role required: admin

About this task
Enable the chat session tabs feature and select the workspace that the feature applies to.

You can configure a minimum of one and a maximum of three chat SLA threshold timers for a workspace. These timers alert agents to unread messages by changing the tab colors of the inactive chats.

Procedure
1. Navigate to **All** > **Conversational Interfaces** > **Settings**.
   This displays the CI Admin console with the Settings tab selected.
2. Select **Agent Chat** on the left side of the CI Admin console.
   This displays the Agent Chat settings screen.
3. In the Session Tab Settings section, enable the **Activate** button in the upper right corner and select **Save**.
   This is a global switch that enables the feature for an instance.
4. Select **CSM/FSM Configurable Workspace** in the **Select a workspace for tab settings** field.
   This is the workspace for which you want to enable the chat session tabs feature.
5. Enable the **Session Tab Enabled** button and select **Save**.

   This enables the chat session tabs feature for the selected workspace and adds the Level 1 timer automatically.

   When enabled, inactive tab colors change color to alert agents to unread messages. You can configure a minimum of one and a maximum of three SLA threshold timers that alert agents to impending SLA breaches.
6. Configure up to three SLA threshold breach warnings.

   a. Select the length of the timer for the **SLA breach warning (Level 1)**.
   This timer alerts the agent to an SLA breach by changing the color of an inactive tab when it reaches the selected duration. The default setting is 30 seconds after the first new message is received.

   b. To configure a second SLA breach warning, select **Add Level**.

   c. Select the length of the timer for the **SLA breach warning (Level 2)**.
   This timer alerts the agent to a critical SLA breach by changing the color of an inactive tab when it reaches the selected duration. The default setting is 1 minute after the first new message is received.

   Note:
   The length of time for the Level 2 timer must be greater than the Level 1 timer.

   d. To configure a third SLA breach warning, select **Add Level**.

   e. Select the length of the timer for the **SLA breach warning (Level 3)**.

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This timer alerts the agent to a severe SLA breach by changing the color of an inactive tab when it reaches the selected duration. The default setting is 2 minutes after the first new message is received.

Note:
The length of time for the Level 3 timer must be greater than the Level 2 timer.

7. Select the tab color for each of the configured SLA threshold breach warnings in the **Tab color** field and then select **Apply**.
   You must select a unique tab color for each warning level. After applying your selection, you can see a preview of the tab with the selected color.
8. Select **Save**.
   The workspace is added to the Configured workspaces list in the Session Tab Settings section.

Edit or remove chat session tabs

Edit the settings for configured SLA threshold levels, add or remove SLA threshold levels, or remove workspaces from the Configured workspaces list in the Conversational interfaces (CI) Admin Console.

Before you begin
Role required: admin

About this task
The Session Tabs Settings section of the Agent Chat settings screen lists the workspaces that have configured SLA threshold levels. Under the Configured workspaces heading, you can see a list of the configured workspaces and the SLA threshold levels that have been configured for each workspace.

From this section, you can do the following:

- Remove a workspace from the Configured workspaces list.
- Edit the SLA threshold levels for a workspace:
  - Update the timer value and tab color for an SLA threshold level.
  - Add or remove an SLA threshold level.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Settings**.
   This displays the CI Admin console with the Settings tab selected.
2. Select **Agent Chat** on the left side of the CI Admin console.
   This displays the Agent Chat settings screen.
3. Scroll to the Session Tab Settings section to view a list of configured workspaces.
   This list displays the workspaces that have been configured for the instance. It also displays the SLA threshold levels that have been configured for each workspace.
4. To edit a workspace, select **Edit**.
   The details of the configured SLA threshold timers are displayed in the Set SLA Levels section.

   a. From Set SLA Levels section, you can perform the following tasks:
      - Update the timer value for an SLA threshold level.
      - Update the tab color for an SLA threshold level.

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- Add an SLA threshold level.
- Remove an SLA threshold level.

b. Select **Save** on the Agent Chat settings screen to save your changes.

5. To remove a workspace from the Configured workspaces list:

a. Select **Remove** for the desired workspace.

b. In the confirmation pop-up window, select **Remove workspace**.
The workspace is removed from the Configured workspaces list in the Session Tab Settings section.

Organize records tabs with ServiceNow Link Manager

Use the ServiceNow Link Manager feature to manage and organize browser tabs within a ServiceNow instance.

The ServiceNow Link Manager feature is designed to enhance user productivity by managing and organizing browser tabs within a ServiceNow instance. This feature ensures that links opened within an instance are consolidated into a single workspace. It is supported on the latest versions of Google Chrome, Microsoft Edge, and Mozilla Firefox. ServiceNow Link Manager is useful for users who need to keep track of numerous open tabs during their workday.

Key features

ServiceNow Link Manager includes the following features:

- **Tab consolidation**: Automatically consolidates new ServiceNow-related tabs into an existing open ServiceNow tab, preventing browser clutter.
- **Cross-platform support**: Supports opening shared record links across environments such as Gmail, Microsoft Teams, Microsoft Outlook, and other web platforms linked to ServiceNow.
- **User-friendly interface**: Easy to enable and disable directly from the Chrome extension settings in the browser.

Frequently Asked Questions

FAQs for ServiceNow Link Manager

Question	Answer
What happens if I turn off ServiceNow Link Manager?	Turning off ServiceNow Link Manager reverts to the default behavior, where each clicked link opens a new tab.
Is the extension available on other browsers?	The extension is currently supported across multiple browsers - Google Chrome, Mozilla Firefox, and Microsoft Edge.
If I have several tabs open and then enable the ServiceNow Link Manager, what will happen?	The existing tabs remain unchanged. Any new links open within the most recent tab in your current workspace.
Can I choose which tabs to consolidate or does ServiceNow Link Manager	ServiceNow Link Manager automatically consolidates all ServiceNow-related tabs. There is currently

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FAQs for ServiceNow Link Manager (continued)

Question	Answer
automatically consolidate all ServiceNow tabs?	no option available to select specific tabs for consolidation.
Does ServiceNow Link Manager affect my non-ServiceNow tabs?	No. ServiceNow Link Manager only affects ServiceNow-related tabs. Non-ServiceNow tabs continue to function as usual.
Will ServiceNow Link Manager slow down my browser performance?	ServiceNow Link Manager is designed to operate efficiently without significantly impacting your browser's performance. However, if you experience any slowdowns, consider limiting the number of active extensions or tabs.
Can I temporarily disable ServiceNow Link Manager without uninstalling the extension?	Yes, you can easily toggle ServiceNow Link Manager on or off from the extension settings without uninstalling the entire extension.
If I am working with multiple ServiceNow instances, can I customize which instance ServiceNow Link Manager consolidates tabs into?	Currently, ServiceNow Link Manager consolidates tabs within each ServiceNow instance independently. If you have multiple instances open, the link will open in the most recently used instance.

Does the extension work with customized URLs or older browser versions?	ServiceNow Link Manager extension works only with base system workspace URL patterns and doesn't support customized URLs. It currently supports the following patterns:
	CSM workspaces:
	`"patterns": [ { "name": "cwf", "match": "https://*/now/cwf/*" },`
	ITSM workspace:
	`"patterns": [ { "name": "sow", "match": "https://*/now/sow/*" }`
	Note: The extension doesn't work on older browser versions that don't support Manifest V3. Make sure you're using the latest version of Google Chrome, Microsoft Edge, or Mozilla Firefox.

What happens to filters when opening a filtered list URL through ServiceNow Link Manager?	When a filtered list URL redirects to an existing workspace tab, the applied filters are not preserved. The list displays all records, and you must manually reapply filters after the page loads. For more details,

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FAQs for ServiceNow Link Manager (continued)

Question	Answer
	see [Now Link Browser Extension] - List Configuration are not working as expected with NowLink Manager

Open new cases in the same tab with ServiceNow Link Manager for Google Chrome

Follow the steps below to install, activate, and use ServiceNow Link Manager in Google Chrome.

Before you begin
Role required: admin

Installing ServiceNow Link Manager

Procedure

1. Select the **Extensions** icon in Chrome browser and select **Manage Extensions**.
2. In the left panel, select **Chrome Web Store** to open it in a new tab.
3. In the search bar, type `ServiceNow Link Manager`.
4. Select the extension in the results and select **Add to Chrome**.
5. Once installed, the extension appears in your extensions list. It is enabled by default. You can toggle it to on or off as needed.

Activating ServiceNow Link Manager

Procedure

1. Select the ServiceNow Settings icon in the top-right corner of your Chrome browser.
2. From the drop down menu, locate the ServiceNow Link Manager toggle switch and turn it on.

Note:
The ServiceNow Link Manager extension turns on automatically in CSM and ITSM Workspace. It doesn't run in other ServiceNow workspaces.

Using ServiceNow Link Manager

Links typically open in a new browser tab. When ServiceNow Link Manager is activated, links consolidate into an already open ServiceNow workspace tab. This consolidation applies whether the link is clicked within ServiceNow itself or from an external site such as Gmail, Microsoft Teams, or Microsoft Outlook.

Open new cases in the same tab with ServiceNow Link Manager for Mozilla Firefox

Follow the steps below to install and activate ServiceNow Link Manager in Mozilla Firefox.

Before you begin
Role required: admin

Installing ServiceNow Link Manager

Procedure

1. Select the **Menu** icon in Mozilla Firefox and select **Add-ons and themes**.
2. Open the **Add-ons for Firefox** site, search for `ServiceNow Link Manager`, and select **Add to Firefox**.

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3. In the pop-up that appears, select **Add** to confirm installation.
4. Once installed, the extension appears in your add-ons list. It is enabled by default. You can toggle it to on or off as needed.
5. You can pin the extension to the toolbar for quick access.

Activating ServiceNow Link Manager

Procedure

1. Select the **Menu** > **Add-ons and themes** > **Extensions**.
2. Locate the **ServiceNow Link Manager** toggle switch and turn it on.

Note:
The ServiceNow Link Manager extension turns on automatically in CSM and ITSM Workspace. It doesn't run in other ServiceNow workspaces.

Using ServiceNow Link Manager

Links typically open in a new browser tab. When ServiceNow Link Manager is activated, links consolidate into an already open ServiceNow workspace tab. This consolidation applies whether the link is clicked within ServiceNow itself or from an external site such as Gmail, Microsoft Teams, or Microsoft Outlook.

Open new cases in the same tab with ServiceNow Link Manager for Microsoft Edge

Follow the steps below to install and activate ServiceNow Link Manager in Microsoft Edge.

Before you begin
Role required: admin

Installing ServiceNow Link Manager

Procedure

1. Select the **Extensions** icon in Microsoft Edge and select **Manage Extensions**.
2. Open the **Edge Add-ons** site, search for `ServiceNow Link Manager`, and select **Get**
3. In the pop-up that appears, select **Add** to confirm.
4. Once installed, the extension appears in your extensions list. It is enabled by default. You can toggle it to on or off as needed.
5. You can pin the extension next to the address bar for quick access.

Activating ServiceNow Link Manager

Procedure

1. Select **Settings and more** icon in the top-right corner and then **Extensions**.
2. Locate the **ServiceNow Link Manager** toggle switch and turn it on.

Note:
The ServiceNow Link Manager extension turns on automatically in CSM and ITSM Workspace. It doesn't run in other ServiceNow workspaces.

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Using ServiceNow Link Manager

Links typically open in a new browser tab. When ServiceNow Link Manager is activated, links consolidate into an already open ServiceNow workspace tab. This consolidation applies whether the link is clicked within ServiceNow itself or from an external site such as Gmail, Microsoft Teams, or Microsoft Outlook.

CSM Configurable Workspace form templates

Create and edit form templates for use in CSM Configurable Workspace and then use the templates to automatically populate fields on records.

Form templates simplify the process of creating and submitting new records by populating fields with selected values. In CSM Configurable Workspace, form templates are available in the Templates tab in the contextual side panel. From the Templates tab, you can do the following:

- View template cards that display information including the template name, description, and when the template was last used.
- View different lists of templates, including Favorites, My Templates, and All.
- Mark templates as Favorites by selecting the star icon on the template card.
- Sort the available templates alphabetically or by last used.
- Create a new template by selecting the Create icon (**+**) at the top of the Templates tab.
- Edit an existing template by selecting the More actions icon on the template card and then selecting **Edit**.

Templates tab

The Templates tab in the contextual side panel includes form templates that are available to the current user. This tab includes three lists of templates:

- **Favorites**: Templates that the user has marked as a favorite by selecting the star icon on the template card. The templates that are added to this list are accessible across different records.
- **My Templates**: Templates created by the user.
- **All**: All templates available to the user.

Within each list of templates, users can do the following:

- Search for templates by entering a keyword in the search box.
- Sort the available templates, either last used or alphabetically, by making a selection from the drop-down menu.

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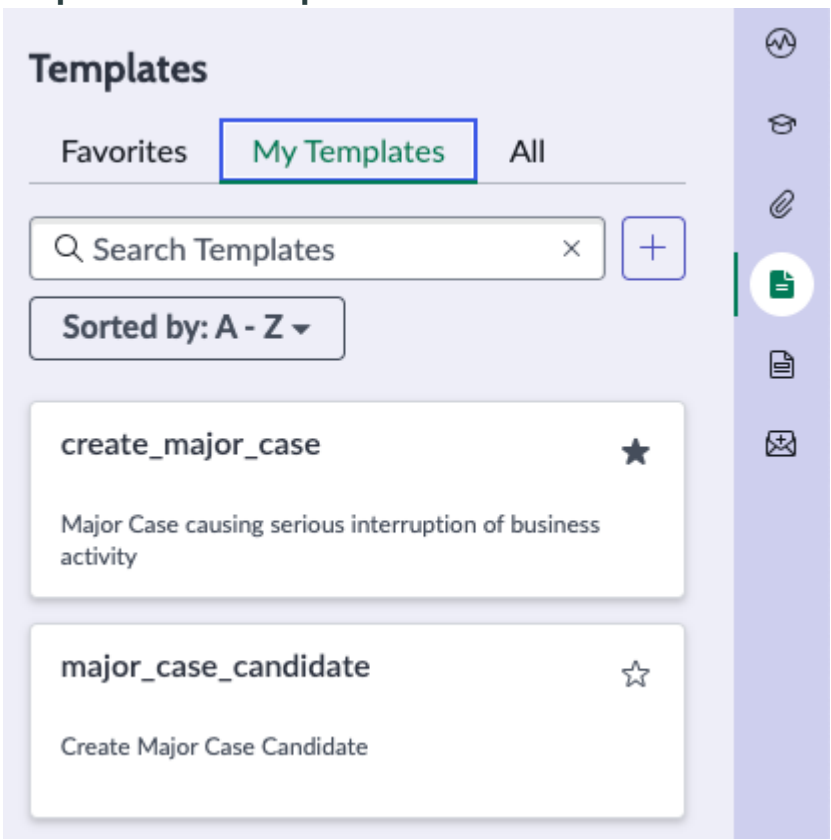
Templates tab with template cards



Template cards

The Templates tab displays a card for each template in a list. These cards provide information about the templates, including:

- A multi-line description of the template.
- A timestamp that shows when the template was last used.
- A star icon that you can use to mark a template as a favorite.

Template form

The template form is used to create and edit templates. This form includes two collapsible form sections:

- **Details**: Includes information about the template, such as the template name and the table that the template applies to.
- **Template**: Includes the selected fields and the configured values for those fields which are applied to a record.

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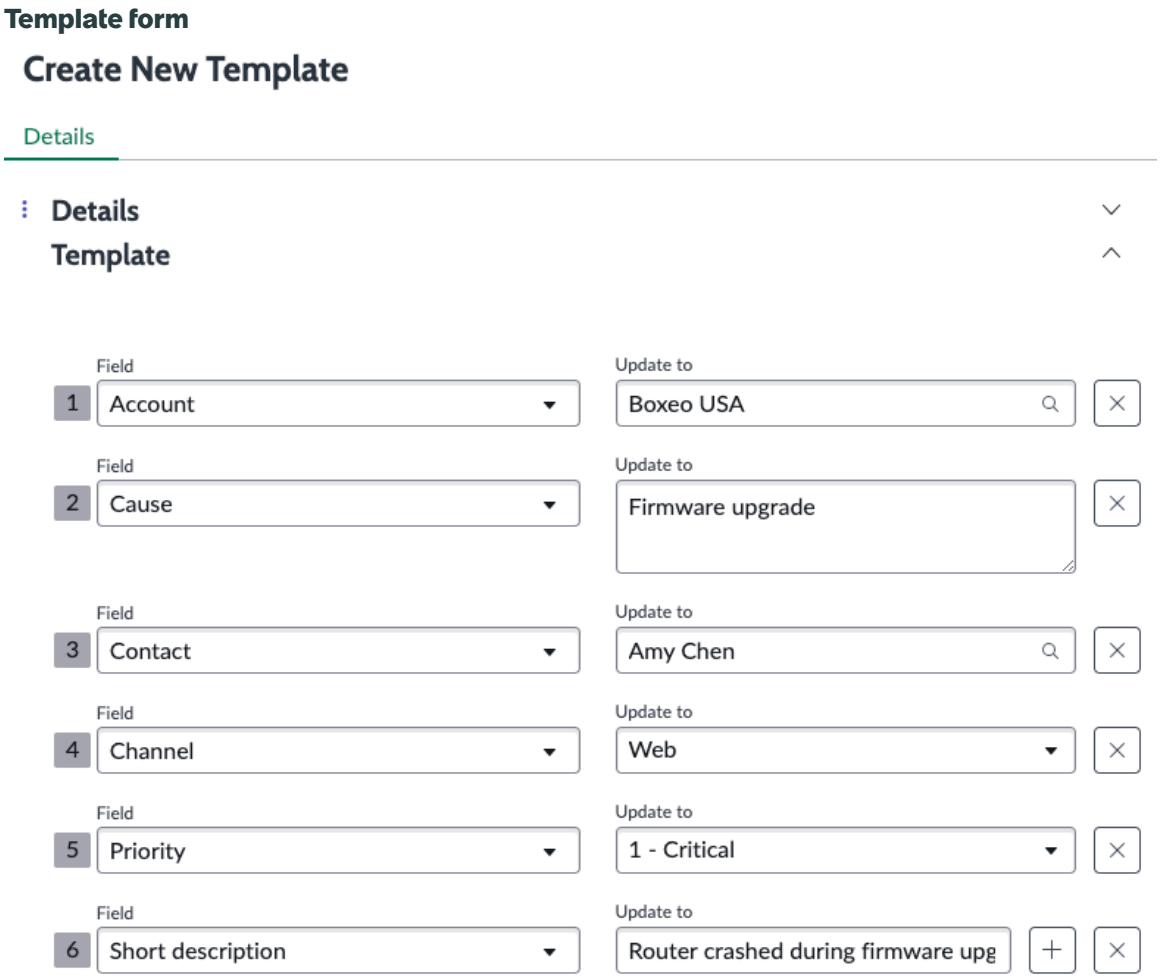
Template form



The Template section includes a row for each field that has been added to the template. These rows are numbered for readability and easy reference. The fields and configured values in each row are also labeled for readability.

- **Field**: The field to update on the record.
- **Update to**: The value to use for that field.

The template form is available when creating a new template from a case or interaction or editing an existing template. The template form tab header displays a description of the current action:

- **Create new template**: The system displays this tab header when you create a template.
- **Edit template**: The system displays this tab header when you save the changes to a new template or when you edit a template.

Using form templates to create comments and work notes

You can create and use form templates that add content to the **Additional comments** and **Work notes** fields on a case record and then post that content to the activity stream. Selecting a template displays a modeless dialog with the template content. For more information, see Modeless dialogs.

Chat summarization

Use the chat summarization feature to automatically create summaries of chat conversations. The chat summary enables an agent to quickly gain an understanding of the interaction without reading the entire transcript of the conversation.

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At the completion of a chat conversation, the system automatically generates a chat summary and adds it to the **Chat summary** field on the Interaction record. This summary is created from the transcript of the chat conversation.

The system calls the chat summary prediction, which generates the summary from predicted values and updates the **Chat summary** field. It also displays the summary as a top recommendation for this field.

An agent can modify and save the information in the **Chat summary** field. To revert the summary to the predicted value, the agent can select the value in the top recommendation.

The chat summarization feature works with or without chat wrap-up enabled. For more information, see Interaction wrap up.

AI indicators

When the system generates a summary and automatically populates the **Chat summary** field, it also does the following:

- Displays an AI icon above the field which indicates that the summary is generated by AI.
- Displays a banner at the top of the Interaction record. The message in the banner advises the agent to check the summary and update the information if it is not accurate.

The agent can dismiss the banner. If the agent manually updates the **Chat summary** field, the AI icon is no longer displayed.

Interaction wrap up with modeless dialog

Interaction wrap up provides agents with dedicated time after each call or chat to finalize interaction details. Agents can use this time to wrap up their work before starting a new conversation.

When interaction wrap up is enabled, an interaction record moves from the Work In Progress state to the Wrap Up state at the end of a customer conversation. This configurable period of time enables agents to complete tasks such as posting work notes and updating record information before moving on to assist other customers.

While in the Wrap Up state, an agent's capacity is not reduced until the state of the interaction moves to Closed Complete.

Interaction wrap up features

Interaction wrap up includes several configurable features:

- Wrap-up codes: Agents can select from a list of codes that provide information about how the interaction was resolved.
- Wrap-up notes: Agents can provide additional information about the interaction resolution.
- Wrap-up timer: Displays the duration of the wrap-up period. When the end of the duration is reached, the system automatically ends the wrap-up period and saves the wrap-up data with the default code and notes field blank.
- Wrap-up modeless dialog: Displays when the agent ends an interaction. Includes the wrap-up timer and fields for the wrap-up code and notes.

Interaction wrap up also includes wrap-up segments, which store interaction wrap-up data. Wrap up segments enable multiple wrap ups per interaction. For example, when one agent transfers an interaction to another agent and each agent completes a wrap up for the same record.

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Interaction wrap-up benefits

Interaction wrap up provides agents with dedicated time to complete their work on an interaction. If enabled, a wrap-up timer displays the remaining time in the wrap-up period. Agents can complete and submit the wrap-up data within the wrap-up period or allow the system to automatically complete the wrap-up period when the time expires.

Managers can configure the length of the wrap-up period for their agents. Managers can also access reports on wrap-up time usage and effectiveness and use analytics to track data accuracy and agent productivity improvements.

Admins can set and manage wrap-up time limits for voice and chat interactions and create wrap-up codes. Agents can quickly select from a list of available codes during wrap-up.

Wrap-up codes

Wrap-up codes provide information about how an interaction was resolved. Agents can select a wrap-up code when wrapping up an interaction in CSM Configurable Workspace. When wrap-up codes are enabled, agents can select a code from the configured list in the wrap-up modeless dialog.

System administrators can create wrap-up codes. From the Interaction Wrap Up Configuration record, system administrators can also do the following:

- Enable wrap-up codes.
- Select the wrap-up codes that are available to agents in the wrap-up modeless dialog.
- Select a default wrap-up code.

For more information, see the following topics:

- Create an interaction wrap-up configuration
- Create interaction wrap up codes
- Enable interaction wrap up codes

Wrap-up timer

The interaction wrap up timer displays a countdown of the wrap-up period. The wrap-up timer starts when the wrap up period begins.

Agents can complete their work within the wrap-up period and submit the wrap-up data. If agents do not complete their work, the system automatically ends the wrap-up period and saves the wrap-up data with the default code and notes field blank.

Depending on the settings in the Interaction Wrap Up Configuration record, the wrap-up timer appears on an interaction record in one of two locations:

- In the wrap-up modeless dialog: The timer is displayed in the modeless dialog if wrap-up codes are enabled.
- In the interaction record header secondary values. The timer is displayed in the secondary values if wrap-up codes are not enabled.

The system administrator can configure the display of the wrap-up timer by enabling the **Show duration to agent** field on the Interaction Wrap Up Configuration record.

The timer counts down the amount of time specified in the **Duration in seconds** field. The background color of the wrap-up timer changes as it counts down the duration.

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Background color	Description
Green	Time remaining is between 100% to 50% of duration.
Yellow	Time remaining is between 50% and 25% of duration.
Orange	Time remaining is between 25% and 0% of duration.
Red	When the timer reaches 0.00, the display turns red and then disappears. The system updates the state of the interaction record to Closed Complete.

Wrap-up notes

Agents can provide additional information about the interaction resolution in the wrap-up notes. After selecting a code in the wrap-up modeless dialog, agents can add this information in the **Notes** field.

Wrap-up modeless dialog

When wrap-up codes are enabled in the Interaction Wrap Up Configuration record, the system displays the wrap-up modeless dialog during the wrap-up period.

The wrap-up modeless dialog includes the following fields:

- Wrap up timer (when configured)
- Wrap up code
- Notes

The agent can select a code and add wrap-up notes and then select **Submit & close** to complete the interaction. The wrap-up data is saved in a segment record and the state of the interaction changes to Closed Complete.

If the wrap-up time expires before the agent selects **Submit & close**, the system closes the modeless dialog and saves the wrap-up data with the default code and no notes.

Agent actions that impact the wrap-up modeless dialog:

Action	Result
Initiating an outbound conversation during the wrap-up period	The system ends the countdown and closes the modeless dialog.
Changing the agent status during the wrap-up period	The system ends the countdown and closes the modeless dialog.
Logging out during the wrap-up period	If an agent logs out during the wrap-up period without selecting **Submit & close**, the wrap-up time continues. If the agent does not log back in, the system closes the wrap-up.
Closing the interaction while in wrap up mode	The system displays a warning message. If the agent still wants to close the interaction, the system submits the wrap-up using the default wrap-up code.

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Action	Result
Transferring a call to another agent	Each agent's wrap-up period begins the moment they exit the call. This behavior applies to both warm and cold transfers. When a call is transferred from one agent to another, each agent's wrap-up period begins the moment they exit the call.
Cancelling an inbound or outbound call	When a caller cancels an inbound call that hasn't been connected to an agent or agent cancels an outbound call, wrap-up is not initiated.

Wrap-up segments

The system stores interaction wrap-up data in wrap-up segments. Storing the data in segments enables multiple wrap-ups per interaction. For example, when one agent transfers an interaction to another agent, each agent can complete a wrap-up for the same interaction record.

Interaction wrap-up segment records are stored in the Interaction Wrap Up Segment table [interaction_wrap_up_segment]. Customer and consumer agents have read access to this table.

My Wrap Ups list

The My Wrap Ups list displays a list of all wrap-up records for the current user. To access this list in the Lists tab, navigate to **Interactions** > **My Wrap Ups**. This list view includes a link to the interaction record, the wrap-up state (In progress or Complete, and the wrap-up code and notes.

The following roles have access to the My Wrap Ups list:

- Customer service agent (sn_customerservice_agent)
- Consumer service agent (sn_customerservice.consumer_agent)
- System administrator (admin)

Wrap up controller

There are two different controllers for interaction wrap up:

- Interaction UI controller: Original controller; includes legacy wrap-up functionality.
- Wrap up controller: New controller introduced in Yokohama; includes wrap-up codes and the wrap-up modeless dialog.

The Wrap up controller includes output properties that determine where the wrap-up timer is displayed: in the modeless dialog or in the interaction header secondary values. The Wrap up controller also controls how the timer is updated.

The CSM Interaction record page and the CSM voice interaction record page include an input property that determines the wrap-up functionality: **disableLegacyWrapUpLogic**.

- If set to false: the wrap-up functionality remains the same. For upgrade customers, this prevents conflicts with the current or custom wrap-up functionality. The default value of this property is false.
- If set to true: the interaction record page uses the new wrap-up functionality.

To edit this property:

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1. In UI Builder, select the CSM/FSM Configurable Workspace experience.
2. Select the CSM Interaction record page.
3. In the Data and scripts section on the left side, select CSM Interaction Record to open the Edit CSM Interaction Record modal.
4. In the Configure tab of the modal, enable or disable the **disableLegacyWrapUpLogic** property.

Interaction record pages

The wrap-up controller, wrap-up codes, and wrap-up modeless dialog are available on the following record pages in CSM Configurable Workspace:

- CSM Interaction record page
- CSM Voice interaction record page

Customer Central

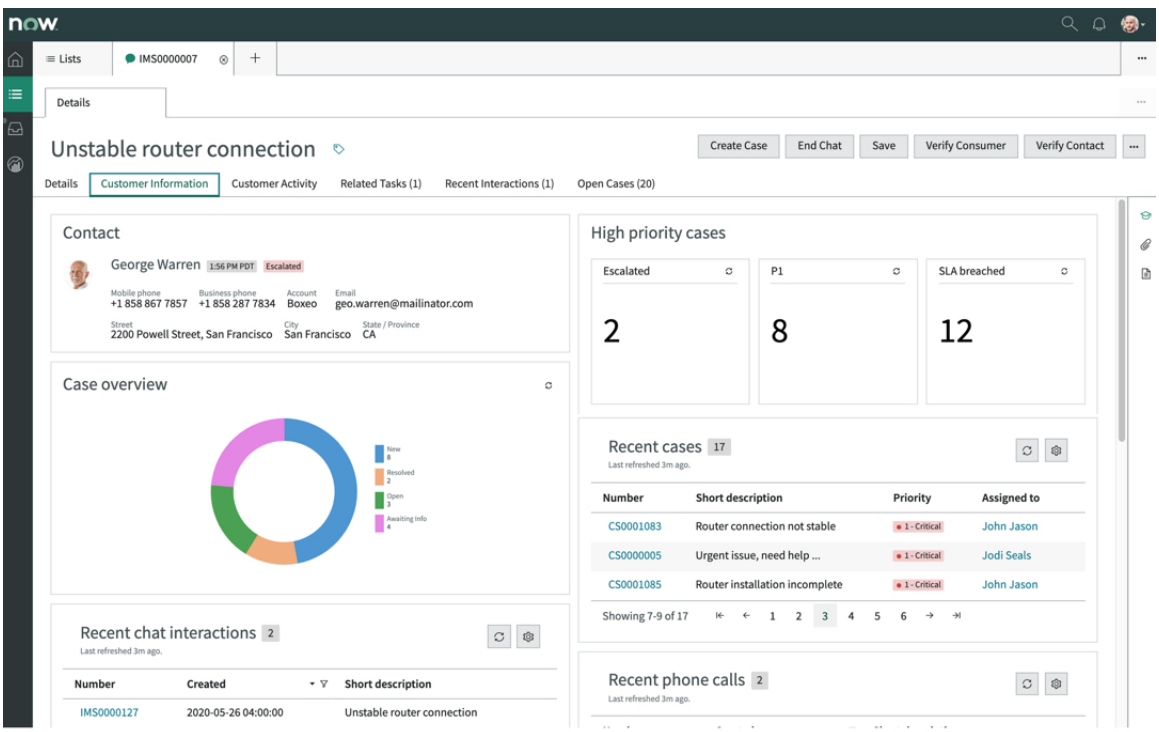
Customer Central provides customer service agents with all the information about the customer in one central place. It enables them to quickly zoom in on the customer issues and provide efficient and supportive service to their customers.

Customer service agents or location agents can view customer central on the interaction, case, account, contact, or consumer records in CSM Configurable Workspace in the form of two views: Customer Information and Customer Activity.

Starting with the Yokohama release, the Customer History component displays customer activity information on some record pages in CSM Configurable Workspace.

Customer Information view

The Customer Information view displays key information about the customer and a view of all recent customer touch points with the service organization. It contains a number of predefined lists, records, reports, and report groups that are highly configurable, or you can create your own. You can also configure the number of days to display the data for.



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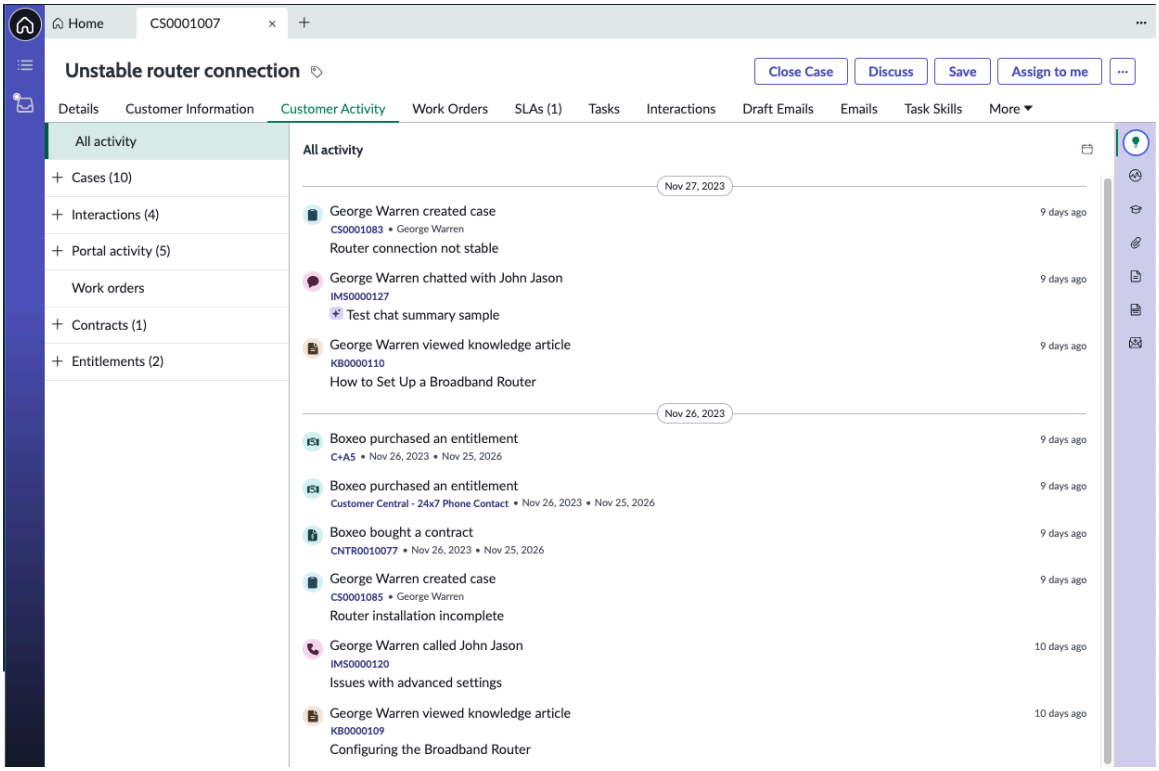
Customer Activity view

The Customer Activity view displays all the recent customer touch points with the service organization in the form of an activity feed. On the left-hand side, there are facets, or categories of information. The data in the activity feed is displayed based on the facet you select. It contains a number of predefined facets and activities that are highly configurable, or you can create your own. You can also select a date range to display the data for.



Chat summarization

Agents can see an AI-generated chat summary instead of a full transcript so that they can quickly understand the past interaction and resolve a customer issue. An interaction chat summary in the Customer Activity tab provides the context about the chat conversation between the agents and customers.

An AI icon and tooltip are displayed before the summary which indicate that the summary is generated by Now Assist.

This feature has the following dependencies:

- Now Assist for CSM (sn_csm_gen_ai)
- UXC Generative AI (sn_uxc_gen_ai)

When these plugins are not installed or the chat summary is unavailable, agents can see the entire conversation transcript to access the chat history.

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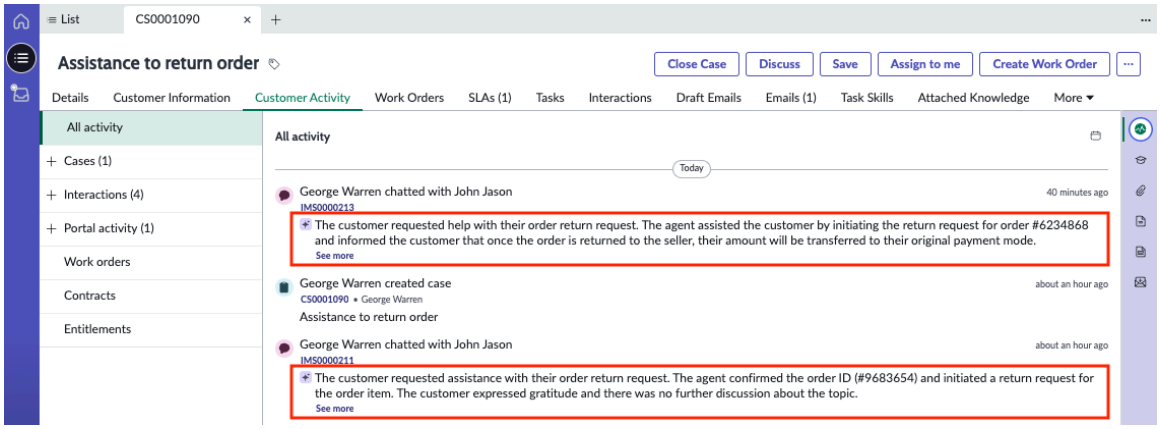
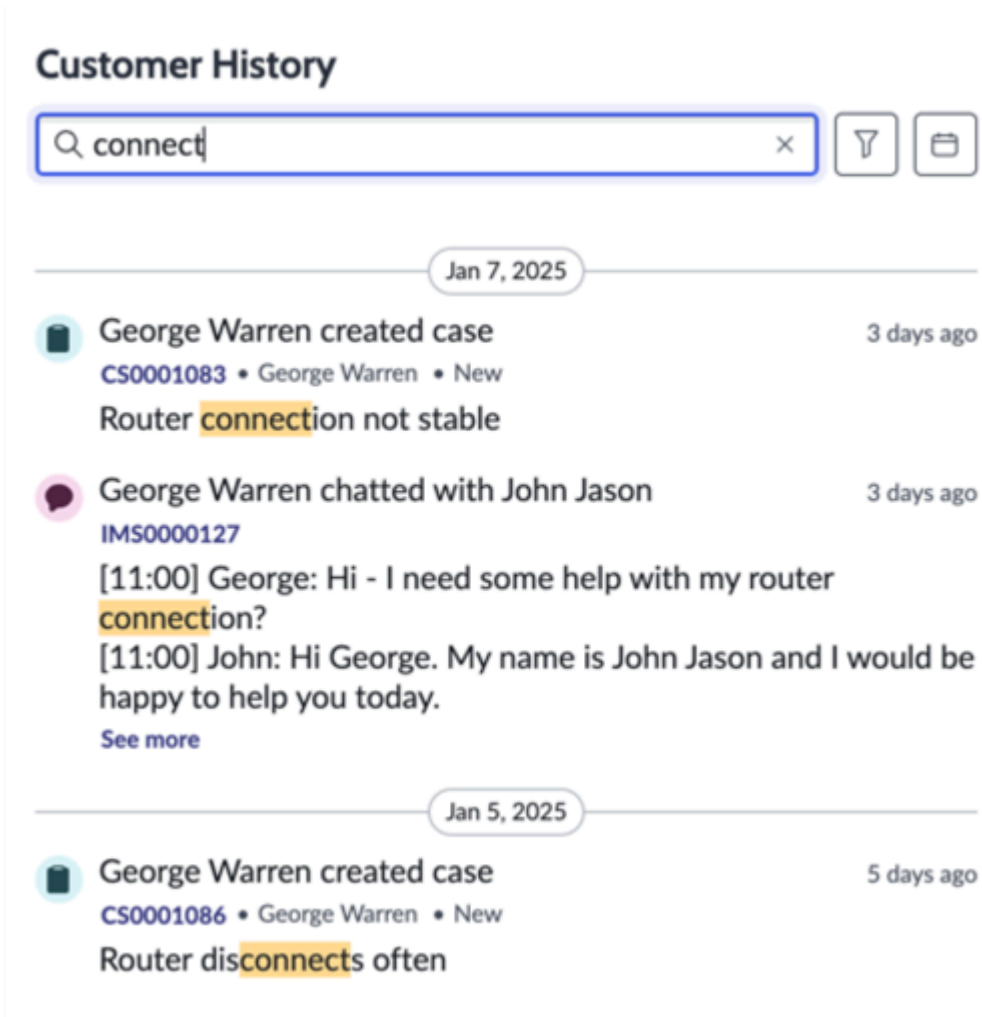


Customer History component

The Customer History component displays customer, consumer, or account history information, depending on the field selections on the interaction record. This component displays the information previously displayed in the Customer Activity tab.



The Customer History component includes the Customer tab. This tab displays customer, consumer, or account history information, depending on the customer information provided on the interaction record. This tab includes a search field, filter, and date range selector that agents can use to find specific information in the history.

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The Customer History component is available on the following record pages in CSM Configurable Workspace:

- Front-line case page: Appears in the contextual side panel.
- CSM voice interaction record page: Appears in the left pane.

Users with the system administrator role can add this component to a record page in UI Builder and configure the component properties.

The Customer History component can be configured to display a **Call Transcript** tab. This tab displays the text of the live call transcript when a conversation record is present for the interaction.

Note:
The Call transcript tab is visible to users if configured in the provider application associated with the interaction.

- This tab displays the text of the call transcript when a conversation record is present for the interaction.
- This tab displays the following text when a conversation record is not present for the interaction record: Call transcript not available yet.

The Call transcript tab is visible to users if configured in the provider application associated with the interaction.

For more information about the Customer history component, see the following topics:

- Customer History component features
- Configuring the Customer History component
- Next Experience Components documentation

Customer Central plugin

The Customer Central application (com.sn_csm_customer_central) is activated with the CSM Configurable Workspace application (com.snc.uib.csm_agent_workspace). The CSM Configurable Workspace application is activated with the Customer Service plugin (com.sn_customerservice).

Starting with the Yokohama release, the Customer Central application (com.sn_csm_customer_central) has moved to the ServiceNow Store. Any new enhancements to this application are delivered through the Customer Central store app.

Request apps from the ServiceNow Store

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

Related topics

Configure Customer Central

Use Customer Central

Customer History component features

Customer service agents can use several features in the Customer History component to view customer, consumer, or account history information.

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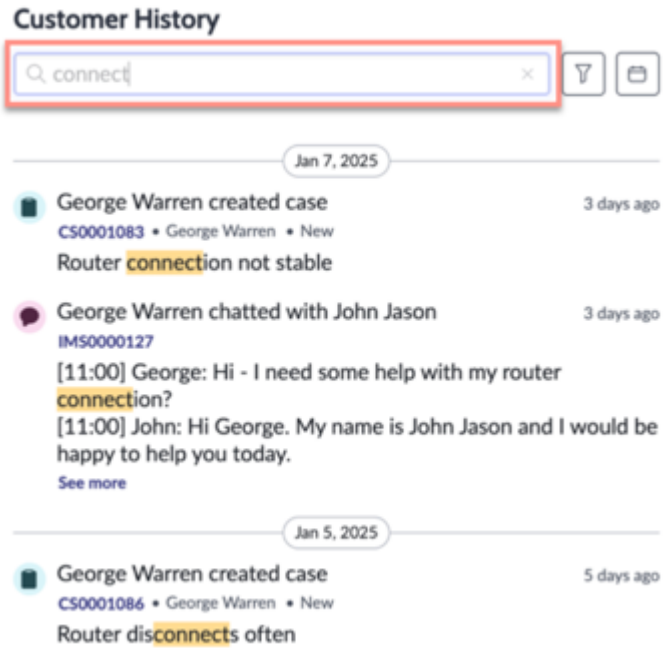
Search

The Search field introduces keyword-based search functionality allowing agents to retrieve activities such as interactions, cases, and work orders by typing keywords or partial matches.

Agents can type a keyword or partial matches to find relevant results. For example, typing **connect** displays cases with terms like connect, connected, or connection.



Filter

Agents can use the filter icon next to the search bar to quickly filter and view relevant case data. Selecting the filter icon displays the results in the Customer History component.

Facets have been replaced by a filter icon. If the **Enable facets** check box is selected in UI builder, the system displays facets on the left of the CSM voice interaction record page. If this check box is not selected, the system displays a filter icon. Selecting the filter icon displays the selectable facets.

When an agent selects a facet:

- The selected facet name appears below the search bar and the system displays the current results.
- Selecting a new facet replaces the current results with the new facet's results.
- Only one facet can be selected at a time.

Note:

- For new customers: Filter icons are displayed by default.
- For existing customers: Facets or filters appear based on screen size.

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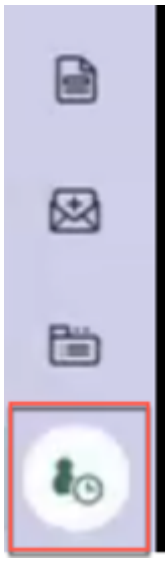
Customer History access

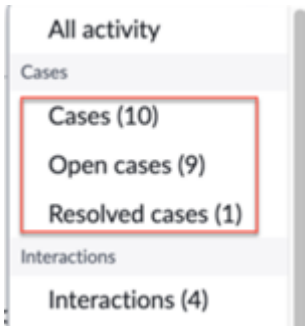
Starting with the Yokohama release, the Front-line case page includes the Customer History component. This component ensures agents can easily view customer details without navigating away from the case page.

Select the **Customer History** tab in the contextual side panel to access customer history.



Cases facet

The Cases facet has been updated to improve case categorization for agents. This helps agents quickly filter the cases based on their status directly within the Customer History component.



The facet is divided into two subcategories:

- Open Cases
- Resolved Cases

Resizable layout blocks

The **Resizable Layout Blocks** feature allows agents to adjust the size of page panel for better visibility. Agents can resize any block (left, center, or right) by following these steps:

1. Click the edges of the block.
2. Drag to adjust the size as needed.

This feature is available across record pages in CSM Configurable Workspace and allows agents to optimize their workspace based on their needs.

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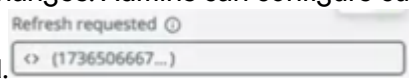
Configuring the Customer History component

Users with admin role can configure several properties for the Customer History component.

Refresh requested

The Customer History component refreshes automatically when the account, contact, or consumer is updated on a record, eliminating the need for manual page refreshes.

The **Refresh requested** property captures the last refresh timestamp and triggers events such as Context Refresh Requested whenever the value changes. Admins can configure custom event handlers to adjust the refresh behavior as needed. 

This property can be set for the following record pages:

- Front-line case page
- CSM default record page

To configure this property on the Front-line case page:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. Open the **Front-line case page**, click the **Customer History** component.
4. Navigate to the **Properties** panel.
5. Enable the **Refresh Requested** property to capture the last refresh timestamp.
6. Add or modify event handlers under the Events tab to customize the refresh behavior.

To configure this property on the CSM Default Record page:

1. Select **Customer Central**.
2. Open the **Customer Activity** section.
3. Navigate to the **Properties** panel.
4. Enable the **Refresh Requested** property to capture the last refresh timestamp.
5. Add or modify event handlers under the Events tab to customize the refresh behavior.

Header title

The Customizable Customer Activity Title feature allows admins to rename the **Customer Activity** title directly from the interface.

To change the title:

1. Navigate to the **Component visibility** settings in the right navigation pane.
2. Edit the **Header title** property to change the title according to user preferences.

This customization option is available on all pages where the Customer History component is used.

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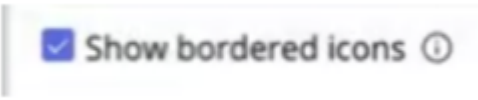
Show bordered icons

The **Show bordered icons** check box allows admins to customize icon borders in the



interface.

- Set to true: Enables bordered icons
- Set to false: Disables bordered icons

Admins can adjust this setting based on their preferences.

Page design

The Page Design feature introduces a drag-and-drop interface for easier customization of page layouts. Admins can add, position, and resize components directly on the page without using tabs.

To use this feature:

1. Click **+Add Content** on the left navigation pane.
2. In the toolbox window that appears, type Customer activity component and then select and drag it.

The Customer History component is now available in the toolbox.

Presets

Admins can choose from two new presets for the Customer History component on the Front-line case page to better manage how customer data is displayed.

- Customer activity for record page with lazy load
- Customer activity for record page

To apply a preset:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. Open the **Front-line case page** and select the **Customer History** component.
4. Select the existing preset in the configuration panel.
5. In the **Select a preset** window, choose **All** under **Controller** to view available presets.
6. Select one of the new presets to update how customer activity is displayed.

Default values are set for all fields to prevent errors by ensuring that fields are never left null or empty.

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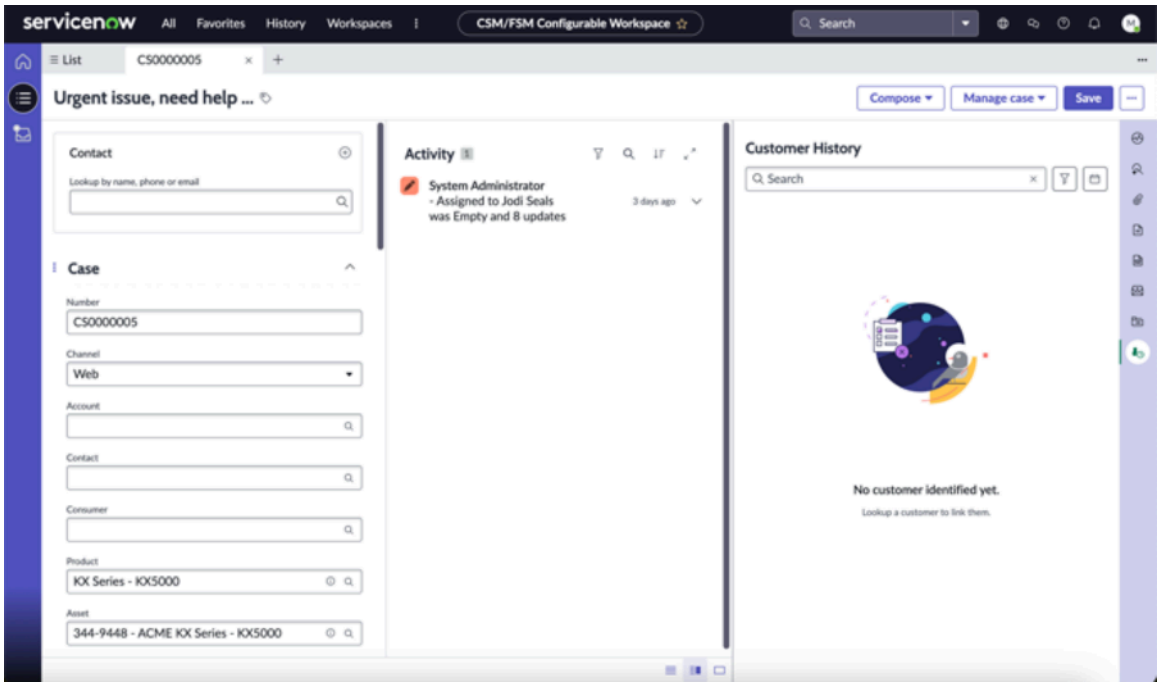
New empty state for context fields



On the agent side, when viewing a case, customer history or activity data loads automatically if available. If there's no activity, the system shows "No activities found". If no account, contact, or consumer is selected, it displays "No customer identified yet". This behavior is part of the empty state feature, guiding users to select or add context (account, contact, or consumer) to proceed.

Admins can now configure cases to handle scenarios where customer contact or name fields are empty. Instead of leaving the fields blank, the system prompts users to add the relevant account or contact information.

Lookup and verify

The lookup and verify feature enables customer service agents to quickly look up contacts or consumers using information such as the name, phone number, or record number.

This feature simplifies the process of looking up and verifying contact or consumer information. Agents can use it as follows:

- If an interaction record is already populated with contact or consumer information from a chat or phone call, the agent can review the information and confirm that it is correct.
- If no customer or consumer information is available, the agent can search for this information, select and confirm the information. and populate the interaction record.

Note:
If this information has already been verified, such as through a customer portal login or authentication by Virtual Agent or by an IVR, the **Verified** check box on the interaction record is checked.

Agents can access the search window on the interaction record as follows:

- CSM Configurable Workspace: By clicking the Verify Contact icon ( ) or the Verify Consumer icon ( ) in the contextual side panel.
- CSM Agent Workspace: By clicking the **Lookup Contact** and **Lookup Consumer** buttons.

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Agents can perform a type-ahead search across multiple configurable fields such as name, phone number, email address, and record number. From the search results list, agents can select a result to display detailed information for the contact or consumer in a verification card. Once verified, the system adds the information to the interaction record and checks the **Verified** check box.

Plugins

The lookup and verify feature is included with the Customer Service (com.sn_customerservice) plugin. This plugin provides the configuration for contact and consumer lookup as well as **Lookup Contact** and **Lookup Consumer** UI actions that can be added to the interaction record in CSM Configurable Workspace.

Note:
These actions are not enabled by default. The workspace admin can enable these actions as part of the lookup and verify feature configuration.

Contact and consumer configurations

Two lookup and verify configurations are provided with the feature, one for contacts and one for consumers. Navigate to **Workspace Experience** > **Lookup and Verify** > **Configuration** to access the Lookup and Verify Configurations list.

Note:
To see the contact and consumer lookup and verify configurations, you must activate the CSM Lookup and Verify plugin (com.snc.sn_csm_lookup_verify).

For each configuration, the workspace administrator can:

- Enable the configuration and display the related UI action on the interaction record.
- Enter the minimum number of characters to start the type-ahead search.
- Enter the maximum number of search results returned.
- Select the primary and secondary fields to include in the search results.
- Select the fields to display on the verification card.
- View the lookup tables.

Note:
Customers can contact ServiceNow to make changes to the search fields.

Using Lookup and verify in CSM workspaces

Agents can use the lookup and verify feature in CSM workspaces.

- CSM Configurable Workspace: agents search for contact or consumer information using the contextual side panel.
- CSM Agent Workspace: agents search for contact or consumer information using the Verify Contact or Verify Consumer pop-up windows on the interaction form.

The search field provides type ahead search that displays results in a list and narrows the results as more characters are entered. Selecting a result from the list displays more detailed information about the contact or consumer in a verification card.

The search feature searches multiple configured fields such as name, account, phone number, and record number.

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- For phone numbers and record numbers, it uses an "exact match" search.
- For other fields, it uses a "starts with" search.

Verification cards

After selecting a search result, detailed information about the contact or consumer is displayed in a verification card. From this card, the customer service agent can review and confirm the information by clicking **Verified**.

Tables

The lookup and verify feature uses the following tables:

- Lookup and Verify Configurations (sn_lookup_verify_config)
- Lookup Tables (sn_lookup_verify_search_on_table)

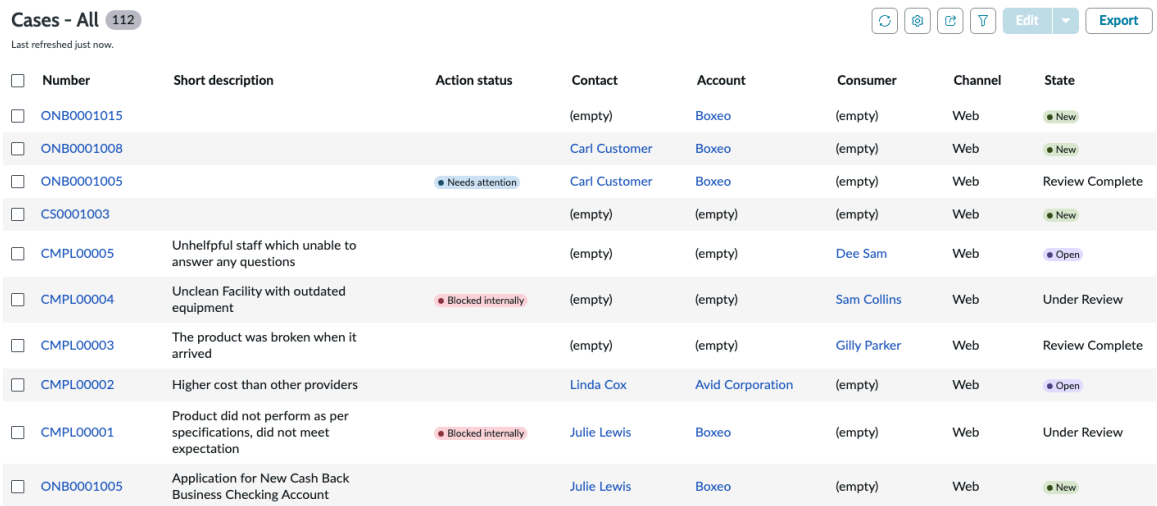
Related topics

Look up and verify a contact or consumer

Case action status

The case action status feature displays the status of cases in the Case list. With this feature, customer service agents can easily identify cases that need attention.

Action status column on the Case list



Action status column

The case action status feature provides visual indicators in the **Action status** column on the My Cases and My Open lists to highlight case status. In addition to the colored indicators, the **Action status** column also displays a brief status message.

Action status column indicators and messages

Indicator	Status message	Description
Blue	Needs attention	A blue indicator highlights cases that need attention, such as cases that have been updated by customers or internal users and are waiting for input or review.

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Action status column indicators and messages (continued)

Indicator	Status message	Description
Red	• Blocked internally • Blocked by customer • Blocked internally and by customer	A red indicator highlights cases that are blocked, such as cases that have open related task records or are waiting for customer feedback.

Actionable case flows

The case action status feature uses actionable case flows to automatically determine the action status for customer service cases. These flows create and resolve blocking tasks for different case-related actions and update the action status indicators. Certain agent actions trigger these case flows, which in turn create and resolve the blocking tasks. Customer service agents and managers can also manually set the action status for cases by enabling the **Needs Attention** field on the Case form.

For more information, see the following topics:

- Actionable case flows
- Configure actionable case flows

Blocking tasks

A blocking task is something that prevents an agent from making progress toward case resolution. For example, a case might have one or more open related case task records or be waiting for customer feedback.

Certain agent actions trigger case flows that create and resolve blocking tasks for customer service cases. These tasks determine the case action status. Additionally, there are actions that resolve these blocking tasks, such as the customer responding to an agent's question or an internal user resolving a problem task. For more information, see Blocking tasks.

Blocked by related list

The case action status feature adds the **Blocked by** related list to the workspace view of the Case form. Blocking tasks for a case appear in this list. When the system adds a blocking task to a case, it also adds one of the following blocking reasons:

- Need information from the customer
- Need task resolution
- Need PRB workaround
- Other

Note:
When a problem is associated with a case, the blocking reason is set to **Needs task resolution**. The agent can update this reason to **Need PRB workaround** if necessary.

When a blocking task is resolved:

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- The **Unblocked By** field displays the user who performed the unblocking action.
- The **Unblocked On** field displays the date that the blocking task was resolved.
- The **Needs Attention** field for the case is enabled.

Notifications

Agents can receive notifications on their preferred channel when a blocking task for an assigned case is resolved. Agents can also receive notifications when the **Needs Attention** field for an assigned case is enabled.

Note:
Notifications are not sent to the user who updated the record.

Users with the admin role can configure notification triggers by navigating to **Agent Workspace** > **Notification Triggers** > **Case Action Status Trigger**.

Related topics

Configure case action status

Administering case action status

Third-party data integration for CSM

The third-party data integration feature enables you to retrieve data from third-party applications and display the data in Agent Workspace for CSM without having to store it in your ServiceNow instance.

Many enterprise customers use ServiceNow applications as part of their IT ecosystems. In these environments, ServiceNow applications coexist with other applications and exchange data through different types of integrations. For customer service agents who typically use a wide variety of applications, this can create a fragmented experience that impacts agent productivity and increases customer wait time.

A frequent integration takes place between ServiceNow and Salesforce applications. In this integration, customers use Salesforce to manage pre-sales activities and ServiceNow to manage post-sales activities. These post-sales activities represent service assurance.

To provide high quality service, agents using the Customer Service Management (CSM) application need a complete understanding of the customer's context, and this includes access to customer data maintained in other systems. A common example of this integration is enriching a CSM customer profile by providing a list of opportunities related to the customer's account. These opportunities are retrieved from Salesforce in real time and are presented in Agent Workspace for CSM.

Using the third-party data integration feature, data from third-party applications can be retrieved as needed. Agents can view the data in lists and forms. This feature uses remote tables to store the third-party data in memory on the application server. Remote tables are useful for data that changes frequently because the data is retrieved in real-time when a user accesses the data from the ServiceNow AI Platform.

Activating third-party data integration

The following plugins are required to implement third-party data integration:

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- Remote Tables (com.glide.script.vtable): Adds the Remote Table Script Definition table (sys_script_vtable) and adds the **Remote Table** flag to the Tables (sys_db_object) table. Active on the base instance.
- OAuth 2.0 (com.snc.platform.security.oauth): Adds the OAuth-related tables and extension points needed to support **OAuth 2.0 –JWT Bearer grant type**. Active on the base instance.
- IntegrationHub (com.glide.hub.integrations): Provides the ability to build reusable integrations with third-party systems and call them from anywhere in the platform. IntegrationHub requires subscription and is available in several subscription packages. Different packages allow for different levels of automation and provide different subsets of predefined third-party integrations, or spokes. For more information, see Request IntegrationHub and IntegrationHub available spokes.
- Customer Service (com.sn_customerservice)

Configuring third-party data integration

Users with the system administrator role can configure the necessary components to enable third-party data integration for Agent Workspace for CSM. At a high level, the configuration steps include:

- Setting up the **OAuth 2.0 – JWT Bearer grant type**, which provides the connection between the ServiceNow instance and the third-party application.
- Setting up aliases to manage connection information and credentials when integrating with external systems and providing alias reference to the IntegrationHub action.
- Creating a remote table to store the third-party data.
- Creating a remote table script definition that maps the data from the third-party application table to the remote table.
- Configuring ACLs for the remote table to provide user access to the third-party data.
- Configuring the lists and forms that display data from the remote table.

For more information, see Configure third-party data integration for CSM.

Using third-party data integration

Within Agent Workspace for CSM, agents can use this feature to:

- View read-only data from third-party applications in lists and forms.
- View data from multiple third-party applications in one browser tab.
- View data from third-party applications in pop-up windows, sub tabs, and related items using iframes.
- Open links to third-party application records from forms.

Domain separation

Remote table script definitions are domain separated. If users do not have access to the same domain as the remote table script definition record, they cannot access records from the remote table specified in the script definition.

The data within the remote table is not domain separated.

For more information, see Domain separation and remote tables.

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Related documentation

- Authentication and credentials
  - Set up OAuth provider with JWT Bearer grant type
  - Credentials and connection information
- IntegrationHub
- Flow Designer
- Retrieving external data using remote tables and scripts
- Salesforce spoke

Third-party data integration solution overview

A typical enterprise ecosystem includes enterprise resource planning (ERP), sales management, and service management systems. There are multiple options for implementing the integrations between these systems.

In this example, the ERP system manages customer data (for example, Accounts).

When a new account is acquired, it is created first in the ERP system and then account data is transferred to Salesforce and ServiceNow (1).

During this process, new accounts are created in Salesforce and ServiceNow. The ServiceNow account record is updated with the Salesforce account ID attribute that holds the reference to the Salesforce account record. The Salesforce account ID is later used to match account records between ServiceNow and Salesforce and also to retrieve opportunity data from Salesforce.

When an agent accesses an account in Agent Workspace for CSM, a list of related opportunities for this account is retrieved from Salesforce in real-time and presented to the agent.

This example assumes that the flow has been implemented and executed and that the ServiceNow account records contain valid Salesforce account IDs. This example also uses the following configuration:

- Connectivity between a ServiceNow and Salesforce.
- Integration using Integration Hub and remote tables.

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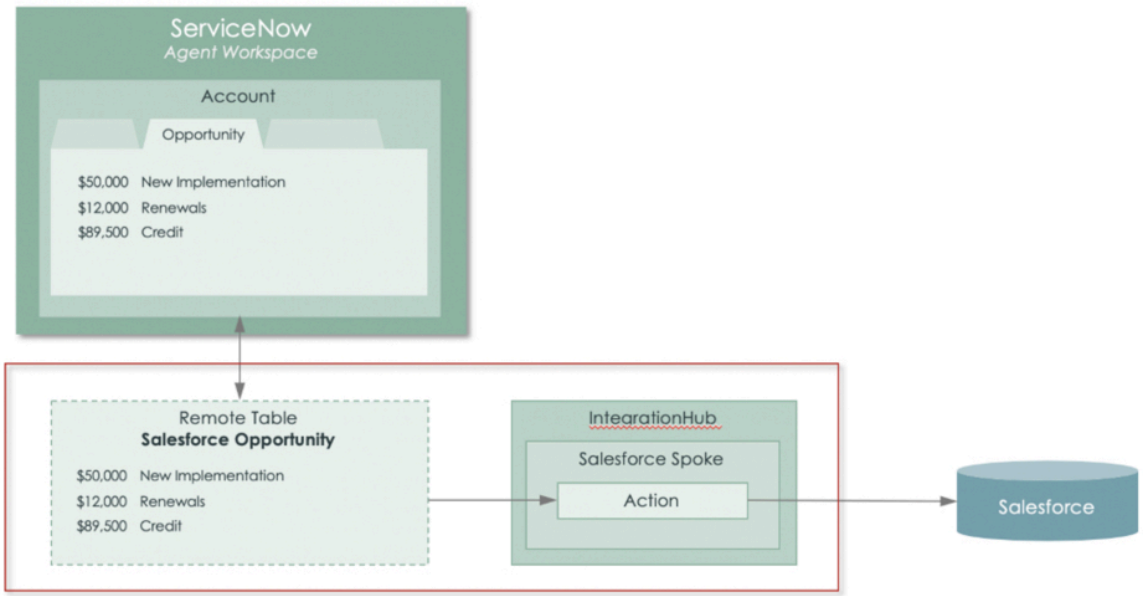
Integration architecture

ServiceNow integrates with Salesforce through the OAuth 2.0 Bearer Token Flow.

Integration architecture



Remote tables and IntegrationHub architecture

Third-party data integration components

These components require configuration by the system administrator to use third-party data integration with Agent Workspace for CSM.

OAuth 2.0 –JWT Bearer grant type

JWT Bearer is the OAuth 2.0 grant type supported for the third-party data integration feature. It allows server-to-server API interactions between the ServiceNow instance and external API providers without requiring any user intervention.

The third-party application admin is used as the subject claim of the JWT that the ServiceNow instance creates and passes to the third-party application instance. This is done to get the

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access token which is used to make the REST API call to fetch records from the third-party application table.

Credentials and connections

IntegrationHub takes advantage of aliases to manage connection information and credentials when integrating with external systems. Using an alias eliminates the need to configure multiple credentials and connection information profiles when using multiple environments. IntegrationHub only requires an alias, which then resolves to use the correct credentials and connection information during runtime.

For more information, see the following topics:

- Introduction to credentials, connections, and aliases
- Create connection attributes for IntegrationHub

Remote tables

The Tables (sys_db_object) table contains a record for each table in the database, including remote tables. For remote table records, the **Remote Table** flag is checked on the record form.

The columns in a remote table are mapped to the columns in a third-party application table from which the data is being pulled. The remote table script definition stores this information. Table definitions for remote tables reside on the ServiceNow AI Platform. The table rows, or external records, are stored in memory while a user views the data in a list or form.

For more information about remote tables, see Create a remote table.

When creating a remote table for use with IntegrationHub, pay special attention to the caching interval and choose an interval based on your workflow and the volatility of the third-party data. If the caching interval is too short, this can result in unnecessary connections to the third-party application. If the caching interval is too long, this can result in out-of-date third-party data being presented in Agent Workspace for CSM.

Remote table script definitions

Use a script definition to retrieve and cache data for a remote table by running the script against an external data source. Remote table script definitions store the following information:

- Name
- Active
- Table
- Script
- Cache TTL
- Domain
- Domain path

For more information about script definitions, see Create a script definition for a remote table.

Third-party data integration sample script

The remote table script can be designed to pull records from a third-party application. This script is called when a query to access data in the remote table is made.

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In order to use a remote table with IntegrationHub, you need to identify the IntegrationHub spoke that works with the third-party application. The spoke consists of the Flow Designer actions that were created to bring various subsets of the data from that application.

For example, if you need to bring account information from the Salesforce application, you would use the Salesforce spoke and the **Get All Accounts** action. See below for an example of the remote table script that accesses this action.

```
(function executeQuery(v_table, v_query) {
  try {
    // prepare inputs for the spoke actions
    // Get All Accounts action does not have any inputs).
    var inputs = {};

    // call spoke action
    var outputs = sn_fd.FlowAPI.executeAction(

 "sn_salesforce_spok.get_all_accounts", inputs);

    // check if Action was completed successfully
    if (outputs.status != "Success") {
      throw new Error(outputs.errorMessage);
    }

    // extract payload from the action outputs
    var accounts = outputs.accounts.data;

    // map action output data to the remote table columns and
 Sys Id
    for (var i = 0; i < accounts.length; i++) {
      v_table.addRow({
        "u_sf_account_id": accounts[i].name,
        "u_sf_account_name": accounts[i].label,
        // assign remote table Sys Id to the primary key of the
 third-party
        // record
        "sys_id": accounts[i].name,
      });
    }

  // process errors
  } catch (error) {
     gs.addErrorMessage("Error trying to retrieve  Salesforce
 Accounts." +
                        "Please contact System Administrator.");
     gs.addErrorMessage("System Error: " + error.message);
  }

})(v_table, v_query);
```

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Note:
Not all IntegrationHub actions can be invoked from the remote table scripts. Specifically, Data Stream Actions cannot be called from the scripts. If the action you would like to use is a Data Stream Action, you might need to create your own action based on the REST step. An easy way to create an action is to copy an existing action and then modify it to accomplish your goal. You can find an example of custom spoke actions in this topic: Create Salesforce spoke actions to retrieve Opportunities for use in the remote table definition.

Configure third-party data integration for CSM

Configure the required components to enable the third-party data integration feature for Agent Workspace for CSM.

Before you begin
Role required: admin

Procedure

1. Identify the third-party application.
   a. Verify that it has the corresponding IntegrationHub spoke and that it is activated on your instance.
   b. Follow the setup instructions specific to the spoke.
   For example, for the Salesforce spoke, follow the instructions in the Set up Salesforce spoke topic.
2. Identify the spoke action that retrieves the desired third-party data.
   You can find the list of available actions in the spoke documentation. If an action that performs the desired task does not exist, you can create your own action by copying an existing action and modifying it to suit your needs. You can find an example of the custom spoke actions in Create Salesforce spoke actions to retrieve Opportunities for use in the remote table definition.

   Note:
   Data Stream Actions cannot be used with the remote table.
3. Create the remote table on your ServiceNow instance to expose the data from the application through the GlideRecord interface.
4. Create the remote table script definition to map the data from the third-party table to the remote table.
   a. Configure error messages if the spoke action call results in an error.
   This error is picked up by the form, list, and field elements and is displayed for the end user when an error occurs. These error messages distinguish between cases where the response from the third-party application has no data and an error while fetching data from the third-party application.
   b. Configure ACLs on the remote table to provide users and roles with read access to the third-party data.
   c. Configure ACLs to revoke CREATE, WRITE, and DELETE access on the remote table for all users.
5. Configure the lists, forms, and fields that pull data from the remote table.

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Once the remote table is set up, you can access data using the GlideRecord interface.

a. Use Agent Workspace components to embed third-party pages and reports in iframes as popups or related items.

b. Configure UI actions on forms to create deep links to the records in the third-party application.

6. Perform some lightweight data synchronization prior to using the feature.
For example, pull in account data from a third-party application using an import set. In the example provided, the Account (customer_account) table has an Account Id column, which is populated with the Id of the account in the third-party application instance. This column is used as the foreign key to pull opportunities for the corresponding account on the third-party application instance.

Reference Salesforce integration using remote tables

In this example, the Customer Account table is extended to include an associated Salesforce Account ID which, in turn, is used to retrieve Salesforce opportunities associated with this account. The remote table is used to hold the retrieved opportunity data.

Use the steps and the examples in the following topics to create a reference Salesforce integration using remote tables.

- Using the IntegrationHub Salesforce spoke.
- Using remote tables and the Salesforce spoke. Identify or create an IntegrationHub action that you can use to test the third-party data integration. Then use this action in the remote table definition.
- Using a related list to create the connection between the customer account and the Salesforce opportunities.

Using remote tables and the Salesforce spoke

Create Salesforce spoke actions that you can use to test the third-party data integration. Then use these actions in the remote table definition.

Using the IntegrationHub Salesforce spoke

Use the Salesforce spoke to integrate a Salesforce account with your ServiceNow instance.

Before you begin

Role required: admin

Procedure

To configure the Salesforce spoke, follow the instructions in Set up the Salesforce spoke.

Related topics

Using remote tables and the Salesforce spoke

Connect Customer Account and Salesforce Opportunities using a related list

Create Salesforce spoke actions to retrieve opportunities for use in the remote table definition

The Salesforce spoke provides actions to retrieve metadata of the opportunity record and create a new opportunity.

Other than Data Stream Actions, there is no action to get a set of the opportunity records based on a given search criteria. You must create your own actions to accomplish the stated goal of the reference example. See Reference Salesforce integration using remote tables.

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To create a new action, copy an existing action and modify it to suit your needs. For example, you can copy the **Get All Accounts** action and modify it to retrieve opportunity records.

For this example, you will create three new Salesforce spoke actions:

- Get All Opportunities
- Get Opportunities for Account Id
- Get Opportunity Details

Each action includes three steps:

1. A pre-processing script step that creates a query.
2. A REST step that executes the query.
3. A post-processing script step that evaluates the response from the query.

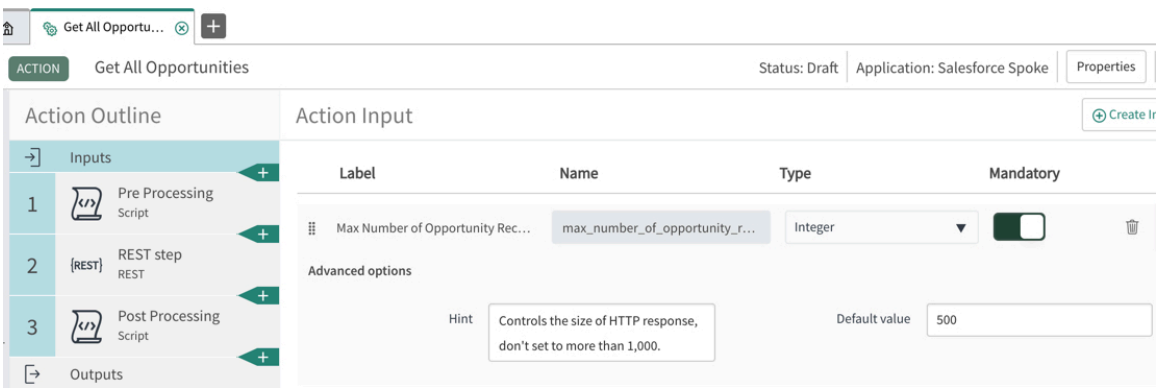
Note:
You can test all actions from the Flow Designer before you attempt to connect them to the remote table.

Get All Opportunities custom action

The **Get All Opportunities** action retrieves opportunity records from the Salesforce application. This action is invoked when you view the remote Opportunity table.

Action inputs

The **Get All Opportunities** action takes a single integer parameter that identifies the maximum number of records to be returned by the query. The REST-based actions can't accommodate pagination and, for this reason, it's important to limit the number of records returned from the third-party application. It isn't recommended to place more than 1,000 records in the remote table. The default number of records is 500.



Pre-processing step

The pre-processing script step takes the action input as its own.

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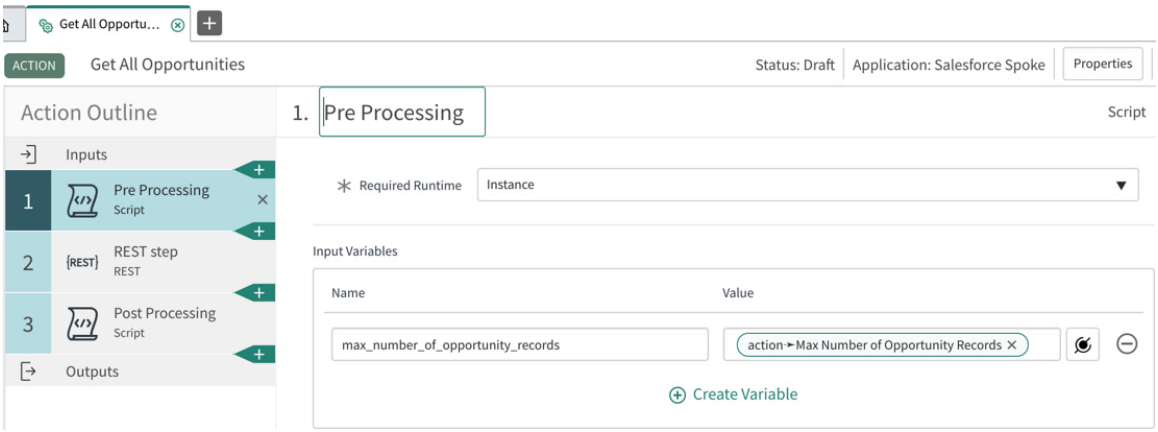


The pre-processing script creates a SELECT query for all opportunities limited by the maximum number of records allowed. This query is based on the Salesforce Object Query Language (SOQL).

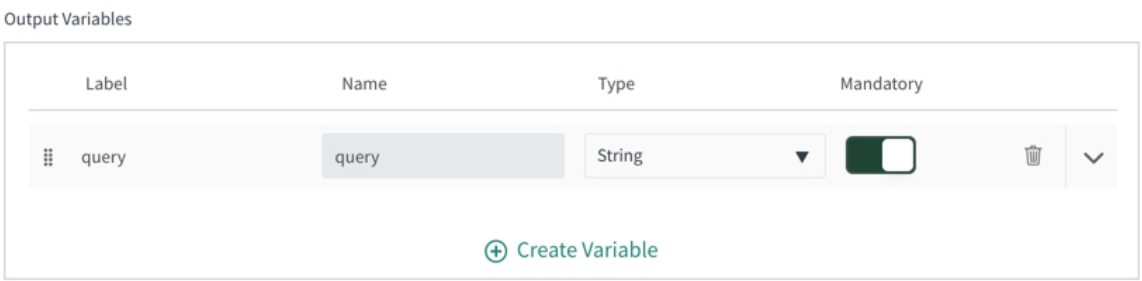
```
(function execute(inputs, outputs) {

 outputs.query =
"query/?q=SELECT+Name,Id,AccountId,CloseDate,Amount," +
                "StageName,Probability,Type+FROM+Opportunity";

 outputs.query = outputs.query +
                "+LIMIT+" +
inputs.max_number_of_opportunity_records;

})(inputs, outputs);
```

You must specify the fields from the opportunity records that you're interested in. This example uses the following fields: Name, Id, Account Id, Close Date, Amount, Stage Name, and Probability. To see the full list of available fields, use the **Get Opportunity Fields** action.

You can also control the ordering of the query search by adding the ORDERED BY keyword and value for ASC or DESC order direction. For example, you can add the following line to the script before the line specifying the LIMIT. It makes the query return the first 500 records with the most recent Close Date.

```
outputs.query = outputs.query + "+ORDERED+BY+CloseDate+DESC";
```

The pre-processing output is a query.



REST step

The REST step is a standard REST step from the Salesforce spoke REST-based actions. You don't need to make any changes. Make sure that it points to the correct Connection Alias.

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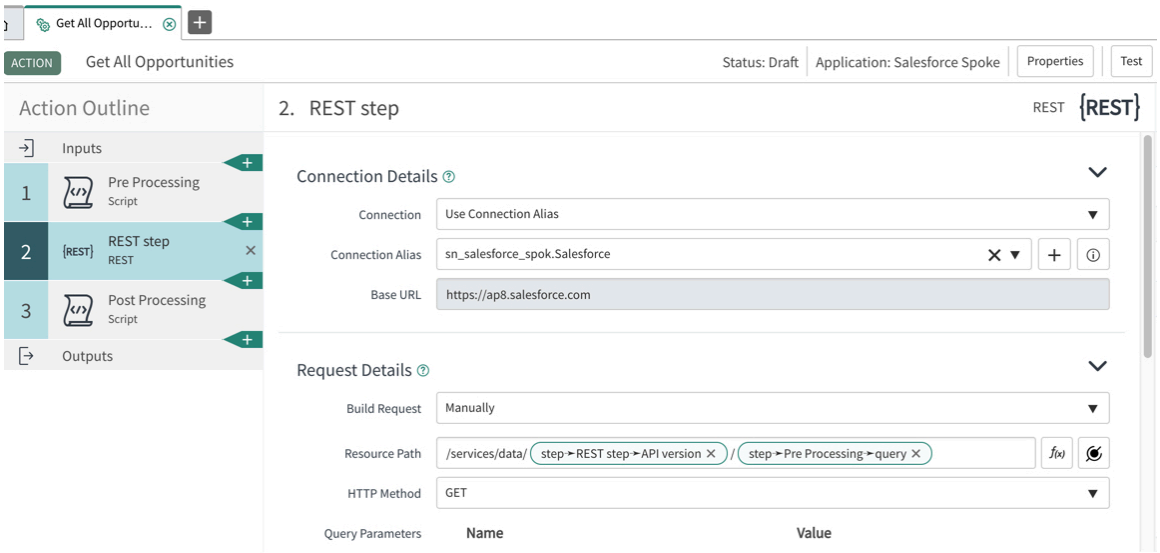
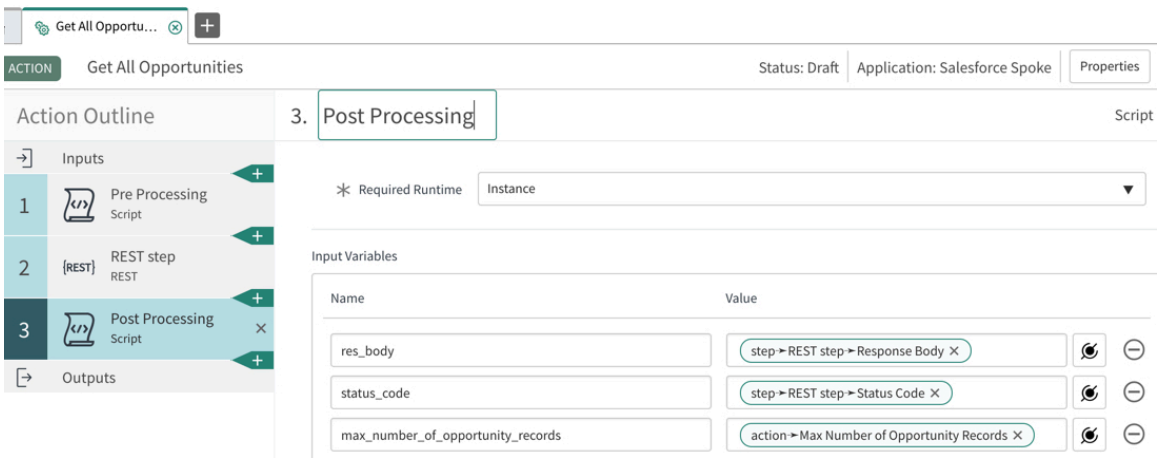


Post-processing step

The post-processing script step takes the action input and REST step output as its inputs.



The post-processing script checks the query response for errors, sets the error message if needed, extracts opportunity data from the response body, and creates an information message to indicate that not all data was retrieved from the Salesforce due to the number of records limitation.

```
(function execute(inputs, outputs) {

  try{
    var response = JSON.parse(inputs.res_body);
  } catch(e) {
    outputs = errorHandler(inputs, outputs);
  }


  function createOutputJson(inputs, outputs) {
    try{
      outputs.records = { data: response.records };
      outputs.status = "Success";

      if ( outputs.records.data.length ==
```

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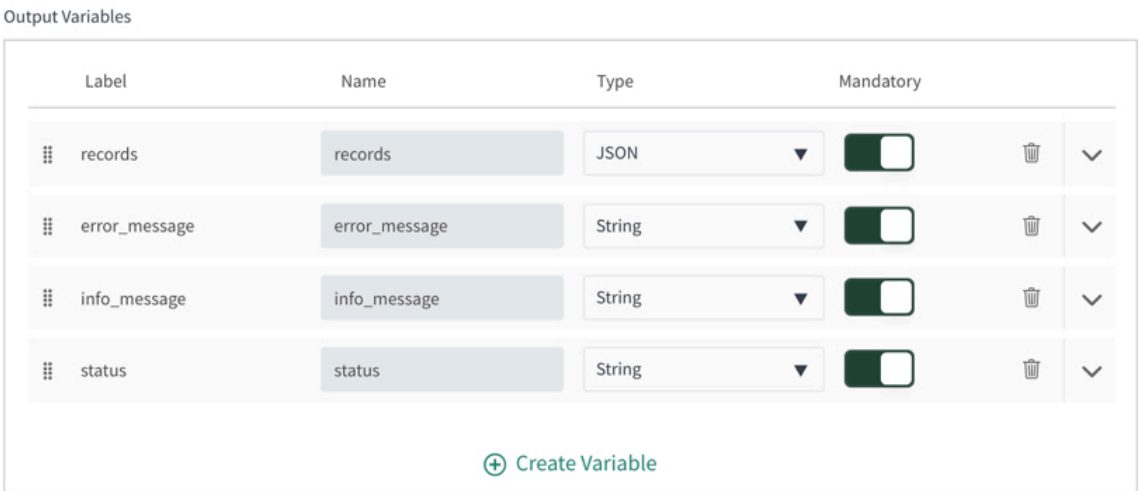
```
          inputs.max_number_of_opportunity_records ) {
        outputs.info_message = "Opportunity retrieve operation
was " +
                                "limited to" +

inputs.max_number_of_opportunity_records +
                                " records.";
      }
    } catch(e) {
      outputs = errorHandler(inputs, outputs);
    }
    return outputs;
  }


  function errorHandler(inputs, outputs) {
    outputs.status = "Error";
    outputs.error_message = "Unknown Error. " +
                            "Please check error log for more
information";

    if(inputs.res_body.contains("message"))
      outputs.error_message = response[0].message;

    return outputs;
  }

  if(inputs.status_code == "200")
    outputs = createOutputJson(inputs, outputs);
  else
    outputs = errorHandler(inputs, outputs);

})(inputs, outputs);
```

The following are outputs of the post-processing step.



Action outputs

Action outputs consist of the query status, error and information messages, and opportunity records. See the preceding screenshot for the action outputs.

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Get Opportunities for Account Id custom action

The **Get Opportunities for Account Id** action retrieves opportunity records for the specific Salesforce account. This action is invoked when the agent views a Salesforce opportunity available for the customer account based on the Salesforce account associated with it.

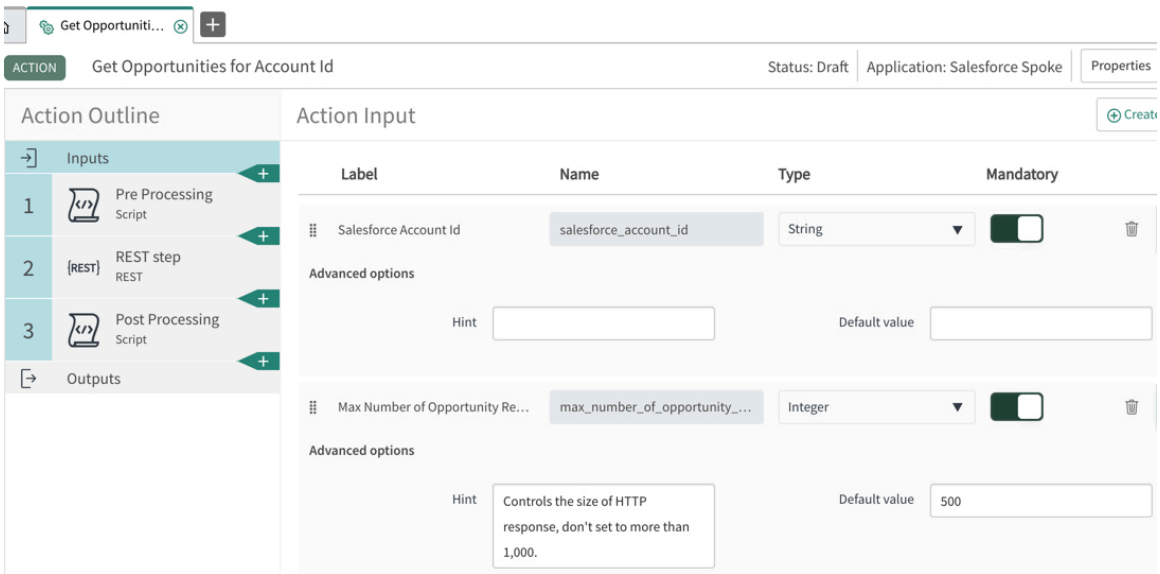
This action is similar to the **Get All Opportunities** action.

Action inputs

In addition to the maximum number of records to be returned by the query, this action also takes a Salesforce Account Id as input to be used as a query parameter. The value of this parameter is provided by the relationship that links the customer account and the Salesforce opportunity through the associated Salesforce Account Id. For more information, see Create defined related lists.

The specific relationship needed for the reference example is also described in the Using a related list to create the connection between the Customer Account and Salesforce Opportunities topic.

The Salesforce Account Id action input parameter has no default value.



Action Outline with Inputs: Pre Processing script, REST step, Post Processing script. Action Input showing Label, Name, Type, and a toggle for Mandatory.

Pre-processing step

The pre-processing script step takes the action input as its own.

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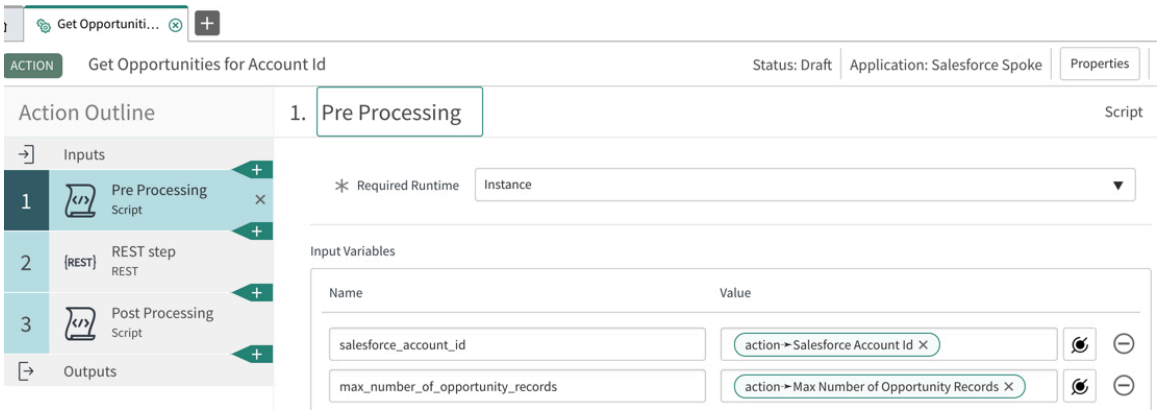

The Pre-Processing step script creates a SELECT query similar to the one created for the **Get All Opportunities** action with the addition of the check against the Salesforce Account Id.

```
(function execute(inputs, outputs) {

 outputs.query =
"query/?q=SELECT+Name,Id,AccountId,CloseDate,Amount," +
                 "StageName,Probability,Type+FROM+Opportunity"
       +

                 "+WHERE+AccountId='" +
inputs.salesforce_account_id + "

                 "+LIMIT+" +
inputs.max_number_of_opportunity_records;

})(inputs, outputs);
```

The pre-processing output is a query, similar to the **Get All Opportunities** action.

REST step, post-processing step, and action outputs

These steps and outputs are the same as for the **Get All Opportunities** action.

Get Opportunities Details custom action

The **Get Opportunities Details** action retrieves a single Opportunity record from the Salesforce application based on the record Id. This action is invoked when the user opens the form for the Opportunity record in the remote table.

Action inputs

The **Get Opportunities Details** action takes a single integer parameter that identifies the Salesforce Account ID. This parameter is set by the form based on the sys_id that was provided to the remote table in the remote table script. For more information, see Example script that queries the Opportunity table.

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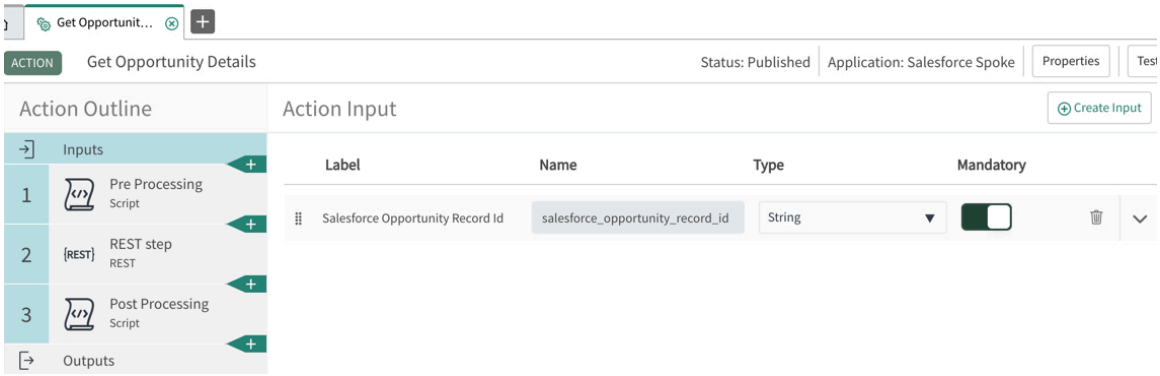
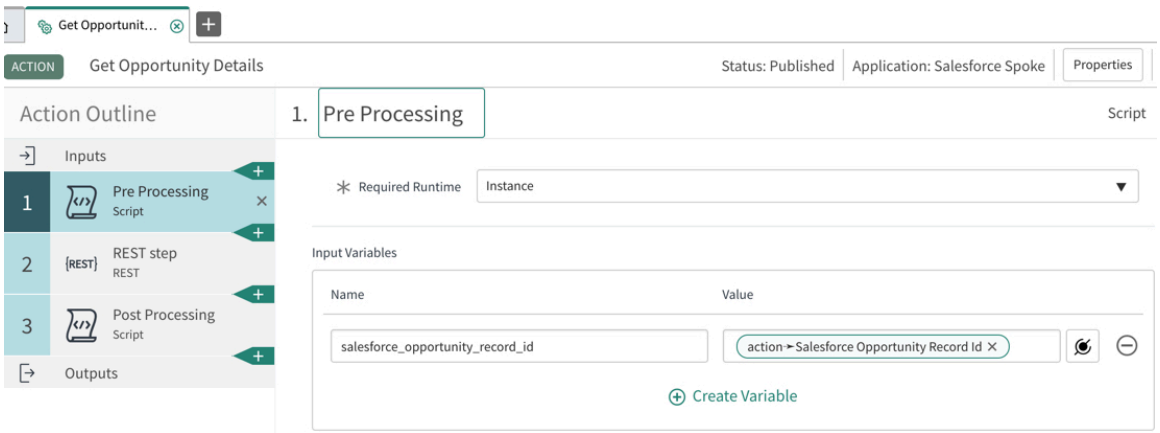


Pre-processing step

The pre-processing script step takes the action inputs as its own.



As with other actions, the pre-processing step creates an opportunity query for the specific parameter. In this case, the match is done against the opportunity record Id. Do not worry about the LIMIT in this query because it returns at maximum a single record.

```
(function execute(inputs, outputs) {

 outputs.query =
"query/?q=SELECT+Name,Id,AccountId,CloseDate,Amount," +
                "StageName,Probability,Type+FROM+Opportunity"
      +

              "+WHERE+Id='" +
inputs.salesforce_opportunity_record_id + "'";

})(inputs, outputs);
```

The pre-processing output is a query similar to the other custom actions.

REST step, post-processing step, and action outputs

These steps and outputs are the same as for the other custom actions except there is no maximum number of records parameter and no information message.

Remote tables and definition

Once you have the spoke custom actions working, you need to create a remote table that describes the schema for the data to be retrieved from the Salesforce Opportunity table.

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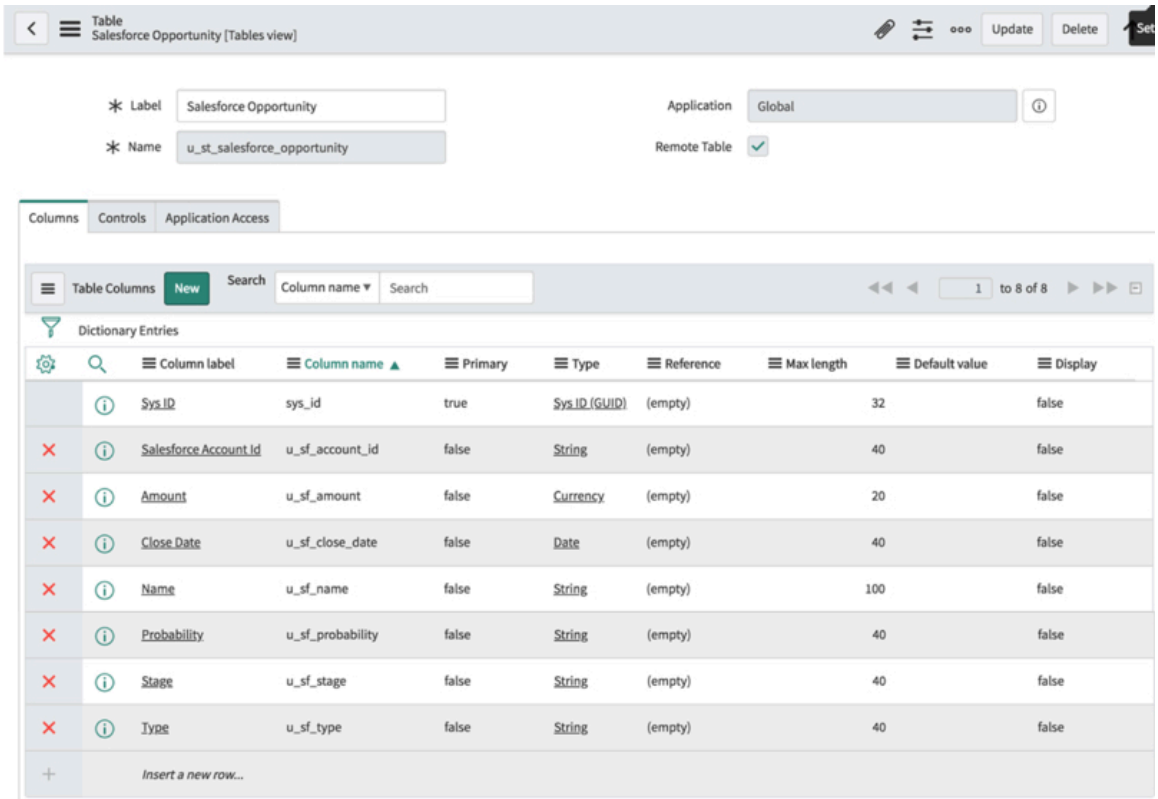
Create a remote table as shown in the following example.



Create the script definition for the remote table (u_st_salesforce_opportunity), which does the following:

- Uses the spoke custom actions to pull data from the Opportunity table in the Salesforce instance.
- Maps the response from Salesforce into the remote table columns.

Example script that queries the Opportunity table

This example script queries the opportunity table using the **Get All Opportunities**, **Get Opportunities for Account Id**, and **Get Opportunity Details** custom actions.

The example script consists of three distinct parts:

1. The first part selects the correct custom action and prepares inputs for it.
2. The second part makes a call to the action.
3. The third part processes the outputs of the action.

Selecting a spoke action and preparing the inputs

In this section of the script, select one of the three custom actions that you are prepared to get opportunities from the Salesforce application:

- **Get All Opportunities**
- **Get Opportunities for Account Id**
- **Get Opportunity Details**

You can decide which action to call based on the parameters included in the `v_query` function argument.

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```
/****** Choose action and prepare action inputs *****/
var action = null;
var inputs = {};

// look up opportunity by salesforce record id
if (v_query.isGet()) {

  action = "get_opportunity_details";
  inputs.salesforce_opportunity_record_id = v_query.getSysId();


// look up opportunities by salesforce account id
} else if (v_query.getParameter("u_sf_account_id")) {

    if (v_query.getParameter("u_sf_account_id") == "undefined")
 {
      gs.addInfoMessage(“Opportunities cannot be retrieved
 because “ +
                        “this “Account does not have associated
 “    +
                        “Salesforce Account. Please contact
 System “ +
                         “Administrator.");
      return;

    } else {
      action = "get_opportunities_for_account_id";
      inputs.salesforce_account_id =
 v_query.getParameter("u_sf_account_id");
    }

// look up all opportunities
} else {
  action = "get_all_opportunities";
}
```

Note that this script configures an information message if the Salesforce account is undefined when it’s required by the action. The undefined value comes from the relationship that is described in Using a related list to create the connection between the Customer Account and the Salesforce Opportunities.

When the Salesforce account is undefined, there’s nothing to query for in this case and the function returns without calling the spoke action.

Calling the spoke action

In this section of the script, call the action using the names of the Salesforce spoke and the selected action and store the outputs of the call.

```
/***** Call action *****/
var outputs =
        sn_fd.FlowAPI.executeAction("sn_salesforce_spok." +
 action, inputs);
```

Processing the action output

In this section of the script, process the outputs starting with the check for errors.

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```
/***** Process action outputs *****/
if (outputs.status != "Success") {
throw new Error(outputs.error_message);
}
```

If the query doesn't return any errors, the script must process the returned records and add them as rows into the remote table. Map the Salesforce Opportunity fields into the remote table columns.

```
var opportunities = outputs.opportunities.data;

 for (var i = 0; i < opportunities.length; i++) {
  var opportunity = opportunities[i];
  v_table.addRow({
    "u_sf_amount": opportunity.Amount,
    "u_sf_close_date": opportunity.CloseDate,
    "u_sf_name": opportunity.Name,
    "u_sf_probability": opportunity.Probability + "%",
    "u_sf_account_id": opportunity.AccountId,
    "u_sf_stage": opportunity.StageName,
    "u_sf_type": opportunity.Type,
    "sys_id": opportunity.Id,
  });
}
```

Note that the Salesforce opportunity record Id is assigned to the remote table sys_id. This verifies that lists and forms for the remote table function properly and that we are able to extract the record Id using `v_query.getSysId()` the next time that the remote table script is invoked.

Then display the information message if it was passed by the query.

```
if (outputs.info_message) {
  gs.addInfoMessage(outputs.info_message);
}
```

Putting the remote table script sections together

The three sections of the script are included in the try-catch block to provide for error handling.

```
(function executeQuery(v_table, v_query) {

  try {

    // place code here from: <Selecting a spoke action and
 preparing the inputs>

    // place code here from: <Calling the spoke action>

    // place code here from: <Processing the action output>

  } catch (error) {
    gs.addErrorMessage("Error retrieving  Salesforce
 Opportunities. " +
                       "Please contact System Administrator.");
    gs.addErrorMessage("System Error: " + error.message);
  }
```

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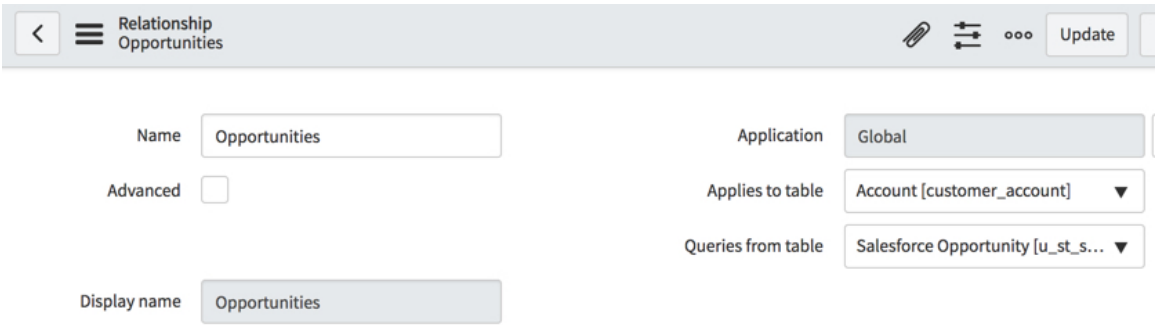
```
})(v_table, v_query);
```

Connect Customer Account and Salesforce Opportunities using a related list

Use a related list to link the Customer Account table with Salesforce Account Id, and the Salesforce Opportunity remote table with the same Account Id.

In this example, create a relationship called Opportunities. Choose the Account table in the **Applies to table** field and the remote opportunity table in the **Queries from table** field. For more information, see Create defined related lists.



Add the following code in the **Query with** field:

```
(function refineQuery(current, parent) {

  var sf_account_id = new
 String(parent.u_salesforce_account_id);

  if (sf_account_id.length == 0)
    sf_account_id = "undefined";

  current.addQuery("u_sf_account_id", sf_account_id);

})(current, parent);
```

This code checks for the presence of the Salesforce Account Id in the Account table and, if it's missing in the record, sets it to `undefined`. The code also includes a query for the Opportunity table column that holds the Salesforce Account Id for the value of this Id from the Account table. This query is invoked when the user opens the list of opportunities associated with the customer account. To see how it is used in the remote table script, see Selecting a spoke action and preparing the inputs.

Set up CSM Configurable Workspace

Set up CSM Configurable Workspace for your agents so they can engage with customers, answer questions, create cases, and resolve issues.

Complete the following tasks to set up CSM Configurable Workspace:

1. Activate the Customer Service plugin (com.sn_customerservice).
2. Set up CSM Configurable Workspace using guided setup.
3. Set up communication channels and routing.
4. Set up additional components specific to CSM Configurable Workspace.

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Activate the plugin

Activating the Customer Service plugin (com.sn_customerservice) provides the CSM Configurable Workspace functionality. For more information, see the following topics:

- Activate Customer Service Management
- Plugins activated with Customer Service Management

Set up CSM Configurable Workspace using guided setup

You can set up CSM Configurable Workspace by using the Customer Service Management Guided Setup. To use the guided setup:

1. Navigate to **Customer Service** > **Administration** > **Guided Setup**.
2. Select **Get Started** on the Welcome page.
3. Scroll through the list of guided setup categories until you reach the CSM Configurable Workspace category.
4. Select **Get Started** in the CSM Configurable Workspace category.

   The CSM Configurable Workspace category includes one task for the Configurable Workspace Guided Setup.
5. Select **Configure** to go to the Configurable Workspace Guided Setup.
6. Select **Get Started**.

The Configurable Workspace Guided Setup includes a sequence of workspace configuration tasks.

Configurable Workspace configuration tasks

Task	Description
Branding and theming	A theme sets the visual style of a configurable workspace experience and provides a consistent look and feel across all pages. • View the brand and theme setting in your workspace experience • Working with themes in Next Experience
Tab Settings	Configure the following in the Tab Settings category: • Configure a New Record menu by adding a table that agents can select to create new records in a configurable workspace. • Select a Service Catalog for your agents to use with a configurable workspace.
Lists	Configure list categories, filtered lists, and tailor lists to show specific items by user role in a configurable workspace. • Create list categories • Create filtered lists

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Configurable Workspace configuration tasks (continued)

Task	Description
Forms	Configure the way forms appear for your agents or workers in a configurable workspace. You can also configure the fields that appear on the form to be different depending on the record type and user roles. For more information, see Administering forms for Configurable Workspace.
Additional Forms Configuration	Configure templates that agents can use to pre-populate fields and UI actions to make a configurable workspace more interactive. For more information, see Administering forms for Configurable Workspace.
Search	Define search sources that your agents can query in a configurable workspace. Agents can use these keywords to search for specific records or knowledge articles. • Configuring search in Next Experience • AI search in Recommended Actions
Configurable Workspace Notifications	Determine the conditions when notifications display in a configurable workspace, such as when a record updates or a record assigns to a user.
Advanced Work Assignment (AWA)	Set up Advanced Work Assignment to automatically route tasks and interactions to the right agents.
Configurable Workspace Agent Chat	Configure Agent Chat to enable live agents to chat with customers and manage various conversation features for agents and end users. For more information, see Setting up Agent Chat.
Playbook	Playbooks display business process workflows in a simple task-oriented view. These step-by-step procedures guide users through workflows that address commonly encountered situations. For more information, see Building Playbooks.

Configuring workspace pages in UI Builder

You can use UI Builder to configure the pages and components that display information in CSM Configurable Workspace including the following:

- Landing pages
- Record pages
- Customer Central – Customer Information tab

For more information, see the Manage UI Builder pages and page variants topic in the UI Builder documentation.

Set up communication channels and routing

Enable agents to chat with customers or to receive and place customer calls. You can also set up routing that automatically directs chats to the appropriate agents. For more information, see Setting up Agent Chat.

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Set up additional CSM Configurable Workspace components

Complete these tasks to set up the components that are specific to CSM Configurable Workspace.

Additional CSM Configurable Workspace configuration tasks

Task	Description
Create or modify a landing page	The landing page is an agent's initial view of the workspace. The **CSM Landing Page** is included with the Customer Service plugin. You can modify this landing page or you can create and modify a page variant in UI Builder.
Set up a ribbon configuration in CSM Configurable Workspace	The form ribbon includes components that display information about a record. You can add the Customer 360, Timeline, and SLA components to the Case form ribbon. You can also configure attributes for the Customer 360 and Timeline components.
Set up a form header in CSM Configurable Workspace	Configure form headers that provide a quick summary of case, account, or contact information.
Set up a highlighted value in a form header in CSM Configurable Workspace	Configure fields that appear as highlighted values in form headers in CSM Configurable Workspace.
Set up a form action in CSM Configurable Workspace	Create form actions that link to UI actions so that you can use the UI actions in CSM Configurable Workspace.
Display the form ribbon and form header secondary values in the Contextual side panel	Configure the form ribbon and the secondary values that appear in a form header to display in the Contextual side panel in CSM Configurable Workspace.
Display field values as interaction record tab titles	Display field values, such as contact or consumer names, as titles on interaction record tabs in CSM Configurable Workspace.
Enable the Create Case UI action for case type selection	Enable the **Create Case** UI action for case type selection for one or more selected tables.
Configure tabs in the contextual side panel	Use the *`inlineTabExclusion`* UX page property to prevent tabs from appearing in the configurable side panel in CSM Configurable Workspace.
Configure service catalogs for CSM workspaces	Customer service agents use service catalogs to fulfill catalog item requests. You can configure the Service Workspace Portal to use the catalogs that contain the desired items.

CSM Configurable Workspace record pages

A record page provides the base structure for how a record is displayed in CSM Configurable Workspace. This includes records such as cases, incidents, and tasks.

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Record page overview

Record pages include elements such as layouts, containers, and components to display record information. Some record pages, including the **CSM default record page** and **CSM Interaction record page**, leverage additional logic using presets, controllers, and extension points. Pages with preset and controller logic benefit from reusability because they automatically inherit styling, events, and data binding. This reusability makes simplifies configuration and makes the pages upgrade friendly.

Several record pages are included with CSM Configurable Workspace. You can use these record pages as is or you can customize them to suit your needs. For more information about customizing record pages, see Manage UI Builder pages and page variants.

Each record page has an order value. The system uses the pages with the lowest order values as the default record pages. When the system displays information in CSM Configurable Workspace, such as interaction and case records, it uses the elements in the default pages to determine the page appearance.

Available record pages

Several record pages are included with CSM Configurable Workspace.

CSM Configurable Workspace record pages

Page	Description
CSM default record page	This page builds on the Record default page and includes specific features for case management. **Note:** Use this page to display generative AI elements and functionality available with Now Assist for Customer Service Management (CSM).
CSM Interaction record page	This page builds on the interaction record page and includes CSM-specific features for interaction management. **Note:** Use this page to display generative AI elements and functionality available with Now Assist for Customer Service Management (CSM).
Front-line case page	This page is designed for front-line agents. It provides a simplified case view that enables agents to quickly gather context, categorize cases, and provide prompt responses to customers.
CSM voice interaction record page	This page provides a component that customers can use for integration with Contact Center as a Service (CCaaS) providers and

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CSM Configurable Workspace record pages (continued)

Page	Description
	an interface that agents can use to handle customer phone calls.
Record default	This page provides the basic structure for a record page, including record information, a communication interface, and suggestions for issue resolution. This page is also known as the standard record page. **Note:** The Record default page is no longer supported with patches and fixes.
Interaction record page	This page provides the basic structure for an interaction record, including interaction information and related search results. **Note:** The Interaction record page is no longer supported with patches and fixes.

Record page elements

Record pages are made up of different elements that determine how record information is displayed in CSM Configurable Workspace.

Record page elements

Element	Description
Layouts	The metadata that determines how components are positioned on a page and what CSS rules apply. Layouts enable you to create useful and visually appealing pages.
Containers	Hold one or more components on a page.
Components	Components are the building blocks that you use to create pages. End users, such as agents, use components to view and interact with data. Commonly used components include Heading, Image, List, Form, and Button. For more information about components and component configuration, see the ServiceNow® Developer site.
Presets	A preset is a set of instructions that define configuration values for a specific component. A preset also specifies how a component connects to a controller. Using presets can simplify component configuration and enable you to avoid manual data binding.
Controllers	A controller combines the complex business logic, including data brokers, state parameters, scripting, and event

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Record page elements (continued)

Element	Description
	management, into a single entity. Presets use the data in a controller to auto-configure a component.
Extension points	An extension point enables subpages, such as viewports and page collections, to inherit controllers from the parent page. Extension points also improve the ability to upgrade.

Default record pages

Each record page has an order number and the page with the lowest order number is the default page. When the system displays a record in CSM Configurable Workspace, it uses this default page to display the record information.

New Z-boot customers see the following pages by default:

- CSM default record page
- CSM Interaction record page

Upgrade customers retain their custom record pages. However, the following pages are no longer supported with patches and fixes:

- Record default
- Interaction record page

For more information about setting the default record pages, see Set record page order.

Front-line case page

The Front-line case page provides a simplified case view that enables front-line agents to quickly gather context, categorize cases, and provide prompt responses to customers.

The Front-line case page focuses on the essential functionality that front-line or tier 1 agents need:

- Looking up and verifying customer information
- Scanning the activity stream
- Viewing related information
- Searching for knowledge articles

The Front-line case page is included with the CSM Configurable Workspace application.

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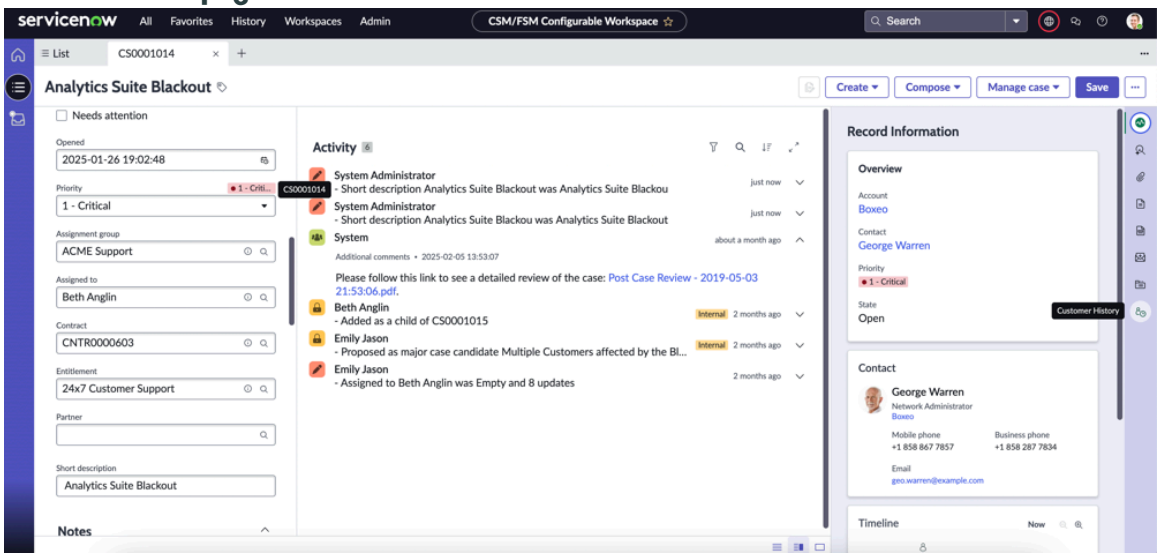
Front-line case page



Front-line case page variant

The Front-line case page variant is included with the CSM Configurable Workspace application. This variant includes the following settings.

Front-line case page variant settings

Setting	Description
Active	Enabling the **Active** check box makes the page variant available to the selected audience. The Front-line case page variant is active for new and upgrade customers. The active setting combined with the page order determines the page that CSM Configurable Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority. The default order for the Front-line case page variant is 1000.
Conditions	Conditions determine when a page variant is displayed. The Front-line case page has the following condition: **table=sn_customerservice_case** This condition limits the use of the Front-line case page variant to records from the Case [sn_customerservice_case] table and tables that extend the Case table.
Audience	The audience determines who can see the page variant. The Front-line case page has the following audience: **CSM - Front-line Agent** This audience includes the sn_cwf_wrkspc.frontline_agent role. For more information, see Learn about audiences.

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To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. In the Record section of the Pages and variants list, select **Front-line case page**.
4. Select **Settings** at the top of the page.

Roles

The CSM Configurable Workspace application includes the following role: Front-line agent role (sn_cwf_wrkspc.frontline_agent). Agents with this role have access to the Front-line case page in CSM Configurable Workspace.

The Front-line case page variant includes the CSM - Front-line Agent audience, which includes the sn_cwf_wrkspc.frontline_agent role.

Note:
To make the Front-line case the default page, the system administrator can set the page to active and set it to the lowest page order.

Front-line case page components

The Front-line case page includes the following components.

Component	Description
Form heading	The form heading displays the case short description and also includes the action bar and record tags.
Record tags	Agents can create multiple tags for a record and then use the tags to group and organize records. For more information, see Group and find records using tags in workspace.
Action bar	The action bar contains the actions available to users while working on case records. The specific actions are determined by factors such as the user role, case state, and other attributes. • **In-progress Actions**: Provides a list of minimized modeless dialogs and includes a badge that displays the number of items in the list. From this list, an agent can select an item to open the minimized comment, work note, or email. • **Create**: Create records such as work orders, incidents, and requests. • **Compose**: Compose comments, work notes, and emails in modeless dialogs. • **Manage case**: Perform case management actions such as accepting a case or requesting information. • **Save**: Save changes to the case record. • **More Actions**: Perform additional actions such as proposing a major case or reporting a knowledge gap.

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Component	Description
Contact lookup	Agents can use the contact lookup component to do the following: • Search for a contact. • Link or unlink a contact. • Edit and save a linked contact record. • Select a reference field on a lookup card, such as a contact name, to open the reference in a sub-tab. • Select an email address on a lookup card to open a draft email in the email composer in a sub-tab. • Select a phone number on a lookup card to make a call. The contact lookup component displays information in record cards. These cards display contact information and provide quick access to details such name, email, and phone. For more information, see the Contact and consumer lookup components section below.
Consumer lookup	Agents can use the consumer lookup component to do the following: • Search for a consumer. • Link or unlink a consumer. • Edit and save a linked consumer record. • Select a reference field on a lookup card, such as a consumer name, to open the reference in a sub-tab. • Select an email address on a lookup card to open a draft email in the email composer in a sub-tab. • Select a phone number on a lookup card to make a call. The consumer lookup component displays information in record cards. These cards display consumer information and provide quick access to details such name, email, and phone. For more information, see the Contact and consumer lookup components section below.
Case details	The case details component includes collapsible sections for: • Case • Notes • Closure Information • Related Records This component also includes a menu with additional form actions, such as personalizing the form, exporting data, and copying the URL.

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Component	Description
Case summarization	The case summarization component appears above the activity stream. When an agent opens a case record, the component is collapsed and in the default state. Agents can use this component to do the following: • Summarize case details. • Post the summary to the activity stream. • Refresh the summary. The case summarization component requires the Now Assist for Customer Service Management (CSM) application to be activated and configured. For more information, see the Case summarization component section below.
Activity stream	The activity stream component displays a list of activities occurring on a case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. For more information, see the Activity stream component section below. **Note:** The Front-line case page uses modeless dialogs for composing comments, work notes, and emails.
Contextual side panel	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Front-line case page includes the following tabs. • Record information • Recommended Actions search • Attachments • Form Templates • Response Templates • Email Templates • Related Lists For more information, see the following sections: • Contextual side panel component • Related lists component

Action bar component

The Front-line case page supports actions from the following Customer Service Management and CSM Configurable workspace plugins:

- Customer Service (com.sn_customerservice)
- CSM/FSM Configurable WS Foundation (com.snc.uib.cwf_workspace)

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- CSM Configurable Workspace (com.snc.uib.csm_agent_workspace)
- CSM Workspace (com.snc.agent_workspace.csm)
- Major Issue Management (com.sn_majorissue_mgt)
- Customer Service with Service Management (com.sn_cs_sm)
- Customer Service with Request Management plugin (com.sn_cs_sm_request)
- Time Recording for Customer Service (com.snc.csm_time_recording)
- Omni-Experience Standard Feature Set

If you are using any additional plugins, you must add the actions from those plugins to the Front-line case page action bar. For more information, see Configure the Front-line case page action bar.

Contact and consumer lookup components

The contact and consumer lookup components enable users to do the following:

- Look up a contact or consumer by name, phone number, or email address. As you type characters in the search box, matching information appears in record cards below the search box.
- Select a contact or consumer after searching by selecting the desired record card. The selected record card replaces the lookup component.

User roles determine which lookup component appears on the Front-line case page.

- Front-line case agents can see the Contact lookup component.
- Consumer agents with the Front-line case agent role can see the Consumer lookup component.
- Some users, such as managers, can have both B2B (account and contact) and B2C (consumer) roles. When a user has both roles, they can see both the Contact and Consumer lookup components.

When using the Contact lookup component to look up and select a contact, the system hides the Consumer lookup component. When using the Consumer lookup component to look up and select a consumer, the system hides the Contact lookup component.

When using the Contact component, the system displays the contacts for the selected account. If the agent selects a different contact, the system updates the account.

After selecting a contact or consumer, users can perform the following actions from the contact or consumer record card:

- Remove a linked contact or consumer from a case record by selecting the more actions icon and then selecting **Unlink**.
- Edit and save a linked contact or consumer record by selecting the pencil icon, editing the information for the contact, and selecting **Save**.
- Select a reference field on a lookup card to open the referenced record in a subtab.
- Select an email address on a lookup card to open to open the email composer in a subtab.
- Select a phone number on a lookup card to make a phone call.
- Collapse the card to display more record content. When collapsed, users can see a link to the contact or consumer name.

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The Contact and Consumer lookup components include advanced search capabilities that enable agents to perform a type-ahead search across multiple tables and fields. This includes the following types of matching:

- Exact match: phone number and record number
- Starts with match: name and email address

Case summarization component

The case summarization component provides agents with a summary of a customer service case, including the issue and the actions taken. Agents can generate summaries to understand case context and post summaries to the case work notes.

The case summarization component appears above the activity stream on the Front-line case page variant. Upon first opening a case, the component is collapsed and in the default state.

Using this component, agents can:

- Select **Summarize** to create a summary of the case details.
- Select **Share to work notes** to copy the summary text to the activity stream.
  - Review the summary text in the Share to work notes pop-up window and modify the text as needed.
  - Select **Save to work notes** on the pop-up window to add the text to the activity stream.
- Select the refresh icon in the component footer to refresh the text and get the latest summary.

Note:
If the case does not contain enough text to summarize, the system displays the following message: "This case doesn't have the minimum number of words required for summarization yet."

To use the case summarization component with the Front-line case page, activate the Now Assist for Customer Service Management (CSM) application and configure the case summarization skill in the Now Assist Admin console. For more information, see:

- Activate Now Assist for Customer Service Management (CSM)
- Configure the case summarization skill in the Now Assist Admin console.

Activity stream component

The activity stream component displays a list of the activities occurring on a case record. The activities in the list can be collapsed or expanded. When collapsed, the agent can quickly scan the list to get an overview of case activities. When expanded, the agent can see detailed information on individual activities.

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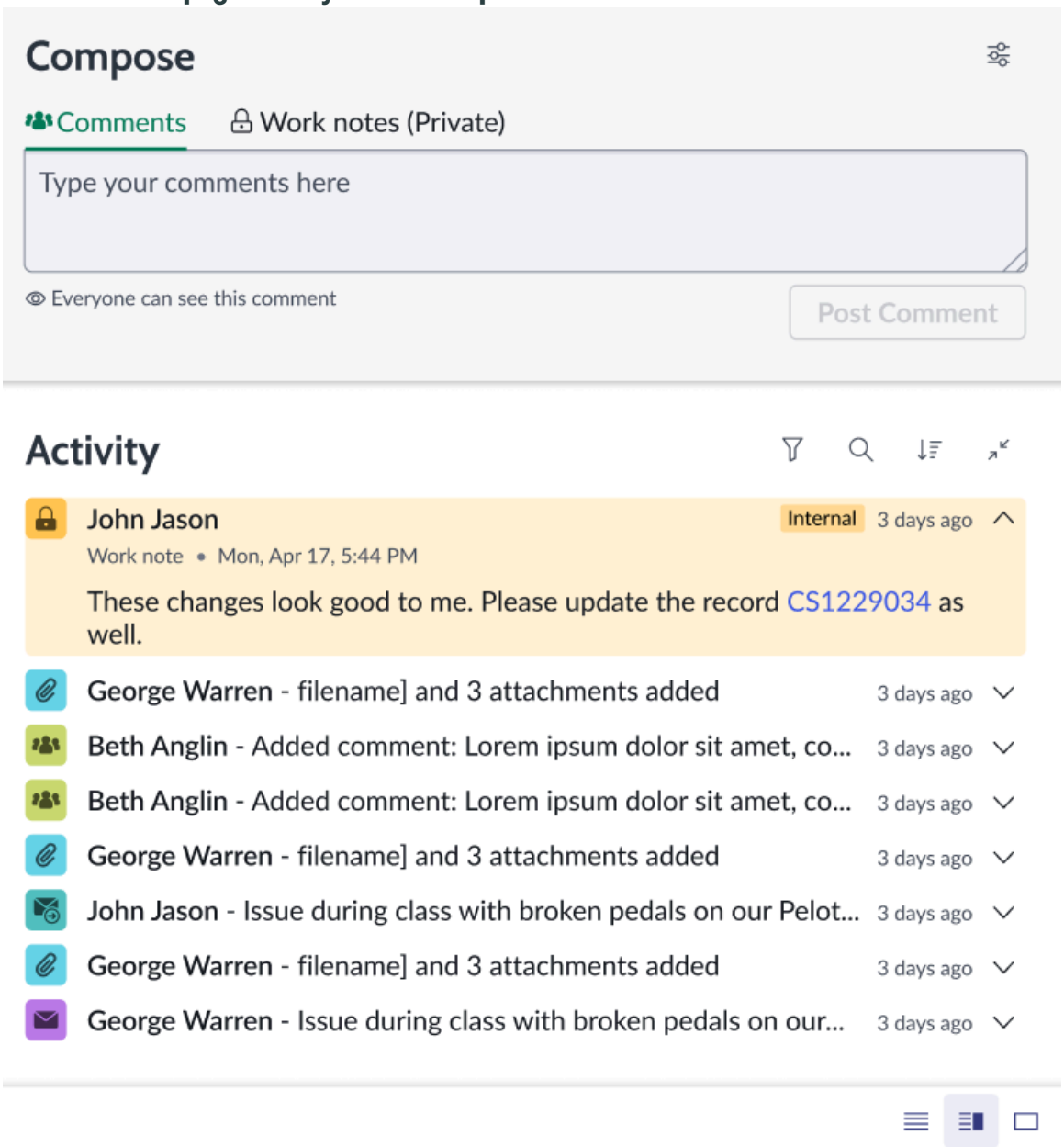
Front-line case page activity stream component



The activities in the activity stream are represented by tiles that use icons and colors to indicate the activity type.

- Comment
- Work note
- Attachment
- Field change
- Email sent or email received
- Chat discussion
- Custom icon

When collapsed, each activity in the list includes:

- A tile that represents the activity type.
- The name of the user responsible for the activity.

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- A brief one-line summary of the activity.
- A badge that indicates if an activity is internal or external.
- A relative timestamp.
- An expand button that the agent can use to see a detailed summary of the activity.

When expanded, each activity also includes:

- A full date and time stamp.
- An action label that describes the type of activity.
- For comments and work notes, the full text of the comment or work note.
- For field updates, the field name and the updated field value.
- For emails, detailed message information.
- For attachments, a small preview of the attached file.
- For chats, a sidebar chat card.

The activity stream uses Modeless dialogs for composing comments, work notes, and emails.

Contextual side panel component

The Front-line case page includes the contextual side panel component, which provides agents with the following functionality.

Front-line case page tabs in the contextual side panel

Tab	Description
Record Information	The Record Information tab includes the following cards: • **Overview**: Displays relevant information about the case including the account and contact, the case priority, and the state. • **Active SLA**: Displays active SLAs for the case, including time remaining, the SLA state, and any breaches. The cards that appear in the Record Information tab can be configured in the **Front-line Case Page Ribbon Config** ribbon configuration. For more information, see Set up a ribbon configuration in CSM Configurable Workspace.
Recommended Actions	The Recommended Actions tab includes AI search functionality. Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the case short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can do the following: • Select a source to see search results of that type. • Filter the list of search results. • Sort the list of search results.

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Front-line case page tabs in the contextual side panel (continued)

Tab	Description

	• Open the search results in full view in a record sub-tab.
	• Take the following actions:
	  ○ View and attach article
	  ○ Perform other actions such as reading articles in full view, flagging articles, or marking articles as helpful or unhelpful.
	• View successful actions by selecting the Actions history icon.
	
	For more information, see Use AI search in Recommended Actions to resolve cases.
	
	Note: Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CSM Configurable Workspace application.

Attachments	The Attachments tab provides access to case-related attachments. From this tab, agents can view and download attachments.
Templates	The Templates tab provides access to available form templates which enable agents to automatically populate fields on new records. Agents can manually apply a template when creating a new record such as an incident or change.
Response Templates	The Response Templates tab provides access to available response templates. These templates contain reusable messages that agents can copy to provide quick and consistent messages to customers.
Email Templates	The Email Templates tab provides access to available email templates. These templates contain default values for fields that agents can add to email messages. These default values can include the recipients (email addresses in the To, Cc, and Bcc fields), the sender, the subject of the email, and text to include in the message body.
Related Lists	The Related Lists tab provides access the case-related lists. The Front-line case page incorporates related list functionality into the contextual side panel. These lists appear in an accordion format that agents can expand and collapse as needed. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format. For more information, see the Related lists component section below.

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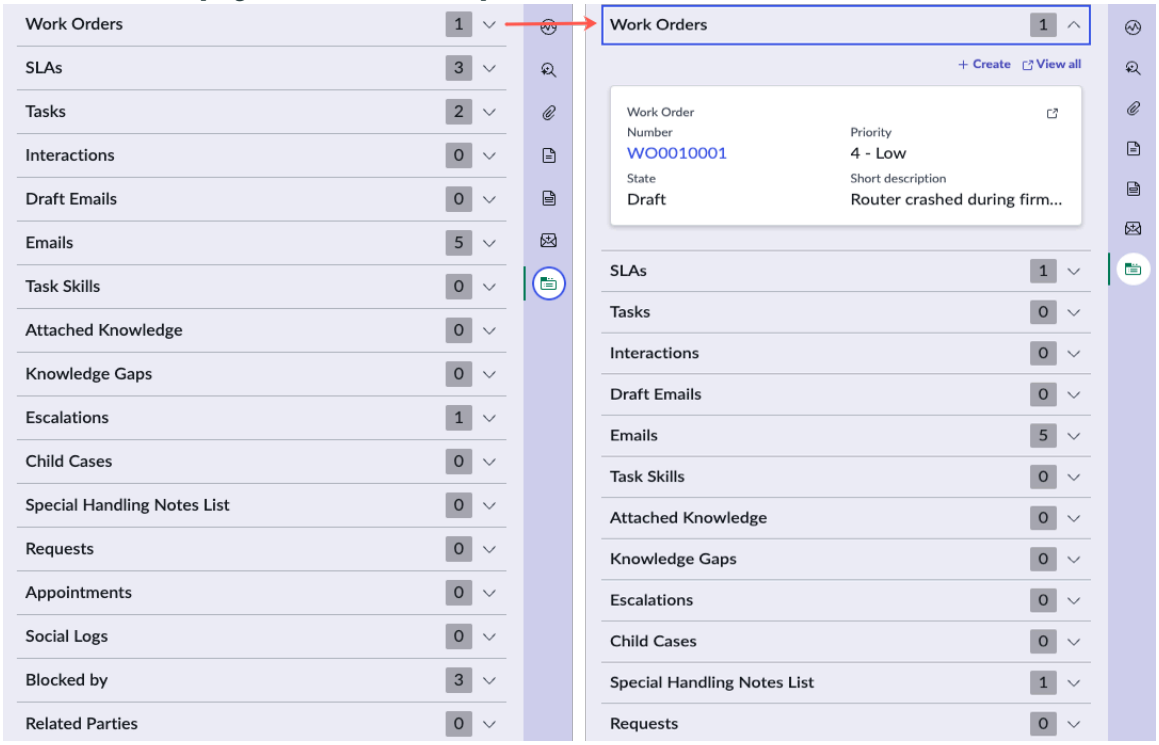
Related lists component

The related lists component provides access to the case related lists. This component uses an expandable accordion format. Agents can expand the desired lists to see the related items. This component also displays an icon with the number of items in a list.

Front-line case page related lists component



Related lists include the following actions:

- **Create**: Opens a blank record in a sub tab that the agent can use to create a new item.
- **View all**: Opens a list of records in a sub tab.
- **Show more**: is displayed for lists that have more than five items.

The items in an expanded list are displayed as cards. An expanded list shows one card for each item in the list.

- Agents can open an item in a sub-tab.
- If a list has more than five items, it includes a **Show more** option.

Customer History component

The Customer History component displays customer, consumer, or account history information, depending on the field selections on the interaction record. This component displays the information previously displayed in the Customer Activity tab. For more information, see Customer History component in the Customer Central documentation.

Record presence feature

The Front-line case page includes the record presence feature. This feature allows agents to see other users who are viewing the same record and enables easy collaboration.

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The user presence component displays an icon in the form header that shows the user who is currently viewing the record. For three or more users, the component displays two icons plus a number that represents additional users.

- Hover over an icon to see more information about a user.
- Select the number icon to see more information about the additional users.

For more information about this feature, see User presence.

Requesting information from customers

The Front-line case page includes a **Request Info** UI action that agents can use to request information from customers. This action provides agents with the option to send a comment to the customer when requesting information.

Note:
The **Request Info** UI action is available to users with the sn_cwf_wrkspc.frontline_agent role and for cases in the Open state.

The **Request Info** UI action on the Front-line case page behaves differently than the same action on the CSM default record page. On the Front-line case page, this action moves a case to the Awaiting Info state but does not require the agent to add a comment.

To request information:

1. Select **Manage Case** in the action bar.
2. Select **Request Info**.

The system sets the case **State** field to Awaiting Info and displays the following message to the agent: *Send a comment to request info if you haven't already. The case is awaiting info.*

If the agent has not sent a comment, they can select **Compose** > **Compose Comments** and use the Compose Activity modeless dialog to create and post a comment.

If the agent has already composed a comment and then selects **Request Info**, the system saves the record and automatically posts the comment to the activity stream.

Attaching and sharing knowledge articles

Agents can share articles with customers by using the **Attach and share article** knowledge guidance. This guidance recommends relevant knowledge articles to customer service agents and enables them to share the selected articles with customers in comments, work notes, or emails.

From the Recommendations tab in the contextual side panel, agents can use modeless dialogs to do the following:

- Attach and add a link to a comment.
- Attach and add a link to an email.
- Add a link to a work note.

Selecting these actions displays the comment, work note, or email modeless dialog. Once the guidance is executed, it is marked as Complete. After an action is completed, an entry is posted in the case record activity stream.

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To display the knowledge article links that are added to the modeless dialogs with the **Attach and share article** guidance, the system administrator needs to manually enable the rich text editor:

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Search for the *glide.ui.journal.use_html* system property.
3. Set the **Value** to true.

When the *glide.ui.journal.use_html* is set to true, the Rich Text Editor is enabled by default for comments and work notes in the Activity Stream. A **Rich Text Editor** toggle appears in the upper-right corner of the message box, allowing users to switch between rich text and plain text as needed.

The editor provides options such as bold, italics, lists, hyperlinks, and text alignment to help create structured, readable content. This setting does not affect email composition, which is managed
separately via *sys_email_client_confguration*. The rich text editor and formatting options are available by default in email messages, but the toggle does not appear.

For more information about the knowledge guidance, see Attach and share article guidance.

Modeless dialogs

Modeless dialogs are windows that overlay the main window content. Modeless dialogs enable for creating and posting comments and work notes to the activity stream, as well as composing and sending emails.

A modeless dialog is a window that appears in a workspace as an overlay on top of the main window content. This overlay enables users to interact with the window content and the overlay content at the same time. Agents can use modeless dialogs to do the following:

- Create comments and work notes to post to the activity stream.
- Create and send emails and reply to or forward emails.

After opening a modeless dialog, agents can move it around the screen and put it where they need it. This feature enables agents to reference information from the main window while drafting text in the overlay window.

The Front-line case page includes the following modeless dialogs:

- Compose Activity - for creating and posting comments and work notes
- Compose Email - for creating and sending emails

Create comments and work notes

Agents can use the Compose Activity modeless dialog to create comments and work notes and post them to the activity stream. See the following table for more information about creating these activities.

Note:
This feature is available with the Front-line case page in CSM Configurable Workspace.

Using the Compose Activity modeless dialog to create comments and work notes

Task	Description
Create a comment or work note	To create a comment or a work note:

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Using the Compose Activity modeless dialog to create comments and work notes (continued)

Task	Description
	1. Select one of the following actions from the action bar to open a Compose window: ○ **Compose** > **Compose Comments** ○ **Compose** > **Compose Work notes (Private)** 2. Add the text to the Compose window. When creating comments and work notes: • Agents can create one draft comment and one draft work note at a time before posting the text to the activity stream. • Agents can open one Compose window at a time. If an agent opens a second window, the previously opened window is minimized.
Post a comment or work note to the activity stream	To post a comment or work note, select one of the following actions from the Compose window: • **Post Comment** • **Post Work Notes (Private)** The Compose window automatically closes after the text is posted to the activity stream. Saving the case record also posts the comment or work note to the activity stream and closes the Compose window.
Minimize a Compose window	Composed windows can be minimized and moved to the In-process Actions menu in the action bar. Minimized comments and work notes appear in a list in the In-process Actions menu. Compose windows can be minimized in the following ways. • Select the Minimize button in the Compose window header. • One Compose window can be open at a time. If an agent opens another Compose window, the first window is minimized.
Open a minimized Compose window	Select the In-progress Actions menu in the action bar and then select an item from the list to open the window.

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Using the Compose Activity modeless dialog to create comments and work notes (continued)

Task	Description
	Items in the In-process Actions menu appear in a list with the action type (email, comment, or work note) and an abbreviated title. • For email, the title is the email subject. • For comments and work notes, the title is the first line of text.
Discard a comment or work note	To discard a comment or work note: 1. Select the Close button in the Compose window header. 2. Confirm the Discard action by selecting **Discard** in the confirmation pop-up window. The system closes the Compose window and discards the comment or work note.

The following guidelines apply to Compose windows:

- Draft comments and work notes are local to the browser. If the browser page is reloaded, they are cleared.
- Comments and work notes stay synchronized on the form and in the modeless dialogs.
- The Compose window can be resized.

Create emails

Agents can use the Compose Email modeless dialog to create and save email drafts and to send emails. This feature increases the speed of drafting emails while referencing record information.

Emails that are sent from a Compose Email window are posted to the activity stream. Agents can reply to and forward emails from the activity stream. See the following table for more information about creating and sending emails.

Note:
This feature is available with the Front-line case page in CSM Configurable Workspace.

Using the Compose Email modeless dialog to create and send emails

Task	Description
Create and send an email	To create and send an email: 1. Select **Compose** > **Compose Email** from the action bar to open a Compose Email window. 2. Fill out the fields:

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Using the Compose Email modeless dialog to create and send emails (continued)

Task	Description
	a. To, Cc, Bcc **b.** Subject **c.** Email body **3.** Select **Send email**. When creating emails and sending emails: • The Compose Email window automatically closes after the email is sent. • The email is posted to the activity stream.
Reply to or forward an email	To reply to or forward an email: **1.** Expand an email in the activity stream. **2.** Select one of the following buttons to open the Compose Email window: ○ **Reply** ○ **Reply all** ○ **Forward** **3.** Add the desired text. **4.** Select **Send email**. The Compose Email window automatically closes after the email is posted to the activity stream.
Add a link to a knowledge article	To add a link to a knowledge article: **1.** Select the Agent Assist tab in the contextual side panel. **2.** View the list of knowledge articles or search for an article. **3.** Select the More Actions menu on the knowledge article card. **4.** Select **Add link in email**. The system adds the title of the article with a link in the body of the email.
Apply a template to an email	To apply a template to an email: **1.** Select the Apply templates icon ( ) in the Compose email modeless dialog footer to display a list of available templates. The Template preview modal displays the available email templates. It does

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Using the Compose Email modeless dialog to create and send emails (continued)

Task	Description
	not display quick messages or response templates. 2. Select a template from the list. You can also search for a specific template. The system adds the contents of the template to the body of the email. **Note:** If no templates are available, the icon does not appear in the footer.
Minimize a Compose Email window	Minimized emails appear in a list in the In-process Actions menu in the action bar. Select the Minimize icon ( ) in the Compose Email window header to move the email draft to the In-progress Actions menu.
Open a minimized Compose Email window	Select an item from the In-progress Actions menu to open the Compose Email window. Items in the In-process Actions menu appear in a list with the action type (email, comment, or work note) and an abbreviated title. • For email, the title is the email subject. • For comments and work notes, the title is the first line of text.
Maximize a Compose Email window	Select the Maximize icon ( ) in the Compose Email window header to expand the Compose Email window to the full screen. Select the Maximize icon again to exit the Maximize mode.
Open a draft email in a subtab	Select the Pop out icon ( ) in the Compose Email window header to open the draft email in a subtab. The Compose Email window closes when the email opens in the subtab.
Close a Compose Email window	Select the Close icon ( ) in the Compose Email window header. The system saves the text as a draft email and closes the Compose Email window.

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Using the Compose Email modeless dialog to create and send emails (continued)

Task	Description
View a list of draft emails	Select the View drafts icon ( ) in the Compose Email window footer. Selecting this icon displays a list that includes the most recent email drafts. The list also includes the following actions: • **Manage drafts**: Displays the Manage drafts pop-up window. From this window, you can view a list of all draft emails. You can also delete email drafts from this window. • **Create new email**: Creates a new email in the Compose email window.
Select an email draft	Select the View drafts icon ( ) in the Compose Email window footer. Selecting this icon displays a list that includes the most recent email drafts. You can select a recent draft from this list. To view a list of all email drafts: 1. Select the View drafts icon and then select **Manage drafts**. 2. Select a draft from the list in the Manage drafts pop-up window. The system saves the current draft email and opens the selected draft email in the Compose Email window.
Select an email draft from the Draft Emails related list	1. Select the Related Lists tab in the contextual side panel. 2. Expand the Draft Emails related list. 3. Select the Open draft icon on the desired draft email card. The system opens the selected draft email in a subtab.
Discard the current draft email	1. Select the Discard draft icon ( ) in the Compose Email window footer. 2. Confirm the Discard action by selecting **Discard** in the confirmation pop-up window. The system displays a message that the draft email has been discarded.

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Using the Compose Email modeless dialog to create and send emails (continued)

Task	Description
Delete an email draft from the Manage drafts pop-up window	1. Select the View drafts icon ( ) in the Compose Email window footer. 2. Select **Manage drafts** to display the Manage drafts pop-up window. 3. Select an email to delete by enabling the check box. 4. Select **Delete** in the pop-up window. 5. Confirm the action by selecting **Delete** again.

The following guidelines apply to the Compose Email window:

- An agent can create multiple email drafts.
- An agent can have one Compose Email window open at a time. The system displays a message if an agent tries to open another Compose Email window while the first Compose Email window is still open.
- An agent must manually close a Compose Email window before opening a new window.
- The Compose Email window can be resized.

Collapsing and expanding the email header

The email header includes the following fields:

- **To**
- **Cc**
- **Bcc**
- **Subject**

You can expand and collapse the email header as needed by selecting the expand header ( ) and collapse header ( ) icons.

When the email header is expanded, you can edit the information in these fields. When the email header is collapsed:

- The names in the **To**, **Cc**, and **Bcc** fields are combined into one line. If there is a long list of recipients, some of the names are replaced with "and more".
- The subject is displayed in a second line.
- The fields are not editable.

When you create a new email or forward an email, the header is expanded by default and displays the **To** and **Subject** fields. If you expand the **Cc** and **Bcc** fields, the collapse header icon is displayed.

When you reply to an email, the header is collapsed by default. Expanding the header shows all the fields that contain information.

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Compose Email modeless dialog footer icons

Several icons appear in the Compose Email modeless dialog footer that you can use when creating email drafts.

Footer icons

Icon	Description
Discard draft ( )	Select this icon to delete the current draft. Then confirm the delete action in the resulting confirmation message.
Apply template ( )	Select this icon to display a list of available templates. You can select a template from the list or search for a specific template. The list can display up to 10 templates. Selecting a template applies that template to the draft email. **Note:** If no templates are available, the icon does not appear in the footer.
View drafts ( )	Select this icon to display a list with recent draft emails as well as email-related actions. You can select an email draft from the list to display that draft in the Compose Email window. Email-related actions include: • **Manage drafts**: Displays the Draft Management pop-up window which includes a list of email drafts. Select a draft to display the contents in the Compose Email window. You can also delete email drafts from this pop-up window. • **Create new email**: Creates a new email draft in the Compose Email window.
Attach file ( )	Select this icon to attach files to an email draft **From computer** or **From record**. After attaching one or more files, you can hide or show the attachments.

Auto-loading the latest email draft

The Compose Email modeless dialog opens with the last saved email draft. When a user selects **Compose** > **Compose Email**, the Compose Email modeless dialog opens and displays this latest draft. If there are no recent drafts for the current case, the system loads a new draft. This feature is enabled by default.

Note:
This feature is controlled by component properties in UI Builder. These properties are located in the Configure tab in the Advanced section:

- **Load latest draft**: When enabled, the system loads the latest email draft.
- **sys ID**: Set this property to -1.

When the property is enabled and a specific sys_id is passed to the email client, the system can load the email draft in the Email Compose modeless dialog.

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Using form templates to create comments and work notes

You can create and use form templates that add content to the **Additional comments** and **Work notes** fields on a case record and then post that content to the activity stream.

Content to add	Description
Comment	If a template includes content to add to the **Additional comments** field on the case record, the system does the following: • Displays a modeless dialog for composing a comment. • Adds the content to the **Comments** field in the modeless dialog. Selecting **Post Comments** adds the content to the **Additional comments** field on the case record and to the activity stream.
Work note	If a template includes content to add to the **Work notes** field on the case record, the system does the following: • Displays a modeless dialog for composing a work note. • Adds the content to the **Work notes** field in the modeless dialog. Selecting **Post Work Notes** adds the content to the **Work notes** field on the case record and to the activity stream.
Comment and work note	If a template includes content to add to both the **Additional comments** and **Work notes** fields on the case record, the system does the following: • Displays two modeless dialogs, one for composing a comment and one for composing a work note. • Adds the content for the comment to the **Comments** field in the comment modeless dialog. • Adds the content for the work note to the **Work notes** field in the work note modeless dialog. Selecting **Post Comments** adds the content to the **Additional comments** field on the case record and to the activity stream. Selecting **Post Work Notes** adds the content to the **Work notes** field on the case record and to the activity stream.

If text already exists in the **Additional comments** or **Work notes** fields, applying a template opens a modeless dialog and adds the template content. Selecting **Undo** removes the template content from the modeless dialog and replaces it with the existing text from the fields on the Case record.

Front-line case page keyboard shortcuts

Use keyboard shortcuts to create comments, work notes, and emails quickly, when using the Front-line case page in CSM Configurable Workspace.

When composing an email, using the shortcut key enables you to compose an email in a subtab.

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When composing a comment or work note:

- If you have a work note in progress, using the keyboard shortcut displays the existing work note.
- If you have a comment in progress, using the keyboard shortcut displays the existing comment.

Keyboard shortcuts

Action	Windows keyboard shortcut	Mac keyboard shortcut
Compose an email	Control+Alt+e	Command+Option+e
Compose a comment	Shift+Alt+c	Shift+Option+c
Compose a work note	Shift+Alt+w	Shift+Option+w

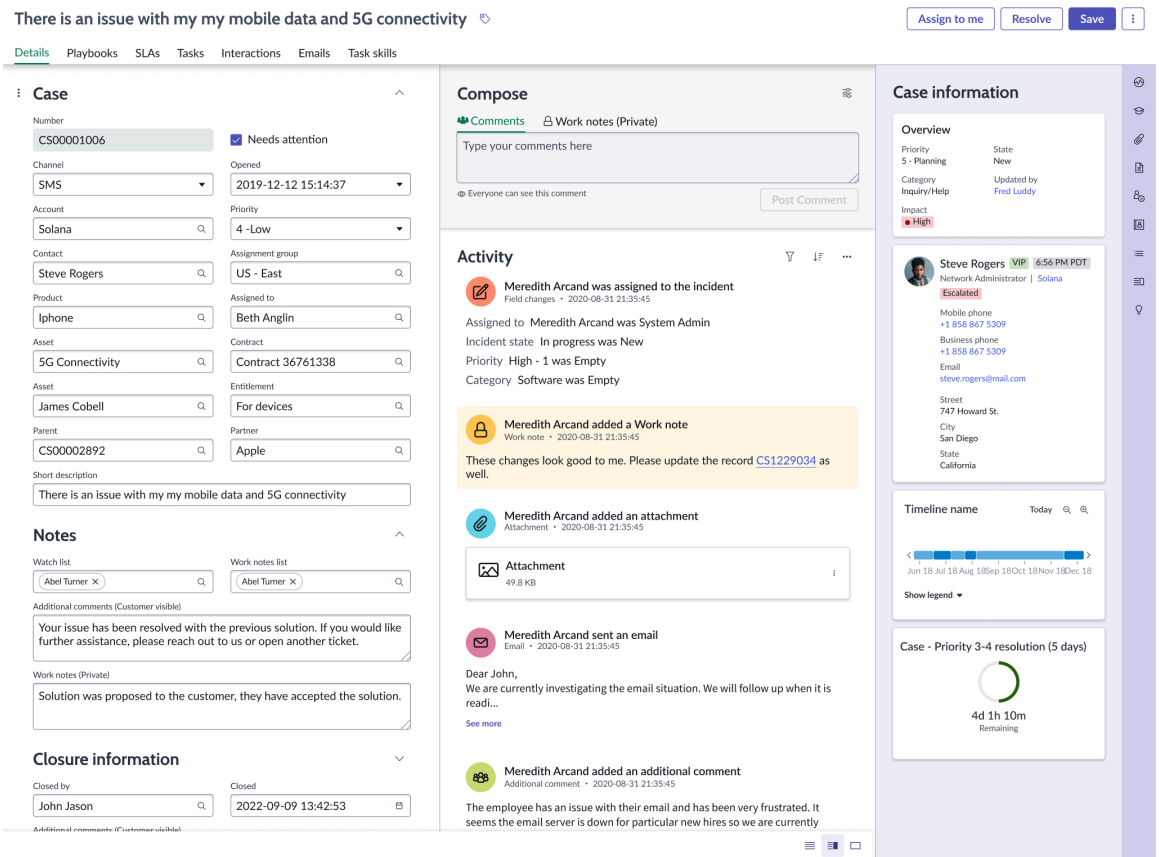
For more information, see Next Experience keyboard shortcuts.

CSM default record page

The CSM default record page provides CSM case management features and functionality and enables agents to create, monitor, and resolve cases.

The CSM default record page includes the basic structure for a record page, including record information, a communication interface, and suggestions for issue resolution. This page is also known as the standard record page.

CSM default record page



The CSM default record page is included with the CSM/FSM Configurable Workspace experience.

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Record presence feature

The CSM default record page and the CSM Interaction record page include the record presence feature. This feature allows agents to see other users who are viewing the same record and enables easy collaboration.

The user presence component displays an icon in the form header that shows the user who is currently viewing the record. For three or more users, the component displays two icons plus a number that represents additional users.

- Hover over an icon to see more information about a user.
- Click the number icon to see more information about the additional users.

For more information about this feature, see User presence.

Email templates feature

The CSM default record page includes the Email Templates feature. CSM Configurable Workspace pages that use the CSM default record page include the Email Templates tab in the contextual side panel.

These templates contain default values for fields that agents can easily add to email messages in the Compose panel on case records. These default values can include the recipients (email addresses in the To, Cc, and Bcc fields), the sender, the subject of the email, and text to include in the message body.

Users with the system administrator role can configure email templates by navigating to **All** > **Email Client** > **Email Client Templates** and selecting **New**. For more information, see Create an email client template.

Agents can use this feature to do the following:

- View available email templates.
- Select an email template to display the template details.
- Apply the selected template to an email in the Compose panel.

For more information, see Compose an email from an email template.

Creating emails and applying email templates

Customer service agents can create emails from case records in the following ways:

- By selecting **Email** at the top of the activity stream to open the Compose Email component.
- By selecting the More actions (•••) menu in the case activity bar and then selecting **Compose email** to open a draft email in a new tab.

When creating emails, agents can apply templates to add content to the draft emails, such as the subject line and message body. To apply a template:

1. Select the Apply email templates icon ( ) in the Compose email footer.

   The system displays a list of available templates. It does not display quick messages or response templates.

2. Select a template from the list. You can also search for a specific template.

   The system adds the contents of the template to the body of the email.

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Note:
If no templates are available, the icon does not appear in the footer.

Recommended Actions feature

The Recommended Actions tab includes AI search functionality and Suggested Actions.

- AI search tab: Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the case short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can select a source to see search results of that type.

  The following table shows the actions that an agent can perform on search results:

  Source type and guidance actions on the CSM default record page

Source type	Guidance actions
Knowledge base articles	○ Attach and add a link in email. ○ Attach and add a link in comment. ○ Add a link in work note. ○ Copy a link. ○ Read an article. ○ Mark an article as helpful.
Cases	○ Show or copy a resolution for resolved cases. ○ Link or open a case.
Incidents	○ Link an incident. ○ Open an incident.
Problems	○ Link a problem. ○ Open a problem.
Requests	○ Link a change request. ○ Open a change request.

  For all the other source types, default guidance is supported. The Default guidance for search results is a guidance that can be used for any search sources that don't have mapped guidances. For more information on default guidance, see Default guidance for search results.

  For more information on how to avail the AI search feature in Recommended Actions, see Enable AI search in Recommended Actions.

  For more information, see Use AI search in Recommended Actions to resolve cases.

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Note:
Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CSM Configurable Workspace application.

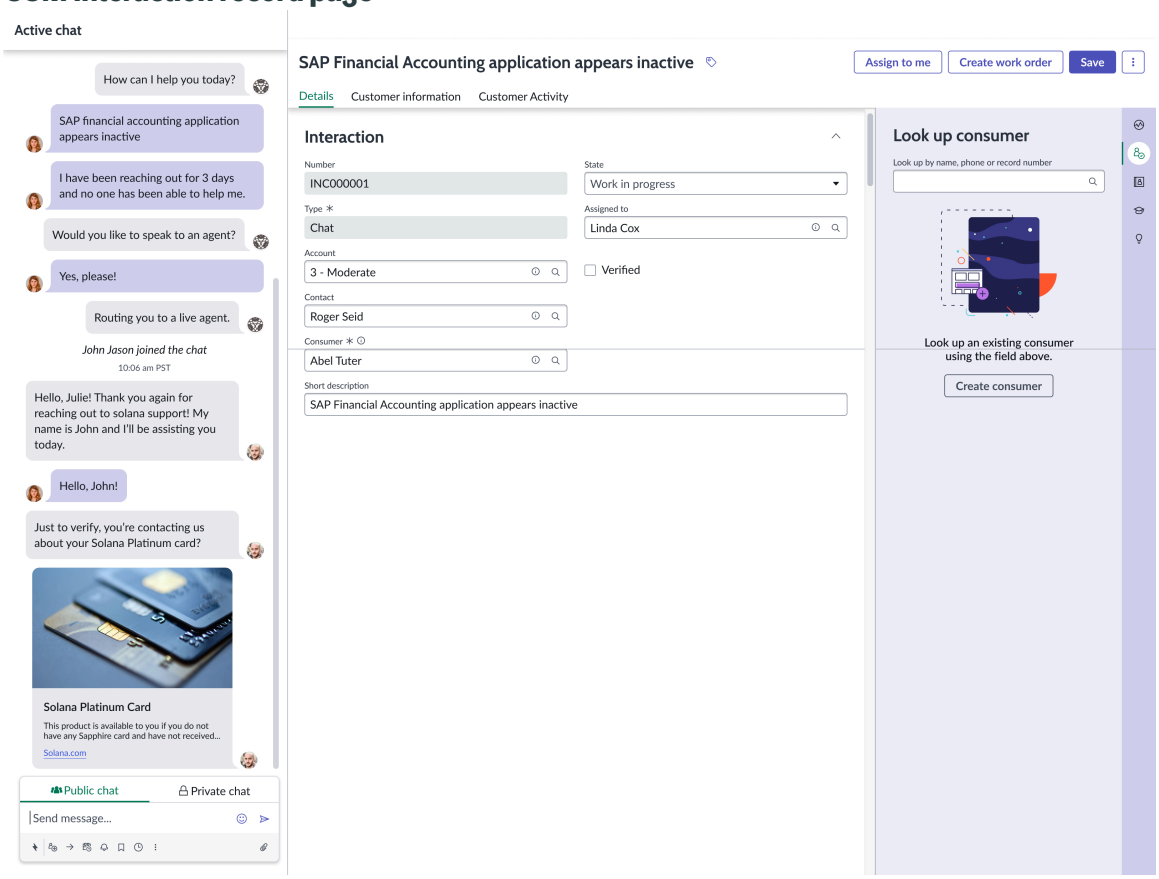
- Suggested Actions tab: This tab displays relevant actions to agents based on a context of a record or recommend a value for a field. For more information on how to configure contexts to display relevant actions for the agent, see Recommended Actions.

CSM Interaction record page

The CSM Interaction record page provides CSM interaction management features and functionality and enables agents to accept and respond to live chats, calls, email and SMS messages.

The CSM Interaction record page provides the basic structure for an interaction record, including interaction information and related search results.

CSM Interaction record page



The CSM Interaction record page is included with the CSM/FSM Configurable Workspace experience.

Record presence feature

The CSM default record page and the CSM Interaction record page include the record presence feature. This feature allows agents to see other users who are viewing the same record and enables easy collaboration.

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The user presence component displays an icon in the form header that shows the user who is currently viewing the record. For three or more users, the component displays two icons plus a number that represents additional users.

- Hover over an icon to see more information about a user.
- Click the number icon to see more information about the additional users.

For more information about this feature, see User presence.

Recommended Actions feature

The Recommended Actions tab includes AI search functionality and Suggested Actions for the chat, video, email, and walk-up channels on the CSM Interaction record page.

- AI search tab: Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the interaction short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can select a source to see search results of that type.

  For the Knowledge source type, agents can do the following:

  - Share an article link in chat, and email.
  - Copy link to an article.
  - Read an article.
  - Flag an article.
  - Mark an article as helpful.

  For all the other source types, default guidance is supported. The default guidance for search results is a guidance that can be used for any search sources that don't have mapped guidances. For more information on default guidance, see Default guidance for search results.

  For more information on how to avail the AI search feature in Recommended Actions, see Enable AI search in Recommended Actions.

  For more information, see Use AI search in Recommended Actions to resolve cases.

  Note:
  Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CSM Configurable Workspace application.

- Suggested Actions tab: This tab displays relevant actions to agents based on a context of a record or recommend a value for a field. For more information on how to configure contexts so that relevant actions are displayed for the agents, see Recommended Actions.

Related topics

CSM voice interaction record page

CSM voice interaction record page

The CSM voice interaction record page provides a component that customers can use for integration with Contact Center as a Service (CCaaS) providers and an interface that agents can use to handle customer phone calls.

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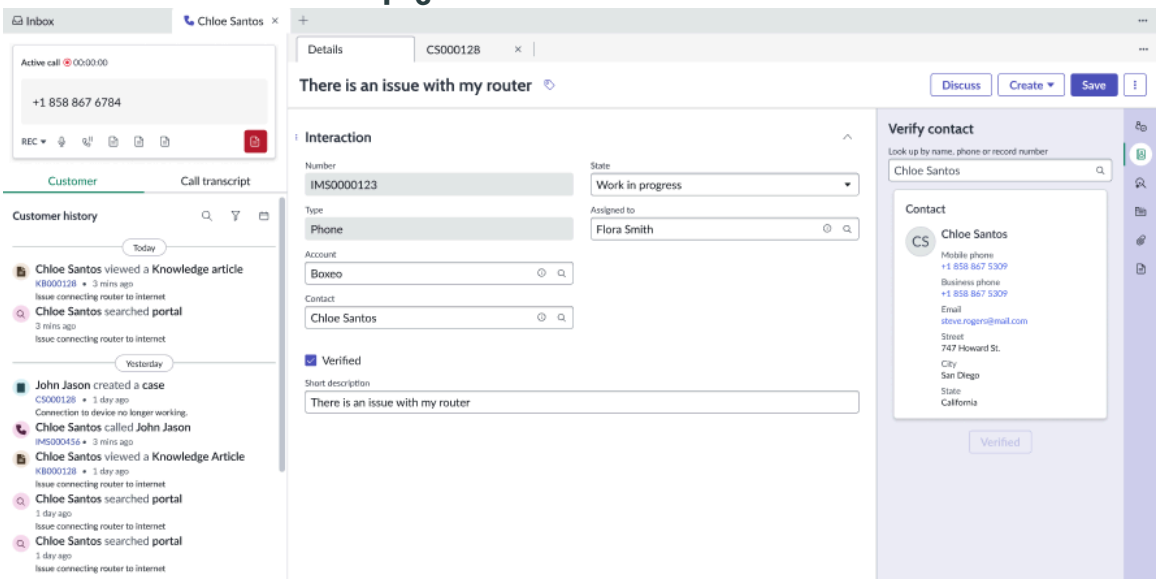
CSM voice interaction record page



The CSM voice interaction record page enables CCaaS providers to display native voice integrations in CSM Configurable Workspace. Using CCaaS call controls integrated in the page, agents can do the following:

- Accept calls directly from the agent inbox.
- Manage call transfers and conferences.
- Place calls on hold and on mute.

For more information about the integration with CCaaS providers, see the following topics:

- Interaction Controls Component
- OpenFrame configuration

Page structure

The CSM voice interaction record page is made up of two different pages:

- CSM voice interaction record page
- Interaction control page

The pages appear together and are visible to agents for phone interactions when the OpenFrame configuration is enabled.

The Interaction control page appears in the left panel and includes the following components:

- Interaction Controls Component (ICC): Enables CCaaS providers to display native voice integrations.
- Customer History component: Displays customer, consumer, or account history information, depending on the customer information provided on the interaction record.
- Live call transcript: Displays the text of the call transcript when a conversation record is present for the interaction.

> **Note:**
> Live call transcript requires additional configuration.

The CSM voice interaction record page includes the following components:

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- Interaction form
- Action bar
- contextual side panel component

Plugin

The CSM voice interaction record page template and page variant are included with the CSM Configurable Workspace application (com.snc.uib.csm_agent_workspace).

The CSM voice interaction record page template and page variant are available to users when the Interaction Controls Component plugin (com.app_interaction_control) is installed.

The Interaction Controls Component plugin has the following dependencies:

- com.app_openframe_store
- com.sn_component_workspace_openframe

CSM voice interaction record template

The CSM voice interaction record template enables customers to create voice interaction record page variants and customize them as needed. This template includes customizable views for different CCaaS providers as well as real-time updates and notifications.

Record pages and page variants created with this template enable agents to manage phone calls with customers and external users and to display information that helps agents to resolve issues. Use this template to customize and extend CSM functionality around phone interaction management. Additionally, you can configure a CCaaS provider to integrate features such as call transcript.

CSM voice interaction record page variant

The CSM voice interaction record page variant is included with the CSM Configurable Workspace plugin and has a dependency on the Interaction Controls Component plugin. This page variant is available for users with the interaction controls enabled. For more information, see OpenFrame configuration.

This page variant includes the following settings.

CSM voice interaction record page variant settings

Setting	Description
Active	Enabling the **Active** check box makes the page variant available to the selected audience. The CSM voice interaction record page variant is inactive by default. The active setting combined with the page order determines the page that CSM Configurable Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority. The default order for the CSM voice interaction record page variant is -2000.

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CSM voice interaction record page variant settings (continued)

Setting	Description

Conditions	Conditions determine when a page variant is displayed. The CSM voice interaction record page variant has the following conditions:
	• **table = interaction**: Limits the use of the CSM voice interaction page variant to records from the Interaction [interaction] table.
	• **csm.interactionRecordValid = true**: Checks if the interaction record is available in the database.
	• **csm.interactionType = phone**: Checks if the **Type** field on the interaction record is set to phone.
	• **csm.interactiveControlsEnabled = true**: Queries the OpenFrame configuration record and checks the following:
	  ○ The **Enable interaction controls** field is enabled.
	  ○ The user belongs to the group selected in the **User Group** field.
	If all of these conditions are met, the system displays the CSM voice interaction record page variant.

Audience	The audience determines who can see the page variant. The CSM voice interaction record page does not have a defined audience. For more information, see Learn about audiences.

To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. In the Record section of the Pages and variants list, select **CSM voice interaction record page**.
4. Select **Settings** at the top of the page.

CSM voice interaction record page components

The CSM voice interaction record page includes the following components.

Component	Description
Form heading	The form heading displays the interaction short description and also includes the action bar and record tags.
Record tags	Agents can create multiple tags for a record and then use the tags to group and organize records. For more information, see Group and find records using tags in workspace.
Action bar	The action bar contains the actions available to users while working on phone interaction records.

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Component	Description
	• **Discuss**: Open a pop-up window to start a Sidebar discussion. • **Create Incident**: Create an incident record related to the interaction record. • **Create Case**: Create a case record related to the interaction record. • **Save**: Save changes to the interaction record. • **More Actions**: Perform additional actions such as creating a request or associating a related record. **Note:** The specific actions available are determined by factors such as the user role and other attributes.
Interaction Controls Component (ICC)	The Interaction Controls Component enables CCaaS providers to display native voice integrations. Agents can then use the component to manage customer calls directly from their inbox. For more information, see OpenFrame configuration.
Customer History component	The Customer History component displays customer, consumer, or account history information, depending on the field selections on the interaction record. This component can also display live call transcript. **Note:** Live call transcript requires additional configuration.
Interaction details	The interaction details include information about the interaction including the account and contact, short description, and record state.
Contextual side panel component	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the CSM voice interaction record page includes the following tabs. • Recommended Actions search • Related Lists • Attachments • Form Templates

Interaction Controls Component (ICC)

The Interaction Controls Component appears at the top of the left panel of the CSM voice interaction record page. This component enables CCaaS providers to display native voice integrations. Agents can then use the component to manage customer calls directly from their inbox.

The CSM voice interaction record page with the ICC component is displayed when the following conditions are met:

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- The interaction is of type phone.
- The **Enable interaction controls** field on the OpenFrame Configuration record is enabled.
- The agent belongs to the **User Group** selected on the OpenFrame Configuration record.
  - If a user group is selected on the configuration record, only agents belonging to that group can see the CSM voice interaction record page.
  - If no group is selected, all agents can see the CSM voice interaction record page.

For more information about the integration with CCaaS providers, see the following topics:

- Interaction Controls Component
- OpenFrame configuration

Customer History component

The Customer History component appears below the Interaction Controls Component in the left panel. This component is included with the Customer Central plugin, which is activated as part of the CSM Configurable Workspace application.

The Customer History component includes the **Customer** tab. This tab displays customer, consumer, or account history information, depending on the customer information provided on the interaction record. This tab also includes a search field, filter, and date range selector that agents can use to find specific information in the history.

Customer tab information

Interaction record information	Customer tab information
Customer information is provided	When a customer is selected on the interaction record and customer history is available, the customer history is displayed in the Customer History tab. If customer history is not available, the Customer History tab displays a message that there is no activity yet.
Customer information is not provided	When a customer is not selected on the interaction record, the Customer History tab displays a message suggesting to link to a customer.
Account information is provided	When an account is selected on the interaction record, the account history is displayed in the Customer History tab.

Refreshing the customer history information:

- When an agent selects a different customer on the interaction record and then saves the record, the agent needs to select **Refresh** on the Customer History component to update the information. The agent can also refresh the record page.
- If there is new activity while the page is open, the agent needs to refresh the Customer History component or the record page to display the new activity in the Customer HIstory tab. For example, if the agent selects **Create Case** on the interaction record.

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Live call transcript

The Customer History component can be configured to display a **Call Transcript** tab, which shows the live call transcript.

- This tab displays the text of the call transcript when a conversation record is present for the interaction.
- This tab displays the following text when a conversation record is not present for the interaction record: Call transcript not available yet.

The Call transcript tab is visible to users if configured in the provider application associated with the interaction.

Action bar component

The action bar component contains the actions available to users while working on phone interaction records.

Note:
The specific actions available are determined by factors such as the user role and other attributes.

- **Discuss**: Open a pop-up window to start a Sidebar discussion.
- **Create Incident**: Create an incident record related to the interaction record.
- **Create Case**: Create a case record related to the interaction record.
- **Save**: Save changes to the interaction record.
- **More Actions**: Perform additional actions such as creating a request or associating a related record.

The CSM voice interaction record page supports actions from the following Customer Service Management and CSM Configurable Workspace plugins:

- Customer Service (com.sn_customerservice)
- CSM/FSM Configurable WS Foundation (com.snc.uib.cwf_workspace)
- CSM Configurable Workspace (com.snc.uib.csm_agent_workspace)
- CSM Workspace (com.snc.agent_workspace.csm)
- Major Issue Management (com.sn_majorissue_mgt)
- Customer Service with Service Management (com.sn_cs_sm)
- Customer Service with Request Management (com.sn_cs_sm_request)
- Time Recording for Customer Service (com.snc.csm_time_recording)
- Omni-Experience Standard Feature Set

If you are using any additional plugins, you need to add the actions from those plugins to the CSM voice interaction record page action bar. For more information, see the configuration steps in this topic: Configure the Front-line case page action bar.

Contextual side panel component

The CSM voice interaction record page includes the contextual side panel component, which provides agents with the following functionality.

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CSM voice interaction record page tabs in the contextual side panel

Tab	Description
Related Lists	The Related Lists tab provides access the interaction related lists. The CSM voice interaction record page incorporates related list functionality into the contextual side panel. These lists appear in an accordion format that agents can expand and collapse as needed. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format. The CSM voice interaction record page includes the following related lists: • Related Tasks • Recent Interactions • Open Cases
Attachments	The Attachments tab provides access to case-related attachments. From this tab, agents can view and download attachments.
Templates	The Templates tab provides access to available form templates which enable agents to automatically populate fields on new records. Agents can manually apply a template when creating a new record such as an incident or change.

OpenFrame configuration

The CSM voice interaction record page variant is included with the CSM Configurable Workspace application (com.snc.uib.csm_agent_workspace). This page variant is available to users when:

- The Interaction Controls Component plugin (com.app_interaction_control) is installed.
- Interaction controls in the OpenFrame configuration are enabled.

Complete the following steps to enable interaction controls:

1. Navigate to **All** > **OpenFrame** > **Configurations**.
2. Select a configuration record. For example, select **CTI**.
3. Select the **Enable interaction controls** check box to enable interaction controls for OpenFrame.
4. Select a group from the available **User Group** column and move it to the **Selected** column. This is the group of users to whom the OpenFrame configuration applies.
5. Unlock the URL field, and add a third-party URL.

   You can get this URL from your contact center provider admin.
6. Select **Update**.

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When the following conditions are met, the agent sees the CSM voice interaction record page with the Interaction Controls Component and the Customer History tab component.

- The interaction is of type phone.
- The **Enable interaction controls** field on the OpenFrame Configuration record is enabled.
- The agent belongs to the **User Group** selected on the OpenFrame Configuration record.

The agent can switch between phone interactions and chat interactions. If an interaction is of type chat, the agent sees the CSM default record page.

Creating pages and page variants

You can create new pages or customize existing pages in UI Builder to display table and record information in CSM Configurable Workspace.

When you create a page in UI Builder, you have the option to create a page from scratch, create a page from a template, or you can duplicate and modify a page variant.

UI Builder terminology

The following table describes the UI Builder terminology around workspace experiences, pages and page variants, and page templates. For more information about UI Builder terminology, see the UI Builder glossary.

UI Builder terminology

Term	Description
Workspace experience	A workspace experience in UI Builder is a collection of web pages. Users use these pages to interact with an application. A workspace experience includes experience settings, routes, page variants, and the audience and conditions required for each variant. A workspace experience resides at a specific URL. When an admin creates a workspace experience, they define the web address for the experience and the homepage that the experience uses.
Page collection	A page collection is a group of pages that can be used across multiple workspace experiences within tabs or modals.
Page	A page is a collection of layouts, columns, and components that display information in a workspace. • A page has a unique name. • A page has a unique URL. The page contains content that resides at this URL. • A page includes components that display data from tables and records.
Page variant	A page variant is a version of a page that has unique settings, including audience, conditions, and order.

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UI Builder terminology (continued)

Term	Description
	• Admins can create variants of pages to target experiences for different audiences at the same URL. • When a user opens a page URL, the variant that they see is based on these settings. You can create a page variant if you want to use the same page and make minor changes for a different audience. For example, you can create a landing page for customer service agents and a variant of that landing page for customer service managers.
Page template	A page template provides a base structure for a page that you can customize to meet your needs. Using a page template can help you create pages faster and keep pages consistent within an experience. Page templates can include components, data resources, and a layout.

Methods for creating pages and page variants

There are different ways to create pages and page variants in UI Builder.

Methods for creating pages and page variants

Method	Description
Create a page from scratch	When you create a page from scratch, you start with a blank page and select layouts and components that guide a user through an experience. Components are like building blocks that you can add to the page and then customize to build the page functionality.
Create a page from a template	When you create a page from a template, you start with a base structure, including layouts and components. From this starting point, you can customize the page to meet your needs. When you create a page from a template: • The page is automatically active. • The page includes basic settings. • The first variant of the page is also created. You can add settings such as conditions and audience to the variant. For example, when you create a page from the Front-line case page template, the page includes only basic settings. It does not include the same settings as the Front-line case page variant that is provided out of box.

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Methods for creating pages and page variants (continued)

Method	Description
Create a page variant	When you create a page variant, you create a variation of a page that exists at the same path. When you create a page by duplicating a variant, the new page inherits the variant settings. By creating a page variant, you can target an experience for a specific audience and add conditions that determine when the variant is shown. • The audience determines who uses the page variant. For example, you can limit the audience to a specific user role. • The conditions determine when a page is shown. For example, you can add a condition for records from a specific table, such as the Case table.

For more information about customizing record pages, see Manage UI Builder pages and page variants.

Note:
If a page is modified after page variants have been created, the changes to the page do not sync with the variants. These changes must be made manually.

Determining which page to use

Each record page has an order number. CSM Configurable Workspace uses the active record page with the lowest order number as the default page. When the system displays a record in CSM Configurable Workspace, it uses this default page to display the record information.

Additionally, the system looks at the page settings in this order:

1. Conditions (i.e., table)
2. Audience (the user roles that have access to the page)

If a page variant has no assigned user roles, then every role can access it.

For more information, see Set record page order.

Set record page order

Set the order number of a record page and activate the record page to determine the default page for displaying records in CSM Configurable Workspace.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

About this task
Each record page has an order number and can also be set to active or inactive. The active record page with the lowest order number is the default page. When the system displays a record in CSM Configurable Workspace, it uses this default page to display the record information.

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Record page order values

Record page	Order
Record default	0
Interaction record Page	100
CSM default record page	-1000
CSM Interaction record page	-1000
Front-line case page	1000

To use a different page as the default page, you need to manually switch from the existing pages to the new pages by changing the page order number.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. Select the desired page in the Variants list, for example, **CSM default record page**.
4. Set the page order.
   a. Select the additional actions menu for the page and then select **Edit conditions**.
   b. Enter a value in the **Order** field.
   c. Select **Save**.
5. Activate the page.
   a. Navigate to **All** > **Now Experience Framework** > **Experiences**.
   b. Select the **CSM/FSM Configurable Workspace** experience.
   c. In the **Admin panel** field, open the UX App Configuration: CSM/FSM Configurable Workspace App Config record.
   d. Locate the page in the UX Screens related list.
   e. Set the **Active** field to true.

Customize a record page

To customize a record page, you first create a variant, or copy, of the page and then make changes to the variant.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. Select the desired page in the **Page** list.
   For example, select **Record page**.
4. Select the desired default record page from the Variants list.
   For example, select **CSM default record page**.
5. Select the additional actions menu for this page and then select **Duplicate** to create a copy of the page variant.

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6. Rename the copy of the page variant.
   a. Select the copy of the page variant in the Variants list.
   b. Select the additional actions menu for this page and then select **Edit page variant settings**.
   c. Enter a new name in the **Variant name** field.
   d. Select **Save**
7. Now you can customize the page variant.
   For more information, see the following UI Builder topics:
   - Work with pages
   - Work with components
   - Layouts in UI Builder
8. To delete a page variant:
   a. Locate the page variant to be deleted in the **Pages and variants** list.
   b. Select the additional actions menu for this page variant and then select **Delete variant**.
   c. On the confirmation dialog, select **Delete**.
   The system removes the page variant from the **Pages and variants** list.

Configure the Front-line case page action bar

Configure the action bar on the Front-line case page to include actions from other plugins.

Before you begin

Role required: admin

About this task

The Front-line case page supports actions from the following Customer Service Management and CSM Configurable workspace plugins:

- Customer Service (com.sn_customerservice)
- CSM/FSM Configurable WS Foundation (com.snc.uib.cwf_workspace)
- CSM Configurable Workspace (com.snc.uib.csm_agent_workspace)
- CSM Workspace (com.snc.agent_workspace.csm
- Major Issue Management (com.sn_majorissue_mgt)
- Customer Service with Service Management (com.sn_cs_sm)
- Customer Service with Request Management plugin (com.sn_cs_sm_request)
- Time Recording for Customer Service (com.snc.csm_time_recording)
- Omni-Experience Standard Feature Set

If you are using any additional plugins, use the steps in this task to add the actions from those plugins to the Front-line case page action bar. You can add actions in the following ways:

- Add actions to an existing layout group (step 2).
- Create a new layout group and add actions to that group (steps 3 and 4).
- Add actions directly to the action bar (step 5).

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Procedure

1. Verify that the UI action or declarative action has a corresponding record in the UX Form Actions table (sys_ux_form_action).
   a. Enter **sys_ux_form_action.list** in the application navigator and press Enter.
   b. Search for the desired form action in the UX Form Actions list.
   c. Create a form action record if it does not exist.
2. **Optional:** Add the action to an existing layout group.
   You can create a new layout group and add the action to that group (see step 3). By default, the Front-line case page supports three groups: Compose, Create, and Manage.
   a. Navigate to **All** > **Declarative Actions** > **Form Action Layout Groups** and select a group.
   b. Select the lock icon next to the **Actions** field, add the desired action from the Available UX Form Actions list, and select **Save**.
3. **Optional:** Create a new layout group.
   a. Navigate to **All** > **Declarative Actions** > **Form Action Layout Groups** and select **New**.
   b. Enter a name for the layout group in the **Name** field.
   c. Select the lock icon next to the **Actions** field, add the desired action from the Available UX Form Actions list, and select **Save**.
   Because this is a new group, you need to add it to the Front-line case page layout (see step 4).
4. If you created a new layout group in step 3, add the group to the Front-line case page layout.
   a. Navigate to **All** > **Declarative Actions** > **Form Action Layouts**.
   b. Select the Front-line Case Actions layout.
   c. Select **New** in the UX Form Action Layout Items related list.
   d. On the new record page, set **Item Type** to Group and set **Group** to the group created in step 3.
   e. Fill in the rest of the fields on the form and select **Save**.
5. **Optional:** To add an action directly on the action bar:
   a. Navigate to **All** > **Declarative Actions** > **Form Action Layouts**.
   b. Select the Front-line Case Actions layout.
   c. Select **New** in the UX Form Action Layout Items related list.
   d. On the new record page, set **Item Type** to Action and set **Action** to the desired UX Form Action.
   e. Fill in the rest of the fields on the form and select **Save**.

Configure record pages to hide Customer Central components

Configure the CSM default record page and CSM Interaction record page to hide the Customer Activity and Customer Information tab components.

Before you begin

Role required: admin

About this task

Starting with the Yokohama release, CSM Configurable Workspace has a dependency on the Customer Central plugin. The Customer Central application is installed automatically with CSM Configurable Workspace.

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The Customer Central installation can result in the Customer Activity and Customer Information tab components appearing on the following CSM Configurable Workspace record pages:

- CSM default record page
- CSM Interaction record page

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the Page collections tab.
3. Select a page collection.
   - CSM default record post-Details
   - CSM Interaction record post-Details
4. Select **Settings** for one of the following page variants to open the settings panel.
   - Customer Activity default
   - Customer Information default
5. In the Availability section, disable the **Active** check box.
6. Select **Save**.

CSM Configurable Workspace page templates

A page template is a blueprint of a record page that you can use to create a new page or page variant in UI Builder.

A page template can include components, data resources, extension points, and a layout. When you create a page or a page variant from a page template, you start from a base structure that you can customize to meet your needs.

Select one of the CSM Configurable Workspace templates when creating a new page or a new page variant in UI Builder.

CSM Configurable Workspace templates

Template	Description
CSM default record template	The CSM default record template includes CSM case management features and functionality and enables agents to create, monitor, and resolve cases. Use this template if you want to customize and extend CSM functionality around case management.
CSM Interaction record template	The CSM Interaction record template includes the CSM interaction management features and functionality. This view enables agents to accept and respond to live chats, calls, and SMS messages. Use this template if you want to customize and extend CSM functionality around interaction management.
Front-line case page template	The front-line case page template provides a simplified case view that enables agents to quickly gather context, categorize cases, and provide prompt responses to customers. This template focuses on the essential functionality that agents need, including:

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CSM Configurable Workspace templates (continued)

Template	Description
	• Looking up and verifying customer information • Scanning the activity stream • Viewing related information • Searching for knowledge articles

For more information, see Create a page from a template in the UI Builder documentation.

Record presence feature

Pages that you create from the CSM record page template and the CSM Interaction record page templates have the record presence feature available. This feature lets you see the users who are currently viewing a record. For more information, see User presence component.

Using AI Search with CSM Configurable Workspace

Use the ServiceNow® AI Search application with CSM Configurable Workspace.

Starting with the Utah release, the AI Search application replaces the Zing search application for CSM Configurable Workspace. To support this feature, the Zing search configurations have been migrated to AI Search.

Use the Unified Navigation search field in CSM Configurable Workspace to search for information. You can switch between global search results and results from the **CSM/FSM Configurable Workspace** workspace application. The different search configurations are based on different tables.

For more information about using AI Search with CSM Configurable Workspace, see AI Search for Next Experience.

Search application configurations

A search application configuration specifies the search engine and the settings to use for search in a ServiceNow AI Platform application. The **[CSM AIS] Configurable Workspace Search Config** search application configuration is provided with the CSM Configurable Workspace store app.

To access this configuration, navigate to **AI Search** > **Search Experience** > **Search Applications**.

AI Search indexed sources

Indexed sources reflect what content users are able to search on. The CSM Configurable Workspace store app adds AI Search indexed sources for the following tables:

- Account [customer_account]
- Case [sn_customerservice_case]
- Consumer [csm_consumer]
- Contact [customer_contact]
- Order Line Item [csm_order_line_item]
- Order [csm_order]
- Catalog item [sc_cat_item]

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Navigation tabs

Navigation tabs appear at the top of the search results page and are static filter options that you can use to filter the results by indexed source. The **[CSM AIS] Configurable Workspace Search Config** search application configuration includes the following navigation tabs:

- All
- Cases
- Accounts
- Contacts
- Consumers
- Orders
- Order Line Items
- Locations

For information about creating navigation tabs, see Configure navigation tabs in an AI Search application configuration.

Facets

Facets are dynamic filter options that you can use to refine the search results by field value. The **[CSM AIS] Configurable Workspace Search Config** search application configuration includes the following facets:

- State
- Priority
- Assignment Group
- Product
- Account
- Contact
- Consumer
- Needs Attention
- Action Status
- Channel
- Active Escalation

For information about creating facets, see Create a facet in an AI Search application configuration.

Guided setup

Guided setup provides a sequence of tasks that helps you configure search application settings. To access guided setup, navigate to **All** > **AI Search** > **AI Search for Next Experience** > **Guided Setup for Zing to AI Search Migration**.

This guided setup tool assists with the migration of Next Experience applications from Zing to AI Search. For more information about using guided setup, see Configuring AI Search for Next Experience.

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Depending on your release, you may need to perform only some of the tasks within the guided setup to use AI Search with CSM Configurable Workspace. For Utah zBoot instances, AI Search is the default search application for global search and the CSM Configurable Workspace application.

Migrating Zing search configurations

If you have added, modified, or deleted any search configurations provided out of box, you may need to migrate existing Zing search configurations to AI Search configurations.

- If you have added or modified any search sources in **Agent Workspace Search Config**, you must migrate these sources to AI Search.
- If you have deleted any search sources from **Agent Workspace Search Config**, you must manually delete them from **[Migrated] Agent Workspace Search Config**

Enable fuzzy matching in AI search

Fuzzy matching enables agents to search for records using partial record IDs or incomplete record details and retrieve relevant results. Fuzzy matching identifies similar but not identical elements in data table sets.

AI search in CSM Configurable Workspace supports fuzzy matching with a script. Activating the Customer Service plugin (com.sn_customerservice) automatically runs the script and enables fuzzy match search in both the CSM Configurable Workspace global search and the Recommended Actions AI search component.

When fuzzy matching is enabled:

- AI search returns results based on approximate matching, including partial text or slightly mistyped record IDs.
- The system ranks the search results in order of relevance, prioritizing exact matches but including close matches.

After fuzzy matching is enabled, the system administrator must re-index the tables used in AI search:

1. Make sure that fuzzy matching is enabled by running this command as a background script:

   ```
   gs.info(new sn_ais.AisUtil().isFuzzyNumberMatchEnabled());
   ```

   The result should be 'true'.

2. Make sure that AI search is enabled.
3. Navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Sources**.
4. Select the table to re-index.
5. Select **Index All Tables**.
6. Go to the homepage and enter a search query in the global search field.

   You should see fuzzy matching results for the tables that were re-indexed.

Note:
If a table is not present in the AI Search Index Sources list, you can add the table by selecting **New** on this list.

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Related topics

Exploring AI Search

Configuring AI Search

Open the CSM/FSM Configurable Workspace experience in UI Builder

Access the CSM/FSM Configurable Workspace experience in UI Builder for editing.

Before you begin
Role required: ui_builder_admin, admin

About this task

Procedure

1. In the navigation filter, navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **Experiences** tab.
3. Select the **CSM/FSM Configurable Workspace** experience.

Result
The CSM/FSM configurable experience opens in UI Builder.

Create a CSM Configurable Workspace landing page

Create landing pages for different agents and teams by creating a page variant and adding or modifying containers and components.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

About this task
A landing page is the page that an agent sees when they open their workspace. One landing page for CSM Configurable Workspace is included with the Customer Service plugin (com.sn_customerservice). This page, the **CSM Landing Page**, gives agents an overview of their new, assigned and high priority cases, plus the cases assigned to their groups.

You can create a variant of this page in UI Builder, a WYSIWYG web user interface builder, and modify it as needed.

Note:
It is important to create a variant of the CSM Landing Page to prevent issues with upgrades.

For example, you can use UI Builder to perform these tasks:

UI Builder tasks

Task	Description
Change the page layout	The layout governs the slots that are available on a page, how the slots are positioned, and what CSS rules apply to them. For more information about layouts and layout systems, see Work with layouts.
Add components to the page	Components are the base elements of your page. Components range from core elements like buttons and labels to more complex experience components like lists and forms. For more information, see Work with components.

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UI Builder tasks (continued)

Task	Description
	Note: You can also find information about UI Builder components on the ServiceNow developer site. For more information, see the component documentation on *www.devportaldocs.service-now.com/*.
Connect data resources to the components	Connect data resources to dynamically expose data from tables, records, or other elements on your page. For more information, see Work with data resources.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the **My experiences** section, click **CSM/FSM Configurable Workspace**.
3. In the Page drop-down menu, select **Landing Page**.
4. In the Variants list, select **CSM Landing Page**.
5. Create a landing page variant.

   a. Click the additional actions menu next to the **CSM Landing Page** variant and select **Duplicate**.

   b. In the Create a variant pop-up window, add a **Variant name**.

   c. Click **Create**.

   d. If desired, specify the audience and display conditions for the page variant.
   The audience determines who can see the page. An audience is a collection of user roles. For more information, see Understanding your audiences.

   The **Order** field determines which page is displayed. The page with the lowest order number is displayed first.

   e. Click **Save**.

6. Add or modify containers and components for the landing page variant.
   See the UI Builder documentation for details about adding or modifying containers and components.
   - Add components to a page: Beginning with step 4, use this task to add a component to a container and to configure the component properties and event handlers. This task also contains information about adding additional containers.
   - Add styling to a component: Beginning with step 3, set CSS styles for a component to change its default appearance.
   - Add a modal to a component: Beginning with step 5, add a window that appears when a user clicks a component. For example, if you add a button component that deletes a record, you can add a modal that asks the user to confirm the record deletion.
7. Click **Save** to save the page variant.

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Set up a ribbon configuration in CSM Configurable Workspace

Create a ribbon setting and add that setting to a ribbon configuration for CSM Configurable Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

Use the steps in this task to set up a ribbon configuration for CSM Configurable Workspace.

- Create a ribbon setting, such as creating another version of the Customer 360 ribbon component.
- Add the ribbon setting to a ribbon configuration.
- Set the width and the order of the ribbon setting within the ribbon configuration.

Note:
You can also use ribbon settings from CSM Agent Workspace in CSM Configurable Workspace if you add the setting to the ribbon configuration.

One ribbon configuration **CSM/FSM Configurable Workspace Ribbon Config**, is included with CSM Configurable Workspace. This configuration includes the Customer 360, Timeline, and Active SLA ribbon components. You can use this configuration in the base system without completing any additional configuration steps.

Procedure

1. Create a ribbon setting.
   a. Navigate to **Now Experience Framework** > **Configuration Settings** > **UX Ribbon Setting**.
   b. Select **New**.
   c. Fill in the fields on the Ribbon Setting form.

Ribbon Setting form

Field	Description
Name	A label that describes this ribbon setting. It often includes the table associated with this ribbon.
Ribbon component	The component to add to the ribbon setting, including Customer360, Timeline, Active SLA, or a custom ribbon component. **Note:** You can only add one component at a time. To make a second component appear in the ribbon, repeat this procedure to create another ribbon setting and add a different component.
Table	The table associated with this ribbon setting. Anytime an agent selects a record from this table, the ribbon setting appears with this component.

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Field	Description
Width	The number of columns that the component occupies in the ribbon. The width of the page is 12 columns. When using multiple components, the total combined width of all the components must equal 12 or less. **Note:** For CSM Configurable Workspace, set the width of the ribbon component on the Ribbon Configuration Setting form (see step 3).
Application	The scope of this ribbon. Global means the ribbon works with all applications.
Order	The location of this component in the ribbon. Ordering the components goes from left to right. For example, if you associate three components with a table, the component with the lowest order appears on the left and the component with the highest order appears on the right. **Note:** For CSM Configurable Workspace, set the order of the ribbon component on the Ribbon Configuration Setting form (see step 3).
Active	Toggle to turn this component on or off in the ribbon for this table.
Inherit	If set to true, the ribbon configuration can be inherited by child tables. For this to be effective, a child table shouldn't have any configured ribbon settings. The **Inherit** field is false by default.
Experience restricted	If set to true, the ribbon component is restricted to Configurable Workspaces. If set to false, the ribbon component is global and appears in CSM Agent Workspace (legacy). For more information, see Set up ribbons in workspace. This field is set to true by default.

d. Select **Submit**.

2. Create a ribbon configuration as a container for your ribbon setting.

a. Navigate to **Now Experience Framework** > **Configuration Settings** > **UX Ribbon Configurations**.

b. Select **New**.

c. Fill in the fields on the UX Ribbon Configuration form.

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UX Ribbon Configurations form

Field	Description
Name	Unique name for this ribbon configuration.
Application	The scope of this ribbon configuration. Global means the ribbon works with all applications.
Active	Toggle to turn this component on/off in the ribbon for this table.
Description	Short description of this ribbon configuration that displays in the UX Ribbon Configurations list.

d. Select **Submit**.

3. Add the ribbon setting to the ribbon configuration.

a. Navigate to **Now Experience Framework** > **Configuration Settings** > **Ribbon Configuration Settings**.

b. Select the configuration from the UX Ribbon Configurations list.

c. Fill in the fields on the Ribbon Configuration Setting form.

Ribbon Configurations Settings form

Field	Description
Table	The table associated with this ribbon setting. Anytime an agent selects a record from this table, the ribbon setting appears with this component.
Ribbon	The ribbon setting to add to the ribbon configuration.
Configuration	The desired ribbon configuration.
Application	The scope of this ribbon. Global means the ribbon works with all applications.
Order	The location of this component in the ribbon. Ordering the components goes from left to right. For example, if you associate three components with a table, the component with the lowest order appears on the left and the component with the highest order appears on the right.
Width	The number of columns the component occupies in the ribbon. The width of the page is 12 columns. When using multiple components, the total combined width of all the components must equal 12 or less. **Note:** The width is ignored if the ribbon is configured to display in the contextual side panel.

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Field	Description
Active	Toggle to turn this component on/off in the ribbon for this table.

d. Select **Submit**.

What to do next

You can display the form ribbon at the top of the form or in the Contextual side panel. For more information, see the following topics:

- CSM Configurable Workspace form ribbon and components
- Display the form ribbon and form header secondary values in the Contextual side panel

Set up a form header in CSM Configurable Workspace

You can create a form header for use in CSM Configurable Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

After creating a form header, you must link it to a form header configuration if you want it to appear in CSM Configurable Workspace.

> **Note:**
> You can also use form headers from CSM Agent Workspace in CSM Configurable Workspace if you link the setting to the form header configuration.

One form header configuration **CSM/FSM Configurable Workspace Header Config**, is included with CSM Configurable Workspace. You can use this configuration out of the box without completing any additional configuration steps.

Procedure

1. Create a form header.

a. Navigate to **Now Experience Framework** > **Configuration Settings** > **UX Form Header**.

b. Select **New** on the Form Headers list.

c. Fill in the fields on the form header form.
For field descriptions, see Set up form headers in workspace.

d. Select **Submit**.

2. Add the form header to the form header configuration.

a. Navigate to **Now Experience Framework** > **Configuration Settings** > **UX Header Configurations**.

b. Select the header configuration.

c. In the Workspace Form Headers related list, select **Edit**.

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Note:
You might have to configure the form to display the related list.

d. Move the desired form header from the left column to the right column to add it to the header configuration.

e. Select **Save**.

Set up a highlighted value in a form header in CSM Configurable Workspace

You can configure fields that appear as highlighted values in a form header in CSM Configurable Workspace.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

About this task
After creating a highlighted value, you must link it to a highlighted value configuration if you want it to appear in CSM Configurable Workspace.

Note:
You can also use highlighted values from CSM Agent Workspace in CSM Configurable Workspace if you link the value to the highlighted value configuration.

One highlighted value configuration, **CSM/FSM Configurable Workspace Highlighted Value Config**, is included with CSM Configurable Workspace. You can use this configuration out of the box without completing any additional configuration steps.

Procedure

1. Create a highlighted value.
   a. Navigate to **Now Experience Framework** > **Configuration Settings** > **UX Highlighted Values**.
   b. Select **New**.
   c. Fill in the fields on the Highlighted Value form and select **Submit**.
   For field descriptions, see Highlight values in the form header.
   d. In the Highlighted Values list, select the record you created.
   e. In the Highlighted Value Conditions related list, select **New**.
   f. Fill in the fields on the Highlighted Value Condition form.
   For field descriptions, see Highlight values in the form header.
   g. Select **Submit**.
2. Add the highlighted value to the highlighted value configuration.
   a. Navigate to **Now Experience Framework** > **Configuration Settings** > **UX Highlighted Values Configurations**.
   b. Select the configuration.
   c. In the Highlighted Values related list, select **Edit**.

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d. Move the desired value from the left column to the right column to add it to the selected configuration.

e. Select **Save**.

Set up a form action in CSM Configurable Workspace

Create a form action that links to a UI action so that you can use the UI action in CSM Configurable Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

In order to use UI actions in CSM Configurable Workspace, each UI action must have a corresponding form action.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Actions and Events** > **UX Form Actions**.
2. Click **New**.
3. Enter a name for the form action in the **Name** field.
   It is recommended that you give the form action the same name as the UI action.
4. In the **Action Type** field, select UI Action.
5. Select the UI action in the **UI Action** field.
6. Click **Submit**.

Display the form ribbon and form header secondary values in the Contextual side panel

Configure the form ribbon and the secondary values that appear in a form header to display in the Contextual side panel in CSM Configurable Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

Note:
This task applies to CSM Configurable Workspace.

The form ribbon includes components that provide agents with an overview of case details, such as a customer summary and a case timeline.

The form header for the Case form can display two levels of field values from the Case table. The primary value is the case short description. The secondary values include the account and contact or consumer, the case priority, and the case state.

You can use properties to determine where the form ribbon and secondary values are displayed: at the top of the record or in the Contextual side panel. Two properties are available for the standard record page and two are available for the interaction record.

These properties can operate independently. For example, you can display the form ribbon in the Contextual side panel and the secondary values in the form header.

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Note:
The form ribbon properties apply to pages that have active ribbon configurations. If a page does not have a ribbon configuration, or has an inactive ribbon configuration, there is no information for the system to display in either location.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Experiences** > **CSM/FSM Configurable Workspace**.
2. In the UX Page Properties list, click the desired property.
3. In the **Value** field for the selected property, enter one of the following values.
4. Click **Update**.

Display field values as interaction record tab titles

Display field values, such as contact or consumer names, as titles on interaction record tabs in CSM Configurable Workspace.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

About this task

Note:
This task applies to CSM Configurable Workspace.

Configure the *`sessionTabTitle`* property to identify the fields that can be used in interaction record tab titles. Enter fields in this property as a comma separated string.

The system evaluates these fields in the order that they appear in the string. The first field that has a value is used as the interaction record tab title. If none of the fields in the string have values, the system displays the record number as the tab title.

Note:
Configured fields must appear on the interaction record.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Experiences** > **CSM/FSM Configurable Workspace**.
2. In the UX Page Properties list, click the *`sessionTabTitle`* property.
3. In the **Value** field, enter the fields to use in interaction record tab titles. Enter the fields as a comma separated string. The default string is *`contact,consumer,number`*.

   Note:
   Configured fields must appear on the interaction record.

4. Click **Update**.

Enable the Create Case UI action for case type selection

Enable the **Create Case** UI action for case type selection for one or more selected tables.

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Before you begin
Role required: workspace_admin, ui_builder_admin, admin

About this task
This procedure adds the **Create Case** UI action to records in the configured table. Selecting this UI action displays the Select a case type pop-up window .

> **Note:**
> For the CSM Configurable Workspace, the **Create Case** UI action for case type selection is disabled out of box.

Procedure
1. Navigate to the Action Assignments list by entering **sys_declarative_action_assignment_list.do** in the application navigator.
2. Filter the actions for the table on which you want the **Create Case** UI action to be enabled. For example, to enable the UI action for the Interaction table, use the **Table** column to filter for the Interaction [interaction] table.
3. Select the **Create Case** action with this description: This Creates Case UI action enables the agent to create a case on Agent Workspace by selecting the type of case from a list of available case types.
4. On the Create Case Action Assignment record, enable the **Active** check box and save the record.
5. Navigate to the UI Actions list by entering **sys_ui_action_list.do** in the application navigator.
6. Filter the actions for the same table as selected in step 2.
7. Select the **Create Case** action with no comments.
8. On the Create Case UI Action record, disable the **Active** check box and save the record.
9. Repeat steps 1 through 8 for each table on which you want to enable the **Create Case** UI action for case type selection.

Configure tabs in the contextual side panel

Use the **inlineTabExclusion** UX page property to prevent tabs from appearing in the configurable side panel in CSM Configurable Workspace.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

About this task
You can configure the **inlineTabExclusion** UX page property for specific tables. The following example shows the default value for this property.

```
[{
  "template": [
    "incident","sn_customerservice_case"
  ],
  "attachment": [
    "sn_customerservice_case"
  ]
}]
```

In the mapping for this property, the key represents the tab to be hidden and the value includes the list of tables for which the tab is hidden. In the above example:

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- The Response template tab is hidden for the Incident [incident] and Case [sn_customerservice_case] tables.
- The Attachment tab is hidden for the Case [sn_customerservice_case] table.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Experiences**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. In the UX Page Properties related list, select **inlineTabExclusion**.
4. Make the necessary changes to the **Value** field.
5. Select **Update**.

Configure the Agent Assist and Response Template tabs in the contextual side panel

Add a table configuration for the Agent Assist tab or Response Template tab for custom tables or custom case types in the contextual side panel in CSM Configurable Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

The Agent Assist tab and the Response Template tab that appear in the contextual side panel use a UX page property that contains table configurations. To display these tabs for custom tables or case types, create a new UX page property called **contextualTableConfigMapping** and add the table configurations to that property.

The mapping for this property includes the tab name, the table name, and the sys_id of the table configuration. For example:

```
[{“tab_name”:[{“table=custom_table_name”:”the sys id of the
 table config”}]},
{“tab_name”:[{“table=custom_table_name”:”the sys id of table
 config”}]}]
```

```
[{“agent_assist”:[{“table=incident":"e15061a4b30303002bf182c136a
8dc34"}]},["response_template":[{“table=template”:”0a73bc83c3041
300e2fd5cb981d3ae29”}]}]
```

You can map multiple tables in this property. For example:

```
[{"agent_assist":[{"table=custom_table_name":"the sys id of
 table config"}, {"table=custom_table_name_2":"the sys id of
 table config"}]}]
```

You can also use operators to match multiple tables in the property configuration. The operators in the following example include:

- STARTSWITH
- ENDSWITH
- LIKE: This operator is used to match table names with a pattern. In the following example, the LIKE operator would match with all tables that include the word "case".
- IN: This operator enables you to set a list of values that must match values in your tables.

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```
[
  {
    "agent_assist": [
      {
        "tableSTARTSWITHkb_template":
 "5cb4030e73e2330021741c86fbf6a7e1"
      },
      {
        "tableENDSWITHu_kb_template":
 "5cb4030e73e2330021741c86fbf6a7e1"
      }
    ],
    "response_template": [
      {
        "tableLIKEcase": "5f0a5f7e77840010ec75945caa1061a5"
      },
      {
        "tableINagent_file, sn_customerservice_case":
 "82d52b55a300021033d6441d041e61bd"
      }
    ]
  }
]
```

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Experiences**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. In the UX Page Properties related list, select **New**.
4. Fill in the following fields on the UX Page Property form.

Field	Description
Page	CSM/FSM Configurable Workspace
Name	Use this name for the property: **contextualTableConfigMapping**
Type	json

Value	Include an entry for Agent Assist or for Response Template or both.
	
	Agent Assist example:
	`[{"agent_assist":[{"table=custom_table_name":"the sys id of table config"}]}]`
	
	Response Template example:
	`[{"response_template":[{"table=custom_table_name":"the sys id of table config"}]}]`
	
	Agent Assist and Response Template example:

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Field	Description
	`[{"agent_assist":[{"table=custom_table_name":"the sys id of table config"}]},{"response_template":[{"table=custom_table_name":"the sys id of table config"}]}]`

5. Select **Save**.
   After adding the property, you can open the record page that uses the configured table and test the results in the contextual side panel.

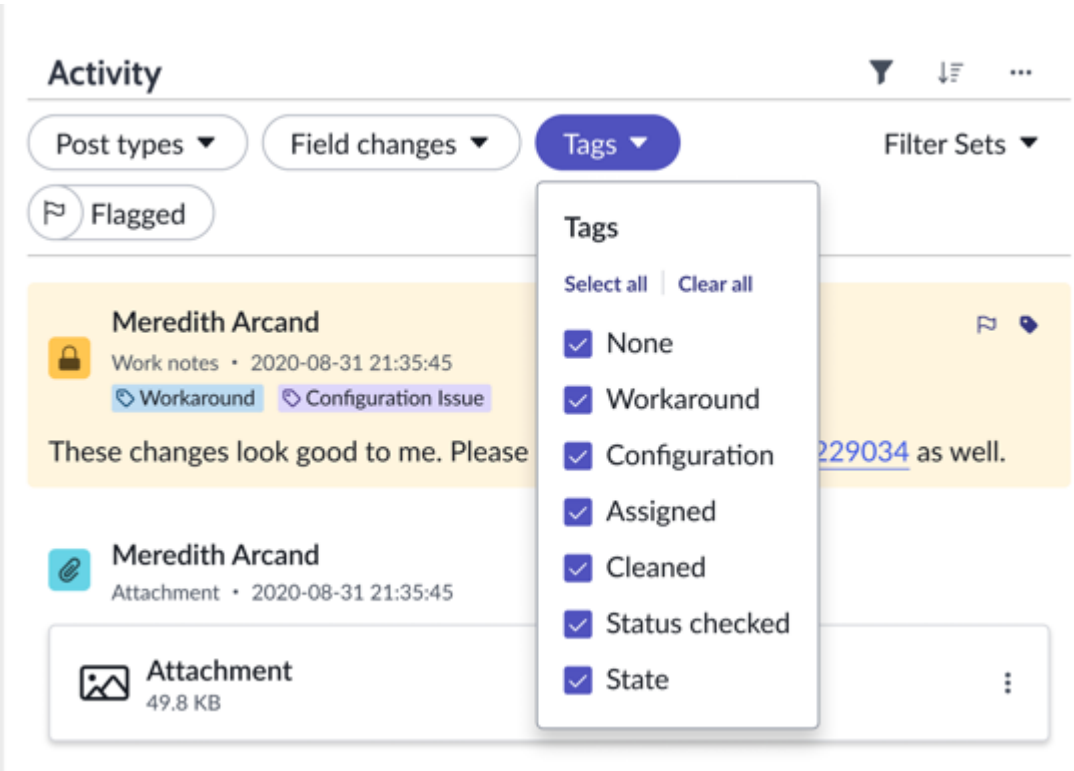
Related topics

Configuring contextual search

Filter activities in the activity stream

Use tags to filter the items that appear in the activity stream.

Tags enable you to filter your activities in the activity stream by dynamic and static states not offered in filter lists. For example, these states can include Workaround or Status checked.



Tags are enabled and created by your system administrator. To enable and add tags for agents as a system administrator, see Create tags for the activity stream.

To use tags to filter activities in the activity stream, see Filter activities with tags.

Set up additional CSM workspace features

You can set up additional features for use in CSM workspaces. These features typically require plugin activation and some configuration.

You can set up the following features for use in CSM workspaces.

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CSM workspace features

Feature	Description
Customer Central	Customer Central provides customer service agents with all the information about the customer in one central place. • The Customer Information view displays key information about the customer. • The Customer Activity view displays recent customer touch points in an activity feed. Use Customer Service guided setup to Configure Customer Central.
Customer Service Case Types	Configure case types to handle different types of customer issues. A case type identifies the processes and the data needed to resolve a specific type of issue, such as a lost or missing credit card. Use Customer Service guided setup to Configure customer service case types.
Proactive Customer Service Operations	Use this feature to track the digital services used by your customers and to proactively create cases for service disruptions. Use Customer Service guided setup to Configure Proactive Customer Service Operations.
Playbooks for Customer Service Management	Playbooks provide step-by-step guidance for completing the tasks needed to resolve specific types of customer service cases. The following playbooks are available for Customer Service Management from the ServiceNow Store: • Case Playbook for Onboarding • Case Playbook for Complaints • Case Playbook for Product Support
Guided decisions	Resolve complex cases faster and more efficiently by guiding customer service agents through a structured troubleshooting process. For details, see Configuring Guided Decisions.
Lookup and verify	This feature enables customer service agents to quickly look up contacts or consumers using information such as the name, phone number, or record number. For details, see Set up lookup and verify in Workspace.
Estimated time to resolve a case	Use machine learning to predict the estimated time to resolve a case (ETTR) based on case attributes such as the short description, category, priority, and assignment group.

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CSM workspace features (continued)

Feature	Description
	For details, see Configure estimated time to resolve a case.

Migrating to Configurable Workspace

If you are currently using CSM Agent Workspace, you can implement CSM Configurable Workspace and continue using some of your existing CSM Agent Workspace configurations.

Some configurations can be used by both CSM workspaces while others need to be configured specifically for CSM Configurable Workspace. Of these configurations that are specific to CSM Configurable Workspace, some are accomplished in the platform interface using lists and forms, while others are accomplished using the UI Builder.

Use the topics in the following table to explore CSM Configurable Workspace features. Then follow the steps to implement CSM Configurable Workspace and migrate your existing CSM Agent Workspace configurations.

Explore	Migrate
• Explore CSM Configurable Workspace • Workspaces in Customer Service Management	1. Set up CSM Configurable Workspace 2. Migrate to CSM Configurable Workspace

Explore CSM Configurable Workspace

CSM Configurable Workspace is a workspace that can easily be configured and extended using UI Builder.

UI Builder is a drag-and-drop web user interface builder that you can use to build and configure CSM Configurable Workspace pages and components.

UI Builder

Working in UI Builder enables you to preview the final interface of the workspace you're building and to see the effects of different configurations. For CSM Configurable Workspace, some configurations are also performed in lists and forms.

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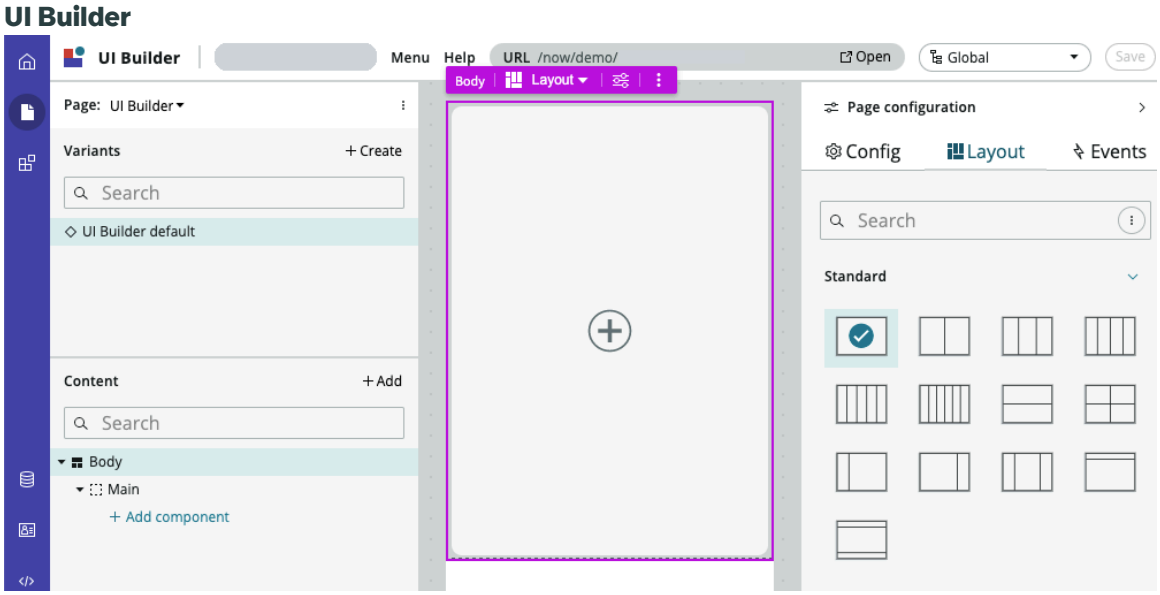

Working in UI Builder

A page in a workspace is made up of components that enable your users to accomplish one or more tasks. For example, you can create a page to solve employee software issues at your company.

You build out the functionality within the page by adding the components that you need for your user experience. Components are elements like buttons and data visualizations. UI Builder comes with a library of components you can add to the page.

After the components are on your page, you can change the layout any way you want. For example, you can use themes to make a page match your company's styles and standards. For more information, see Manage the visual style of UI Builder experiences.

Add an event mapping to a component. Event mapping is an important process within UI Builder. When you build pages with components, you need those pages to actually perform actions for users. For example, you can map a button to an event handler to perform a button action when a user selects that button. Another example may be adding a data resource such as a form. You could set up an event handler to notify a user when the page succeeds in loading the form.

UI Builder is as powerful as you need it. You can build simple web experiences, or you can create complex data-driven experiences.

Setting up CSM Configurable Workspace

For more information about configuring different features in CSM Configurable Workspace, such as ribbon configurations, form headers, and UI actions, see Set up CSM Configurable Workspace.

Related topics

UI Builder

Migrate to CSM Configurable Workspace

Follow the instructions in this topic to migrate from CSM Agent Workspace to CSM Configurable Workspace.

If you are currently using CSM Agent Workspace and want to migrate to CSM Configurable Workspace, you can continue using most of your existing configurations. Some features,

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however, need to be configured specifically for CSM Configurable Workspace. You can migrate some of the configurations using lists and forms and others using the UI Builder tool.

Workspace configuration examples

Workspace configurations	Examples
Configurations that work in both CSM Agent Workspace and CSM Configurable Workspace without modification.	• Ribbons • Forms
Configurations that are different for CSM Configurable Workspace.	• Lists • List categories

Also, be aware that some configuration changes made for one workspace can also affect the other. For example, changes to the CSM Agent Workspace configuration may impact CSM Configurable Workspace. The same applies to changes to the CSM Configurable Workspace configuration, which may impact CSM Agent Workspace.

Note:
For customers who are **not** currently using CSM Agent Workspace and want to implement CSM Configurable Workspace:

- Use the CSM Configurable Workspace guided setup by navigating to **Customer Service** > **Administration** > **Guided Setup** > **CSM Configurable Workspace**. Clicking **Configure** in this category takes you to the Configurable Workspace guided setup. The information and instructions in the different guided setup categories can help you set up a new implementation of CSM Configurable Workspace.
- For additional information, see Setting up Workspace.

Workspace features

This section provides information, parameters, and steps to complete the migration of CSM Agent Workspace configurations to CSM Configurable Workspace. Select the feature that you want to migrate from the following list.

Workspace features and descriptions

Feature	Description
Activity stream	Activity Stream enables agents to communicate with requesters and make internal notes about the work done on a record.
Agent assist	Agent assist provides agents with automatic search results that show possible solutions for records they open.
Agent Chat for Customer Service Management Configurable Workspace	Agent Chat enables agents to interact with customers, create incident or case records, or transfer chats to another agent or queue.

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Workspace features and descriptions (continued)

Feature	Description
Branding and theming	Branding and theming enables you to customize your Configurable Workspace to your company branding and theming.
Email Composer and Email Viewer	The Email Composer enables requestors and fulfillers to use email to communicate.
Customer Central	Customer Central displays all the touch points that a customer has had with a contact center in the form of information cards.
Declarative actions	Declarative actions add custom functionality to your Workspace forms, fields, lists, and related lists without writing custom scripts or learning APIs.
Forms	The form is the user interface where agents do most of their work.
Form headers	Form headers provide an overview of the record.
Global Search in configurable workspaces	Global Search provides users with the ability to search for information within the defined search sources.
Highlights	Highlights provide background color that visually expresses the status of a highlighted value.
Lists	The list view displays filtered lists of records, such as All tasks, Open tasks, and My tasks.
Ribbons	Ribbons help agents quickly scan relevant information about a record, such as a timeline, a user, or a customer summary.
UI Action Bar	UI actions include custom buttons, menu items, and limiting access to forms based on user role.

Activity stream

Learn about how the Workspace Activity stream functions in Configurable Workspace.

Activity stream enables agents to communicate with requesters and make internal notes about the work done on a record. Configure the Activity stream and Activity stream Compose components in UI Builder to set up Activity stream in Configurable Workspace.

For more information about the Activity Stream component, see Next Experience Components documentation and select Activity Stream from the list of Next Experience Components.

Activity Stream corresponding parameters

Workspace Activity stream matched with Configurable Workspace parameters.

Note:
Not every Configurable Workspace component parameter has a corresponding Workspace (legacy) parameter.

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Activity stream and corresponding parameters

Component	Legacy component name	Legacy component parameter name	UIB component parameter name
Activity Stream	now-activity-stream-connected	table	table
		sysID	sysID
		isNewRecord	isNewRecord
			title
			view
			showConversationFilter
			showTileAvatars
			showTileIcons
			events
			supplemental
			ambChannels
			filterOptions
			timestamp
Activity Stream compose	now-activity-stream-compose-connected	table	table
		sysID	sysID
		isNewRecord	isNewRecord
		fields	Fields
			title
			useTabs

Agent assist

Learn about how the Workspace Agent assist functions with Configurable Workspace.

Agent assist provides agents with automatic search results that show possible solutions for records they open. Configure Agent assist in Configurable Workspace by configuring a record page with a Glide form data source and a Contextual Sidebar. For more information, see Agent assist Overview on the ServiceNow Developer Site.

Note:
You may need to log in to the Developer Site to see the content.

For more information about using contextual search for Agent Assist, see the following topics:

- Contextual search
-

Agent Chat for Customer Service Management Configurable Workspace

Learn how the CSM Agent Workspace Agent Chat functions with CSM Configurable Workspace.

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Agent Chat enables agents to interact with customers, create incident or case records, or transfer chats to another agent or queue. CSM Agent Workspace Agent Chat configurations work with CSM Configurable Workspace.

For more information about the Agent Chat component, see Next Experience Components documentation and select Agent Chat from the list of Next Experience Components.

Agent Chat corresponding parameters

Parameters that are hidden in UI Builder (UIB) aren't configurable in UIB. These parameters are used for specific customer workflow use cases.

Component parameters for Agent Chat

Component	Legacy component name	Legacy component parameter name	UIB component parameter name
Agent Chat	sn-chat	Interaction - Active	• Interaction Sys ID - Active (Hidden in UIB) • User isUxf (Hidden in UIB)

Branding and theming

Learn about branding and theming for your Configurable Workspace.

Branding and theming enables you to customize your Configurable Workspace to your company branding and theming. Configure your Configurable Workspace branding and theming in UI Builder to brand and theme your Configurable Workspace.

For more information about branding and theming, see the following topics:

- View the brand and theme setting in your workspace experience
- Configuring Next Experience with Theme Builder
- Configuring Next Experience themes and preferences

Email Composer and Email Viewer

Learn about how the Email Composer and Email Viewer function with Configurable Workspace.

Email Composer

The Email Composer component enables requestors and fulfillers to use email to communicate. The component is associated with a record to include conversations as part of the record. For example, an agent can compose an email to a customer to gather information about the customer's case.

Email Composer corresponding tables

Legacy table name	UIB table name
No corresponding table	sys_ux_screen

Configure the Email Composer in UI Builder.

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For more information about the Email Composer component, see Next Experience Components documentation.

Email Viewer

The Email Viewer component enables customer service agents to preview emails in CSM Configurable Workspace before sending them to customers. The component is associated with a record to include emails as part of the record.

Email Viewer corresponding tables

Legacy table name	UIB table name
No corresponding table	sys_ux_screen

Configure the Email Viewer in UI Builder.

For more information about the Email Viewer component, see Next Experience Components documentation.

Customer Central

Learn about how CSM Agent Workspace Customer Central functions with CSM Configurable Workspace.

Customer Central displays all the touch points that a customer has had with a contact center in the form of information cards. CSM Agent Workspace Customer Central configurations function in CSM Configurable Workspace. Configuration changes at the sn_customercentral_cust_info_config and sys_declarative_action_assignment and their related lists, however, can be configured in CSM Configurable Workspace.

- Set up the Customer Information view in CSM Configurable Workspace using Guided Setup.
- Set up the Customer Information view in CSM Agent Workspace using Guided Setup.

Customer Central corresponding tables

Legacy table name	UIB table name
sys_declarative_action_assignment	sys_ux_screen

Declarative actions

Learn how the Workspace declarative actions function with configurable workspace.

Declarative actions add custom functionality to your Workspace forms, fields, lists, and related lists without writing custom scripts or learning APIs. Declarative actions include: form and list actions, related list actions, and field decorators.

Declarative actions corresponding tables

Legacy table name	UIB table name
Action Assignment [sys_declarative_action_assignment]	Action Assignment [sys_declarative_action_assignment] UX Add-on Event Mapping [sys_ux_addon_event_mapping]

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To migrate a declarative action, convert your custom declarative actions to new UXF Client Action type, and then define the corresponding add-on event mapping. For more information, see the following topics:

- Customizing your workspace with declarative actions
- Create a UXF client action for forms
- Declarative actions glossary
- Custom Playbook actions

Related topics

Manage actions in UI Builder pages

Bind an event to a declarative action

Forms

Learn how the Workspace form functions with Configurable Workspace.

The form is the user interface where agents do most of their work. Workspace form configurations work without modification in Configurable Workspace, but the configurations may affect the functioning of your Configurable Workspace.

Form parameters

Form mapping doesn't directly correspond between Workspace form components and Configurable Workspace form components. Workspace components are hard-coded with the form and incorporate everything on the form including the form header, UI action bar, Activity stream, the sidebar, etc. In Configurable Workspace, these features are separate components.

Form headers

Learn how Workspace form headers function with Configurable Workspace.

Form headers provide an overview of the record.

Form header corresponding tables

Legacy table name	UIB table name
sys_aw_form_header	sys_aw_form_header sys_ux_header_config sys_ux_m2m_workspace_header_ux_header_config

To migrate your Workspace form header to Configurable Workspace, add an additional step in custom form headers to the Configurable Workspace form header setup.

- An additional form header configuration is provided out of box, CSM/FSM Configurable Workspace Header Config.
- Legacy form headers function without modification, but may affect the functionality of Configurable Workspace.
- Add the Form header component to your Configurable Workspace for additional functionality.

For additional information, see Set up a form header in Configurable Workspace.

Global Search in configurable workspaces

Learn about how the CSM Agent Workspace Global Search functions with CSM Configurable Workspace.

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Global Search provides users with the ability to search for information within the defined search sources.

Global Search corresponding tables

Legacy table name	UIB table name
sys_aw_global_search_config	sys_ux_page_property

For more information, see Using AI Search with CSM Configurable Workspace.

Highlights

Learn how Workspace highlights function with Configurable Workspace.

Highlights provide background color that visually expresses the status of a highlighted value. The status you choose determines the color highlight.

Highlight corresponding tables

Legacy table name	UIB table name
sys_highlighted_value	sys_highlighted_value sys_ux_highlighted_value_config sys_ux_m2m_highlighted_value_config

To migrate your highlights, add an extra step in the custom highlighted values to Configurable Workspace.

An additional highlighted value configuration is provided out of box, CSM/FSM Configurable Workspace Highlighted Value Config.

- Legacy highlighted values in form headers work without modification, but may affect the functionality of Configurable Workspace.
- Highlighted values must be added to a highlighted value configuration to appear in Configurable Workspace.

For more information, see Set up a highlighted value.

Lists

Learn about how Workspace lists function with Configurable Workspace.

The list view displays filtered lists of records, such as All tasks, Open tasks, and My tasks. By setting up list categories and filtered lists, you help your agents quickly find the records they need to work on. Configure your Workspace lists setups in Configurable Workspace.

List Menu Configuration

The Menu Configuration is a container that houses the default configurations of the list menu which consists of categories and filters.

List Menu corresponding tables

Legacy table name	UIB table name
No corresponding table	sys_ux_list_menu_config

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The List Menu setup is added by default to Configurable Workspace. Associate your list and list categories with this configuration.

List categories

List categories enable you to group records so that agents can find the records they need to work on.

List category corresponding tables

Legacy table name	UIB table name
sys_aw_list_category	sys_ux_list_category

List category data lives in a new UIB table. For more information about setting up list categories, see List categories.

Filtered lists

Filtered lists enable you to group records that help agents do their work more efficiently.

Filtered list corresponding tables

Legacy table name	UIB table name
sys_aw_list	sys_ux_list

List filter data lives in a new UIB table. For more information about setting up list filters, see List filters.

Note:
Roles and groups are defined in the UIB table and are not applicable.

Role and Access

Roles and access enable you to define the audience of each of the lists defined in the list filters.

Role and Access corresponding tables

Legacy table name	UIB table name
sys_aw_list	sys_ux_applicability_m2m_list

To migrate roles and access, select a filtered list and choose the audience.

Ribbons

Learn how CSM Agent Workspace ribbons function with CSM Configurable Workspace.

Ribbons help agents quickly scan relevant information about a record, such as a timeline, a user, or a customer summary.

Ribbon corresponding tables

Legacy table name	UIB table name
sys_aw_ribbon_setting	sys_aw_ribbon_setting sys_ux_ribbon_config sys_ux_ribbon_config_setting

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Legacy ribbon widgets work in CSM Configurable Workspace, but not the legacy ribbon configurations. Add ribbon settings to a ribbon configuration to appear in CSM Configurable Workspace.

For more information, see Set up a ribbon configuration in Configurable Workspace.

UI Action Bar

Learn how the Workspace UI Actions component functions with Configurable Workspace.

UI actions include custom buttons, menu items, and limiting access to forms based on user role. The UI Action Bar component replaces the UI Actions component in Workspace.

UI Action Bar corresponding tables

Legacy table name	UIB table name
sys_ui_action	sys_ux_form_action

To migrate UI actions, each UI action must have a corresponding form action to use UI actions in Configurable Workspace.

For more information, see Set up a form action in Configurable Workspace.

Case routing and assignment

Set up Advanced Work Assignment (AWA) to automatically route cases to the appropriate customer service agents in CSM Configurable Workspace.

Setting up Advanced Work Assignment for CSM Configurable Workspace

Topic	Description
Exploring Advanced Work Assignment	Learn more about the AWA tool, including concepts such as work assignment and assignment rules, service channels, work items and work item queues, and agent capacity.
AWA for CSM	Use AWA to automatically assign work to your agents based on availability, capacity, and skills. AWA pushes work to qualified agents using work item queues, routing conditions, and assignment criteria that you define. Agents see their assignments in their CSM Configurable Workspace inbox.
Set up an Advanced Work Assignment service channel for assigning case tasks	Set up an Advanced Work Assignment (AWA) service channel that you can use to assign case tasks to available users.
Configure the AWA queues for the proxy contact role	Modify the Advanced Work Assignment queues and add routing conditions that support the proxy contact role. This role enables employees to create cases for customer accounts and contacts. Employees can also be proxy case contacts on behalf of customers.

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AWA for CSM

Use the ServiceNow® Advanced Work Assignment (AWA) for Customer Service Management feature to automatically assign work items to agents based on their availability, capacity, and skills. AWA for CSM pushes work to qualified agents using work item queues, routing conditions, and assignment criteria that you define. Agents see their assignments in their Agent Workspace inbox.

Plugins

The Advanced Work Assignment for CSM feature is available with the Customer Service plugin (com.sn_customerservice).

To use the shift-based assignment feature for customer service cases, you must enable the Workforce Optimization for Customer Service plugin (com.snc.wfo.csm) in addition to the Advanced Work Assignment plugin (com.glide.awa). For more information, see Activate Workforce Optimization for Customer Service.

To use the chat feature with Advanced Work Assignment for CSM, you must also activate the Agent Chat plugin (com.glide.interaction.awa).

For more information, see Activate related plugins for Advanced Work Assignment.

Inbox layouts

Three chat inbox layouts are included with the Chat service channel.

Chat Layouts and fields on the Chat Service channel

Chat Layout	Included Fields
Default Chat Layout	Short description
Contact Chat Layout	Short description, Contact, Account
Consumer Chat Layout	Short description, Consumer

Two case inbox layouts are included with the Case service channel.

Case Layouts and fields on the Case service channel

Case Layout	Included Fields
Default Case Layout	Short description, Contact, Account, Priority, Category
Consumer Case Layout	Short description, Consumer, Priority, Category

Variable work item sizing

Organizations may like to size cases based on the complexity of the case, time and effort required to complete work. This helps in estimating agent utilization accurately. Advance work assignment currently treats every case as one unit of work. However, sometimes, certain cases may require more work than others. These cases may account for a greater share of an agent's capacity. Work item sizing allows to size the case differently based on the case attributes. For more information, see Service channel capacity and utilization.

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Agent affinity

Agent Affinity is an Advanced Work Assignment enhancement that enables you to streamline the routing of work items. Advanced Work Assignment automatically assigns work items based on historical, task-based, or account team affinity. For more information about agent affinity, see Using Agent Affinity.

Related topics

Advanced Work Assignment

Set up an Advanced Work Assignment service channel for assigning case tasks

Set up an Advanced Work Assignment (AWA) service channel that you can use to assign case tasks to available users.

Before you begin

Role required: admin

You can use the Advanced Work Assignment (AWA) feature to automatically assign work items to users based on their availability and capacity.

AWA assigns work items using assignment groups so it's important that your users and groups are set up correctly.

- Determine the assignment group to use in the AWA service channel configuration and add users to this group.
- Add the **Assignment Group** field to the Case Task form view and make the field mandatory.
- Ensure that the users in the assignment group have access to case tasks.

> **Note:**
> By default, CSM uses assignment groups to control visibility to case tasks. Therefore the logic to assign a case task to the correct assignment group is triggered when a case task is created.

About this task

Setting up a service channel involves multiple steps, which are detailed in the following procedure. Once the service channel setup is complete, you can use AWA to assign newly created case tasks that:

- Are unassigned.
- Satisfy the conditions specified in the service channel.
- Have the configured AWA assignment group selected in the **Assignment Group** field on the Case Task form.

Procedure

1. Create the case task service channel.

   a. Navigate to **Advanced Work Assignment** > **Service Channels** and click **New**.

   b. Fill in the fields on the Service Channel form.

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New service channel field description

Field	Description
Name	Name of the service channel that you are configuring. For example, Case Task.
Inbox order	Order in which channel items appear in the user inbox. The **Inbox Order** field is an integer field type. This field can store whole numbers.
Application	Name of the application. For the Case Task channel, select Customer Service.
Active	Option for activating the service channel. When you select this option, the associated queues for the service channel can start accepting work items.
Short description	Brief description of the service channel.
Table	Table that stores the service channel records. To route case tasks, select the Task (sn_customerservice_task) table.
Assign to field	Field that references the user that the item is assigned to. For the Task table, this field is the **Assigned to** (assigned_to) field.
Assignment group field	Field that references the assignment group that the item is assigned to. For the Task table, this field is the **Assignment group** field.
Advanced condition	If enabled, the advanced conditions that apply to the channel. For case tasks, the parent case is active: **[Active] [is] [true]**.
Default work item size	Amount of a user's capacity that is used if this work item is assigned. The default is 1.
Default capacity	Number of items automatically assigned to agents (pending overrides). The default for this field depends on the type of work item.
Utilization condition	Condition that determines what constitutes an active item that counts toward user workload/capacity. For case tasks: **[State] [is not] [Closed]**.

c. Click **Submit**.
The system adds the Case Task channel to the Service Channels list.

For more information about creating an AWA service channel, see Create a service channel.

2. Configure the layout for the case task inbox card.

a. Click **Case Task** in the Service Channel list to open the record.

b. In the Inbox Layout related list, click **Default Case Task layout**.

c. Add the following fields to the card layout.

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- **Field 1**: Number
- **Field 2**: Subject
- **Field 3**: Parent Number

d. Click **Update**.

For more information about configuring the card layout, see Create or modify an inbox layout.

3. Create a queue for the case task service channel.

a. In the Queue related list, click **New**.

b. Fill in the following fields on the Queue form.

Queue related list field description

Field	Description
Name	Name of the queue. For example, Case Task Assignment.
Short description	Brief explanation of the queue. For example, Assign case tasks to middle office users.

c. Click **Submit**.

For more information about configuring a queue, see Create a work item queue.

4. Create an assignment rule for the Case Task Assignment queue.

a. Navigate to **Advanced Work Assignment** > **Assignment Rules** and click **New**.

b. Fill in the fields on the Assignment Rule form.

New assignment rules field description

Field	Description
Name	Name of the assignment rule.
Short description	Brief description of the assignment rule. For example, Assign the case tasks based off this configuration.
Assign by	Type of assignment. Select **Most Capacity**, which routes a work item to the user who has the greatest availability for handling the work.
Allow agents to reject	In the Rejection handling form section, enable this check box to enable users to reject work items in their inbox.

c. Click **Submit**.

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For more information about creating an assignment rule, see Configure agent assignment rules.

5. Create a group for the Case Task Assignment queue.

   a. Navigate to **Advanced Work Assignment** > **Management** > **Groups** and click **New**.

   b. Fill in the fields on the Group form and click **Submit**.

   c. Click the group to display the Group form.

   d. In the Group Members related list, add users to the group.
   The users that you add to the group for the Case Task Assignment queue require the following roles:

   - Case task agent (sn_customerservice.case_task_agent)
   - AWA agent (awa_agent)

   For more information about creating a group, see Create or modify groups for Advanced Work Assignment queues

6. Associate the assignment rule with the Case Task Assignment queue.

   a. Navigate to **Advanced Work Assignment** > **Settings** > **Queues** and click the Case Task Assignment queue.

   b. In the Assignment Eligibility related list on the Queue form, click **New**.

   c. Select the case task assignment rule in the **Agent assignment rule** field.

   d. Select the case task assignment group in the **Groups** field.

   e. Click **Submit**.

7. Activate the service channel.

   a. Navigate to **Advanced Work Assignment** > **Settings** > **Presence States**.

   b. Click the **Available** presence state and add the case task service channel to the **Selected** column.

   c. Click **Update**.
   Once the service channel is activated, you can use it to assign work items. For more information, see Service channels.

Configure the AWA queues for the proxy contact role

Modify the Advanced Work Assignment queues and add routing conditions that support the proxy contact role and the **Internal contact** field on the Case form.

Before you begin

Role required: admin

About this task

Modify the following AWA queues:

- For the Case service channel: Customer Service Cases
- For the Chat service channel: Customer Service

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Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Queues**.
2. Select the **Customer Service Cases** queue.
3. In the **Work item routing condition** field, add the following OR condition: **Internal Contact is not empty**.
4. Click **Update**.
5. Select the **Customer Service** queue.
6. In the **Work item routing condition** field, add the following OR condition: **Roles is sn_customerservice.proxy_contact**.
7. Click **Update**.

Agent tools

Enable agents to resolve cases quickly and efficiently by providing them with tools, such as Guided Decisions, playbooks, dynamic related records, and Customer Central.

Setting up agent tools

Tool	Description
Guided Decisions	Set up structured troubleshooting processes to help agents resolve complex issues in a consistent way.
Playbooks	Set up playbooks to provide agents with step-by-step guidance for resolving specific types of customer service cases, including onboarding, complaint, and product support cases.
Dynamic related records	Configure the dynamic related records feature to display related records in the contextual side panel in CSM Configurable Workspace. These records dynamically change based on the context of the current record or playbook activity.
Customer Central	Configure the Customer Information and Customer Activity views in Customer Central to provide agents with all the information about a customer in one central place.
Customer Service mobile application	Configure and customize the Customer Service mobile application for agents who use the application instance on their mobile devices.

Configuring Guided Decisions

Create structured troubleshooting processes for your agents through the ServiceNow® Guided Decisions Experience application. Help your agents solve complex issues in a consistent way.

The Guided Decisions Experience application is a tool for authoring and running decision tree flows. A decision tree walks an agent through a troubleshooting process based on a record context. The process asks a series of questions and the agent provides the answers. Based on those answers, the agent receives guidance on the next steps to take in the resolution

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process. Agents can resolve complex issues faster and more efficiently. For more information, see Decision trees in Guided decision.

Scenarios for using decision trees

Decision trees can help agents resolve the following types of customer issues:

- Troubleshoot a faulty device, such as a laptop that doesn't work. Use a decision tree to find the cause and provide a fix for the customer.
- Review a refund request. Use a decision tree to determine whether the customer is eligible for a refund, which can include checking for exceptions and creating tasks.
- Reset a customer's password. Use a decision tree to walk the agent through the process, such as verifying the customer's identity, trying other options, and, if needed, resetting the password.

For an example of end-to-end configuration of a decision tree for a specific scenario, see Example configuration of a decision tree.

Guided Decisions features

- Reuse values in a decision tree by linking inputs in question and guidance nodes. You can also link inputs of a child tree to a parent tree.
- Link an activated decision tree to your current decision tree to reuse other decision trees and reduce effort in creating new ones. The linked decision tree acts as a child tree to the current decision tree.
- Enable users to edit their responses in the previous question nodes or a guidance node.

  In a nested decision tree, users can navigate back to the previous node of a parent tree from a child tree.

Guided Decisions experiences

The Guided Decisions Experience application provides two different experiences for creating and editing decision trees: through the Decision Tree Builder or the Core UI.

- Create a graphical diagrammatic representation of nodes and their paths in a troubleshooting process through the Decision Tree Builder. For more information, see Decision trees in Decision Tree Builder.
- Use forms and lists and edit existing decision trees through the Core UI. For more information, see Decision trees in Core UI.

Setting up the Guided Decisions Experience application

As an admin, set up the Guided Decisions Experience application to enable users to create and run decision trees by completing the following setup tasks:

- Install the Guided Decisions Experience application.
- Assign roles to Guided Decisions users - Use roles to control access to Guided Decisions features and information.
- Install the Recommended Actions application - Enables decision trees to be run as recommended actions.

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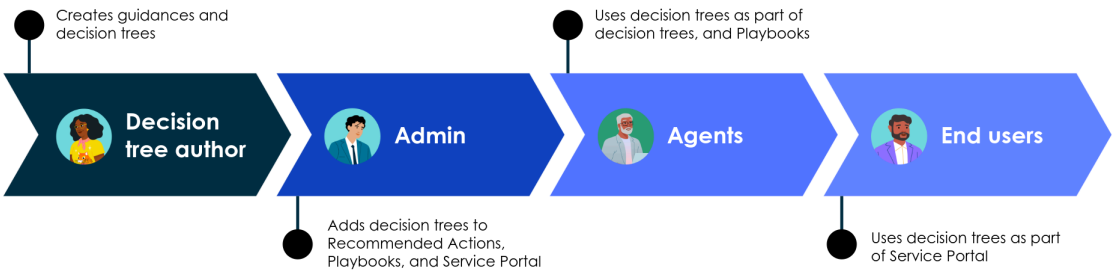
Creating and using decision trees



Users with the decision tree author role (decision_tree_author) create decision trees. After creating a decision tree, the decision tree is implemented by adding it to a recommended action, playbook, or Service Portal. For more information, see the following topics:

- Create a decision tree in Decision Tree Builder
- Edit a decision tree in Core UI
- Add Guided Decisions to playbooks
- Add Guided Decisions to Recommended Actions
- Add Guided Decisions to Service Portal

Agents interact with decision trees as part of a recommended action or as part of a playbook within a record, such as a case.

Customers and end-users interact with decision trees on Service Portal.

For guided decisions that are added to playbooks, agents can work through the decision trees and complete actions suggested in the guidance as part of a playbook stage or activity. How the agent interacts with the decision tree depends on the playbook configuration. For more information, see the following topics:

- Use Guided Decisions in playbooks to resolve cases
- Use Guided Decisions in recommended actions to resolve cases

Request apps from the ServiceNow Store

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

Decision trees in Guided decision

Decision trees and guidances enable agents to work through a structured troubleshooting process to resolve customer issues faster and provide standardized resolution.

Decision trees

A decision tree is a multi-step process that includes a series of questions, answers, and a guidance for an agent to follow. This process is made up of different decision tree elements, including nodes, inputs, and paths. For more information, see Decision tree elements.

Decision trees contain different types of nodes. Decision nodes represent one or more questions. Guidance nodes provide recommendations to agents. Each decision tree has a root node called the start node. Each node includes a path to

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the next node. Based on the answers to the questions, each decision node leads to an outcome, which can be a guidance, a follow-up question, or another decision tree.

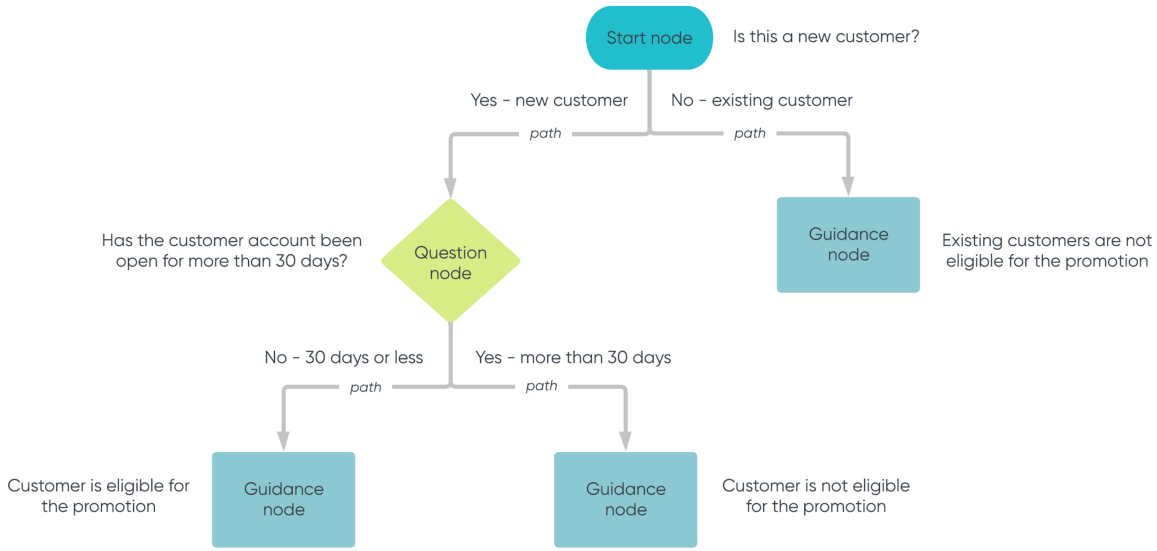
Guidances

A guidance is an action that an agent can take or information that an agent can share. For example, a guidance can recommend that the agent can share a knowledge article or create a work order. Agents can perform the action by clicking a button on the card.

Decision tree example

The following example uses a flowchart to show the structure of a decision tree that determines customer eligibility for a promotion. This promotion is available to customers who opened their accounts within the last 30 days.

Decision tree for evaluating customer eligibility



The agent can select one of two paths to answer the question "Is this a new customer?"

- The **No** path indicates that the customer isn't eligible for the promotion.
- The **Yes** path asks an additional question to determine if the account has been open for more than 30 days.
  - If **Yes**, the customer isn't eligible for the promotion.
  - If **No**, the customer is eligible to receive the promotion.

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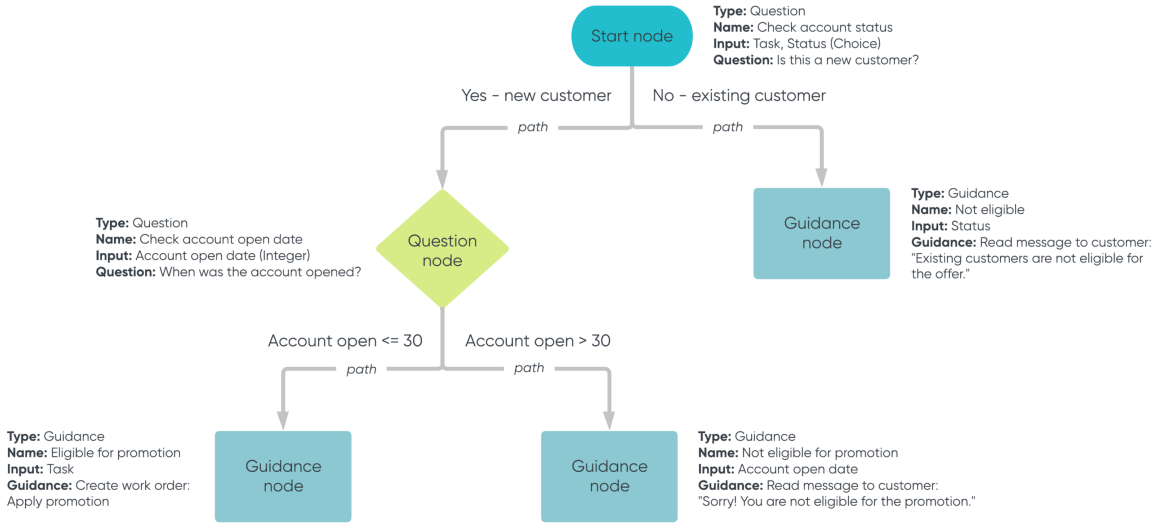
Decision tree configuration details



For more information about creating a decision tree, see the following topics:

- Configuring decision trees in Decision Tree Builder
- Create a decision tree in Core UI

Decision tree elements

Decision trees are made up of several types of elements including nodes, inputs, and paths.

Decision trees are built using different elements, which are described in the following table. The terminology for these elements differs slightly between Decision Tree Builder and Core UI but the definitions remain the same. For more information decision tree nodes and paths, see Decision tree nodes and Decision tree paths.

Core UI terms, decision tree builder terms, and definitions

Core UI term	Decision Tree Builder term	Definition
Decision tree	Decision tree	A multi-step process that includes a series of questions and answers. Based on the answers, each question in a decision tree leads to another question, a guidance for the agent to follow, or another decision tree.
Node	Node	A node is a point in a decision tree. You can create different types of nodes depending on what is happening at that point in the tree. Node types include the following: • Start node • Question node • Guidance node • Linking node
Start node	Start node	The first node in a decision tree. When you create a decision tree, the system

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Core UI terms, decision tree builder terms, and definitions (continued)

Core UI term	Decision Tree Builder term	Definition
		automatically creates the start node. The start node can be a question or a task.
Decision node	Question node (When adding a node and selecting **Ask users at least one question** in the pop-up window)	This type of node represents one or more questions. The answers to the questions lead to an outcome, which can be another question, a guidance, or another decision tree.
Guidance node	Guidance node (When adding a node and selecting **Propose a guidance as an outcome** in the pop-up window)	This type of node has a reference to a guidance, which provides a recommendation to an agent.
Linking node	Linking node (When adding a node and selecting **Link decision tree** in the pop-up window)	A linking node includes a reference to another decision tree. This linking connects the execution of the primary decision tree to another decision tree when a specific condition is met.
Guidance	Guidance	An action that an agent can take or information that an agent can share. You can select guidances included with the Guided Decisions Experience plugin or you can Create a guidance in the Core UI.
Decision input	Question or instruction	A question or instruction with a configured answer type. When working through a decision tree, an agent can provide an answer to the question in the format of answer type that you configure.
Input type	Type of answer	The type of data that the question in a question node can accept as an answer, such as string, integer, or choice. For a list of supported input types, see Answer types for questions.
Decision input mapping	Link input	Linking inputs from one decision tree node to another to reuse input values in prior decision tree nodes.
Label (for a node)	Node name	The name for a question, guidance, or linking node. In Decision Tree Builder, this name appears on the node in the canvas.

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Core UI terms, decision tree builder terms, and definitions (continued)

Core UI term	Decision Tree Builder term	Definition
Type (for a node)	Node purpose	The type of a node in the Decision Tree Node record in Core UI. The purpose of a node in the right panel in Decision Tree Builder. • Question node: Ask users at least one question • Guidance node: Propose a guidance as an outcome
Not applicable	Path	A path connects two nodes in a decision tree or question node to the start node of the next decision tree. A path is created and associated with a node and represents the potential outcome of that node.
Decision path	Not applicable	A path that provides possible outcomes of a decision node. A decision path links a decision node to the next node of type decision.
Guidance path	Not applicable	A path that links a decision node to the next node of type guidance.
Linking path	Not applicable	A path that links a decision node to the start node of the next decision tree.
Order	Path priority	The priority in which the path is executed.

Decision tree nodes

Decision trees include several types of nodes, including start nodes, question nodes, guidance nodes, and linking nodes.

A decision tree begins with a start node, which presents the first set of questions to an agent. The start node is typically followed by a question node, which asks another set of questions. A question node can be followed by another question node, a guidance node, which provides a recommendation to an agent, or by a linking node, which includes a reference to another decision tree.

You can enable agents to modify their responses in previous nodes:

- Agents can go back to the previous node by selecting the **Back** button.
- Agents can jump to any previous node by selecting the Edit icon) in the View my responses tab.

For more information, see Create a decision tree in Core UI and Add questions or instructions to a decision tree.

Start nodes

A start node is the first node in a decision tree. When you create a decision tree, you provide internal and external names, a title and short description, and a name for the action label. After

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saving the record, the system creates the decision tree and the start node. You can use this start node to build the rest of the decision tree.

A start node includes a minimum of one question. A start node always has a task input of reference type so you can reuse the task input in other decision or guidance nodes via linking inputs. The task input includes a reference to the table that stores the record type that the agent is working on.

Decision or question nodes

A question node asks one or more questions. The answer to the question leads to an outcome, which can be another question, a guidance for the user to follow, or another decision tree.

A question node presents the agent with a question or instructions to follow to evaluate the customer's situation and provide the right solution. You can add HTML formatting, such as images, links, or text formatting to the question node. Examples of typical questions or instructions include:

- For resetting a password: "What is the customer's account ID?"
- For troubleshooting a faulty device: "What is the device type or model number?"

The answers to the questions are used to create path conditions.

For more information about the available answer types, see Answer types for questions.

Note:
Using unsupported input types can cause errors in the runtime experience.

Guidance nodes

A guidance node proposes a solution to a customer’s issue through a reference to a guidance, which provides a recommendation to an agent. Examples of a guidance include recommending a knowledge article, creating a work order, or escalating a case.

A guidance node can be followed only by a question node. The execution of the decision tree continues after the agent performs the guidance, and the guidance history is marked as complete. You can use a question node to connect two guidance nodes.

A guidance can have outputs, which drive further decision making. With a guidance, you can do the following:

- Define output variables.
- Define values for the output variables, which are mapped in the Automation Plan flow for the guidance by the Assign Guidance Outputs flow action.
- Connect the guidance to the guidance node's next node.
- Map the outputs of the guidance to inputs for the guidance node's next node.

For descriptions of the available guidances, see Guidances included with Guided Decisions Experience application.

Users with the Decision tree author role can also create guidances to reuse in decision trees or recommended actions. For more information, see Create a guidance in the Core UI.

Linking nodes

A linking node includes a reference to another decision tree. This type of node connects the execution of the primary decision tree to another decision tree when a defined condition is met.

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Linking to another decision tree is useful for complex troubleshooting or for troubleshooting that requires multiple stages.

A linking node includes the following elements:

- A linked decision tree, where the execution of the primary decision tree continues after this node is reached.
- Input mapping, which maps the inputs from the nodes preceding the linking node to the start node of the linked decision tree.
- A path, which connects the previous question node to the start node of the child tree.

For more information, see the following topics:

- For Decision Tree Builder: Link an activated decision tree to this decision tree.
- For Core UI: Link another decision tree to this decision tree

Linking inputs in decision tree nodes

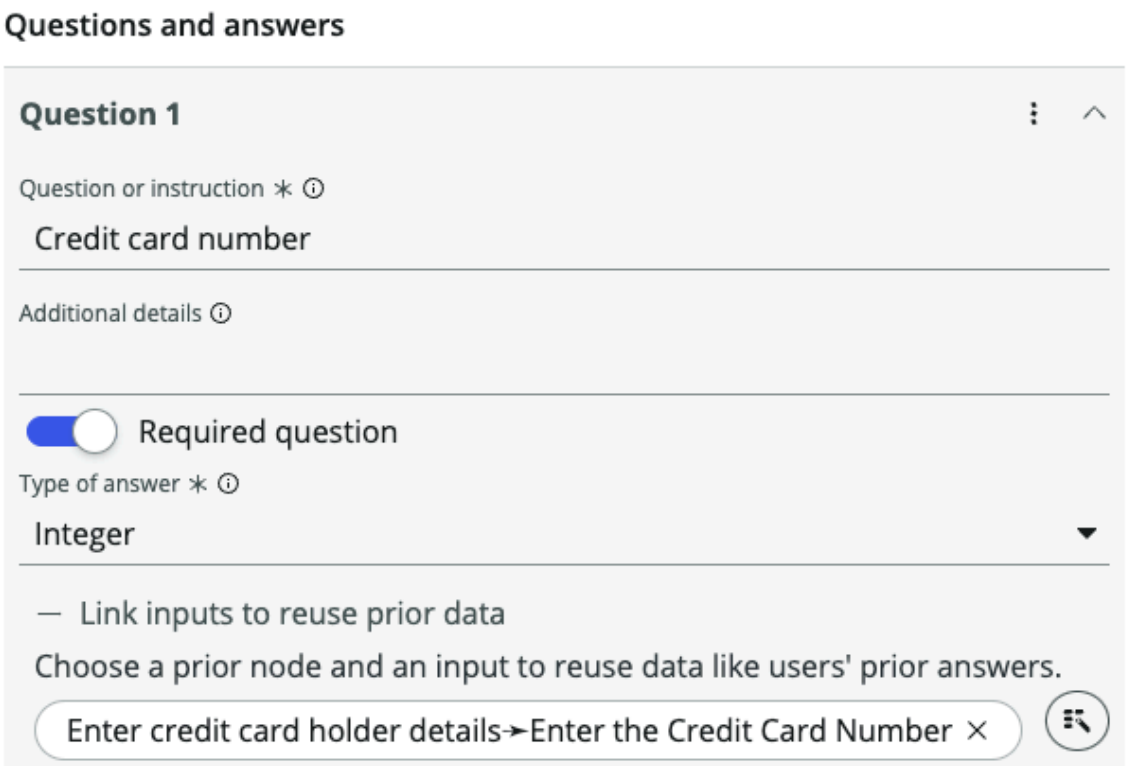
Linking of inputs enables decision tree authors to reuse input values (answers) from prior nodes.

Linking inputs in question and linking nodes

Most questions are presented to an agent to provide answers. When you link an input to another input, the question is not displayed to the agent. Because the input reuses values from the input it is linked to, the agent does not need to provide any answer.

Similar to other inputs, you can use linked inputs to create path conditions.

Example of linking inputs in a question node



For example, if you have already asked the credit card number in the start node, you can reuse that input in the following question node. This question is not presented to the agent again and the value is automatically filled out during run time.

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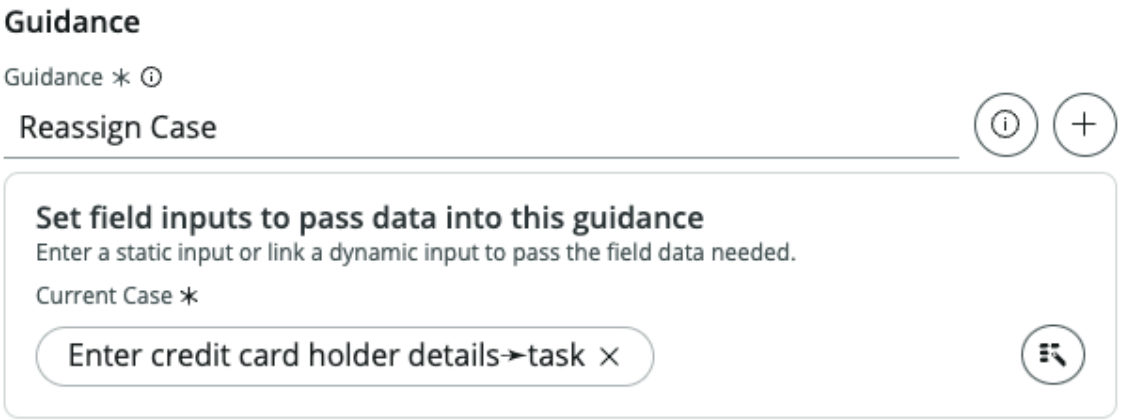
Linking inputs in guidance nodes

With linking inputs, you can reuse the answers that customer provided to supply input values to the guidance inputs. You can link the task input in the start node to the guidance inputs to pass the information about the record that the agent is working on.

Example of linking inputs in a guidance node



For example, you can connect the start node's task input to the following guidance. The task input holds a reference of the record the agent is working on in a workspace. You need a case number, which is provided by the task input, for reassigning the case to someone else.

Special cases for linking inputs

In most cases, you can only link inputs to other prior node's inputs of the same type. For example, you can link a string input field type to another string input field type.

The Guided Decisions Experience application supports the following special cases.

Cases supported in the Guided Decisions

Input type	Description
String input field type	Accepts any type of field to be linked. For example, string accepts integer, decimal, choice, and others. String is a text field which accepts any characters.
Reference input field type	Accepts only reference type of field. You can link reference input types only if the current question node's input table matches the prior node's input table at the same level or at the child level. For example, the Task table can be linked to the Task table or the Task table can be linked to the Case table, which is a child of the Task table.
Choice input field type	Accepts choice type and string type because a choice in a choice list is a string.
Date and Date/Time input field types	Accepts the following types: • `glide_date_time` • `glide_date`

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Cases supported in the Guided Decisions (continued)

Input type	Description
	• `date` • `datetime` • `due_date` • `calendar`

Note:
The Guided Decisions Experience application does not support `glide_var` type fields to map to any inputs.

Decision tree paths

A path is created and associated with a node and represents the potential outcome of that node.

When you create a path, you provide a name, a priority, and the path conditions.

Field	Description
Path name	The path name appears in the decision tree.
Path priority	The priority determines which path and its conditions get checked first when there are multiple paths. A node can have more than one path but only one path from a node can be executed at a time. For example, a path with a priority of 100 has a lower priority value than a path with a priority of 200, so only path with priority 100 is executed.
Path conditions	Path conditions represent the potential answers or outcomes from a node. You create path conditions using a condition builder, which has access to its direct parent node's inputs. It uses these inputs to create informative path conditions that represent potential answers or outcomes for the node. Path conditions must be met in order to go to the path's destination node.

- Decision Tree Builder: Determine the next node displayed in a decision tree
- Core UI: Determine the next node in a decision tree

Example configuration of a decision tree

This example demonstrates an end-to-end configuration of a decision tree to help you get started with Guided Decisions. After you configure the decision tree, you can either embed it in a playbook or use it as a recommendation in Recommended Actions.

For more information about decision trees, see Decision trees in Guided decision and Configuring guidances and decision trees.

Troubleshooting a failed credit card transaction

Paul, who holds an account with the StellarVest bank is trying to purchase a smart watch using their credit card. But the transaction failed at the time of payment. Paul created a case in the

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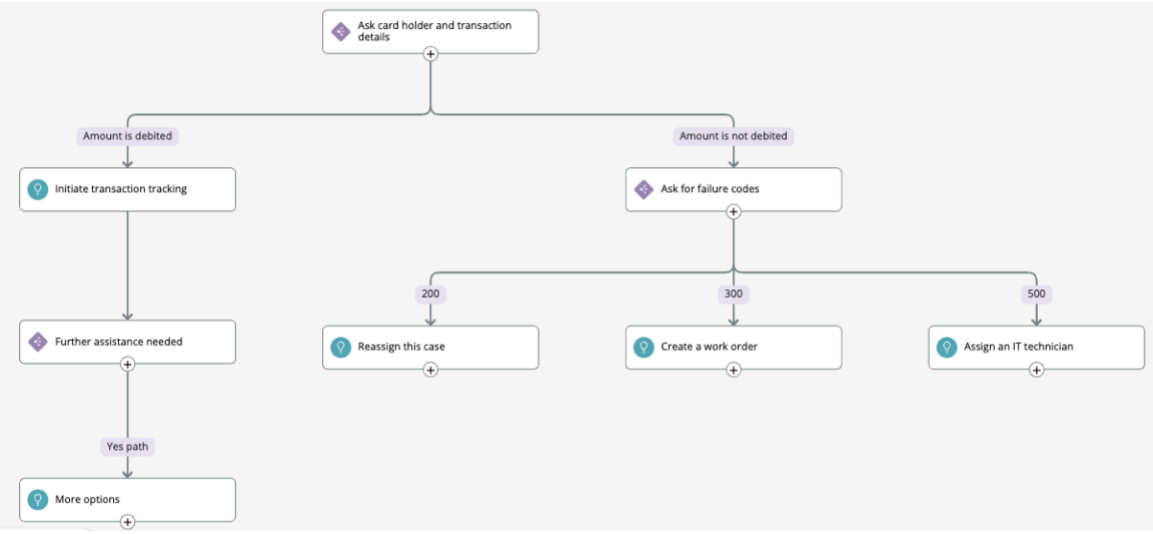
StellarVest bank portal seeking assistance. Agents from the StellarVest bank work on the cases created by customers to resolve their issues.

In this scenario, the agent assigned to the Paul's case uses a decision tree to troubleshoot the failed credit card transaction. The decision tree collects user, credit card, and transaction details. If money was debited, transaction tracking is initiated. However, if no money was debited, the agent provides a failure code which determines what guidance is provided. Examples of potential guidances include: reassigning the case, creating a work order, or assigning the case to an IT technician.



Creating the decision tree to troubleshoot the failed transaction

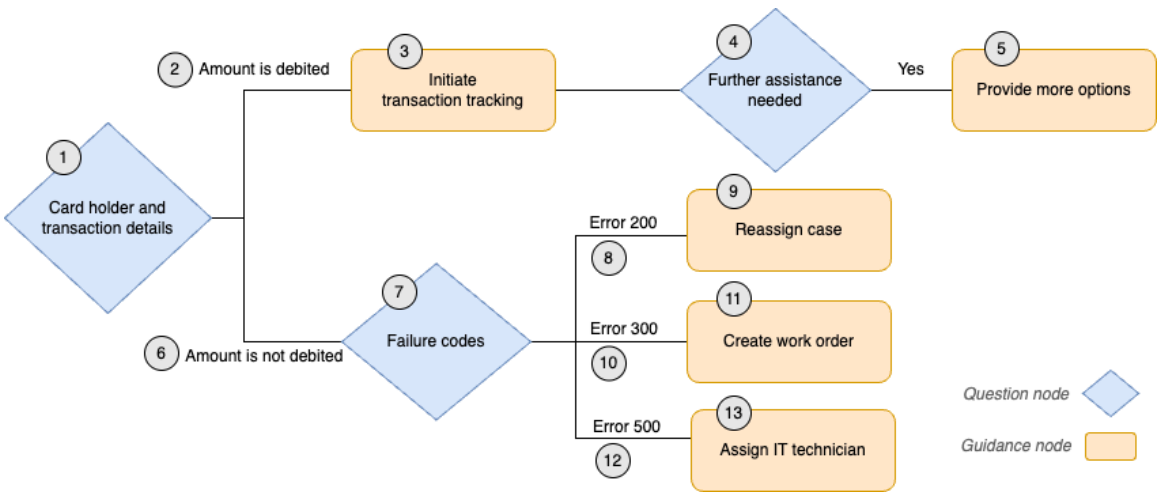
Learn how process analysts or business owners create a decision tree, and configure various decision tree nodes in the next pages.

Preparation for creating a decision tree

Before configuring a decision tree, process analysts should document the flow of the decision tree using a flow chart including the questions, answers, associated paths, and guidance.

Anita, who is a process analyst at the StellarVest bank wants to create a decision tree that enables agents to troubleshoot a failed credit card transaction.

Anita first creates a flowchart to document the flow of a decision tree to determine the questions, answers, and possible guidance to configure.



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Flow chart for decision tree

No.	Element	Name	Description
1	Start node	Card holder and transaction details	Start node that collects customer, credit card, and transaction details.
2	Path	Amount is debited	Path with condition: Amount is debited.
3	Guidance node	Initiate transaction tracking	Guidance to initiate transaction tracking when amount is debited.
4	Question node	Further assistance needed	Ask whether the customer needs further assistance.
5	Guidance node	Provide more options	Guidance to provide more options such as talk to an agent or request a new card.
6	Path	Amount is not debited	Path with condition: amount isn't debited.
7	Question node	Failure codes	Collect transaction failure codes when amount isn't debited.
8	Path	Error 200	Error code received is 200.
9	Guidance node	Reassign case	Guidance to reassign the case to someone else.
10	Path	Error 300	Error code received is 300.
11	Guidance node	Create work order	Guidance to create a work order for dispatching a new credit card.
12	Path	Error 500	Error code received is 500.
13	Guidance node	Assign IT technician	Guidance to assign an IT technician to resolve the issue.

Create a decision tree for troubleshooting a failed transaction

Help Anita create a decision tree that agents can use to troubleshoot a failed credit card transaction. After this step, the decision tree can be configured in Decision Tree Builder.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

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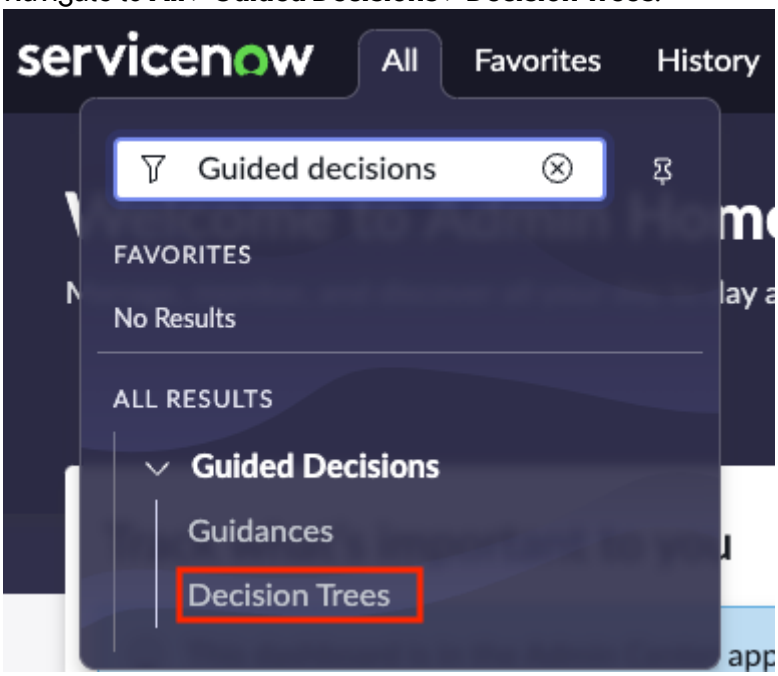
Procedure

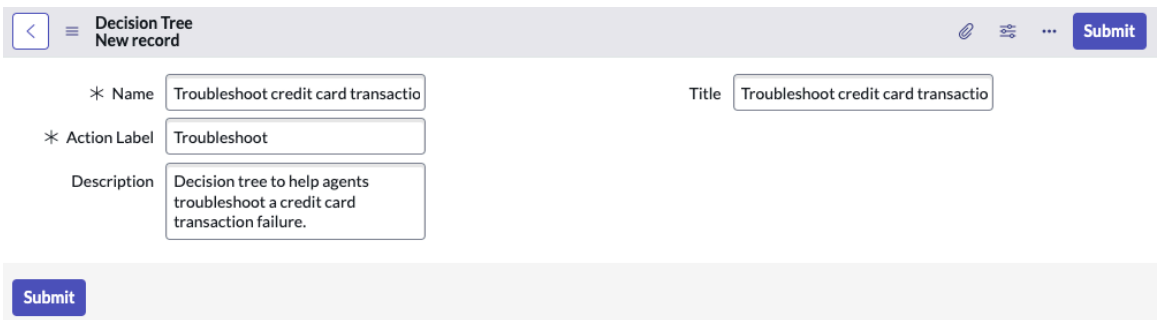
1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.



2. Select **New** on the Decision Trees list.
3. On the form, fill in the fields.

Decision tree form for troubleshooting a failed transaction

Field	Description
Name	Type `Troubleshoot credit card transaction failure`.
Action Label	Type `Troubleshoot`.
Description	Type `Decision tree to help agents troubleshoot a credit card transaction failure`.
Title	Type `Troubleshoot credit card transaction failure`.
Question font size	Enter the desired font size for the questions in the guided decision tree. Example: `14`
Show a dismiss button	Select this check box if you want the Dismiss button to appear on recommendation for the agent.



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4. Select **Submit**.
   The **Open in Builder** button is shown.

What to do next

Configure the start node to ask for the user, card, and transaction details and determine if any amount was debited.

Create the Initiate transaction tracking guidance

Create the Initiate transaction tracking guidance by configuring inputs, outputs, preview experience and detail experience.

Before you begin

Role required: sn_gd_guidance.guidance_manager

Procedure

1. Navigate to **All** > **Guided Decisions** > **Guidances**.
2. Create a guidance.
   a. Select **New** in the Guidances list.
   b. In the **Name** field, enter `Initiate transaction tracking`.
   c. In the **Description** field, enter `Guidance for tracking the failed credit card transaction`.
3. Create the following inputs for the guidance.
   Inputs are the variables or information that the system needs to perform the guidance. You can use inputs in multiple places such as the guidance preview experience and the guidance actions.

   a. In the Guidance Input tab, select **New** for each input.

   b. Create the following inputs and select **Submit**.

Guidance inputs

Label	Type	Reference	Order	Is form field
Cardholder name	String	-	100	true
Task	Reference	Case	200	false
Credit card number	Integer	-	300	true
Transaction ID	Integer	-	400	true
Date and time of transaction	Date/time	-	500	true

4. **Optional:** Create an output for the guidance.
   Outputs are the desired result of the guidance action. For example, if a guidance action creates a case task, the output of that action can return a reference to the case task that was created.
   a. In the Guidance Output tab, select **New**.
   b. In the **Label** field, enter `Case number for transaction tracking`.

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c. In the **Type** field, select Reference.

d. In the **Reference** field, select the Case table.

e. Select **Submit**.

5. Configure the preview and detail experiences.
   For more information, see Configure guidance detail experience.
6. Select **Submit**.

What to do next

Configure a guidance action that an agent can take while initiating transaction tracking.

Create a guidance action for the Initiate transaction tracking guidance

Configure the actions that agents can take to initiate a transaction tracking.

Before you begin

Role required: sn_gd_guidance.guidance_manager

Procedure

1. Navigate to **All** > **Guided Decisions** > **Guidances**.
2. Select the Initiate transaction tracking guidance from the Guidances list.
3. In the Guidance Actions form section, select **New**.
4. On the Guidance Action form, fill in the fields.

Field	Description	Value
Guidance	The guidance that this action is associated with. This field is read only.	Initiate transaction tracking
Action label	A name for this guidance action.	Initiate
Call to Action Label	The label for the action button that appears on the recommendation card in the contextual side panel. For example, **Review and attach article** or **Propose Solution**.	Initiate
Action Behavior	The selected behavior for the guidance action: ○ **Single click**: The action is initiated and completed with one click and the card moves to the **History** tab in the side panel. Useful for simple actions such as escalating a case. ○ **Open in Contextual Side Panel**: The action opens in a detailed view within the side panel. The agent can review the details in the side panel, such as reviewing	Single click

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Field	Description	Value
	the content of a knowledge base article. ○ **Open in Sub Tab**: The action opens in a separate tab. You can configure the preview experience for all the action behavior types and configure the detail view for the actions that open in the subtab or contextual side panel. For more information, see Configure guidance detail experience. **Note:** Actions that open in the contextual side panel or in the subtab don't move to the in-progress state. The action moves to the in-progress or completed state only when the agent selects the action button in the detail view.	
Primary	Denotes the guidance action as a primary action. This field is enabled by default. A primary action highlights the action that the agent should take and makes that action available as a button on the recommendation card. **Note:** A guidance can have only one primary guidance action. If this field is not selected, the guidance action is a secondary action available through the more actions menu on the recommendation card.	Select the field
Application	The application that this guidance action is associated with. This field is read only.	Global
Guidance Action Automation	The flow associated with this guidance action.	Initiate transaction tracking subflow
Order	The order of the action.	100
Completion Message	The message that appears at the top of the recommendation	The transaction tracking is initiated.

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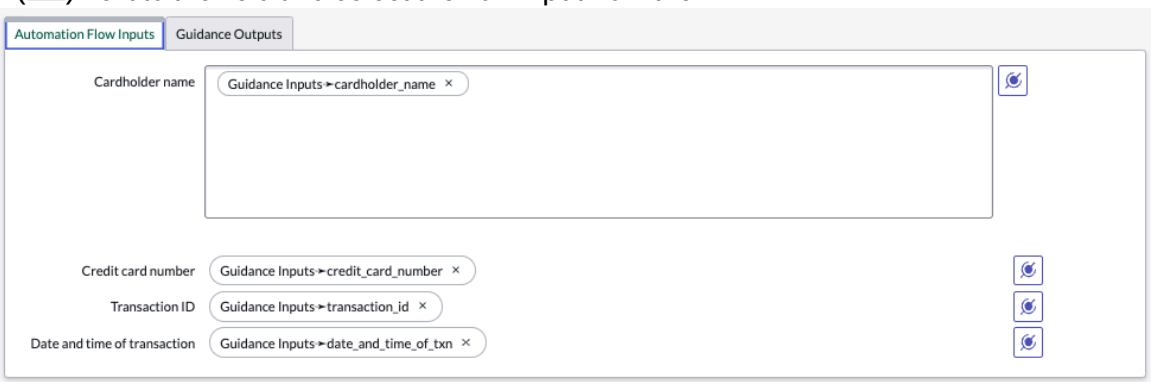
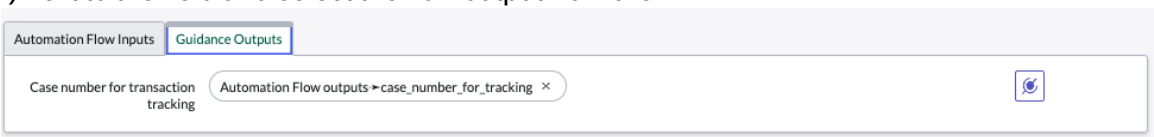
Field	Description	Value
	card when the guidance action is complete.	

5. Right-click the form header and select **Save**.
   Depending on the selected flow in the **Guidance Action Automation** field, the flow inputs and outputs are shown.
6. Configure the flow inputs and guidance outputs.
   - In the **Automation Flow Inputs** tab, select the Pill-picker icon ( ) next to the field and select the flow input from the list.



   - In the **Guidance Outputs** tab, select the Pill-picker icon ( ) next to the field and select the flow output from the list.



7. Select **Submit**.

Configure the start node to ask for cardholder and transaction details

Add questions to ask for credit cardholder details and transaction details and configure answer types in a start node in Decision Tree Builder.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

In the question node, you can add the questions that you want to ask customers or details that you want to collect. For example, you can ask for the type of credit card or whether any amount is debited. Based on the answers provided, the path to a next question or guidance node is taken.

Procedure

1. Select **Open in Builder**.

   The new decision tree opens in Decision Tree Builder in a new tab.

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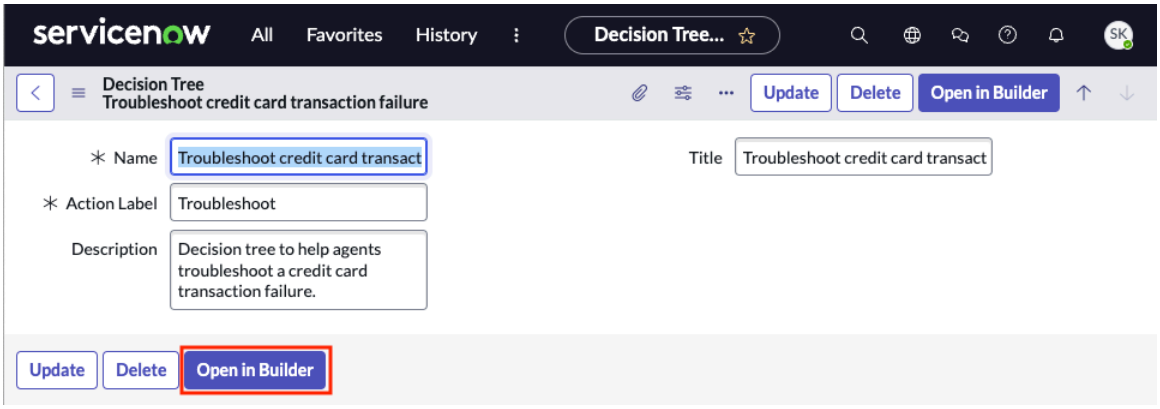
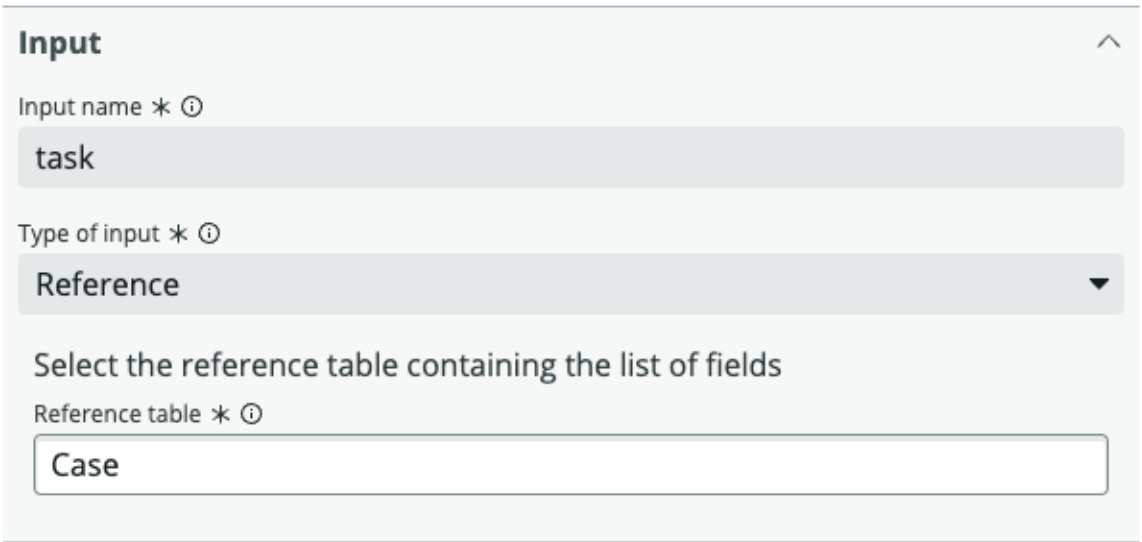


2. Select **New node**, which is a start node of your decision tree.
3. In the **Node name** field, enter `Ask card holder and transaction details`.
4. In the Input section, in the **Reference table** field, select the Case table.



The reference table doesn't necessarily have to be a task table. For example, you can select a case, incident, or interaction table for the record context to recommend this decision tree in a workspace.

Note:
You must select the same table as the reference table for the context record in Recommended Actions.

5. Configure question 1.
   a. In the **Question or instruction** field, type `Enter your name`.
   b. Make this question a required question by selecting the **Required question** field.
   c. In the **Type of answer** field, select String.

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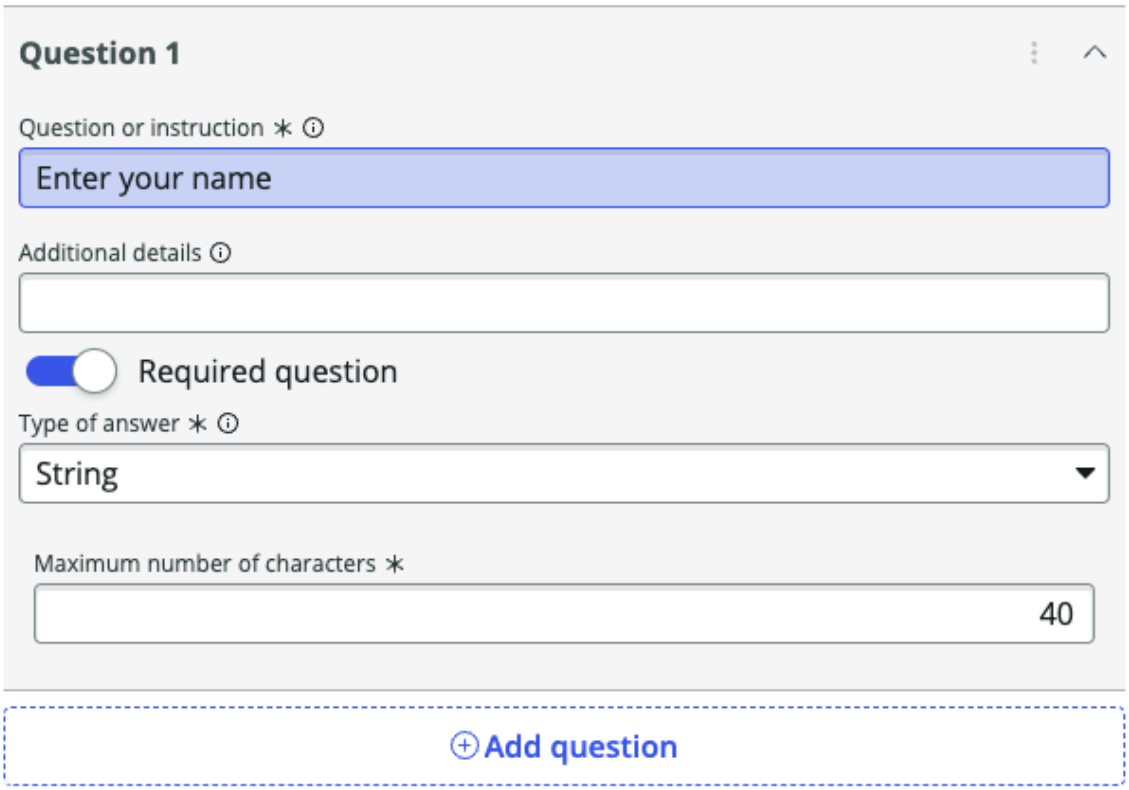
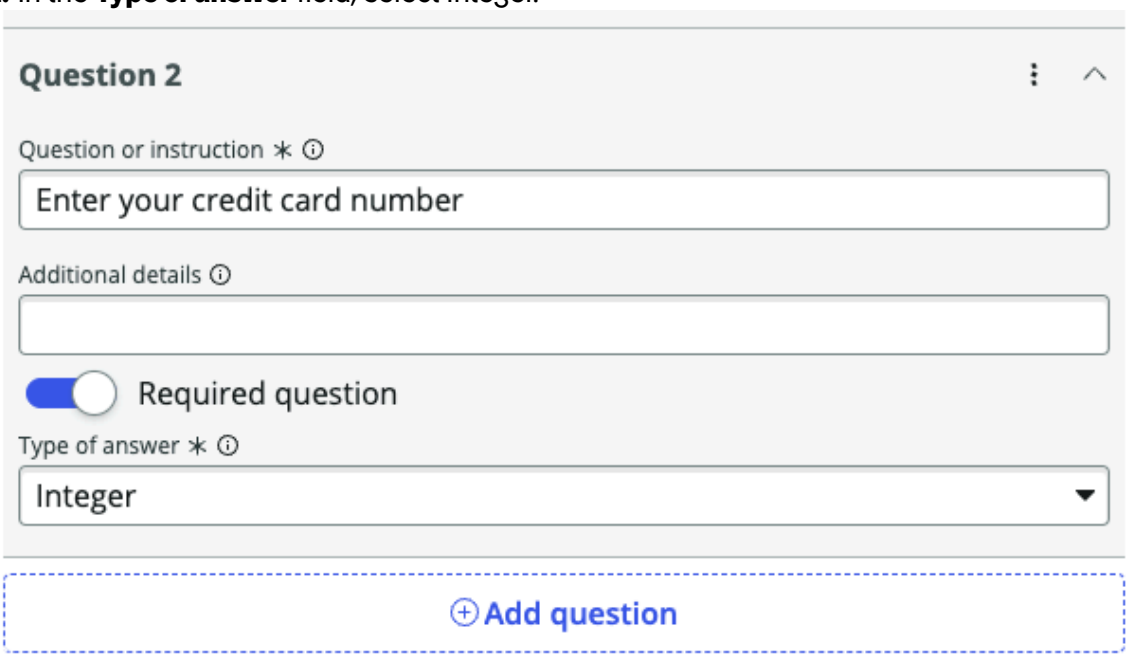


6. Configure question 2.
   a. Select the **Add question** button.
   b. In the **Question or instruction** field, type `Enter your credit card number`.
   c. Make this question a required question by selecting the **Required question** field.
   d. In the **Type of answer** field, select Integer.



7. Configure question 3.
   a. Select the **Add question** button.
   b. In the **Question or instruction** field, type `Enter the transaction ID`.

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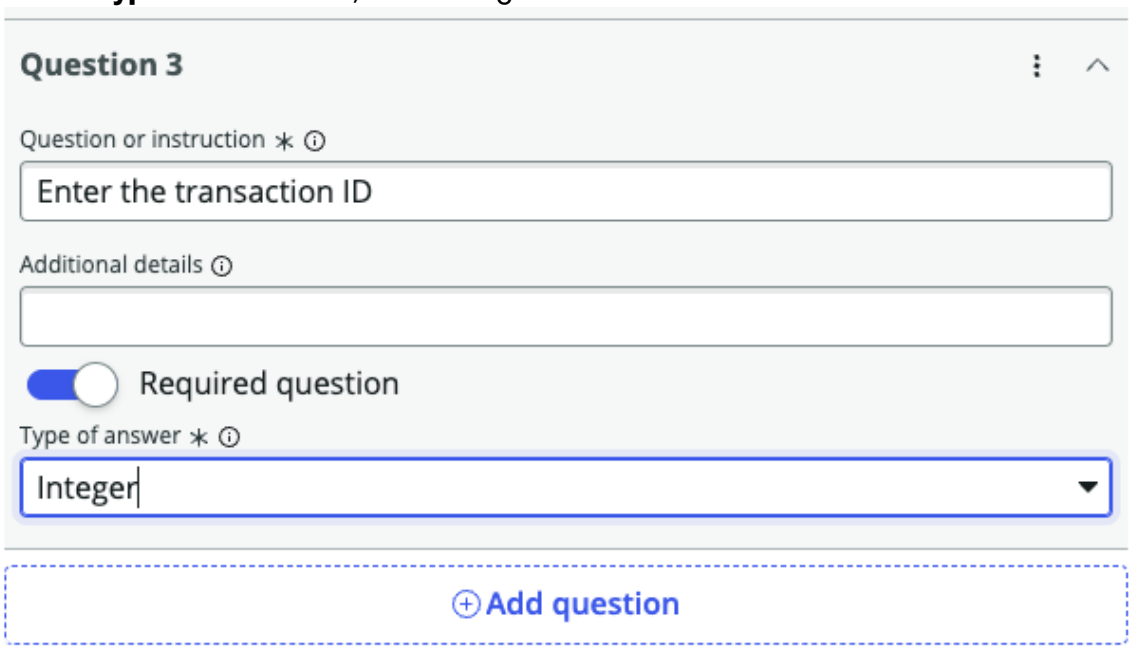
c. Make this question a required question by selecting the **Required question** field.

d. In the **Type of answer** field, select Integer.



8. Configure question 4.

a. Select the **Add question** button.

b. In the **Question or instruction** field, type `Select the card type`.

c. Make this question a required question by selecting the **Required question** field.

d. In the **Type of answer** field, select Choice.

e. In the **Label** field, enter `Visa` for the first option in the list.

f. Select **Add choice**.

g. In the **Label** field, enter `MasterCard` for the second option in the list.

h. Select **Add choice**.

i. In the **Label** field, enter `Meestro` for the third option in the list.

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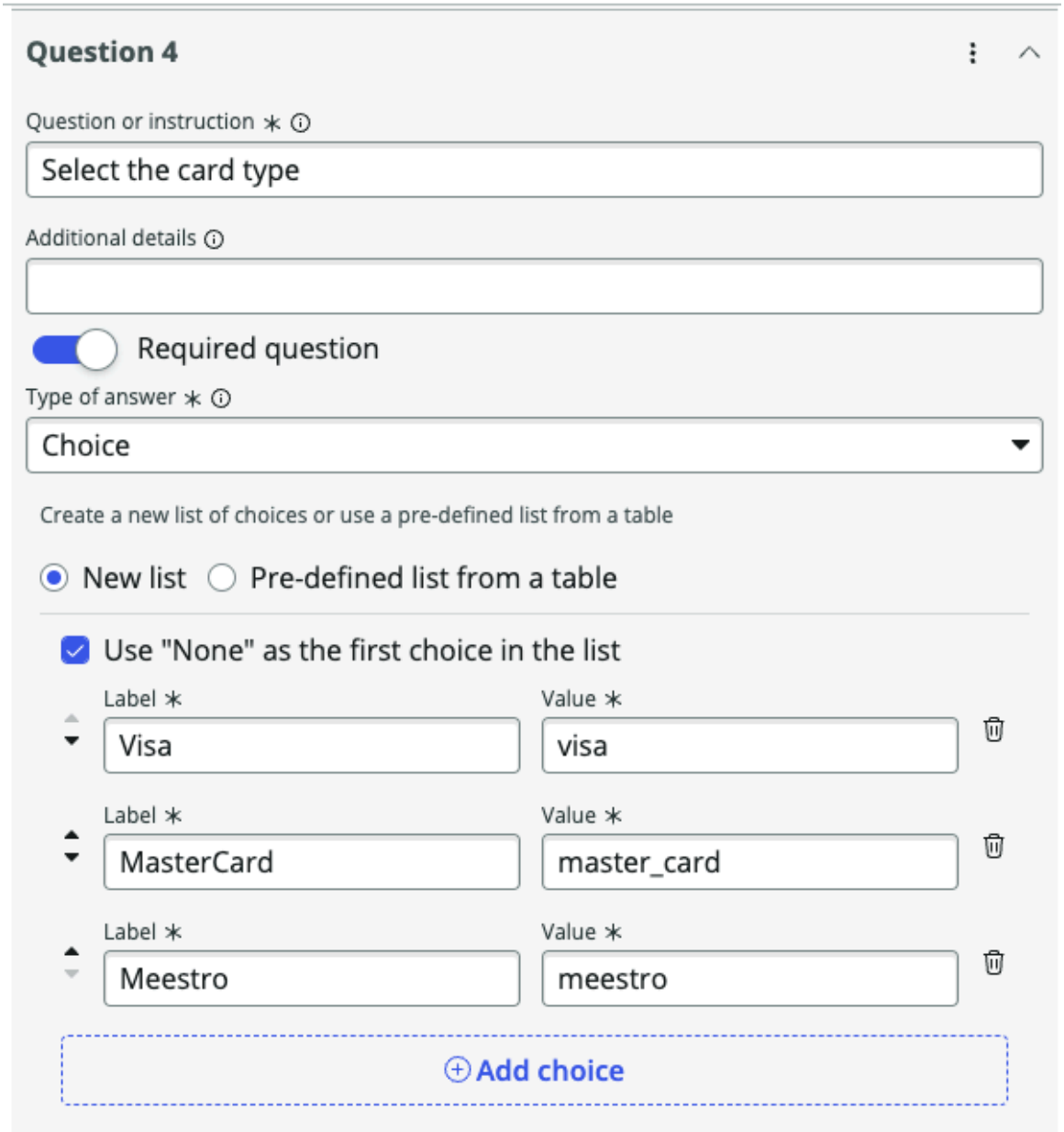

9. Configure question 5.
   a. Select the **Add question** button.
   b. In the **Question or instruction** field, type `Select date and time of the failed transaction`.
   c. Make this question a required question by selecting the **Required question** field.
   d. In the **Type of answer** field, select Date/time.

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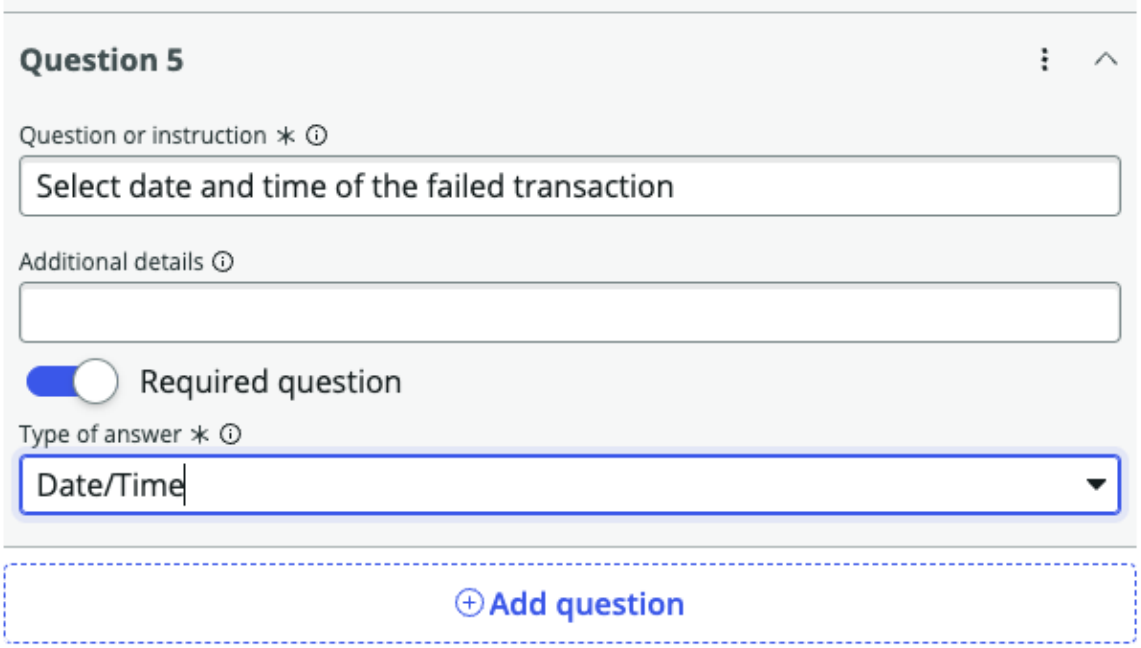
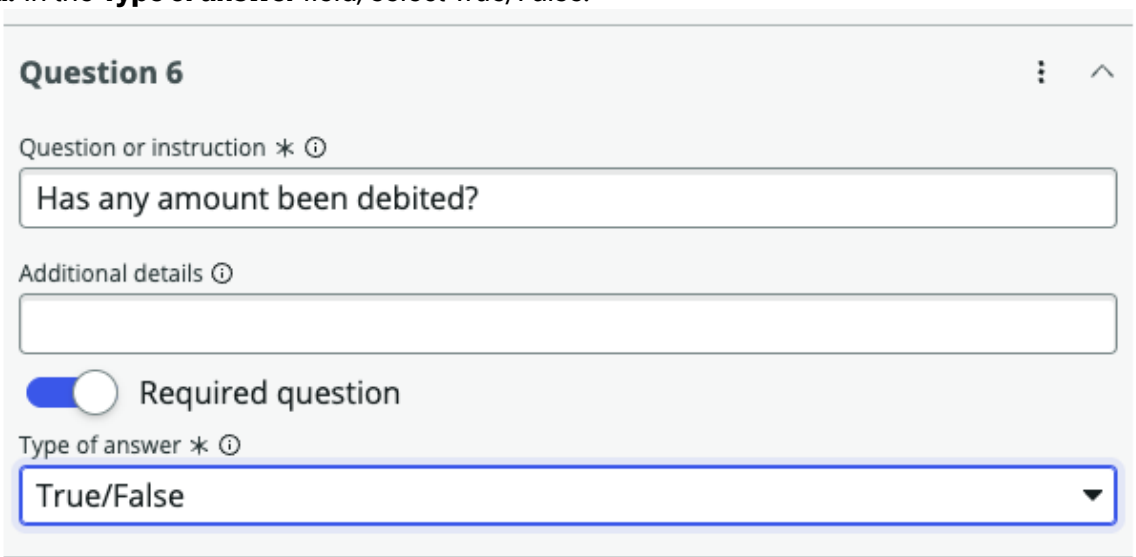


10. Configure question 6.
    a. Select the **Add question** button.
    b. In the **Question or instruction** field, type `Has any amount been debited?`.
    c. Make this question a required question by selecting the **Required question** field.
    d. In the **Type of answer** field, select True/False.



11. Select **Save and close**.

What to do next

Add paths and configure conditions for transactions when the next question or guidance node is displayed in a decision tree.

Configuring paths with conditions whether the amount is debited or not

Configure paths with conditions to determine the next question or guidance node that is displayed in a decision tree.

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- If any amount is debited during a failed transaction, the path that leads to the Initiate transaction tracking guidance is taken.
- If no amount is debited during a failed transaction, the path that leads to the next question node is taken.

Configure the path for the amount-debited condition

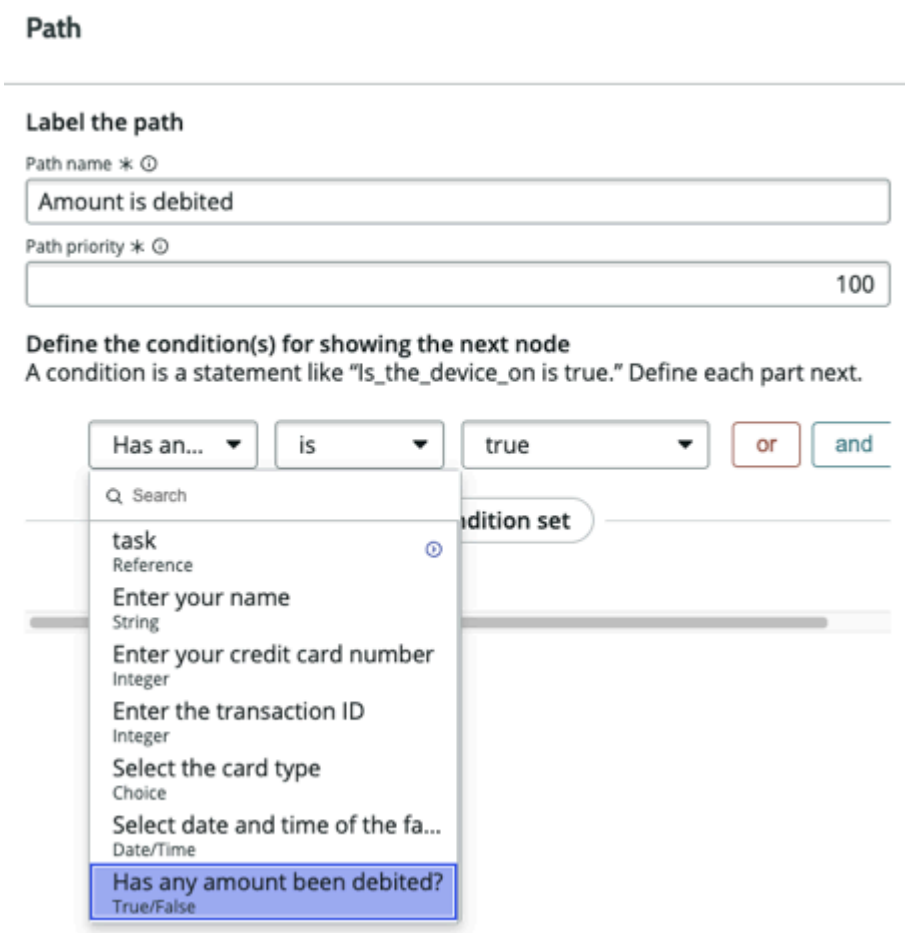
Configure a path for the amount-debited condition for the next guidance node.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When a customer answers that the amount is debited from the credit card, the path that leads to the Initiate transaction tracking guidance is taken.



Procedure

1. In Decision Tree Builder, select the Add path icon (⊕) on the start node.
   A new path and a new node are added to the canvas.

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2. Select the new path.
3. In the **Path name** field, enter `Amount is debited`.
4. In the **Path priority** field, enter `100`.
5. Select the appropriate fields to set the condition "Has any amount been debited? | is | true".
6. Select **Save and close**.

What to do next

Configure a guidance node that allows agents to initiate the transaction tracking for a failed transaction.

Configure the path for the amount-not-debited condition

Configure a path for the amount-not-debited condition for the next question node.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When a customer answers that the amount isn't debited from the credit card, the path that leads to the next question node is taken. The question node asks for failure codes that the user received.

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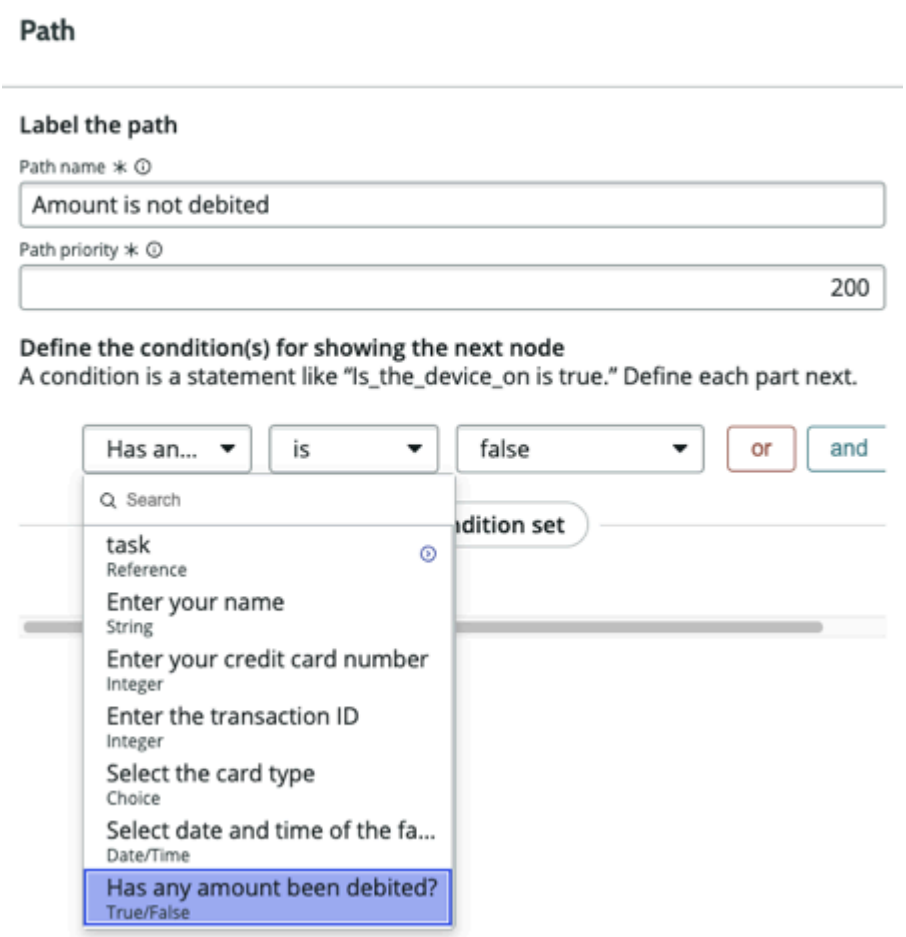

Procedure

1. In Decision Tree Builder, select the Add path icon (⊕) on the start node.
   A new path and a new node are added to the canvas.

2. Select the new path.
3. In the **Path name** field, enter `Amount is not debited`.
4. In the **Path priority** field, enter 200.
5. Select the appropriate fields to set the condition "Has any amount been debited? | is | false".
6. Select **Save and close**.

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What to do next

Configure a question node to ask for the failure codes that customer received after the failed transaction.

Configure a guidance node to initiate the transaction tracking

Configure a guidance node in Decision Tree Builder so that agents can initiate the transaction tracking.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When the customer answers that money is debited after a failed transaction, agents can create a case to initiate the transaction tracking.

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Node

Node purpose *

Propose a guidance as an outcome

Node name *

Initiate transaction tracking

Guidance

Guidance *

Initiate transaction tracking

Set field inputs to pass data into this guidance

Enter a static input or link a dynamic input to pass the field data needed.

Task

Ask card holder and transaction details→task ×

Set more field inputs to show to users

Enter a static input or link a dynamic input to show as placeholder text in these fields.

Cardholder name

Ask card holder and transaction details→Enter your name ×

Credit card number

Ask card holder and transaction details→Enter your credit car... ×

Transaction ID

Ask card holder and transaction details→Enter the transaction... ×

Date and time of txn

Ask card holder and transaction details→Select date and time ... ×

Review this guidance's outputs

Label Case number for transaction tracking Type reference

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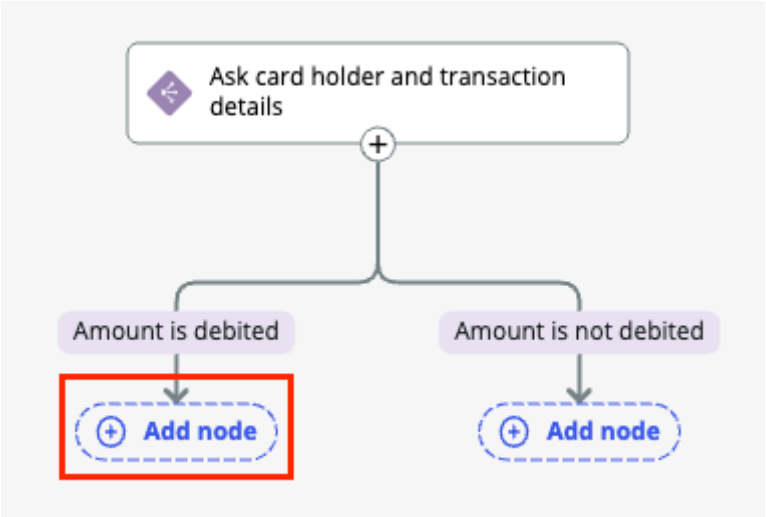
Procedure

1. Select **Add node** on the Amount-is-debited path.



2. In the pop-up window, select **Propose a guidance as an outcome** to configure a guidance node.
   A guidance is an outcome of a decision tree.
3. In the **Node name** field, enter `Initiate transaction tracking`.
4. In the **Guidance** field, select Initiate transaction tracking guidance.
5. In the **Set field inputs to pass data into this guidance** section, link the task input from the previous question node.

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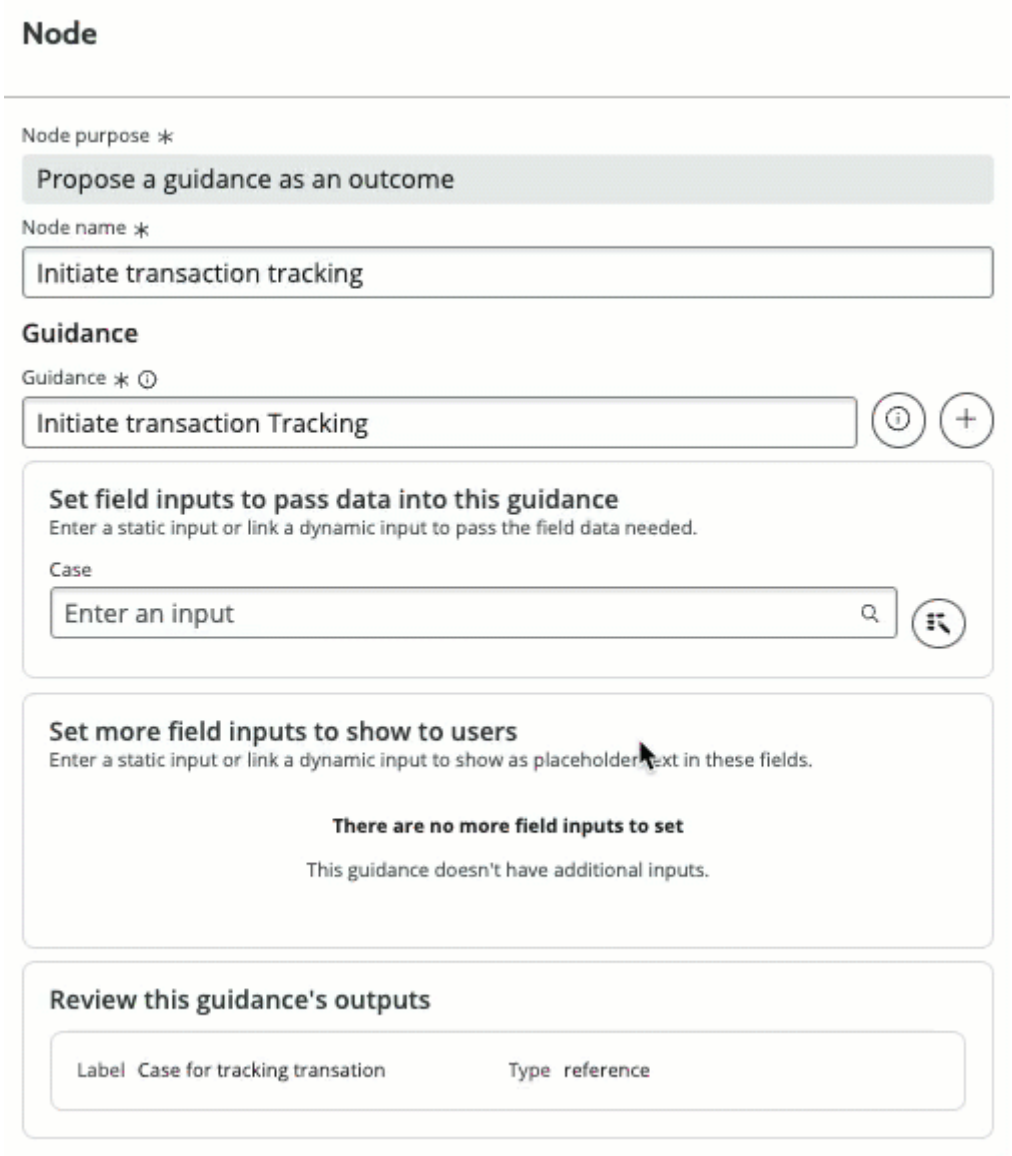

6. In the **Set more field inputs to show to users** section, link guidance inputs to the inputs from the previous question node.

   a. Select the Link input icon ( ) next to the field.

   b. Select the previous question node and the question from the list.
   The provided answer to the question is mapped to the guidance input during runtime.

7. Select **Save and close**.

What to do next

Do the following steps to add the next question node:

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1. Add a new path by selecting the Add path icon (⊕) on the Initiate transaction tracking guidance node.

   You can add a question node only after a guidance node. The execution of the decision tree continues after the guidance is performed. The path configuration isn't required because there can only be one question node after a guidance node.

2. Configure a question node for further assistance.

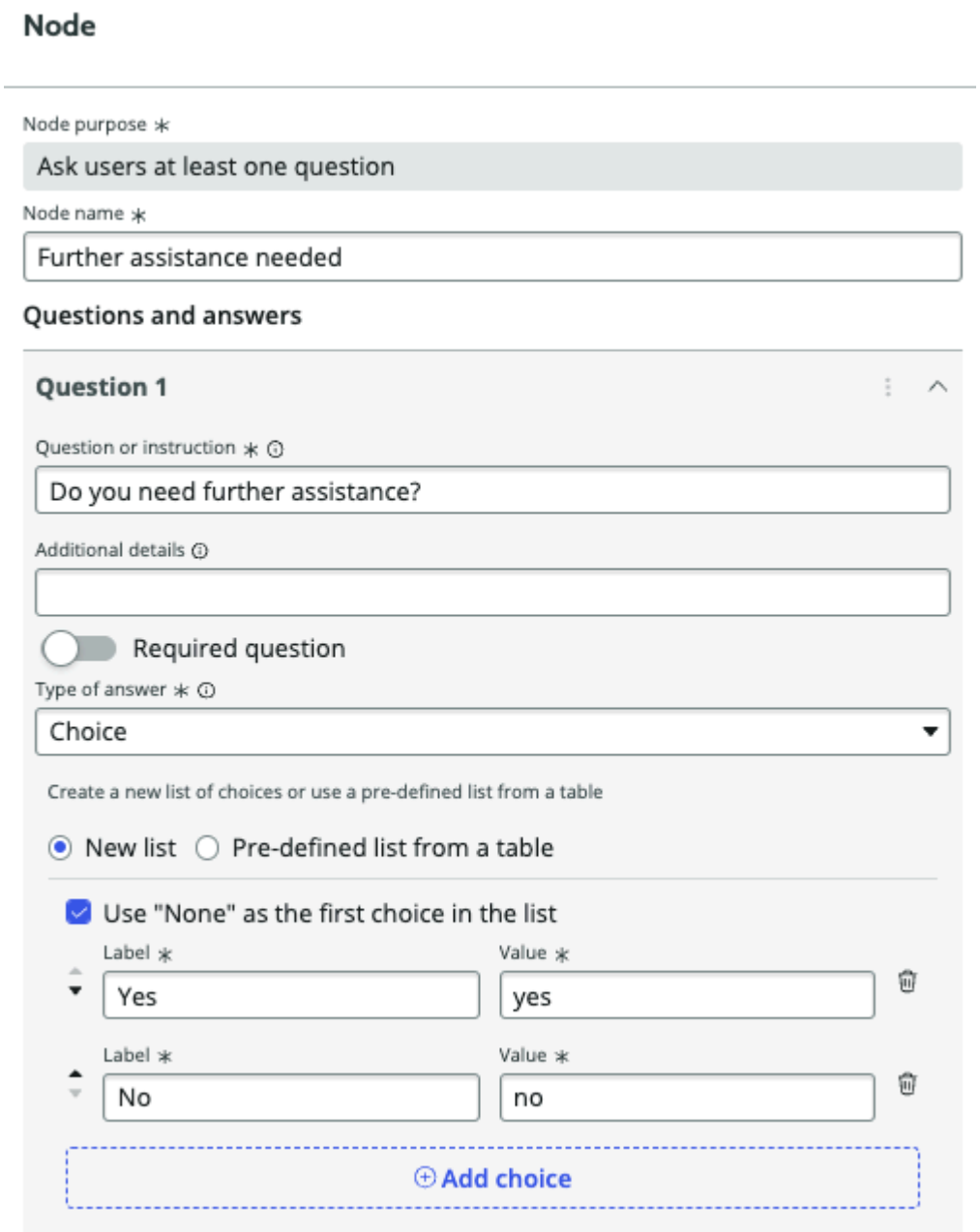
Configure a question node for further assistance

Add a question node to ask users whether they need further assistance.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task



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Procedure

1. Select **New node** on the path that comes from the Initiate transaction tracking guidance.
2. In the **Node name** field, enter `Further assistance needed`.
3. In the **Question or instruction** field, type `Do you need further assistance?`.
4. Make this question a required question by selecting the **Required question** field.
5. In the **Type of answer** field, select Choice.
6. In the **Label** field, enter `Yes` for the first option in the list.
7. Select **Add choice**.
8. In the **Label** field, enter `No` for the second option in the list.
9. Select **Save and close**.

What to do next

Do the following steps to add the next guidance node:

1. Configure a path with the condition "Do you need further assistance? | is | Yes". For more information and example, see Determine the next node displayed in a decision tree and Configuring paths with conditions whether the amount is debited or not.
2. Add a guidance node and associate the More options guidance to the Yes path. For more information and example, see Provide actions to agents in a decision tree and Configure a guidance node to initiate the transaction tracking.

Configure a question node to ask failure codes

Add a question to ask for the failure code that the customer received after a failed credit card transaction.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

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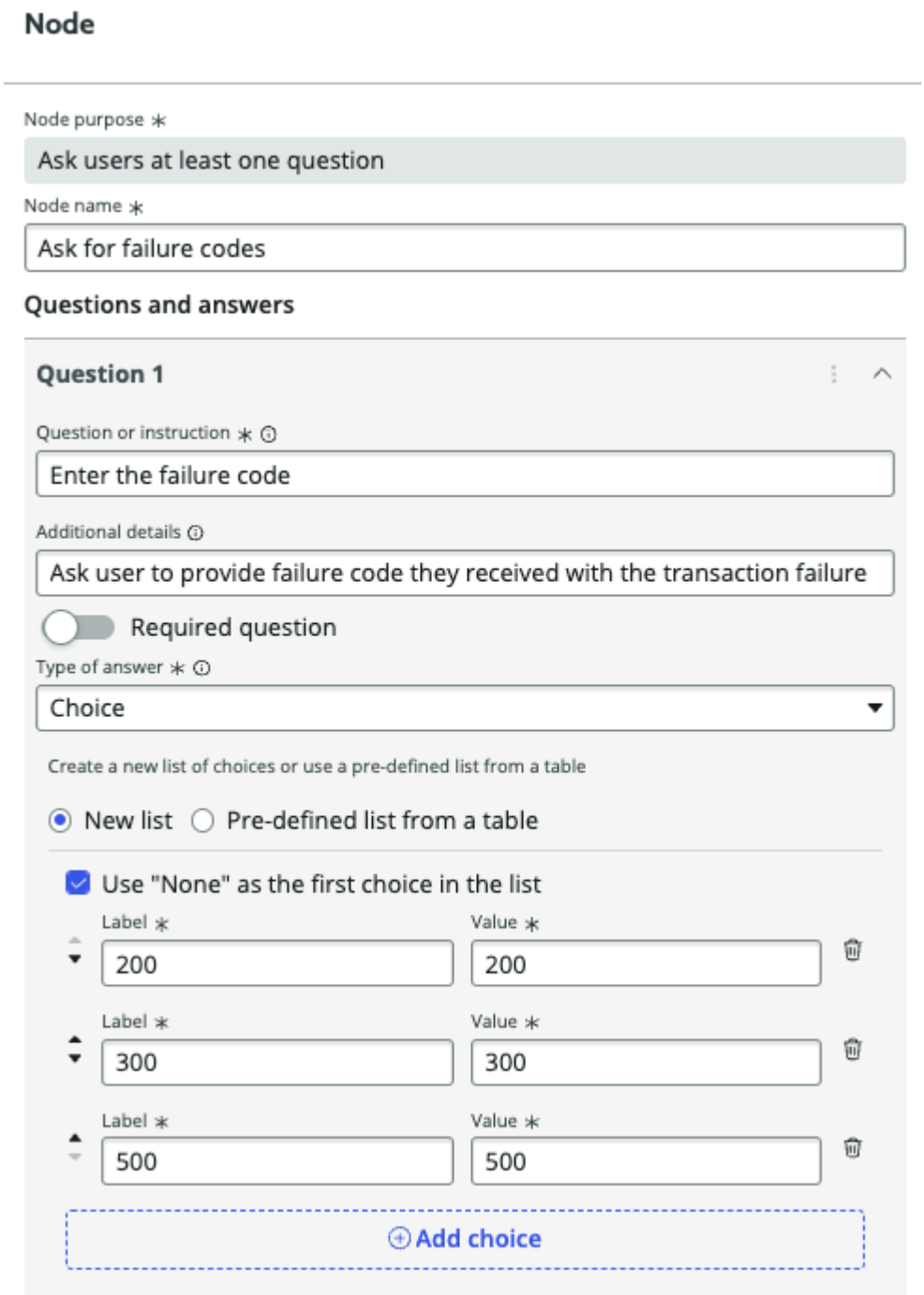
About this task



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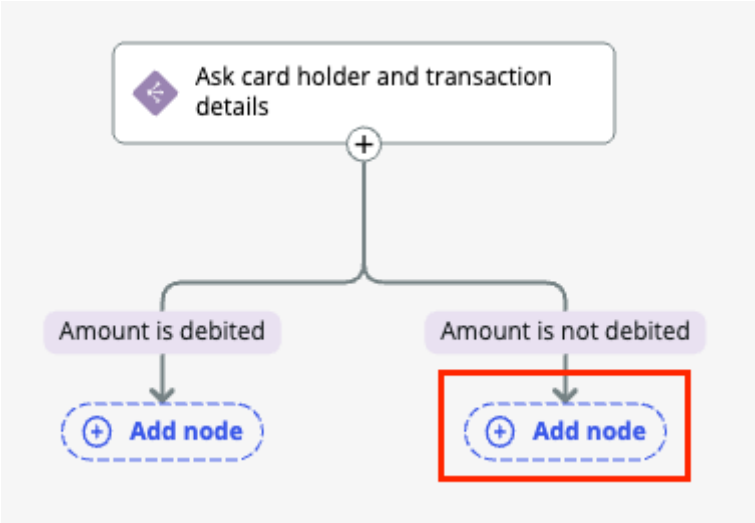
Procedure

1. Select **Add node** on the Amount-not-debited path.



2. In the pop-up window, select **Ask users at least one question** to configure a question node.
3. In the **Node name** field, enter `Ask for failure codes`.
4. In the **Question or instruction** field, type `Enter the failure code`.
5. Make this question a required question by selecting the **Required question** field.
6. In the **Type of answer** field, select Choice.
7. In the **Label** field, enter `Failure code 200` for the first option in the list.
8. Select **Add choice**.
9. In the **Label** field, enter `Failure code 300` for the second option in the list.
10. Select **Add choice**.
11. In the **Label** field, enter `Failure code 500` for the third option in the list.
12. Select **Save and close**.

What to do next

Configure a path for each failure code the customer can receive after a failed credit card transaction.

Configure paths for different failure code conditions

Configure a path for each failure code condition to provide appropriate guidance to agents.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When the failure code received by the customer is 200, the path that leads to the Reassign case guidance is taken.

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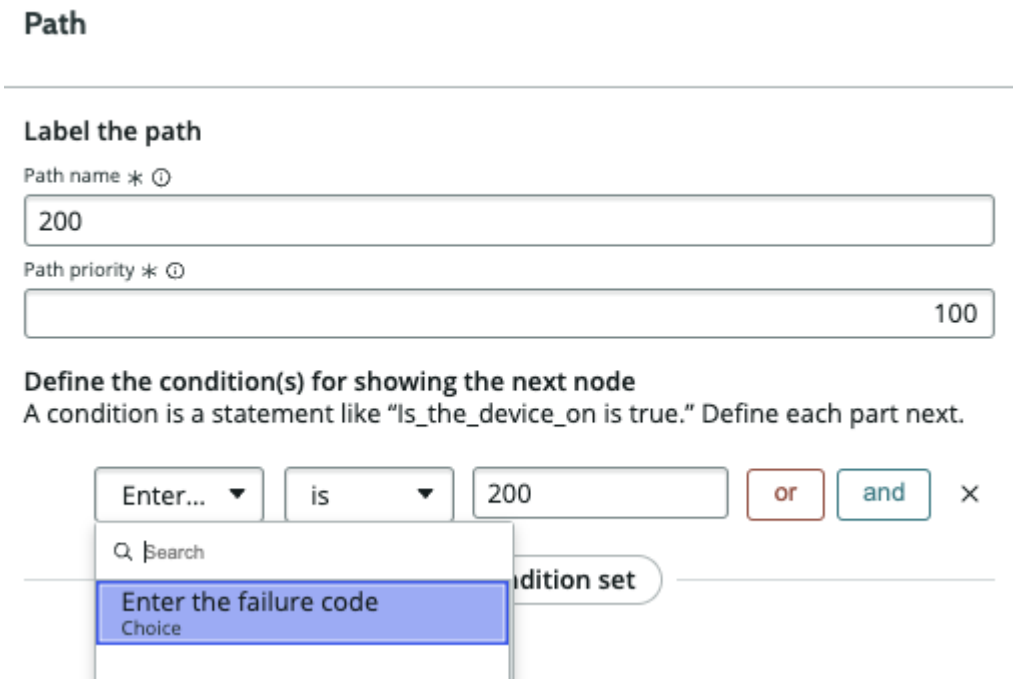

For more information about how to configure a path, see Determine the next node displayed in a decision tree.

Procedure

1. In Decision Tree Builder, select the Add path icon (⊕) on the Ask for failure codes question node.
   A new path and a new node are added to the canvas.
2. Select the new path.
3. In the **Path name** field, enter `200`.
4. In the **Path priority** field, enter `100`.
5. Select the appropriate fields to set the condition "Enter the failure code | is | true".
6. Select **Save and close**.

What to do next

Configure paths for other failure codes:

- 300 failure code - This path leads to the Create work order guidance.
- 500 failure code - This path leads to the Assign IT technician guidance.

Associate guidances for different failure codes

Associate guidances to paths with different failure code conditions.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

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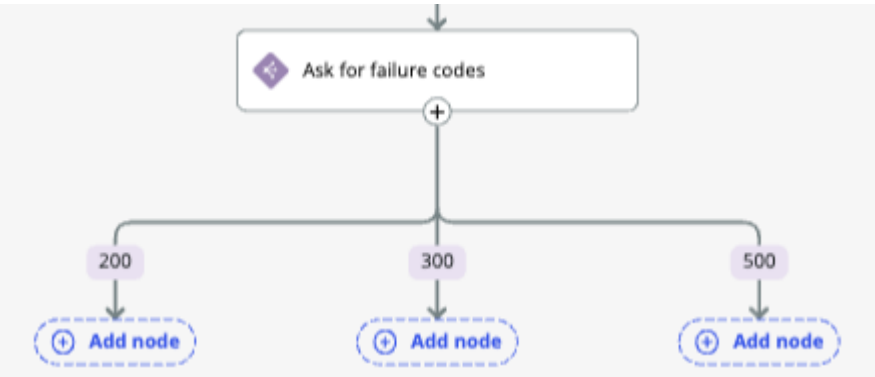
About this task



Procedure

1. Associate a guidance to the 200 path.
   a. Select **Add node** in the 200 path.
   b. In the pop-up window, select **Propose a guidance as an outcome** to configure a guidance node.
   A guidance is an outcome of a decision tree.
   c. In the **Node name** field, enter `Reassign this case`.
   d. In the **Guidance** field, select the Reassign case guidance.
   e. In the **Set more field inputs to show to users** section, map inputs by selecting the Link input icon ( ) next to the field and selecting a guidance input from the list.
   f. Select **Save and close**.
2. Associate a guidance to the 300 path.
   a. Select **Add node** in the 300 path.
   b. In the pop-up window, select **Propose a guidance as an outcome** to configure a guidance node.
   A guidance is an outcome of a decision tree.
   c. In the **Node name** field, enter `Create a work order`.
   d. In the **Guidance** field, select the Create work order guidance.
   e. In the **Set more field inputs to show to users** section, map inputs by selecting the Link input icon ( ) next to the field and selecting a guidance input from the list.
   f. Select **Save and close**.
3. Associate a guidance to the 500 path.

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a. Select **Add node** in the 500 path.

b. In the pop-up window, select **Propose a guidance as an outcome** to configure a guidance node.
A guidance is an outcome of a decision tree.

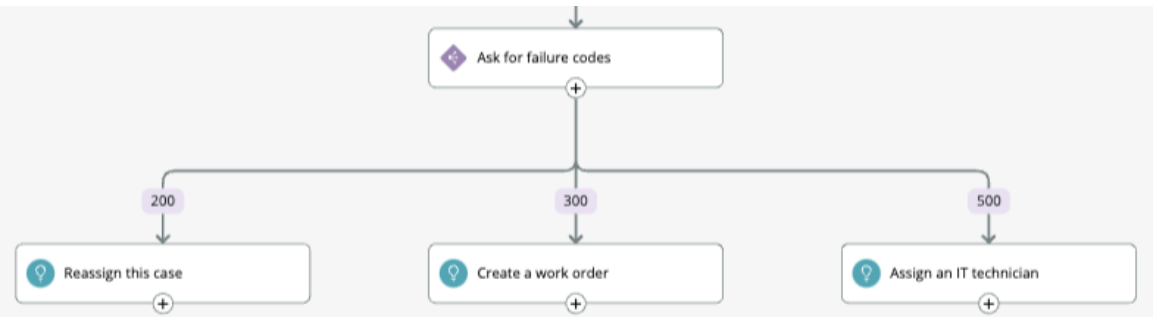
c. In the **Node name** field, enter `Assign an IT technician`.

d. In the **Guidance** field, select the Assign IT technician guidance.

e. In the **Set more field inputs to show to users** section, map inputs by selecting the Link input icon ( ) next to the field and selecting a guidance input from the list.

f. Select **Save and close**.

Result



Activate the Troubleshoot credit card transaction failure decision tree

Validate and activate the completed decision tree so you can use it in playbooks in case records or as recommendations in Recommended Actions.

Before you begin
Role required: admin, sn_gd_core.decision_tree_author

About this task
When you activate the completed decision tree, Decision Tree Builder checks for errors such as missing information, invalid input mappings due to changes in prior node inputs, or missing guidance inputs. After all the errors are resolved, you can validate and activate the decision tree.

If you change an activated decision tree, remember to activate the decision tree again to display the updated decision tree in a workspace.

Procedure

1. In Decision Tree Builder, select **Activate**.
   - If there are errors in your decision tree, error icons and alert messages are displayed. You must resolve the errors before you can activate the decision tree. For more information, see Validation error notifications in Decision Tree Builder.
   - If there are no errors, a confirmation dialog box displays.
2. In the confirmation dialog box, select **Activate now**.
   A success message with instructions on the next action to take is displayed.

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Result

- The status of the decision tree is changed from **Not Active** to **Active**.
- The **Activate** button is disabled.

What to do next

- Configure recommended actions to use the activated decision tree as a recommendation. The recommendations appear as cards in the contextual side panel of a workspace. For more information, see Add Guided Decisions to Recommended Actions.
- Configure Playbooks to use the activated decision tree as part of a playbook in a record tab. For more information, see Add Guided Decisions to playbooks.

Install the Guided Decisions Experience application

You can install the Guided Decisions Experience application (sn_ga_exp) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Guided Decisions Experience application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Guided Decisions Experience:

- Plugins
- Tables
- Roles
- Guidances

For more information, see Components installed with Guided Decisions Experience.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Guided Decisions Experience application (sn_ga_exp) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

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4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Components installed with Guided Decisions Experience

Several types of components are installed with the Guided Decisions Experience application, including tables, roles, and guidances.

Tables

The following tables are added to your instance with the activation of Guided Decisions Experience.

Tables added with Guided Decisions Experience activation

Table	Description
Decision Tree [ga_decision_tree]	Stores details of all decision trees.
Decision Tree Node [ga_decision_tree_node]	Stores details of all decision tree nodes in each decision tree.
Decision Input Mapping [ga_decision_input_mapping]	Stores input-mapping details such as source node, source input, destination node, and destination input.
Decision Tree Version [ga_decision_tree_version]	Stores decision tree versions with states.

Roles

The following roles are added to your instance with the activation of the Guided Decisions, Guided Decisions Experience, and Recommended Actions plugins.

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Roles added with Guided Decisions and Recommended Actions

Role	Description	Contains roles
Decision tree author [decision_tree_author]	Creates, views, updates, and deletes decision trees. **Note:** This role is automatically given to customer service managers.	• decision_table_admin • sn_gd_guidance.guidance_manager • decision_tree_user **Note:** Included with the Guided Decisions plugin.
Decision tree user [decision_tree_user]	Views decision trees. **Note:** This role is automatically given to customer service agents.	• decision_table_reader • sn_gd_guidance.guidance_user **Note:** Included with the Guided Decisions plugin.
Guidance manager [sn_gd_guidance.guidance_manager]	Creates, views, updates, and deletes guidances, which are outcome of a decision tree. **Note:** This role is automatically given to customer service managers.	sn_gd_guidance.guidance_user **Note:** Included with the Guided Decisions - Guidance plugin.
Guidance user [sn_gd_guidance.guidance_use	Views guidances. **Note:** This role is automatically given to customer service agents.	uxframework_user **Note:** Included with the Guided Decisions - Guidance plugin.
Playbook author [pd_content_author]	Adds decision trees and guidances to a new or existing playbook for service agents to access on their workspace.	• sn_gd_core.decision_tree_user • pd_shared.user • pd_trigger_author
Resource Generator author [sn_nb_action.resource_generator_author]	Configures resource generators.	• flow_operator • decision_table_reader • platform_ml_read • sn_nb_action.trend_definition_author **Note:** Included with the Recommended Actions plugin.

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Roles added with Guided Decisions and Recommended Actions (continued)

Role	Description	Contains roles
Trend Definition author [sn_nb_action.trend_definition_author]	Configures trend definitions.	**Note:** Included with the Recommended Actions plugin.

Guidances

The Guided Decisions Experience application includes the guidances described in the following table.

Guidance involved in Guided Decisions

Guidance	Description
Apply resolution from a solved case	Enables agents apply a resolution from recommended solved cases by clicking the **Resolve case** button on a card. The action copies the resolution notes and a resolution code from the solved case into the Closure Information section of the current case. The state of the current case changes to resolved.
Communicate Workaround	Enables agents to communicate a workaround from a recommended problem record by clicking a **Communicate workaround** button on a card. The action opens the guidance in the side panel. The guidance shows the workaround from the problem record and provides a note field for the agent to add additional notes. The workaround and notes are added in the work notes and the problem record is linked to the current case.
Create case task	Enables agents to create a case task for the current case by clicking a **Create** button on a card, which opens the guidance in the side panel where the agent can enter a subject for a new case task and submit it.
Create Work Order	Enables agents to create a work order for a case by clicking a **Create** button on a card. Creates a work order task and opens the task in a subtab.

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Guidance involved in Guided Decisions (continued)

Guidance	Description
Link to existing defect	Enables agents to link an existing defect to the current case by clicking a **Link to defect** button on a card, which links the defect to the case and updates the work notes.
Link to existing open case	Enables agents to link the current case to an existing open case by clicking the **Link to this case** button on a card. The action sets the open case as the parent of the current case.
Offer Recommendation	Enables agents to recommend upgrade of a product to provided product model.
Propose Resolution	Enables agents to enter resolution notes and a resolution code for a case by clicking a **Propose Solution** button on a card.
Read message to customer	Enables an agent to indicate that a message was read to the customer during a call by clicking the **Mark as read** button on a card, and adding the message to the work notes.
Reassign case	Enables agents to reassign the current case to a recommended assignment group by clicking a **Reassign** button on a card, which opens the guidance in a side panel where the agent can enter notes. The current case is reassigned to a different assignment group and the work notes are updated.
Review and attach article	Enables agents to review a recommended knowledge article in the contextual side panel. They can do this by clicking the **Review and attach article** button on a card, which opens the article in the side panel. In the side panel, agents can do the following: • Review the article. • Attach the article to the case. • Mark the article as helpful. • Open the article in a subtab.

Configuring guidances and decision trees

Configure guidances and decision trees to resolve customer issues faster and provide standardized resolution.

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A decision tree is a structured troubleshooting process for service agents to work through. For more information, see Setting up Guided Decisions.

The configuration process consists of the tasks listed in the following table.

Guidance and decision tree configuration tasks

Step	Description
Create a guidance in the Core UI	Configure guidances to provide actions to your agents.
Configuring decision trees in Decision Tree Builder	Configure decision trees that agents can use to troubleshoot solutions for customer issues. You can create decision trees in Decision Tree Builder only.
Editing decision trees in Core UI	Edit the decision trees that you created using Core UI to improve or extend the troubleshooting process. Only editing of existing decision trees is supported in Core UI. You can create decision trees in Decision Tree Builder only.
Add Guided Decisions to Recommended Actions	Add decision trees to recommended actions, so that agents can take relevant actions in a troubleshooting process based on a record context.
Add Guided Decisions to playbooks	Add decision trees to playbooks, so that agents can provide resolution in a troubleshooting process for their cases.
Add Guided Decisions to Service Portal	Add decision trees to Service Portal, so that internal users can leverage self-service or troubleshoot their issues.

Create a guidance in the Core UI

Create a guidance in the Core UI so that you can link the guidance to the guidance node of a decision tree. For example, your agent may attach a knowledge article or propose a solution to a customer to help resolve an issue.

Before you begin

Role required: sn_gd_guidance.guidance_manager

About this task

The preview information appears on the Recommended Actions card in the contextual side panel. The preview experience is applicable only for Recommended Actions, where agents can see previews of recommendations before launching them.

Playbooks don't have a preview experience because decision trees are embedded and considered launched already in playbooks.

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Procedure

1. Navigate to **All** > **Guided Decisions** > **Guidances**.
2. Create a guidance.
   a. Select **New** in the Guidances list.
   b. On the form, fill in the fields.

Guidance form

Field	Description
Name	Name for the guidance.
Description	Brief description of the guidance.
Action available to multiple users	Makes the guidance available to multiple agents working on the case. When this option isn't selected, only one agent can work on any guidance. When the first agent works on the guidance and the state is In-progress, Completed, or Error, the other agents can't see this guidance.
Allow users to re-run the guidance	Enables agents to go back to the previous node, edit the previous nodes, or re-execute the guidance in the runtime experience of a decision tree.
Hide completed guidance	Hides the guidance recommended for a case resolution. In other words, the completed guidance in the View my response section of a Decision Tree is not displayed for the agent. **Note:** This field is visible only when the Guided Decision Experience plugin is installed. You may need to configure the form to add this field.

   c. Select **Submit**.
3. Open the guidance that you want to update.
4. Create one or more inputs for the guidance.
   Inputs are the variables or information that the system needs to perform the guidance. You can use inputs in multiple places such as the guidance preview experience and the guidance actions.
   a. In the Guidance Input tab, select **New**.
   b. On the form, fill in the fields.

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Guidance Input form

Field	Description
Type	Field type of the input. Depending on the field type that you select, you might need to configure additional settings. For example, if you select Reference as the field type, you need to select a reference table.
Label	Name for the guidance input.
Column name	
Is form field	If the guidance input requires an action by the agent, such as adding information to a field, select the **Is form field** check box.
Order	Sequence in which the guidance input is displayed when more than one guidance input is defined.
Choice List Specification	Choices are: ▪ Dropdown without --None-- (must specify a default value) ▪ None ▪ Dropdown with --None-- None is the default value. ▪ Suggestion This tab appears when you select a value in the **Type** field.
Default value	Specifies the default value of the field for any new record. Ensure that this value uses the correct field type. For example, an integer field uses a default value of 2 but cannot use a default value of two.

c. Select **Submit**.

5. **Optional:** Create one or more outputs for the guidance.
   Outputs are the desired result of the guidance action. For example, if a guidance action creates a case task, the output of that action can return a reference to the case task that was created.

   a. In the Guidance Output tab, select **New**.

   b. On the form, fill in the fields.

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Guidance Output form

Field	Description
Type	Field type of the output. (Optional) Depending on the field type that you select, you might need to configure additional settings. For example, if you select Reference as the field type, you need to select a reference table.
Label	Defines a unique label for the guidance output. The label appears on list headers and form fields for the output.
Column name	Defines the field name of the column. When you create a new field, this name is populated automatically based on the label.
Order	Sequence in which the guidance output is displayed when more than one guidance outputs is defined.
Default value	Specifies the default value of the field for any new record. Ensure that this value uses the correct field type. For example, an integer field uses a default value of 2 but cannot use a default value of two.

c. Select **Submit**.

6. Configure the preview experience.

a. Select the **Preview Experience** tab.

b. In the **Preview Title** field, add a title for the guidance preview as either static text, dynamic content (field values from guidance inputs), or a combination of static text and dynamic content.

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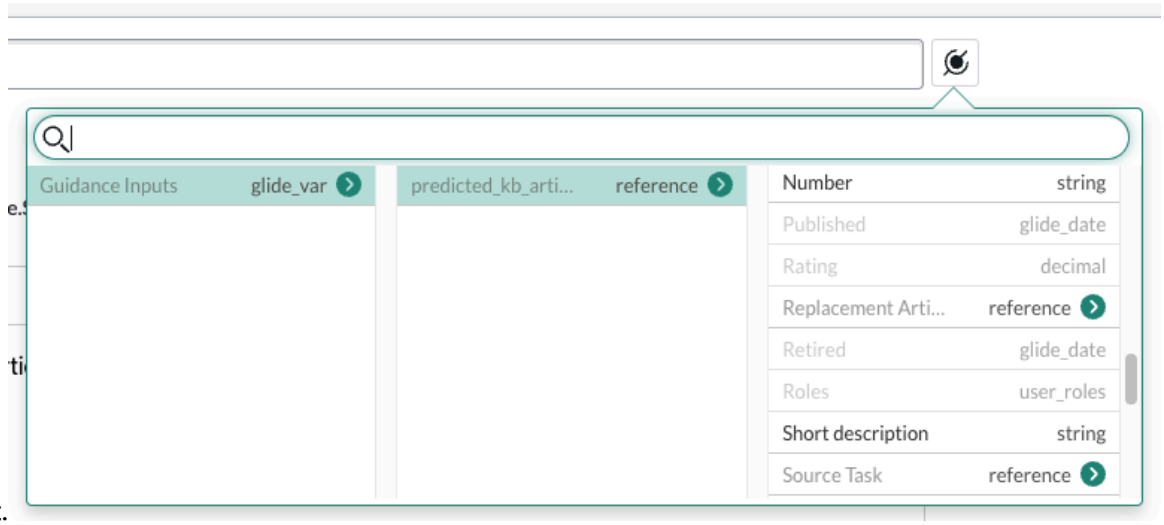
- To enter static text, type the text into the field.
- To enter dynamic content, select the Pill-picker icon ( ) next to the field and select a guidance input from the list.

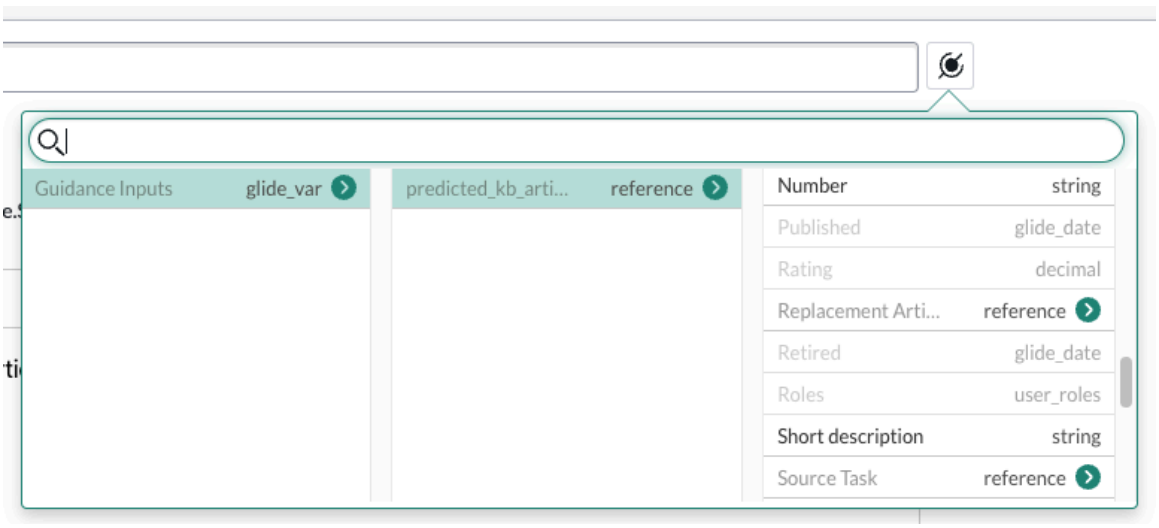
  You can drill down to find the specific input you want.



This field can contain static text, dynamic content, or a combination of static text and dynamic content. To select dynamic content as a field value:

i. Select the Pill-picker icon ( ) next to the **Preview Title** field.

ii. Select a guidance input from the list. You can drill down to another level to find the input you want.



c. In the **Fields To Display** field, select fields to display in the guidance preview.

d. In the **Message** field, create a message for the guidance preview.
You can use the tools available in the rich text editor to create and format the message. This field can include text and HTML content like images, videos, and links.

7. Select **Submit**.

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What to do next

Configure guidance detail experience for Recommended Actions cards.

Configure guidance detail experience

Configure a guidance title and description that are displayed to users in recommended actions or playbooks.

Before you begin

Role required: sn_gd_guidance.guidance_manager

About this task

The detail information appears in playbooks, or in a contextual side panel or in a subtab for Recommended Actions for Customer Service.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Guidances**.
2. Select a guidance from the Guidances list.
3. Configure the detail experience for the guidance in the Detail Experience tab.
   The detail experience is a message that is displayed for guidances that opens in the contextual side panel or in a subtab.
   a. In the **Title** field, add a title for the guidance in the detailed view.
   b. In the **Guidance Message** field, provide a message for the detail view.
4. Select **Submit**.

What to do next

- Customize a guidance preview experience in the UI Builder
- Customize a guidance detail experience in the UI Builder

The process for configuring a guidance is the same in the Guided Decisions Experience application and the Recommended Actions for Customer Service application.

Create a guidance action for a guidance

Configure the actions that agents can take to resolve cases or issues.

Before you begin

Role required: sn_gd_guidance.guidance_manager

Procedure

1. Navigate to **All** > **Guided Decisions** > **Guidances**.
2. Select a guidance from the Guidances list.
3. In the Guidance Actions form section, select **New**.
4. On the Guidance Action form, fill in the fields.

Field	Description
Guidance	The guidance that this action is associated with. This field is read only.
Action label	A name for this guidance action.

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Field	Description
Call to Action Label	The label for the action button that appears on the recommendation card in the contextual side panel. For example, **Review and attach article** or **Propose Solution**.
Action Behavior	The selected behavior for the guidance action: ○ **Single click**: The action is initiated and completed with one selection and the card moves to the **History** tab in the side panel. Useful for simple actions such as escalating a case. ○ **Open in Contextual Side Panel**: The action opens in a detailed view within the side panel. The agent can review the details in the side panel, such as reviewing the content of a knowledge base article. ○ **Open in Sub Tab**: The action opens in a separate tab. You can configure the preview experience for all the action behavior types and configure the detail view for the actions that open in the sub tab or contextual side panel. For more information, see Configure guidance detail experience. **Note:** Actions that open in the contextual side panel or in the subtab don't move to the in-progress state. The action moves to the in-progress or completed state only when the agent selects the action button in the detail view.
Primary	Denotes the guidance action as a primary action. This field is enabled by default. A primary action highlights the action that the agent should take and makes that action available as a button on the recommendation card. **Note:** A guidance can have only one primary guidance action. If this field is not selected, the guidance action is a secondary action available through the more actions menu on the recommendation card.
Application	The application that this guidance action is associated with. This field is read only.
Guidance Action Automation	The flow associated with this guidance action.
Order	The order of the action.
Completion Message	The message that appears at the top of the recommendation card when the guidance action is complete. For example, **KB article was shared**.

5. Depending on the selected flow in the **Guidance Action Automation** field, you can configure flow inputs and guidance outputs.

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- Configure flow inputs in the **Automation Flow Inputs** tab.
- Configure outputs in the **Guidance Outputs** tab.

  These fields can contain static text, dynamic content (field values from guidance inputs), or a combination of static text and dynamic content. To use dynamic content, select the Pill-picker icon ( ) next to the field and select a guidance input from the list.

6. Select **Submit**.

What to do next
Configure a guidance node and link the created guidance to this node to provide actions to agents.

Create a decision tree in Core UI

Create a decision tree that agents can use to troubleshoot solutions to customer issues.

Before you begin
Role required: admin, sn_gd_core.decision_tree_author

About this task
Decision trees are first created in Core UI. You then use Decision Tree Builder to configure the start node and add nodes and paths to build a decision tree.

Procedure
1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. On the Decision Trees page, select **New**.
3. On the form, fill in the fields.

Decision Tree form

Field	Description
Name	The internal name of the decision tree.
Action Label	The label of the call-to-action button on the Recommended Actions card.
Description	The description of the decision tree to show on the Recommended Actions card.
Title	The external name of the decision tree that end-users or agents see in a workspace. If the **Title** field is empty, the internal name is shown as the external name on the Recommended Actions card.
Question font size	The font size of the questions in the guided decision tree. It reflects in the workspace and service portal. The font size defined in the parent decision tree is inherited by the child decision tree even though the Question font size for the child decision tree has its own Question font size defined.

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Field	Description
	You may need to configure the form to add this field.
Show a dismiss button	Shows or hides the **Dismiss** button that cancels the flow of a decision tree. This field is turned on by default.

4. Select **Submit**.

Result
A decision tree record and a start node are created.

What to do next
Configure a start node to add initial set of questions or instructions to a decision tree in Decision Tree Builder.

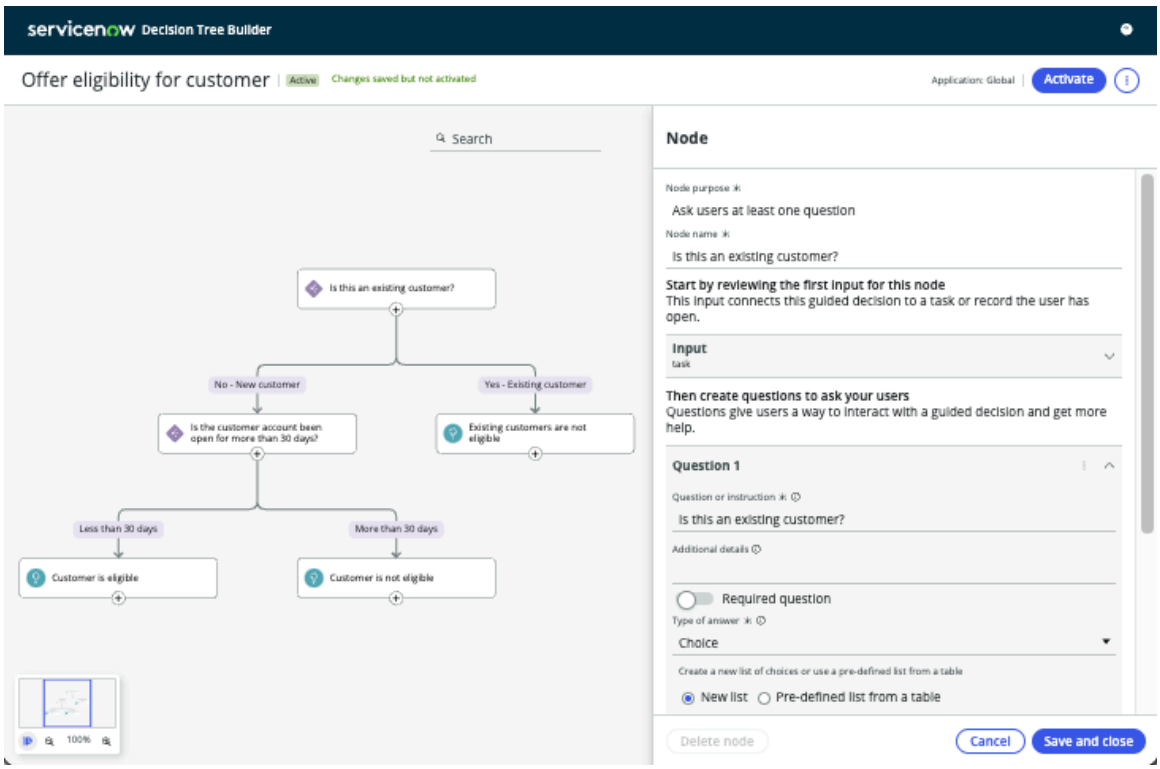
Configuring decision trees in Decision Tree Builder

Configure decision trees using the no-code visual Decision Tree Builder, which provides a canvas for a diagrammatic representation of nodes and their paths in a troubleshooting process.

As a process owner or business analyst, you can configure decision tree by adding nodes, defining paths, and attaching guidances through Decision Tree Builder. For more information, see Decision tree nodes.

You can validate and activate a decision tree with a single action. For more information, see Activate a decision tree.

Decision Tree Builder canvas



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Accessing Decision Tree Builder

You can access the Decision Tree Builder by selecting the **Open in Builder** button on the decision tree record.

Configuring question and guidance nodes

You can configure a new node as a question node or a guidance node. When there are multiple questions in a start node or a question node, you can delete a question or change the order of the questions. For more information, see Add questions or instructions to a decision tree.

Guidance nodes provide actions to agents to resolve or escalate a customer issue. You can either select a guidance from the list of available guidances or create a guidance in Core UI. You can then configure guidance inputs by entering static values or reuse inputs from prior nodes. For more information, see Provide actions to agents in a decision tree.

Linking node

You can configure a new node as a linking node to link a child decision tree to the current decision tree. This linking connects the execution of the primary decision tree to another decision tree when a specific condition is met. For more information, see Link an activated decision tree to this decision tree.

Creating paths for the next nodes

A path in a decision tree connects one node to another. You can configure a condition to define when the path must be taken. Selecting certain answers can be a condition for the path. The priority order for a path sets the precedence of one path over another.

For more information, see Determine the next node displayed in a decision tree.

Editing a node or a path

When you edit the inputs of nodes and their paths, make sure to update the following nodes as well because they might be reusing data from these inputs.

Deleting a node or a path

Note the following information about deleting a node or path:

- You can delete a leaf node if it isn't connected to any path or a node.
- Deleting a leaf node removes the node from the decision tree but the configuration of the path before the deleted node remains intact.
- You can't delete an intermediate node or path.
- When you delete the question node after a guidance node, both the question node and the path are deleted.

Linking inputs

You can link inputs from one node to another to reuse input values from prior nodes. You can use linked inputs to create path conditions. For more information about input mapping in the question node or guidance node, see Linking inputs in decision tree nodes.

For more information, see Reuse answers at decision points.

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Related topics

Validation error notifications in Decision Tree Builder

Activate a decision tree

Revert to the previous activated decision tree version

Add questions or instructions to a decision tree

Add questions you want to ask your customers or instructions you want to provide to them and configure answer types in a start node in Decision Tree Builder.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

The start node is the first node in a decision tree. It contains a task input and a minimum of one question or instruction. You can configure one or more questions to ask customers or instructions to provide to them.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, select **New node**.
5. In the **Node name** field, enter a name for the start node.
6. **Optional:** In the **Reference table** field, select a table for the record type.

   (Optional) The table that you select for the task input does not necessarily have to be a task table. For example, you can select a case, incident, or interaction table for the record context to recommend this decision tree in a workspace.

   Note:
   You must select the same table as the reference table for the context record in Recommended Actions.

7. In the Question 1 section, enter a question or instruction for customers.
   You can add text formatting, images, or links using the controls at the top of the Question 1 section.
8. **Optional:** Make this question a required question by selecting the **Required question** field.
9. Select the type of answer for your question.

   For a description of the answer types, see Answer types for questions.

   The answer the customer provides to a question can be passed to other nodes and paths via input mapping.

10. **Optional:** Link inputs to reuse answers from prior nodes.
    For more information, see Reuse answers at decision points.
11. **Optional:** Add more questions or instructions.
12. Select **Save and close**.

What to do next

Determine the next node displayed in a decision tree

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Answer types for questions

Several answer types are available for agents to provide answers to questions in a decision tree.

Type of answer

Choice	Description
Choice	A list of choices. The list types are: • **New list**: New choice list • **Pre-defined list from a table**: Existing choice list from a selected table **Use "None" as the first choice in the list**: Option to add **None** as the default value in the list.
Date	Date in the format of YYYY-MM-DD
Date/time	Date and time in the format of YYYY-MM-DD HH:MM:SS
Decimal	A number including decimal points.
Integer	A number that does not include decimal points.
Reference	Reference to a field from another table. When this answer type is selected, the following fields appear: • **Reference table**: Table for selecting a field from. • **Apply a filter**: Condition to filter the search results. For example, the Caller field on the Incident table is a reference to the User [sys_user] table.
String	A line of text. When this answer type is selected, the following field appears: **Maximum number of characters**: Length limit of the text string.
True/ False	Check box that enables the user to indicate whether the condition is true or false. If selected, it returns a value of true.

Determine the next node displayed in a decision tree

Configure a path in Decision Tree Builder to set the conditions for when the next question or a guidance is displayed in a decision tree.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

You can create two or more paths from any question node.

Because you can add a question node only after a guidance node, the path configuration isn't required.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.

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4. In Decision Tree Builder, select the Add path icon (⊕) on a node.
   A new path and a new node are added to the canvas.
5. Select the new path.
6. Enter a name for the path.
7. In the **Path priority** field, enter a priority order for this path.
   The path with the lowest priority order is executed first.
8. Configure one or more conditions by selecting a question from the previous node, an operator, and an input's value.
   For example, if the answer type is an integer, you can set a condition that when a value that a customer provides is more than the value you specify in the condition, this path must be taken.

   You can access the direct parent node's inputs only while configuring a condition for the path.
9. **Optional:** If there are multiple questions in a question node, select **New condition set** to define a complex condition for a combination of answers.
10. Select **Save and close**.

What to do next

Continue building your decision tree.

- Add a next set of questions. For more information, see Add a follow-up set of questions or instructions in a decision tree.
- Provide guidance to agents. For more information, see Provide actions to agents in a decision tree

Add a follow-up set of questions or instructions in a decision tree

Configure a question node in Decision Tree Builder to add follow-up questions or instructions. Answer to these questions either lead to a guidance or a further set of questions.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, add a new node by selecting the Add path icon (⊕) on a node.
5. Select **Add node**.
6. In the pop-up window, select **Ask users at least one question** to configure a question node.
7. Enter a name for the node.
8. In the Question 1 section, enter a question or instruction for customers.
9. **Optional:** Make this question a required question by enabling the **Required question** field.
10. **Optional:** Enter more details related to your question or instruction in the **Additional details** field.
11. Select the type of answer.

    For a description of the answer types, see Answer types for questions.

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The answer the customer provides is passed to other nodes and paths via input mapping.

12. **Optional:** Link inputs to reuse answers from prior nodes.
    For more information, see Reuse answers at decision points.
13. **Optional:** Add more questions or instructions.
14. Select **Save and close**.

What to do next
Continue building your decision tree.

- Add a next set of questions. For more information, see Add a follow-up set of questions or instructions in a decision tree
- Provide guidance to agents. For more information, see Provide actions to agents in a decision tree

Provide actions to agents in a decision tree

Configure a guidance node in Decision Tree Builder so agents can view a recommendation on what to do next.

Before you begin
Verify that the guidances you want to use exist or create them. For more information, see Create a guidance in the Core UI.

Role required: admin, sn_gd_core.decision_tree_author

About this task
Note:
If the **Allow users to re-run the guidance** field is selected when creating a guidance, users can re-execute the guidance or go back and modify responses in the previous question nodes in the run-time experience.

You can link guidance inputs and outputs to the next question node.

You can select a guidance from the list of available guidances to link to your guidance node or create a new one in Core UI.

Procedure
1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, add a new node by selecting the Add path icon (⊕) on a node.
5. Select **Add node**.
6. In the pop-up window, configure a guidance node by selecting **Propose a guidance as an outcome**.
   A guidance is an outcome of a decision tree.
7. Enter a name for the node.
8. In the **Guidance** field, select the guidance by starting to type the guidance name and selecting it from the list.
9. Enter specific values for guidance inputs in the **Set field inputs to pass data into this guidance** section.

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These fields can contain static text, dynamic content such as field values from guidance inputs, or a combination of static text and dynamic content. To use dynamic content, select the Link input icon ( ) next to the field and select a guidance input from the list.

10. **Optional:** Enter placeholder values for guidance inputs in the **Set more field inputs to show to users** section.
    Agents can substitute their own information for the placeholder values. These fields can contain static text, dynamic content such as field values from guidance inputs, or a combination of static text and dynamic content. To use dynamic content, select the Link input icon ( ) next to the field and select a guidance input from the list.
11. Select **Save and close**.

What to do next

Add a next node that is a question node after a guidance node.

Link an activated decision tree to this decision tree

Nest and invoke a decision tree from a linking node when specific conditions are met in Decision Tree Builder. Use nested trees to execute complex troubleshooting and reuse existing decision trees.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, add a new node by selecting the Add path icon ( ) on a node.
5. Select **Add node**.
6. In the pop-up window, select **Link decision tree** to configure a linking node.
7. Enter a name for the node.
8. In the **Child decision tree** field, select an activated decision tree.
9. Enter values or link inputs to reuse answers from prior nodes.
   For more information, see Reuse answers at decision points.
10. Select **Save and close**.

Reuse answers at decision points

Link inputs to reuse answers from prior nodes in Decision Tree Builder. For example, in a decision tree that deals with a loan application, you could reuse the input related to the customer's salary at multiple decision points to determine the loan eligibility.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

Linked inputs can be used to create path conditions.

For more information about input mapping and exceptions related to input mapping, see Linking inputs in decision tree nodes.

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Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, select the node you want to map inputs to.

Different nodes and actions

Node type	Action
Question node	**a.** Enter a question and select the type of answer. **b.** Select **Link inputs to reuse prior data**. **c.** Use the Link input icon () to select a prior node and an input that you want to reuse in this question. **Note:** The question with a reused answer is answered automatically during runtime.
Guidance node	**a.** Select a guidance from the list. **b.** Select the Link input icon () to select a prior node and the input that you want to reuse in the guidance input.
Linking node	**a.** Select a child tree from the list. **b.** Select the Link input icon () to select a prior node and the input that you want to reuse in the start node of the child tree.

5. Select **Save and close**.

Activate a decision tree

Activate a completed decision tree so you can use it in playbooks created using Playbooks, in recommendations created using Recommended Actions for Customer Service, or in Service Portal.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When you activate a decision tree, Decision Tree Builder checks for errors such as missing information, invalid input mappings due to changes in prior node inputs, or missing guidance inputs. After all the errors are resolved, you can activate the decision tree.

If you make changes to an activated decision tree, remember to activate the decision tree again to display the updated decision tree in a workspace.

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Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree that you want to activate.
3. Select **Open in Builder**.
4. In Decision Tree Builder, select **Activate**.
   - If there are errors in your decision tree, error icons and alert messages are displayed. You must resolve the errors before you can activate the decision tree. For more information, see Validation error notifications in Decision Tree Builder.
   - If there are no errors, the confirmation dialog box to activate the decision tree displays.
5. In the confirmation dialog box, select **Activate now**.
   A success message with instructions on the next action to take is displayed.

Result

- The decision tree status changes from **Not active** to **Active**.
- The **Activate** button is disabled.

What to do next

- Configure recommended actions to use the activated decision tree as a recommendation. The recommendations appear as cards in the contextual side panel of a workspace. For more information, see Add Guided Decisions to Recommended Actions.
- Configure Playbooks to use the activated decision tree as part of a playbook in a record tab. For more information, see Add Guided Decisions to playbooks.
- Configure a Service Portal page to use the activated decision tree for providing troubleshooting process to internal users. For more information, see Add Guided Decisions to Service Portal.

Revert to the previous activated decision tree version

Discard any changes in a non-activated decision tree and revert the decision tree to the last activated version.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. Select the More options icon (⋮) and select **Discard latest version**.

Result

The decision tree reverts to the last activated version.

Validation error notifications in Decision Tree Builder

Notifications of errors that you might encounter while building and activating a decision tree in Decision Tree Builder enable you to recover easily from errors.

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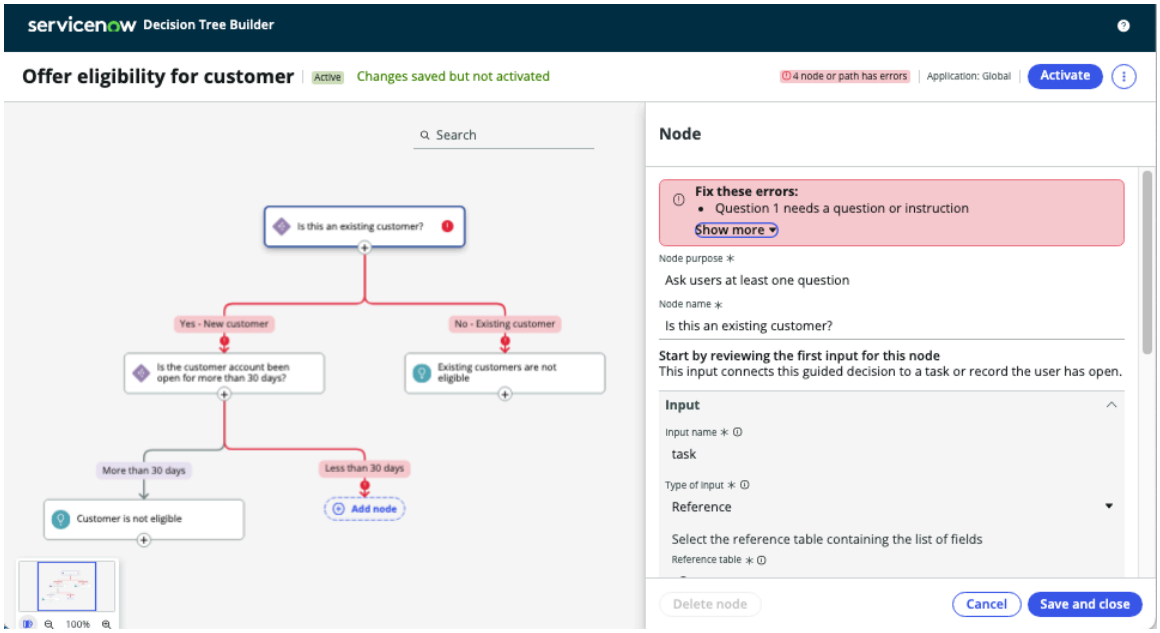

Error display

If there are missing values or incorrect configurations in a node or path, errors may appear during validation when saving or activating a decision tree.

The errors are indicated in the following ways:

- Error icons on nodes and paths that have errors
- A label for a count of nodes and paths that have errors in the top-right corner
- An alert message in the side panel showing a list of errors in the selected node or path

For more information on errors and recovery across various nodes and paths, see Validation errors.

Validation errors

Several types of errors are displayed for missing or incorrect information in the nodes and paths while saving an element or activating a decision tree.

Question node errors

Resolving errors in question nodes

Error message	Resolution
This node needs a unique name	Enter a name in the **Node name** field.
The questions in this node need to be unique	Enter a unique question or instruction in the **Question or instruction** field.
This node needs a question to ask users	Enter a unique question or instruction in the **Question or instruction** field.
The task input needs a reference table to pass data about records	Select a table in the **Reference table** field for the task input to pass data about the record on which this decision tree is run.

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Resolving errors in question nodes (continued)

Error message	Resolution
Question {number} needs a question or instruction	Enter a question or instruction in the **Question or instruction** field.
Question {number} needs an answer type	Select an input type for the expected answer in the **Type of answer** field.
Question {number} needs answer choices	The Choice answer type requires a choice list. Enter values in the **Label** and **Value** fields to configure a list. You can add as many choices as you want.
Question {number} needs an answer-string character limit	Enter a character limit in the **Maximum number of characters** field.
Type of answer in Question {number} doesn't exist	The answer type that you entered in the **Type of answer** field isn't valid. Select the answer type from the list. For more information, see Answer types for questions.
Question {number} needs a choice table and choice fields for the answer(s)	The **Pre-defined list from a table** option for the choice answer type requires you to specify the choice table and choice field to reuse choices. Select a table and list field in the **Choice table** and **Choice field** fields respectively.
Choice table in Question {number} doesn't exist	Enter a valid table name in the **Choice table** field.
Question {number} needs a reference table for the answer(s)	The reference input type requires a reference table to be selected. Select a table in the **Reference table** field to add a reference field, which stores a reference to a field on another table, as an answer type.
Reference table in Question {number} doesn't exist	Enter a valid table name in the **Reference table** field.
You need to add a path after this node	Question nodes require paths to add the next question or guidance nodes. Select the Add path icon ⊕ on the question node in the canvas to add a new path.
The input you linked in Question {number} isn't valid because of mismatched answer types. You can unlink this input, link a new one, or change this question's answer type.	After you change a question's answer type in a prior node, the input mapping from the question in the current node is no longer valid. **1.** Unlink the input by deleting the link. **2.** Either change this question's answer type to match the changed answer type in the prior node or add a question that matches it. **3.** Select the Link input icon (⛓) to link the inputs.

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Resolving errors in question nodes (continued)

Error message	Resolution
The input you linked to Question {number} no longer exists after recent node changes. Unlink this input to fix this error.	Unlink the input by deleting the link.
The input you linked in Question {number} isn't valid because of mismatched reference tables with a prior node. Tables need to match at the same or child level.	You can link reference input types only if the current question node's input table matches the prior node's input table at the same level or at the child level. For example, the Task table can be linked to the Task table or the Task table can be linked to the Case table, which is a child of the Task table. 1. Unlink the input by deleting the link. 2. If necessary, select the reference table that matches at the same level or at the child level. 3. Select the Link input icon ( ) to link the reference inputs again.

Guidance node errors

Resolving errors in guidance nodes

Error message	Resolution
This node needs a unique name	Enter a name in the **Node name** field.
This node needs a guidance	Guidance nodes must be linked to a guidance. Either select an existing guidance or create one. • Select an available guidance from the list in the **Guidance** field. • Create a guidance in Core UI by selecting the Create a guidance icon in the **Guidance** field. For more information, see Create a guidance in the Core UI.
You need to set inputs for this guidance	Configure the guidance inputs for the guidance that you selected. For more information, see Provide actions to agents in a decision tree.
{Guidance input name} input isn't valid because of mismatched reference tables with a prior node. Tables need to match at the same or child level.	You can link reference input types only if the current guidance node's input table matches the prior node's input table at the same level or at the child level. For example, the Task table can be linked to the Task table or the Task table can be linked to the Case table, which is a child of the Task table.

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Resolving errors in guidance nodes (continued)

Error message	Resolution
	1. Unlink the input by deleting the link. 2. Select the ( ) icon to link the inputs again or enter a static value.
The input you linked to {Guidance input name} no longer exists after recent node changes. Unlink this input to fix this error.	1. Unlink the input by deleting the link. 2. Select the Link input icon ( ) to link the inputs again or enter a static value.
You need to reset the input(s) for this guidance because of changes in prior nodes	1. Unlink the input by deleting the link. 2. If necessary, select the Link input icon ( ) to link the new answer type from the prior node or enter a static value.

Linking node errors and warnings

Resolving errors in linking nodes

Error message	Resolution
This node needs a unique name	Enter a name in the **Node name** field.
This node needs a child tree	Linking nodes must be linked to a child tree. Either select an activated decision tree or create one. • Select an activated decision tree from the list in the **Child decision tree** field. • Create a decision tree in Core UI by selecting the Create a decision tree icon ⊕ in the **Child decision tree** field. For more information, see Create a decision tree in Core UI.
You need to map the inputs of the child decision tree to this decision tree correctly.	Configure the start node inputs of the child decision tree or select the Link input icon ( ) to link the inputs.
{Input name} input isn't valid because of mismatched reference tables with a prior node. Tables need to match at the same or child level.	You can link reference input types only if the current guidance node's input table matches the prior node's input table at the same level or at the child level. For example, the Task table can be linked to the Task table or the Task table can be linked to the Case table, which is a child of the Task table.

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Resolving errors in linking nodes (continued)

Error message	Resolution
	1. Unlink the input by deleting the link. 2. Select the ( ) icon to link the inputs again or enter a static value.

Resolving warnings in linking nodes

Warning message	Resolution
The child decision tree you linked earlier changed. Double-check the mapped inputs.	1. Unlink the input by deleting the link. 2. If necessary, select the Link input icon () to link the input from the prior node or enter a static value.
Make sure these linked decision trees can still use {child decision tree}: • {Name of parent tree 1} • {Name of parent tree 2} • {Name of parent tree 3}	When you update and activate a decision tree, the parent decision trees that use this decision tree as a child tree must also be updated. 1. Select the parent decision tree. 2. Select the link node that references the child decision tree that has changed. 3. Unlink the input by deleting the link. 4. If necessary, select the Link input icon () to link the input from the prior node or enter a static value.

Path errors

Resolving errors in paths

Error message	Resolution
This path needs a name	Enter a name in the **Path name** field.
This path needs a unique path priority	Enter a unique value in the **Path priority** field.
This path needs conditions for showing the next node	Configure one or more conditions by selecting an input from the previous node, an operator, and an input value.
Every condition in this path needs to be complete	Complete a condition in the path by selecting an input from the previous node, an operator, and an input value.
You need to add a node after this path	A path must lead to a node. Select **Add node** to configure the placeholder node as a question node or a guidance node.

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Resolving errors in paths (continued)

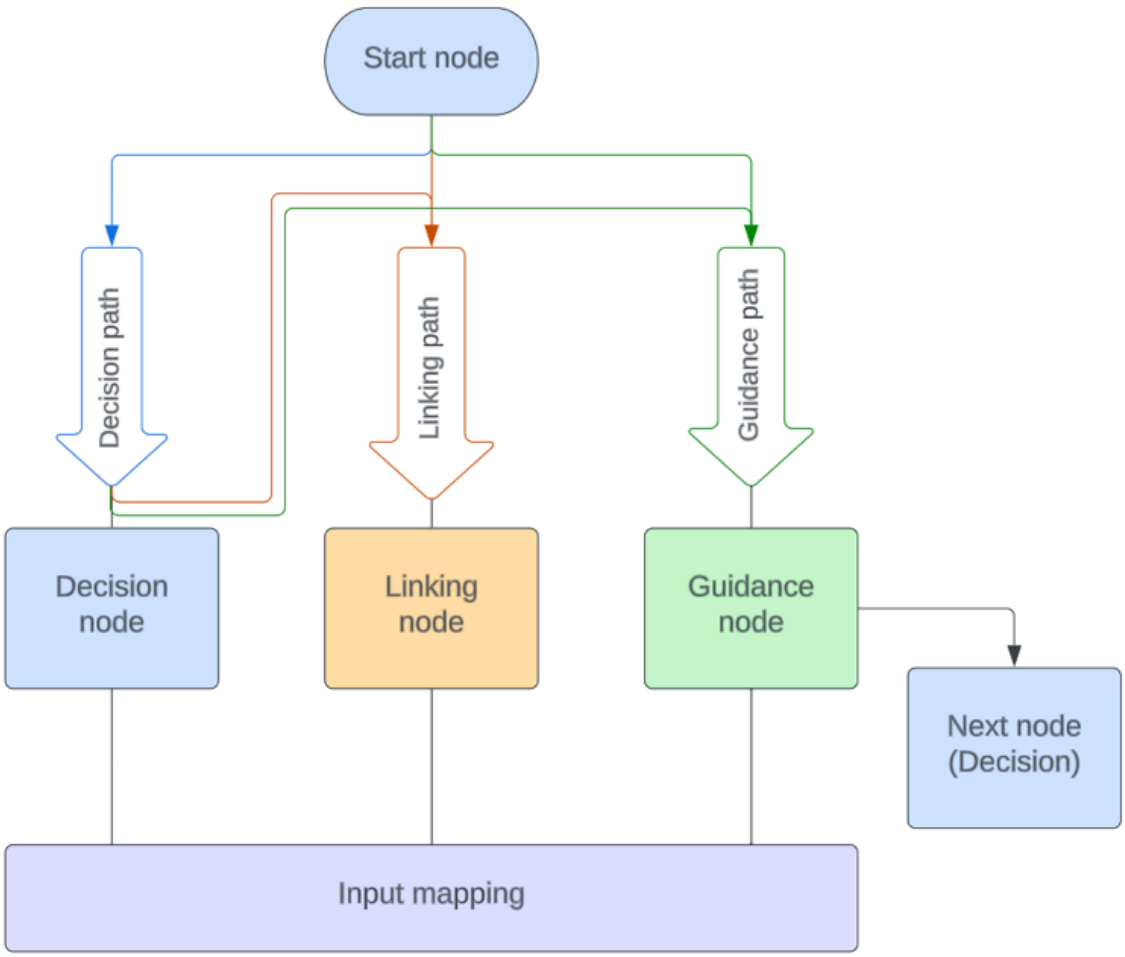
Error message	Resolution
The path condition needs new values because of changes in prior nodes	Reconfigure the path condition by selecting the new input from the previous node, an operator, and the new input value.
The path conditions can't be defined until the prior node has a question and answer	Configure questions and answer types in the path's parent node.

Editing decision trees in Core UI

You can edit decision trees created in Core UI to improve or extend a troubleshooting process.

Note:
You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Decision tree configuration flow in Core UI



The following table provides high-level information for editing a decision tree in the Core UI.

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Decision tree configuration steps

Decision tree step	Description
Configure a start node and a task input	Each decision tree includes a start node of type decision and a task input. The task input stores a reference of the record that the agent is working on. For more information, see Edit a decision tree. Select the start node from the Decision Tree Nodes related list. Create inputs to add initial questions you want to ask customers. Select the input type for the expected answer and configure the answers in the related list. For more information, see Add questions or instructions to a decision input.
Create a decision path	Create a decision path and configure conditions for the next decision node. For example, you can set up a condition to select an answer for the question in the start node. When a user selects this answer, this path that leads to a decision node is taken. For more information, see Determine the next node in a decision tree. A decision node is automatically created.
Create inputs to add follow-up questions in the decision node	Select the input type for the expected answer and configure the answers in the related list. For more information, see Add questions or instructions to a decision input.
Create a guidance path	Create a guidance path and configure conditions for the next guidance node. For example, you can set up a condition to select an answer for the question in the start node or decision node. When a user selects that answer, this path leads to a guidance node. For more information, see Determine the next node in a decision tree. A guidance node is automatically created.
Configure the created guidance node	Configure the guidance node to provide resolution to a customer. Associate a guidance to the guidance node and configure the guidance inputs. For more information, see Provide actions to agents in a decision tree.
Create a linking path	Create a linking path and configure conditions for the next decision tree. For example, you can set up a condition to select an answer for the question in the decision node. When a user selects that answer, this path leads to the next decision tree. For more information, see Determine the next node in a decision tree.

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Decision tree configuration steps (continued)

Decision tree step	Description
	A linking node is automatically created.
Configure the created linking node	Configure the linking node to link another decision tree to this decision tree. For more information, see Link another decision tree to this decision tree.
Configure a next node	Configure a next node that is a decision node. **Note:** You can't add another guidance node after a guidance node. • You can add an intermediate decision node to add another guidance node. • You can configure a linking node after this decision node to link another decision tree. For more information, see Add a next node after a guidance node.
Map inputs from one node to another	Map inputs from one node to another to reuse answers by selecting a source node and a source input and a destination input. In the guidance node, you can pass inputs from the prior nodes to the guidance inputs by using the Pill-picker icon ( ) to reuse answers. For more information, see Reuse answers at decision points.

Note:
To go back to your decision tree from any node, select the Preview this record icon (ⓘ) next to the **Decision Tree** field and then select **Open Record**. You can see all the nodes that you created in the related list.

Edit a decision tree

Edit a decision tree that you created using Core UI to improve or extend a troubleshooting process.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

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Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. On the form, edit the fields, as necessary.

Decision Tree form

Field	Description
Name	The internal name of the decision tree. **Note:** A start node is created for the decision tree with this name.
Action Label	The label of the call-to-action button on the Recommended Actions card.
Description	The description of the decision tree to show on the Recommended Actions card.
Start Node	The reference of the start node.
Title	The external name of the decision tree that end-users or agents can see in a workspace. If the **Title** field is empty, the internal name is shown as the external name on the Recommended Actions card.
Show a dismiss button	Shows or hides the **Dismiss** button that cancels the flow of a decision tree. This field is turned on by default.

4. Select **Update**.

What to do next
Add questions or instructions to a decision input

Add questions or instructions to a decision input

Create decision inputs for each decision node. Decision inputs appear in the form of questions in a workspace for service agents to answer.

Before you begin
Role required: admin, sn_gd_core.decision_tree_author

Create a decision path first. A decision node is automatically created with the same name as the decision path.

About this task
Decision nodes can have one or multiple questions with different answer types.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

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Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the start node or any decision node.
4. Select **Create Input**.
5. In the **Type** field, select the type of a decision input.

> **Note:**
> In the **Type** field, you have access to many input types. Select only one of the recommended input types listed the following table.

Input type

Field	Description
Choice	A list of choices **Choice list specification**: Type of choice list. You can create a choice list by clicking **New** in the Choices related list.
Date	Date in the format of YYYY-MM-DD
Date/time	Date and time in the format of YYYY-MM-DD HH:MM:SS
Decimal	A number with the decimal points
Integer	A number with no decimal points
Reference	Reference to a field from another table ○ **Reference**: Reference table for selecting a field. ○ **Reference qual condition**: Condition to filter the search results. For example, the Caller field on the Incident table is a reference to the User [sys_user] table.
String	A line of text **Maximum number of characters**: Option to specify the length of the string
True/ False	A check box field

6. In the **Label** field, enter a question or instruction for customers.
7. Select **Submit**.

What to do next

Determine the next node in a decision tree

Determine the next node in a decision tree

Create a path to set conditions and priority order for the next node in a decision tree.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

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About this task

Based on the answer a service agent provides to a question, a decision path guides the agent to the next decision node, a guidance path guides the agent to the next guidance node, and a linking path guides the agent to the next linking node.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the start node or decision node.
4. Select one of the following actions.

5. In the **Label** field, enter a label for the path.
6. In the **Order** field, enter a priority order for this path.
   The path with the lowest priority order is executed first.
7. Configure a condition for this path to display the next node.

Path types and descriptions

Path	Description
Decision path	Decision paths include conditions when the next question is displayed to an agent.
Guidance path	Guidance paths include conditions when a guidance that provides resolution for an issue is displayed to an agent.
Linking path	Linking paths include conditions when a next decision tree is executed.

You can only access the direct parent node's inputs while configuring a condition for the path.

8. Select **Update**.

Note:
You can create as many decision, guidance, or linking paths as required.

What to do next

Continue building the decision tree.

- Add questions or instructions to a decision input
- Provide actions to agents in a decision tree
- Link another decision tree to this decision tree

Provide actions to agents in a decision tree

Associate a guidance to a guidance node so that service agents can act to resolve or escalate a customer issue.

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Before you begin
Role required: admin, sn_gd_core.decision_tree_author

Create a guidance path first. A guidance node is automatically created with the same name as the guidance path.

About this task
A guidance is an outcome of a decision tree.

You can either create a guidance or select a guidance from a list. For a complete list of guidances that are available by default, see Components installed with Guided Decisions Experience. You can then enter guidance inputs, as required.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Procedure
1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the guidance node created.
4. In the **Guidance** field, select a guidance to associate with the guidance node.
5. Depending on the guidance you selected, enter guidance inputs, as required.

   Note:
   If you selected the Attach Knowledge Article guidance, enter the knowledge article to link to.

   If you selected the Provide Resolution guidance, enter the case, resolution notes, and a resolution code.

   If you selected the Create Work Order guidance, enter the task to link to.

6. Select **Update**.

What to do next
Link task input in the start node to the guidance

Link task input in the start node to the guidance

Link the task input in the start node to the task input in the guidance to pass record information.

Before you begin
Role required: admin, sn_gd_core.decision_tree_author

About this task
The task input in the start node holds a reference of the record that an agent is working on in a workspace. For example, if you want to attach a KB article to a case, you would need the case number.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

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Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the guidance node created.
4. Select **Create Input Mapping**.
5. In the **Source Node** field, select the start node of your decision tree.
6. In the **Source Input** field, select the task input.
7. In the **Destination Input** field, select the task input associated with the guidance.

> **Note:**
> The **Destination Node** is automatically filled with the value of the decision node that you're creating the input mapping from.

8. Select **Submit**.

Link another decision tree to this decision tree

Nest and invoke decision trees from linking nodes when specific conditions are met. Use guidance output and nested trees to execute complex troubleshooting.

Before you begin
Role required: admin, sn_gd_core.decision_tree_author

Create a linking path first. A linking node is automatically created with the same name as the linking path.

About this task
The execution of the linked decision tree begins when a specific condition specified in the linking path is met. The linking node holds a reference of the start node in the next decision tree.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the linking node.
4. In the **Linked Decision Tree** field, select an available decision tree from the list.
5. Select **Update**.

Add a next node after a guidance node

Add a next node that is a decision node after a guidance node. If a next node is configured, the execution of the decision tree continues after the agent performs the guidance and the guidance history is marked as complete.

Before you begin
Role required: admin, sn_gd_core.decision_tree_author

About this task
You can only add a decision node after a guidance node.

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- You can add an intermediate decision node to add another guidance node.
- You can configure a linking node after this decision node to link another decision tree.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the guidance node.
4. Select **Set Next Node**.
5. In the **Label** field, enter a name for the next decision node.
6. Select **Update**.

What to do next

Continue building the decision tree.

- Add questions or instructions to a decision input
- Determine the next node in a decision tree

Reuse answers at decision points

Create input mapping to reuse answers from prior nodes. For example, in a decision tree that deals with loan application, you can reuse the input related to the customer's salary at multiple decision points to determine the loan eligibility.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

For more information about input mapping in a decision node or a guidance node, see Linking inputs in decision tree nodes.

Mapped inputs can be used to create path conditions.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision node or the guidance node that must reuse inputs.
3. Click **Create Input Mapping**.
4. In the **Source Node** field, select the node you want to copy from.
5. In the **Source Input** field, select the node input to copy.
6. In the **Destination Input** field, select the node input you want to copy the values to.

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Note:
The **Destination Node** is automatically filled with the value of the node that you're creating the input mapping for.

7. Select **Submit**.

Delete a decision tree

Delete a decision tree and all the related version records. All related records such as decision tree versions, nodes, and paths are deleted.

Before you begin
Role required: admin, sn_gd_core.decision_tree_author

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Delete**.

Add Guided Decisions to Recommended Actions

Add decision trees created using the Guided Decisions Experience application to Recommended Actions, so customer service agents can work through it to resolve cases more efficiently.

Before you begin
Ensure that you have Recommended Actions application (sn_nb_action) installed.

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Create a context for a table.
   A context enables agents to see recommended actions for a record in that table.
3. Create a rule for the context.
   A rule is a set of conditions that applies to a context and determines when a recommended action appears for records in the context table.
4. Create a recommendation of type decision tree.
   A recommendation is a way to suggest an action to an agent.

Related topics

Configuring Guided Decisions

Configuring guidances and decision trees

Add Guided Decisions to playbooks

Add decision trees created using the Guided Decisions Experience application to a playbook, so customer service agents can work through it to resolve cases more efficiently.

Before you begin
Role required: admin, pd_content_author

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About this task

A playbook is set of steps that defines a process. A decision tree can be added as one of the steps within a playbook.

Playbooks are displayed in cases on Agent Workspace based on trigger definitions defined for each playbook in the Process Automation Designer. For more details, see Process Automation Designer. Based on the context of the case the customer service agent is working on, the playbook and any associated decision trees are displayed.

For more details on playbooks for Customer Service Management, see Playbooks for Customer Service Management.

Procedure

1. Navigate to **All** > **Process Automation** > **Process Automation Designer**.
   Playbooks opens in a new tab.
2. Select the process you want to add the decision tree to.
3. Select **Add activity**.
4. Select **Guided Decisions Experience** > **Guided Decisions**.
5. In the Details tab, fill in the basic details of your activity.

Option	Description
Label	Unique name for your activity. This name ap pears in user-facing views of your playbook.
Description	Description of your activity.
Run condition	After the activity starts, the activity runs only if specific conditions are met.
When to start	Options when your activity must start: ○ **After Previous**: This activity starts when the preceding activity has a state of Skipped or Complete. ○ **Immediately**: This activity starts when its stage starts running. Your activity doesn't depend on the state of any preceding activi ties. ○ **With Previous**: This activity starts when the immediately preceding activity starts run ning.

6. Select **View all properties**.
7. In the Automation tab, in the **Decision tree** field, select the decision tree you want to add to the guided decision.
8. Select **Done**.
9. In the main header, select **Activate**.
   Activating your process publishes it so that it runs when triggered.

Result

The decision tree is added to the playbook. Depending on the context of the case, customer service agents can access the decision trees from cases on Agent Workspace.

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Related topics

Configuring Guided Decisions

Configuring guidances and decision trees

Add Guided Decisions to Service Portal

Create or edit a page to add decision trees to Service Portal so internal users can troubleshoot their issues.

Before you begin

The decision tree that you want to add to the Service Portal page must exist. For more information, see Configuring decision trees in Decision Tree Builder.

Role required: sp_admin or admin

About this task

These steps are intended for users with little to no coding experience.

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. From the Service Portal Designer, either select an existing page or add a new page.
4. Under Layouts, create the area to add widgets by selecting **Container** and dragging it onto the page.
5. In the **Widgets** tab, in the **Filter Widget** field, search for the Decision tree - Visualizer widget, then drag the widget to the layout.
6. Select the Edit icon ( ).
7. Provide the decision tree ID.
   a. On the decision tree record, select the Additional actions icon ( ).
   b. Select **Copy sys_id** from the menu.
8. Select **Save**.

What to do next

If you want the decision tree theme to match the Service Portal, you can apply a UX theme to change your existing theme. For more information, see Match the theme of the decision tree component with the Service Portal page.

Related topics

Configuring Guided Decisions

Configuring guidances and decision trees

Match the theme of the decision tree component with the Service Portal page

Customize the theme of the decision tree component to match the Service Portal theme.

Before you begin

A variant UX theme to match the theme of the decision tree component with the Service Portal theme must exist. For more information, see Manage the visual style of UI Builder experiences .

Role required: sp_admin or admin

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Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. In the **Search** field, enter `ux_portal_theme_to_uib_theme_mapping` and select the record.
3. Copy the value of the **Name** field from the ux_portal_theme_to_uib_theme_mapping record. The **Name** field contains the system property name appended with the existing portal theme ID, for example, `ux_portal_theme_to_uib_theme_mapping.f548bd34845a1110f87767389929c667`.
4. Select **New** to create a system property.
5. In the **Suffix** field, paste the copied value.
6. Provide the UX theme ID of the theme that you want to apply in the **Value** field.
   a. On the UX theme record, select the Additional actions icon ( ).
   b. Select **Copy sys_id** from the menu.
7. Select **Update**.

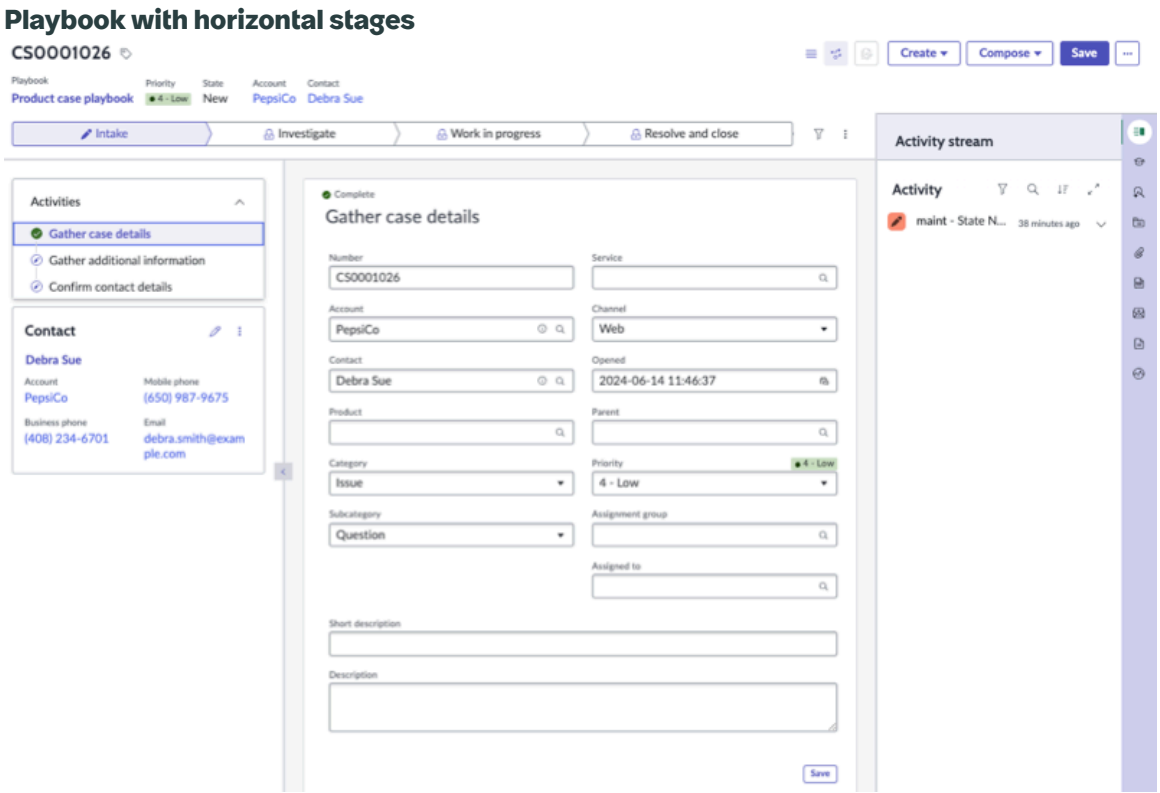
Result

The Service Portal theme is applied to the decision tree component.

Playbooks in Customer Service Management

Playbooks provide customer service agents with step-by-step guidance for resolving specific types of cases. Agents can follow a playbook in CSM Configurable Workspace and complete guided activities to resolve customer issues.

Playbook with horizontal stages



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Playbook overview

A playbook is an end-to-end workflow that includes the stages, steps, and guidance to lead users through a business process. A playbook visualizes a workflow in a task-oriented view and guides users through sequences of tasks.

A playbook takes a workflow and breaks it into multiple stages. Each stage in a playbook includes a logical group of sequential activities for an agent to complete. Stages can also include automated activities, such as sending an email to a customer when a stage or activity is complete.

Playbooks include:

- A series of steps that a user must complete in order to achieve a particular goal and the necessary guidance for completing those steps.
- One or more stages, or groups of tasks, and sequences of activities within each stage.

Playbooks are created in the Workflow Studio application. Pages that display playbooks in a workspace are created in the UI Builder application. Agents use playbooks in CSM Configurable Workspace to complete activities. End users can also use playbooks from service portals to create requests and provide information. For more information, see the following sections in this topic:

- Playbook users and tools
- Configuring and configuring playbooks

Playbook users and tools

The following table describes the different user roles that are involved in the creation, configuration, and use of playbooks. It also describes the tools and applications used by each of those roles.

Playbook user roles and tools

User role	Tool / application
Playbook admin [playbook.admin]	Uses the Workflow Studio application to author, configure, and monitor playbooks. Workflow Studio is the design environment where playbook owners build playbooks.
Playbook experience admin [playbook_experience.admin]	Uses the Playbook Experience application to create playbook experience records. These records define how playbook activities appear within a playbook.
UI Builder admin [ui_builder_admin]	Uses the UI Builder application to create or customize pages that display playbooks in CSM Configurable Workspace. UI Builder is a web user interface builder. Users with the UI Builder admin role use the tool to create pages, which are collections of components that make up a workspace user interface.

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Playbook user roles and tools (continued)

User role	Tool / application
	Note: Playbook page templates are available for UI Builder admins to use as a starting point for creating playbook pages.
Customer service agent [sn_customerservice_agent]	Uses playbooks in CSM Configurable Workspace to complete activities and resolve cases. The playbook runtime experience is where end users, such as agents, follow the playbook to complete a business process.
End user [sn_customerservice.customer]	Uses playbooks create cases, provide requested information, and complete assigned tasks. For more information, see Playbooks for portals.

Creating and configuring playbooks

Creating and configuring a playbook involves different tools and applications. Playbooks are created using the Workflow Studio application. Some of the configuration for a playbook is performed in UI Builder as part of the playbook component configuration. Additional settings can be configured in the playbook experience record in the Core UI. These settings include selecting the playbook activity view and configuring playbook stage and activity visibility. For more information, see Configure Playbooks for Customer Service Management.

Configuration tasks and tools

Tools	Tasks
Workflow Studio	Workflow Studio is the design environment where playbook owners (users with the playbook.admin role) build playbooks. For more information, see the following topics: • Exploring Workflow Studio • Getting started with Playbooks
Playbook Experience	Playbook experience records define how playbook activities appear within a playbook. • Users with the playbook_experience.admin role can create playbook experience records. • Users with the ui_builder_admin role can select a playbook experience when adding a playbook to a page in UI Builder. The playbook experience record includes settings for the playbook stage and activity visibility, such as hiding or displaying playbook activities based on user role or activity state.
UI Builder	Users with the ui_builder_admin role can use UI Builder to create or customize pages, which are collections of components that make up a workspace user interface. Some of the playbook configuration tasks in UI Builder include:

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Configuration tasks and tools (continued)

Tools	Tasks
	• **Selecting a playbook activity view**: The activity view determines how the stages and activities are displayed in the playbook. Select a playbook activity view in the playbook component configuration in UI Builder. • **Selecting a playbook experience**: The playbook experience determines how the system renders a playbook in a workspace. You can use playbook experiences to customize the look and feel of a playbook, map user actions, and override activities. Select a playbook experience when adding a playbook to a page in UI Builder. • **Configuring a playbook to use compact mode**: Compact mode moves the playbook to the contextual side panel. Agents can complete playbook activities in the side panel while viewing other information in the record page. Configure a playbook to use compact mode in the playbook component configuration in UI Builder.

Using playbooks

Customer service agents can use the guidance available with playbooks to complete the tasks and activities that are needed to resolve specific types of cases.

A playbook includes multiple stages and each stage includes one or more activities for an agent to complete. When using a playbook, agents can:

- View the stages and activities.
- Select an activity and perform the work necessary to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities necessary to resolve the case.

For more information, see Using Playbooks for Customer Service Management.

Playbook applications

Several applications are available that enable you to create and use playbooks with Customer Service Management. See Playbook plugins for detailed plugin and dependency information.

Customer Service Management playbook applications

Application	Description
Playbooks for Customer Service Management	Use this application to create or customize playbooks based on your individual business needs. Create playbooks that support case types or the base customer service case.
Case Playbook for Onboarding	Use this application to manage the process for taking on new customers or enrolling customers in new products. An onboarding case captures the details of the new customer,

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Customer Service Management playbook applications (continued)

Application	Description
	including their selection of products and services.
Case Playbook for Complaints	Use this application to manage the process for handling customer complaints. A complaint case captures the details of the problem reported by the customer and the expected resolution.
Case Playbook for Product Support	Use this application to guide agents through the steps that are needed to resolve product issues. A product support case captures information about the customer, the product, and the reported issue.

Playbook plugins

The Playbooks for Customer Service Management plugin (sn_csm_playbook) is available from the ServiceNow Store. This plugin requires the following plugins:

- Customer Service (com.sn_customerservice)
- Dynamic Related Records (com.snc.uib.sn_dyn_rel_rec)
- Playbook Experience (com.playbook_experience)

The following playbook applications are available for use with Customer Service Management and are available from the ServiceNow Store:

- Case Playbook for Onboarding
- Case Playbook for Complaints
- Case Playbook for Product Support

These playbooks require the following plugins:

- Playbooks for Customer Service Management (com.sn_csm_playbook)
- Customer Service Case Types (com.snc.csm_case_types)

Request apps from the ServiceNow Store

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

Related topics

Set up a custom Playbook user experience

Interact with Playbook

Configure Playbooks for Customer Service Management

Using Playbooks for Customer Service Management

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Playbook layout and features

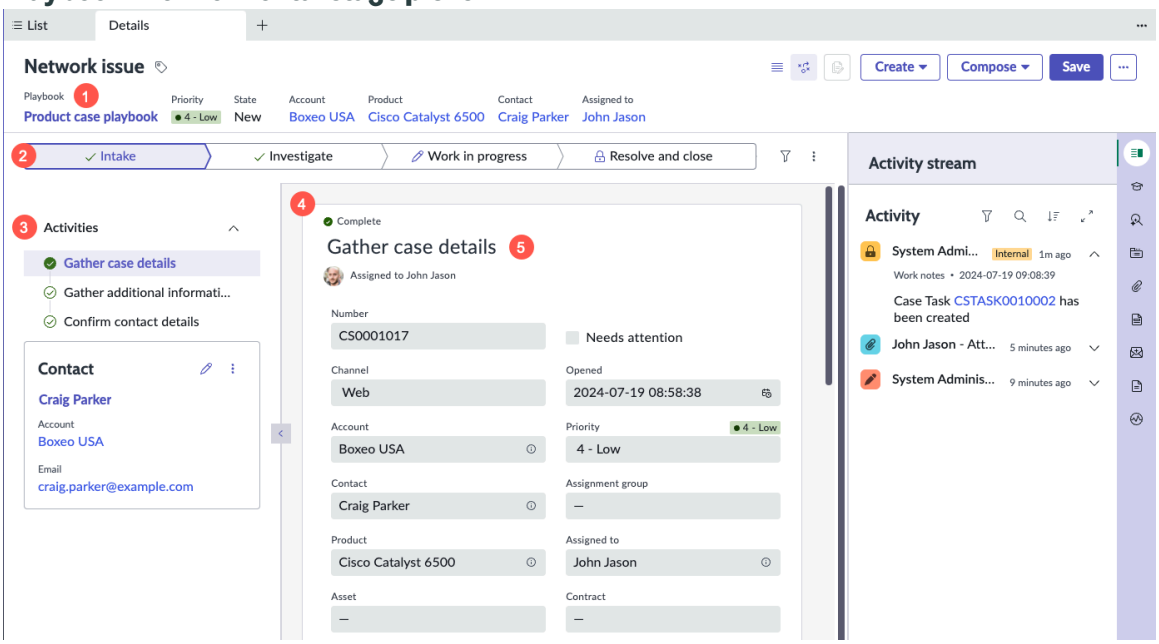
A playbook includes several features that agents use to complete activities and resolve cases, including the playbook stage picker, activity picker, and activity viewer. Record pages created in UI Builder determine how these playbook features are displayed in CSM Configurable Workspace.

UI Builder page templates and record pages that include horizontally and vertically oriented playbooks are available with the Playbooks for Customer Service Management application [com.sn_csm_playbook].

For more information about using these record pages, see the following topics:

- Case playbook: horizontal stages record page
- Case playbook: vertical stages record page

Playbook with horizontal stage picker



Playbook layout and features

Callout	Playbook feature	Description
1	Playbook name	The name of the playbook appears in the page header.
2	Stage picker	Playbooks include either a horizontal or vertical stage picker, which gives the agent a complete view of the playbook and where they are within the playbook. • The horizontal stage picker displays the playbook stages across the top of the record page below the page header. Select a stage to see the activities in the activity picker. • The vertical stage picker displays the playbook stages and activities on the side of the record page. Select a stage to expand the stage and display the included activities.

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Playbook layout and features (continued)

Callout	Playbook feature	Description
3	Activity picker	The activity picker displays the activities for the current stage. Each activity has an indicator that shows the activity state: • Completed • In progress • Remaining With the horizontal stage picker, you can expand or collapse the list of activities for the current stage. With the vertical stage picker, you can expand each stage to see the activities within that stage. Selecting an activity displays the details in the activity viewer.
4	Activity viewer	The activity viewer displays the selected activity. This is the main work area where an agent performs the work necessary to complete the current activity.
5	Activity cards	Activity cards display the details about the current activity in the activity viewer. Depending on the type of activity, the activity cards can display information such as form data, task status, SLA timers, or attachments. Agents use the cards to complete the work for each activity, such as filling in forms, completing checklists, completing tasks, or adding attachments.

Playbook activity view

The activity view determines how the stages and activities are displayed in the playbook.

- **Focused**: Displays the stages and activities in the playbook lifecycle panel and the current activity in the playbook work area.
- **Stacked**: Displays the stages in the playbook lifecycle panel and cards for each of the activities in the current stage in the playbook work area.

The system administrator can configure the playbook activity view in UI Builder. For more information, see Select a playbook activity view.

Playbook stages

Playbooks contain one or more stages and stages contain one or more activities. The current stage in a playbook is highlighted and the activities in that stage appear in the activity picker.

The stages in the stage picker include icons that indicate the stage status:

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- A check mark indicates that the stage is complete.
- A pen icon indicates the current stage.
- A lock icon indicates that a stage is locked and can't be started until the previous stage is complete.

There are two versions of stage picker: horizontal and vertical.

- The horizontal stage picker displays across the top of the UI and shows persistent information in the left panel. With the horizontal stage picker, you can expand or collapse the list of activities for the current stage.
- The vertical stage picker displays in the left panel. With the vertical stage picker, you can expand each stage to see the activities within that stage.

Playbook activities

Activities are the individual tasks that an agent needs to complete in order to complete a playbook stage. The activity picker displays the activities for the current playbook stage. Each activity in the activity picker has an indicator that shows the activity state:

- Complete ( )
- In Progress ( )
- Pending ( )
- Skipped

Selecting an activity displays the details of that activity in the activity viewer.

Navigating playbook stages and activities

Agents can use the stage picker and activity picker to navigate between stages and activities as assigned roles or activity security configurations permit. For example, activities such as case tasks can be assigned to different users. A user with the case task agent role can only see the case tasks that are assigned to them.

When an agent opens a record that uses a playbook, it opens to the current stage and highlights the current activity. For stages with multiple activities, the current activity is the first available activity. An available activity is an activity that has a state other than Complete.

When an agent selects an available activity, it becomes the current activity. An agent can navigate stages and activities in any order as long as there is at least one available activity to select.

Note:
The playbook configuration determines the visibility and accessibility of pending stages and activities. For more information, see Configure playbook stage and activity visibility.

Using keyboard navigation in a playbook

Use the following keyboard keys to navigate playbook stages and activities.

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- **Tab** key: Use the **Tab** key to initiate navigation and move between stages, activities, and the playbook work area.
- **Arrow** keys: Use the left, right, up, and down arrow keys to navigate the fields on a playbook activity card.
- **Enter** key: Press the **Enter** key to select buttons on a playbook activity card.

Filtering playbook activities

Agents can filter playbook activities and see those activities that match the filter conditions.

- To filter playbook activities, select the filter icon ( ) and select one or more of the following states:
  - Complete
  - In Progress
  - Pending
  - Skipped
- To clear the filter, select the filter icon again and remove the selections.

Configuring stage and activity visibility

Users with the admin role can configure the visibility of playbook stages and activities, including:

- Showing or hiding stages and activities that are pending.
- Showing or hiding stages and activities where a user does not have access.

The administrator configures these settings in the Playbook Experience record. For more information, see Configure playbook stage and activity visibility.

Playbook capabilities

The capabilities provided by playbooks enable agents to quickly resolve customer issues. These capabilities work together to provide agents with a better overall experience when using playbooks to resolve customer issues.

Playbook capabilities

Capability	Description
Create a record using a playbook	Customer service agents can create a record using a playbook instead of a record form. Creating a record using a playbook opens the playbook and initiates the first activity. The agent completes this activity as part of the record creation. For example, an agent can create a case and gather the necessary information about the customer and the issue as the first activity in the playbook. For more information about configuring this feature, see Playbook record generator in the Workspace Playbook setup documentation.

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Playbook capabilities (continued)

Capability	Description
See the entire end-to-end workflow using the stage picker and activity picker	The stage picker and activity picker enable agents to see the following information: • The end-to-end workflow. • The stages in the playbook. • The activities in the current stage. • Stage and activity progress indicators. • Details of the current activity displayed in the activity viewer.
Use the contextual side panel to view additional information	Playbooks can display the following information in the contextual side panel: • Activity stream • Ribbon information such as the case overview, customer details, timeline, and SLAs • Dynamic related records (see below for more information) • Related Items tab For more information, see: • Using the activity stream in the contextual side panel • Viewing ribbon information in the contextual side panel • Viewing related records in the contextual side panel • Related Items
Use the contextual side panel to display dynamic related records	Display records in the contextual side panel that dynamically change based on the context of the current record or playbook activity. For more information, see Dynamic related records.
Use a playbook in compact mode	Compact mode displays the playbook in the contextual side panel. Agents can complete playbook activities in the contextual side panel while viewing other information on the record page. For more information about configuring this feature, see Integrate Playbook with Workspace.
View the SLA widget on playbook activity cards	Activity cards in the playbook activity viewer can display an SLA widget in the upper right corner. The widget appears on the activity card when the playbook activity has an SLA. This includes activities in the following stages:

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Playbook capabilities (continued)

Capability	Description
	• Triage • Research • Respond The color of the widget indicates the time remaining for the SLA: • Green: 0–50% • Yellow: 50–75% • Orange: 75–99% • Red: 100% or breached

Playbook terminology

Use the following list of terms to gain an understanding of playbook structure, tools, and configuration.

A playbook is an end-to-end workflow that includes the steps, strategies, and guidance to lead users through a business process. A playbook:

- VISUALIZES a workflow in a task-oriented view and guides users through sequences of tasks.
- INCLUDES a series of steps that a user must complete to achieve a particular goal.
- PROVIDES guidance for completing those steps.

Playbook structure

A playbook contains one or more stages, or groups of tasks, and sequences of activities within each stage. A playbook also includes a trigger. The structure of a playbook is created in Workflow Studio.

Playbook structure

Term	Definition
Trigger	A trigger determines when a playbook starts running. Each trigger has a type and conditions that, when met, start running an activated playbook. The trigger type represent a record operation, such as when a record is created or updated. Trigger conditions determine when and how a trigger is fired. Triggers are created in Workflow Studio.
Stage	A stage is a sequence of activities in a playbook that are grouped in a logical way. A playbook can contain one or more stages and each stage includes one or more activities for a user to complete. Stages can also include automated activities.

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Playbook structure (continued)

Term	Definition
	Stages are added to a playbook in Workflow Studio.
Activity	An activity is one step in the overall business process represented in a playbook. Activities are the tasks, steps, or actions that a user takes to complete a playbook. Activities are grouped in stages and are sequenced in a logical order. Users can complete or skip manual activities. Activities can also be completed automatically. Activities are added to playbook stages in Workflow Studio.

Playbook UI components

Customer service agents interact with playbooks in CSM Configurable Workspace. The record pages that display playbooks in a workspace are created or customized in UI Builder. Different components make up the playbook record pages.

Playbook UI components

Term	Definition
Playbook picker	A playbook picker can be used to select a playbook in the user interface. A playbook picker is available if there are multiple playbooks on a record.
Stage picker	A stage picker displays the stages in a playbook. It gives the user a complete view of the playbook and where they are within the playbook. A stage picker can be oriented horizontally or vertically and includes icons that indicate the stage status.
Horizontal stage picker	A horizontal stage picker displays the playbook stages horizontally at the top of the record page and highlights the current stage. It displays activities within the current stage in the activity picker.
Vertical stage picker	A vertical stage picker displays the playbook stages and activities vertically on the side of the record page. It highlights and expands the current stage to display the activities within that stage.

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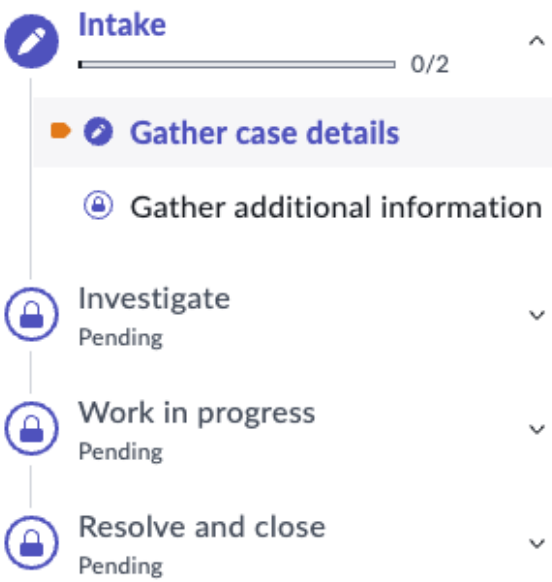
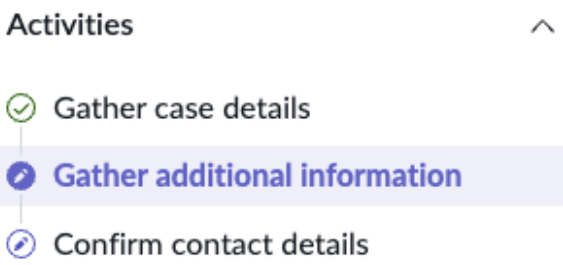
Playbook UI components (continued)

Term	Definition
	
Activity picker	The activity picker displays the activities in the current stage. It includes indicators that show the activity state. 
Activity viewer	The activity viewer displays the details of the current activity. This is where a user performs the work necessary to complete the current activity.
Activity card	An activity card displays the details of the current activity. Users use the cards to complete the work for each activity.

Playbook page templates

Use playbook page templates to create pages and page variants for use in CSM Configurable Workspace. These pages and page variants provide agents with either horizontal or vertical playbooks that they can use to complete tasks and resolve cases.

The following page templates are available with the Playbooks for Customer Service Management application [com.sn_csm_playbook]. For more information, see Playbook plugins.

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Playbook page templates

Page template	Description
Case playbook: horizontal stages	Includes a horizontal stage picker that displays across the top of the UI and shows persistent information in the left panel.
Case playbook: vertical stages	Includes a vertical stage picker that displays in the left panel. This stage picker can track overall progress on the UI in a vertical view.

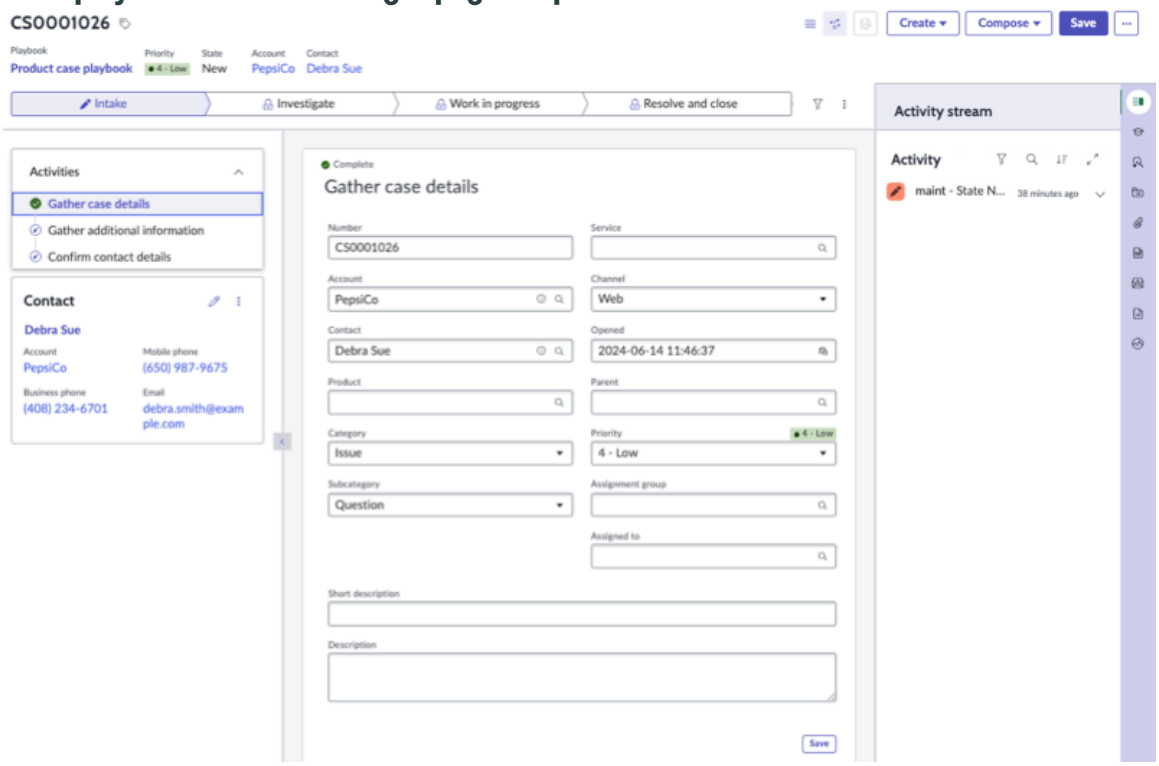
Considerations for using these page templates include the number of stages that appear in the picker and the length of the stage names. For example, longer stage names in the horizontal playbook can be truncated.

Note:
By default, the playbook page templates aren't active. To activate a page template, see Activate a playbook page or page variant.

Case playbook: horizontal stages page template

The Case playbook: Horizontal stages page template includes a horizontal stage picker across the top of the page and an activity picker on the left side. For details about the components included in this template, see Playbook template components.

Case playbook: horizontal stages page template



Case playbook: vertical stages page template

The Case playbook: Vertical stages page template includes a vertical stage picker on the left side of the page. For details about the components included in this template, see Playbook template components.

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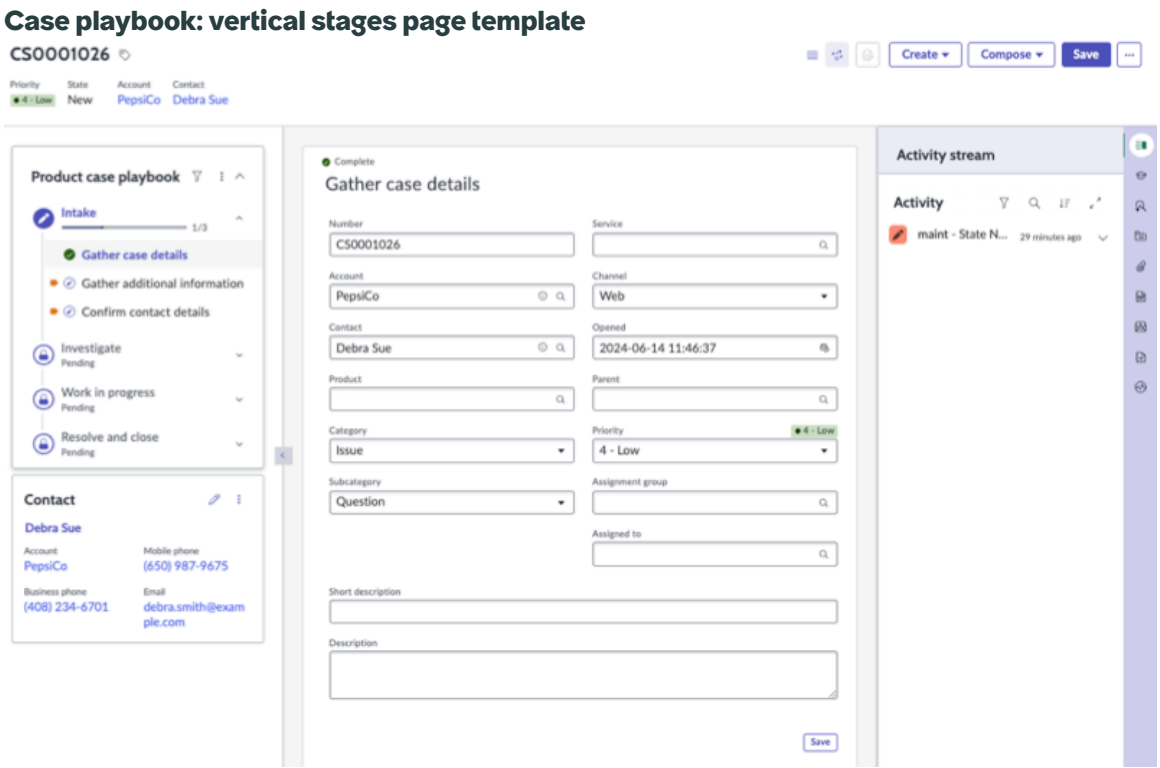

Playbook page template components

The playbook page templates include modular components that enable you to quickly build playbook pages in UI Builder.

Case playbook page template components

Component	Description
Page header	The page header includes record information that is displayed in the primary and secondary fields: • The primary field displays the short description of the record. • The secondary fields display the additional record information such as the priority, state, and contact or consumer details. You can configure the fields that appear in the page header. For more information, see Customize the page header for a playbook page.
Action bar	The action bar contains the actions that are available to users while working on case records. The available actions are determined by factors such as the user role, case state, and other attributes. • **Record Details**: Displays the record details. • **Playbook Details**: Displays the playbook details. • **In-progress actions**: Provides a list of minimized modeless dialogs and includes a badge that displays the number of

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Case playbook page template components (continued)

Component	Description
	items in the list. From this list, an agent can select an item to open the minimized comment, work note, or email. • **Create**: Create records such as requests, incidents, and work orders. • **Compose**: Compose comments, work notes, and emails in modeless dialogs. • **Save**: Save changes to the case record. • **More Actions**: Perform additional actions such as proposing a major case or reporting a knowledge gap. You can configure the actions that are included in the action bar. For more information, see Customize UI actions for a playbook page.
Playbook name	In the Case playbook: horizontal stages template, the playbook name appears in the form header above the horizontal stage picker. In the Case playbook: vertical stages template, the playbook name appears at the top of the vertical stage picker.
Stage picker	The playbook templates include either a horizontal or vertical stage picker, which gives the agent a complete view of the playbook and where they are within the playbook. • The horizontal stage picker displays the playbook stages across the top of the record page below the page header. Select a stage to see the activities in the activity picker. • The vertical stage picker displays the playbook stages and activities on the side of the record page. Select a stage to expand the stage and display the included activities. The stages in the stage picker include icons that indicate the stage status: • A check mark indicates that the stage is complete. • A pen icon indicates the current stage. • A lock icon indicates that a stage is locked and can't be started until the previous stage is complete.
Activity picker	The activity picker displays the activities for the current stage. Each activity has an indicator that shows the activity state: • Completed • In progress • Remaining With the horizontal stage picker, you can expand or collapse the list of activities for the current stage.

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Case playbook page template components (continued)

Component	Description
	With the vertical stage picker, you can expand each stage to see the activities within that stage. Selecting an activity displays the details in the activity viewer.
Activity viewer	The activity viewer displays the selected activity. This is the main work area where an agent performs the work necessary to complete the current activity.
Activity cards	Activity cards display the details about the current activity in the activity viewer. Depending on the type of activity, the activity cards can display information such as form data, task status, SLA timers, or attachments. Agents use the cards to complete the work for each activity, such as filling in forms, completing checklists, completing tasks, or adding attachments.
Contact or consumer lookup	The lookup component enables agents to look up contact or consumer information and display that information in a record card. These cards display customer information and provide quick access to details such name, email, and phone. The contact record card also includes account information. Agents can use the lookup component to do the following: • Search for a contact or consumer. • Link or unlink a contact or consumer record. • Edit and save the information in a linked contact or consumer record. • Select a reference field on a record card, such as a contact or consumer name, to open the reference in a sub-tab. • Select an email address on a lookup card to open a draft email in the email composer in a sub-tab. • Select a phone number on a lookup card to make a call. For more information, see Playbook lookup component.
Case summarization	The case summarization component appears below the lookup component. When an agent opens a case record, the component is collapsed and in the default state. Agents can use this component to do the following: • Summarize case details. • Post the summary to the activity stream. • Refresh the summary. The case summarization component requires the Now Assist for Customer Service Management (CSM) application to be activated and configured. For more information, see Playbook case summarization component.

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Case playbook page template components (continued)

Component	Description
Record details	The case details component includes collapsible sections for: • Case • Notes • Closure Information • Related Records This component also includes a menu with additional form actions, such as personalizing the form, exporting data, and copying the URL. Agents can view case details by selecting the **Record Details** button in the action bar.
Contextual side panel	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Case playbook: horizontal stages page includes the following tabs. • Activity Stream • Agent Assist • Search • Related Items • Attachments • Response Templates • Email Templates • Templates • Record Information For more information about the tabs in the contextual side panel, see Playbook contextual side panel component.
Activity stream	The activity stream component displays a list of activities occurring on a case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. For more information, see Playbook activity stream component. **Note:** The Case playbook: horizontal stages page uses modeless dialogs for composing comments, work notes, and emails.
Compose email and Compose comments modeless dialogs	A modeless dialog is a window that overlays the main window content. You can use modeless dialogs to create and post comments and work notes to the activity stream and to compose and send emails as you work through the stages and

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Case playbook page template components (continued)

Component	Description
	activities in a playbook. For more information, see Playbook modeless dialogs.

Using multiple form controllers

The multiple form controller feature enables page authors to add multiple form components to UI Builder templates. This feature is available with the following playbook page templates:

- Case playbook: horizontal stages
- Case playbook: vertical stages

With this feature, page authors can:

- Integrate inline tabs with forms that use dedicated form controller instances, eliminating the need for page collections and enhancing UI Builder usability and runtime performance.
- Enhance record pages with custom component bundles that include a form controller.
- Incorporate modals containing forms into record pages, facilitating the transmission of notifications and form updates back to the main page.

For more information about using multiple form controllers, see Add forms to UI Builder pages.

Playbook activity stream component

The activity stream component displays a list of activities occurring on a case record.

The activities in the list can be collapsed or expanded. When collapsed, the agent can quickly scan the list to get an overview of case activities. When expanded, the agent can see detailed information on individual activities.

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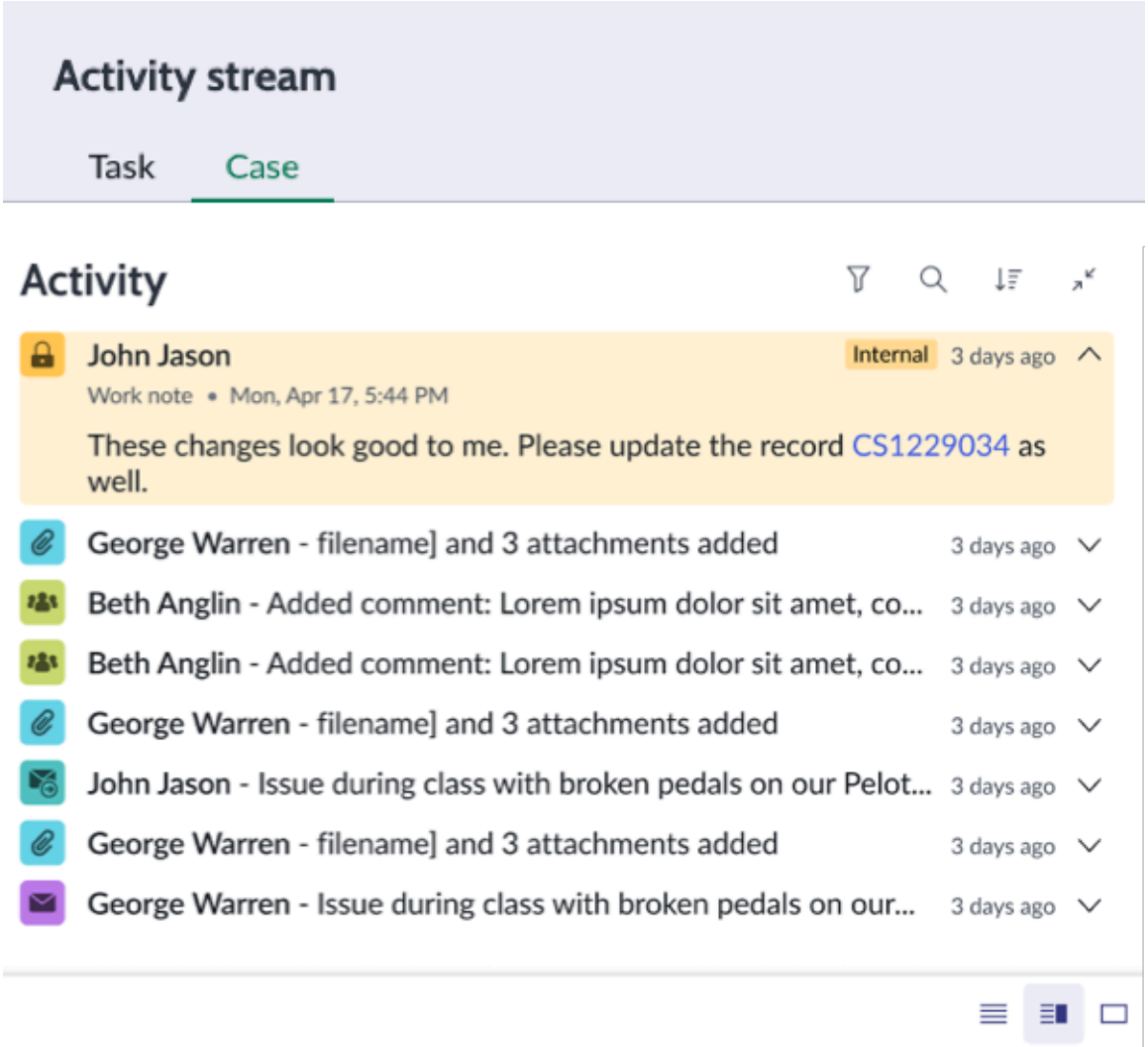
Playbook activity stream component



Note:
The activity stream uses Modeless dialogs for composing comments, work notes, and emails.

Activity stream Case and Task tabs

The activity stream component includes tabs for tasks and cases. The Task tab appears when an agent is working on a playbook activity whose associated record is a case task.

Activity stream tiles

The activities in the activity stream are represented by tiles that use icons and colors to indicate the activity type. These activity types include:

- Comment
- Work note
- Attachment
- Field change
- Email sent or email received
- Chat discussion
- Custom icon

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When collapsed, each activity in the list includes:

- A tile that represents the activity type.
- The name of the user responsible for the activity.
- A brief one-line summary of the activity.
- A badge that indicates if an activity is internal or external.
- A relative timestamp.
- An expand button that the agent can use to see a detailed summary of the activity.

When expanded, each activity also includes:

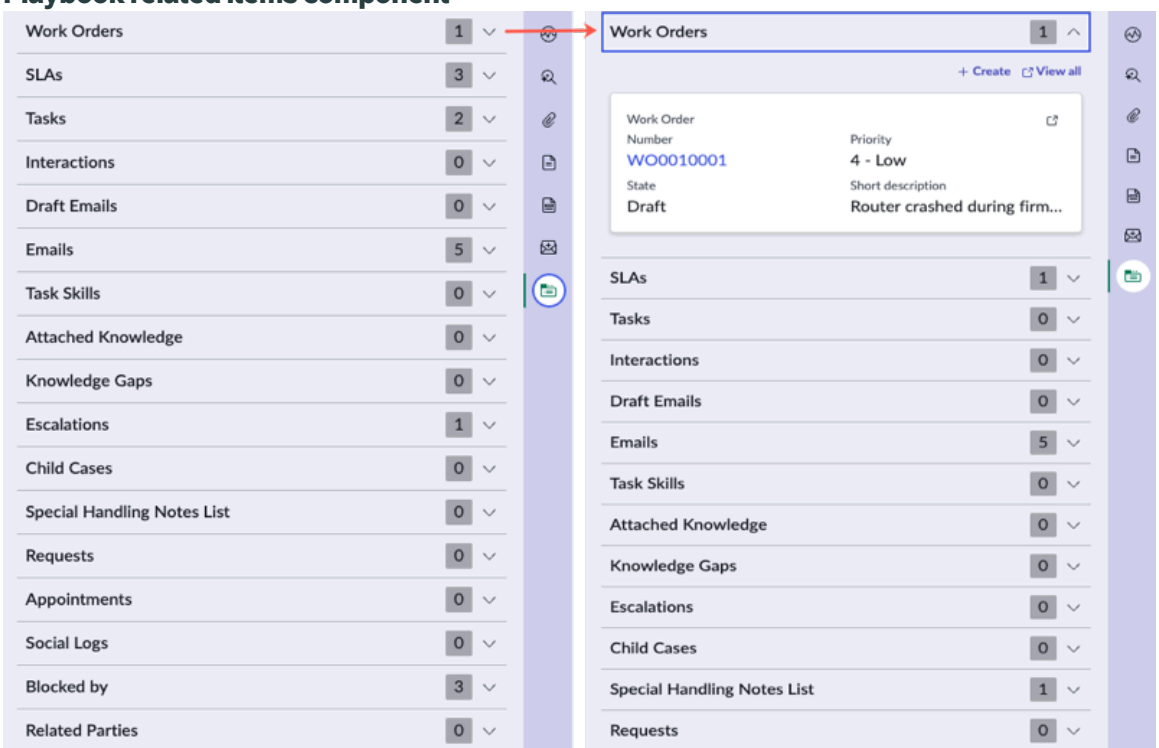
- A full date and timestamp.
- An action label that describes the type of activity.
- For comments and work notes, the full text of the comment or work note.
- For field updates, the field name and the updated field value.
- For emails, detailed message information.
- For attachments, a small preview of the attached file.
- For chats, a sidebar chat card.

Playbook related items component

The related items component provides access to the case-related lists.

The related items component uses an expandable accordion format. Agents can expand the desired lists to see the related items. This component also displays an icon with the number of items in a list.

Playbook related items component



Related lists include the following actions:

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- **Create**: Opens an empty record in a subtab that the agent can use to create an item.
- **View all**: Opens a list of records in a subtab.
- **Show more**: Is displayed for lists that have more than five items.

The items in an expanded list are displayed as cards. An expanded list shows one card for each item in the list.

- Agents can open an item in a subtab.
- If a list has more than five items, it includes a **Show more** option.

Playbook lookup component

The playbook lookup component enables agents to look up contact and consumer records.

Using the lookup component, agents can do the following:

- Look up a contact or consumer by name, phone number, or email address. As the agent types characters in the search box, matching information appears in record cards below the search box.
- Select a contact or consumer after searching by selecting the link icon on the desired record card. The selected record card replaces the lookup component.

Agents can perform the following actions from a record card:

- Remove a linked contact or consumer from a case record by selecting the more actions icon and then selecting **Unlink**.
- Edit and save a linked contact record by selecting the pencil icon, editing the information for the contact, and selecting **Save**.
- Select a reference field on a lookup card to open the referenced record in a sub-tab.
- Select an email address on a lookup card to open to open the email composer in a sub-tab.
- Select a phone number on a lookup card to make a phone call.

Note:
An account lookup component is also available. To display this component, turn off the **Hide component** setting for this component in UI Builder. This setting is located in the Component visibility section of the Configure tab.

Playbook contextual side panel component

The playbook contextual side panel component provides agents with access to tools and information such as the activity stream, templates, and attachments.

The contextual side panel component provides agents with the following functionality.

Tabs in the contextual side panel

Tab	Description
Activity Stream	The activity stream displays a list of activities occurring on a case record. For more information, see Playbook activity stream component.
Agent Assist	Agent assist provides agents with a list of resources that show possible solutions for the current record. This list is based on the record short description.

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Tabs in the contextual side panel (continued)

Tab	Description

Search	The Search tab includes AI search functionality. Agents can use AI search to find relevant resources or resolutions for customer issues.
	
	The search feature displays an initial set of search results based on the text in the case short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search.
	
	From the list of search results, agents can do the following:
	• Select a source to see search results of that type.
	• Filter the list of search results.
	• Sort the list of search results.
	• Open the search results in full view in a record sub-tab.
	• Take the following actions:
	  ○ View and attach article
	  ○ Perform other actions such as reading articles in full view, flagging articles, or marking articles as helpful or unhelpful.
	• View successful actions by selecting the Actions history icon.
	
	For more information, see Use AI search in Recommended Actions to resolve cases.
	
	Note: Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CSM Configurable Workspace application.

Related Items	The Related Items tab provides access to the case-related lists. The Case playbook: horizontal stages page incorporates related list functionality into the contextual side panel. These lists appear in an accordion format that agents can expand and collapse as needed. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format. For more information, see Playbook related items component.
Attachments	The Attachments tab provides access to case-related attachments. From this tab, agents can view and download attachments.
Response Templates	The Response Templates tab provides access to available response templates. These templates contain reusable

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Tabs in the contextual side panel (continued)

Tab	Description
	messages that agents can copy to provide quick and consistent messages to customers.
Email Templates	The Email Templates tab provides access to available email templates. These templates contain default values for fields that agents can add to email messages. These default values can include recipients (email addresses in To, Cc, and Bcc), sender, subject, and text for the message body. For more information, see Email Templates.
Templates	The Templates tab provides access to available form templates which enable agents to automatically populate fields on new records. Agents can manually apply a template when creating a new record such as an incident or change.
Record Information	The Record Information tab includes the following cards: • **Overview**: Displays relevant information about the case including the account and contact, the case priority, and the state. • **Contact**: Displays customer information including the name, title, phone numbers, and email address. • **Timeline**: Displays a chronological summary of case activities, including case state changes and interactions between the agent and the requester. • **Active SLA**: Displays active SLAs for the case, including time remaining, the SLA state, and any breaches.

Playbook modeless dialogs

Use modeless dialogs, windows that overlay the main window content, to create and post comments and work notes to the activity stream and to compose and send emails.

A modeless dialog is a window that appears in a workspace as an overlay on top of the main window content. This overlay enables users to interact with the window content and the overlay content at the same time. Agents can use modeless dialogs to do the following while working in a playbook:

- Create comments and work notes to post to the activity stream.
- Create and send emails and reply to or forward emails.

After opening a modeless dialog, agents can move it around the screen and put it where they need it. This feature enables agents to reference information from the main window while drafting text in the overlay window.

The playbook page templates include the following modeless dialogs:

- Compose Activity - for creating and posting comments and work notes
- Compose Email - for creating and sending emails

You can access the modeless dialogs by selecting the **Compose** button in the action bar and then selecting one of the following actions:

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- Compose Comments
- Compose Email
- Compose Work notes (Private)

Create comments and work notes

Agents can use the Compose Activity modeless dialog to create comments and work notes and post them to the activity stream. See the following table for more information about creating these activities.

Using the Compose Activity modeless dialog to create comments and work notes

Task	Description
Create a comment or work note	To create a comment or a work note: 1. Select one of the following actions from the action bar to open a Compose window: ○ **Compose** > **Compose Comments** ○ **Compose** > **Compose Work notes (Private)** 2. Add the text to the Compose window. When creating comments and work notes: • Agents can create one draft comment and one draft work note at a time before posting the text to the activity stream. • Agents can open one Compose window at a time. If an agent opens a second window, the previously opened window is minimized.
Post a comment or work note to the activity stream	To post a comment or work note, select one of the following actions from the Compose window: • **Post Comment** • **Post Work Notes (Private)** The Compose window automatically closes after the text is posted to the activity stream. Saving the case record also posts the comment or work note to the activity stream and closes the Compose window.
Minimize a Compose window	Composed windows can be minimized and moved to the In-process Actions menu in the action bar. Minimized comments and work notes appear in a list in the In-process Actions menu. Compose windows can be minimized in the following ways.

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Using the Compose Activity modeless dialog to create comments and work notes (continued)

Task	Description
	• Select the Minimize button in the Compose window header. • One Compose window can be open at a time. If an agent opens another Compose window, the first window is minimized.
Open a minimized Compose window	Select the In-progress Actions menu in the action bar and then select an item from the list to open the window. Items in the In-process Actions menu appear in a list with the action type (email, comment, or work note) and an abbreviated title. • For email, the title is the email subject. • For comments and work notes, the title is the first line of text.
Discard a comment or work note	To discard a comment or work note: 1. Select the Close button in the Compose window header. 2. Confirm the Discard action by selecting **Discard** in the confirmation pop-up window. The system closes the Compose window and discards the comment or work note.

The following guidelines apply to Compose windows:

- Draft comments and work notes are local to the browser and are cleared if the browser page is reloaded.
- Comments and work notes stay in sync on the form and in the modeless dialogs.
- The Compose window has a fixed size.

Create emails

Agents can use the Compose Email modeless dialog to create and save email drafts and to send emails. This feature increases the speed of drafting emails while referencing record information.

Emails that are sent from a Compose Email window are posted to the activity stream. Agents can reply to and forward emails from the activity stream. See the following table for more information about creating and sending emails.

Using the Compose Email modeless dialog to create and send emails

Task	Description
Create and send an email	To create and send an email:

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Using the Compose Email modeless dialog to create and send emails (continued)

Task	Description
	1. Select **Compose** > **Compose Email** from the action bar to open a Compose Email window. The system automatically applies the email template with the lowest order to the new email. 2. Fill out the fields: **a.** To, Cc, Bcc **b.** Subject **c.** Email body 3. Select **Send email**. When creating emails and sending emails: • The Compose Email window automatically closes after the email is sent. • The email is posted to the activity stream.
Reply to or forward an email	To reply to or forward an email: 1. Expand an email in the activity stream. 2. Select one of the following buttons to open the Compose Email window: ○ **Reply** ○ **Reply all** ○ **Forward** 3. Add the desired text. 4. Select **Send email**. The Compose Email window automatically closes after the email is posted to the activity stream.
Add a link to a knowledge article	To add a link to a knowledge article: 1. Select the Agent Assist tab in the contextual side panel. 2. View the list of knowledge articles or search for an article. 3. Select the More Actions menu on the knowledge article card. 4. Select **Add link in email**. The system adds the title of the article with a link in the body of the email.

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Using the Compose Email modeless dialog to create and send emails (continued)

Task	Description
Apply a template to an email	To apply a template to an email: **1.** Open the Email Templates tab in the contextual side panel. **2.** Select the More Actions menu on the desired email template. **3.** Select **Apply template**. The system adds the contents of the template to the body of the email. **Note:** When you create a new email, the system automatically applies the email template with the lowest order.
Minimize a Compose Email window	Minimized emails appear in a list in the In-process Actions menu in the action bar. Select the Minimize icon ( ) in the Compose Email window header to move the email draft to the In-progress Actions menu.
Open a minimized Compose Email window	Select an item from the In-progress Actions menu to open the Compose Email window. Items in the In-process Actions menu appear in a list with the action type (email, comment, or work note) and an abbreviated title. • For email, the title is the email subject. • For comments and work notes, the title is the first line of text.
Maximize a Compose Email window	Select the Maximize icon ( ) in the Compose Email window header to expand the Compose Email window to the full screen. Select the Maximize icon again to exit the Maximize mode.
Open a draft email in a sub-tab	Select the Pop out icon ( ) in the Compose Email window header to open the draft email in a sub-tab. The Compose Email window closes when the email opens in the sub-tab.
Close a Compose Email window	Select the Close icon ( ) in the Compose Email window header.

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Using the Compose Email modeless dialog to create and send emails (continued)

Task	Description
	The system saves the text as a draft email and closes the Compose Email window.
Select an email draft from the Draft Emails related list	1. Select the Related Lists tab in the contextual side panel. 2. Expand the Draft Emails related list. 3. Select the Open draft icon on the desired draft email card. The system opens the selected draft email in a sub-tab.

Modeless dialog guidelines

The following guidelines apply to the Compose Email window:

- An agent can create multiple email drafts.
- An agent can have one Compose Email window open at a time. The system displays a message if an agent tries to open another Compose Email window while the first Compose Email window is still open.
- An agent has to manually close a Compose Email window before opening a new window.
- The Compose Email window can be resized.

Playbook case summarization component

The playbook case summary component provides agents with a summary of a customer service case, including the issue and the actions taken. Agents can generate summaries to understand case context and post summaries to the case work notes.

The case summarization component appears below the lookup component on the playbook page templates. Upon first opening a case, agents see that the component is collapsed and in the default state.

Using this component, agents can:

- Select **Summarize** to create a summary of the case details.
- Select **Share to work notes** to copy the summary text to the activity stream.
  - Review the summary text in the Share to work notes popup window and modify the text as needed.
  - Select **Save to work notes** on the popup window to add the text to the activity stream.
- Select the refresh icon in the component footer to refresh the text and get the latest summary.

Note:
If the case does not contain enough text to summarize, the system displays the following message: "This case doesn't have the minimum number of words required for summarization yet."

To use the case summarization component with the playbook page templates, activate the Now Assist for Customer Service Management (CSM) application and configure the case summarization skill in the Now Assist Admin console. For more information, see:

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- Activate Now Assist for Customer Service Management (CSM)
- Configure the case summarization skill in the Now Assist Admin console.

Playbook pages

Use playbook pages in CSM Configurable Workspace so that your agents can view the stages and activities in a playbook, work on activities, and have quick access to in-context information.

Overview of templates, pages, and page variants

Pages provide the base structure for how the system displays record information in CSM Configurable Workspace. You can create and customize pages with UI Builder, a web user interface builder.

A page template is a pre-defined page configuration. When you create a page in UI Builder, you can select a page template as a starting point. You can also create a page from scratch or by copying another page and then customizing the page to meet your needs.

A page variant is a version of a page that includes unique settings such as the audience, conditions, and page order. For more information about templates, pages, and page variants, see Creating pages and page variants.

Pages and page variants can also include playbooks, which are created in Workflow Studio. A playbook provides step-by-step guidance for resolving a specific type of case. The workflows that are associated with a specific type of case and the activities that need to be completed to resolve cases of this type are detailed in the playbook.

Playbook pages

The Playbooks for Customer Service Management plugin provides the following playbook pages:

- Case playbook: horizontal stages page
- Case playbook: vertical stages page

Additional CSM playbook applications provide playbook pages that you can activate and use with case types in CSM Configurable Workspace.

Playbook applications and playbook pages

Application	Page variant	Description
Case Playbook for Complaints v5.0	Complaint case process page	Includes a horizontal stage picker that provides an end-to-end view of the complaint process.
Case Playbook for Onboarding v5.0	Onboarding case process page	This playbook page includes a horizontal stage picker at the top of the record that provides an end-to-end view of the onboarding process.
Case Playbook for Product Support v4.0	Product Support process page	This playbook page includes a horizontal stage picker at the top of the record that provides an end-to-end view of the product support process.

For more information, see Playbook plugins.

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Note:
By default, playbook pages are read-only. To use a playbook page, activate the page and set the page order.

Benefits of using playbook pages

Resolving customer issues or requests often involves the execution of tasks across multiple users, departments, and systems. Different users are responsible for different tasks within the overall resolution process. Using playbooks provides the following benefits:

- An experience that is tailored to customer service agents and other users.
- Visibility into the overall resolution process, the current stage in the process, and the activities that need to be completed within that stage.
- Access to in-context information.

Configuring playbook pages

The following table includes configuration tasks for playbook pages.

Playbook page configuration tasks

Task	Description
Activate a playbook page or page variant	Activate a playbook page or page variant and set the page order. **Note:** Some playbook pages and page variants are not active by default.
Customize the page header for a playbook page	Configure the page header for a playbook page. The page header includes a primary value and several secondary values. These fields can provide case, account, and contact information at a glance.
Customize UI actions for a playbook page	Configure the UI actions to display in the action bar for a playbook page.
Customize content in the left side panel for a playbook page	Add custom components in the side panel. By default, this panel includes the Customer 360, Timeline, and Active SLA components.
Customize tabs in the contextual side panel for a playbook page	Add or remove the tabs from the contextual side panel. Agents can use these tabs to perform tasks such as adding attachments and viewing recommendations.
Customize the dynamic related records for a playbook page	Configure the Dynamic Related Records feature to display the related records in the contextual side panel.
Configure the app route to use an existing subpage	Create an app route to make an existing page a part of the page collection.
Configure an optional activity for a playbook	Configure an optional activity in#Workflow Studio at various stages in a playbook so that

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Playbook page configuration tasks (continued)

Task	Description
	agents and fulfillers can insert an activity when they are using the playbook.
Set up a record generator for case type	Create a record for a case type as the first step in a playbook by using a playbook record generator.
Set up email templates in Configurable Workspace	Configure new email templates to enable agents to create emails for common issues.

Using playbook pages

Playbooks enable your agents to view and complete their tasks more efficiently.

Playbook user tasks

User task	Description
Create a record using a playbook	If a playbook is configured to use the feature, an agent can create a record by using a playbook activity. Creating a record opens the playbook and initiates the first activity, which is to guide an agent through the record creation process. After saving the case, an agent moves to the next activity in the current stage or to the first activity in the next stage.
Resolve a case using a playbook	Opening a case takes the agent to the first open assigned activity. An agent can do the following actions while working on the activities in a playbook: • View the entire playbook process in the horizontal stage picker. • View the activities for each stage in the stacked playbook activity view. • Use the activity stream in the contextual side panel • Filter activity cards. • Select an activity and perform the work required in the main work area. • View and update the case details by using the **View Details** button. • View the persistent contextual information in the left side panel, such as the account and contact.

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Playbook user tasks (continued)

User task	Description
	• View the related list tabs in the Dynamic related records component in the contextual side panel. • Access information in the contextual side panel, including the activity stream, form ribbon, Agent Assist, Dynamic related records, attachments, and templates. • Create tasks, compose email, and add worknotes. • Open reference fields in subtabs under the session tab.
Add an activity to a playbook	Add optional activities to a playbook stage as needed.
Summarize case details	Use the Now Assist for CSM case summarization skill to summarize the case details and display this information on the case record.
Compose an email from an email template	Quickly compose emails for common issues by selecting an email template in the Compose Email page instead of manually drafting an email.

Note:
For tasks that an agent completes outside of a playbook, the system automatically updates the playbook activities.

Case playbook: horizontal stages record page

The Case playbook: horizontal stages page is a record page that you can use in CSM Configurable Workspace. This page includes a playbook with a horizontal stage picker that displays across the top of the user interface and persistent information in the left panel.

The Case playbook: horizontal stages record page is created from the Case playbook: horizontal stages template.

The Case playbook: horizontal stages record page is available with the Playbooks for Customer Service Management v6.0 store application. For more information, see Playbook plugins.

Case playbook: horizontal stages page variant

The Case playbook: horizontal stages page variant is included with the Playbooks for Customer Service Management v6.0 store application. This variant includes the following settings.

Case playbook: horizontal stages page variant settings

Setting	Description
Active	The Case playbook: horizontal stages page variant is not active by default. Enabling the **Active** check box makes the page variant available to the selected audience.

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Case playbook: horizontal stages page variant settings (continued)

Setting	Description
	The **Active** setting combined with the page order determines the page that CSM Configurable Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority. The default order for the Case playbook: horizontal stages page variant is -1.
Conditions	Conditions determine when a page variant is displayed. The Case playbook: horizontal stages page variant has the following condition: **table=sn_customerservice_case** This condition limits the use of the Case playbook: horizontal stages page variant to records from the Case [sn_customerservice_case] table and tables that extend the Case table.
Audience	The audience determines who can see the page variant. The Case playbook: horizontal stages page variant does not have an audience. This means everyone with access to the experience can see this page variant. For more information, see Learn about audiences.

To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. In the Record section of the Pages and variants list, select **Case playbook: horizontal stages**.
4. Select **Settings** at the top of the page.

Case playbook: horizontal stages page components

The Case playbook: horizontal stages page includes the following components.

Component	Description
Page header	The page header includes record information that is displayed in the primary and secondary fields: • The primary field displays the short description of the record. • The secondary fields display the additional record information such as the priority, state, and contact or consumer details.

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Component	Description
	You can configure the fields that appear in the page header. For more information, see Customize the page header for a playbook page.
Record tags	Agents can create multiple tags for a record and then use the tags to group and organize records. For more information, see Group and find records using tags in workspace.
Action bar	The action bar contains the actions available to users while working on case records. The specific actions are determined by factors such as the user role, case state, and other attributes. • **Record details**: Displays the record details. • **Playbook details**: Displays the playbook details. • **In-progress Actions**: Provides a list of minimized modeless dialogs and includes a badge that displays the number of items in the list. From this list, an agent can select an item to open the minimized comment, work note, or email. • **Create**: Create records such as work orders, incidents, and requests. • **Compose**: Compose comments, work notes, and emails in modeless dialogs. • **Save**: Save changes to the case record. • **More Actions**: Perform additional actions such as proposing a major case or reporting a knowledge gap. You can configure the actions that are included in the action bar. For more information, see Customize UI actions for a playbook page.
Playbook name	In the Case playbook: horizontal stages page variant, the playbook name appears in the form header above the horizontal stage picker.
Stage picker	The Case playbook: horizontal stages page variant includes a horizontal stage picker, which gives the agent a complete view of the playbook and where they are within the playbook. The horizontal stage picker displays the playbook stages across the top of the record page below the page header. Select a stage to see the activities in the activity picker. The stages in the stage picker include icons that indicate the stage status: • A check mark indicates that the stage is complete. • A pen icon indicates the current stage. • A lock icon indicates that a stage is locked and can't be started until the previous stage is complete.

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Component	Description
Activity picker	The activity picker displays the activities for the current stage. Each activity has an indicator that shows the activity state: • Completed • In progress • Remaining With the horizontal stage picker, you can expand or collapse the list of activities for the current stage. Selecting an activity in a stage displays the details in the activity viewer.
Activity viewer	The activity viewer displays the selected activity. This is the main work area where an agent performs the work necessary to complete the current activity. Activity cards display the details about the current activity in the activity viewer. Depending on the type of activity, the activity cards can display information such as form data, task status, SLA timers, or attachments. Agents use the cards to complete the work for each activity, such as filling in forms, completing checklists, completing tasks, or adding attachments.
Contact or consumer lookup	The lookup component enables agents to look up contact or consumer information and display that information in a record card. These cards display customer information and provide quick access to details such name, email, and phone. The contact record card also includes account information. Agents can use the contact lookup component to do the following: • Search for a contact or consumer. • Link or unlink a contact or consumer record. • Edit and save the information in a linked contact or consumer record. • Select a reference field on a record card, such as a contact or consumer name, to open the reference in a sub-tab. • Select an email address on a lookup card to open a draft email in the email composer in a sub-tab. • Select a phone number on a lookup card to make a call. For more information, see Playbook lookup component.
Case summarization	The case summarization component appears below the lookup component. When an agent opens a case record, the component is collapsed and in the default state. Agents can use this component to do the following:

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Component	Description
	• Summarize case details. • Post the summary to the activity stream. • Refresh the summary. The case summarization component requires the Now Assist for Customer Service Management (CSM) application to be activated and configured. For more information, see Playbook case summarization component.
Record details	The case details component includes collapsible sections for: • Case • Notes • Closure Information • Related Records This component also includes a menu with additional form actions, such as personalizing the form, exporting data, and copying the URL. Agents can view case details by selecting the **Record Details** button in the action bar.
Contextual side panel	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Case playbook: horizontal stages page includes the following tabs. • Activity Stream • Agent Assist • Recommended Actions • Related Items • Attachments • Response Templates • Email Templates • Templates • Record Information For more information about the tabs in the contextual side panel, see Playbook contextual side panel component.
Activity stream	The activity stream component displays a list of activities occurring on a case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. For more information, see Playbook activity stream component.

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Component	Description
	Note: The Case playbook: horizontal stages page uses modeless dialogs for composing comments, work notes, and emails.
Compose email and Compose comments modeless dialogs	A modeless dialog is a window that overlays the main window content. You can use modeless dialogs to create and post comments and work notes to the activity stream and to compose and send emails as you work through the stages and activities in a playbook. For more information, see Playbook modeless dialogs.

Case playbook: vertical stages record page

The Case playbook: vertical stages page is a record page that you can use in CSM Configurable Workspace. This page includes a playbook with a vertical stage picker that displays in the left panel and can track overall progress on the UI in a vertical view.

The Case playbook: vertical stages record page is created from the Case playbook: vertical stages template.

The Case playbook: vertical stages record page is available with the Playbooks for Customer Service Management v6.0 store application. For more information, see Playbook plugins.

Case playbook: vertical stages page variant

The Case playbook: vertical stages page variant is included with the Playbooks for Customer Service Management v6.0 store application. This variant includes the following settings.

Case playbook: vertical stages page variant settings

Setting	Description
Active	The Case playbook: vertical stages page variant is not active by default. Enabling the **Active** check box makes the page variant available to the selected audience. The **Active** setting combined with the page order determines the page that CSM Configurable Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority. The default order for the Case playbook: vertical stages page variant is -1.
Conditions	Conditions determine when a page variant is displayed. The Case playbook: vertical stages page variant has the following condition: **table=sn_customerservice_case** This condition limits the use of the Case playbook: vertical stages page variant to records from the Case [sn_customerservice_case] table and tables that extend the Case table.

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Case playbook: vertical stages page variant settings (continued)

Setting	Description
Audience	The audience determines who can see the page variant. The Case playbook: vertical stages page variant doesn't have an audience. This means everyone with access to the experience can see this page variant. For more information, see Learn about audiences.

To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CSM/FSM Configurable Workspace** experience.
3. In the Record section of the Pages and variants list, select **Case playbook: vertical stages**.
4. Select **Settings** at the top of the page.

Case playbook: vertical stages page components

The Case playbook: vertical stages page includes the following components.

Component	Description
Form heading	The page header includes record information that is displayed in the primary and secondary fields: • The primary field displays the short description of the record. • The secondary fields display the additional record information such as the priority, state, and contact or consumer details. You can configure the fields that appear in the page header. For more information, see Customize the page header for a playbook page.
Record tags	Agents can create multiple tags for a record and then use the tags to group and organize records. For more information, see Group and find records using tags in workspace.
Action bar	The action bar contains the actions available to users while working on case records. The specific actions are determined by factors such as the user role, case state, and other attributes. • **Record details**: Displays the record details. • **Playbook details**: Displays the playbook details. • **In-progress Actions**: Provides a list of minimized modeless dialogs and includes a badge that displays the number of items in the list. From this list, an agent can select an item to open the minimized comment, work note, or email.

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Component	Description
	• **Create**: Create records such as work orders, incidents, and requests. • **Compose**: Compose comments, work notes, and emails in modeless dialogs. • **Save**: Save changes to the case record. • **More Actions**: Perform additional actions such as proposing a major case or reporting a knowledge gap.
Playbook name	In the Case playbook: vertical stages page variant, the playbook name appears at the top of the vertical stage picker.
Stage picker	The Case playbook: vertical stages page variant includes a vertical stage picker, which gives the agent a complete view of the playbook and where they are within the playbook. The vertical stage picker displays the playbook stages and activities on the side of the record page. Select a stage to expand the stage and display the included activities. The stages in the stage picker include icons that indicate the stage status: • A check mark indicates that the stage is complete. • A pen icon indicates the current stage. • A lock icon indicates that a stage is locked and can't be started until the previous stage is complete.
Activity picker	The activity picker displays the activities for the current stage. Each activity has an indicator that shows the activity state: • Completed • In progress • Remaining With the vertical stage picker, you can expand each stage to see the activities within that stage. Selecting an activity in a stage displays the details in the activity viewer.
Activity viewer	The activity viewer displays the selected activity, which is the main work area where an agent performs the work necessary to complete the current activity. Activity cards display the details about the current activity in the activity viewer. Depending on the type of activity, the activity cards can display information such as form data, task status, SLA timers, or attachments.

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Component	Description
	Agents use the cards for completing the work for each activity, such as filling in forms, completing checklists, completing tasks, or adding attachments.
Contact or consumer lookup	The lookup component enables agents to look up contact or consumer information and display that information in a record card. These cards display customer information and provide quick access to details such name, email, and phone. The contact record card also includes account information. Agents can use the contact lookup component to do the following: • Search for a contact or consumer. • Link or unlink a contact or consumer record. • Edit and save the information in a linked contact or consumer record. • Select a reference field on a record card, such as a contact or consumer name, to open the reference in a subtab. • Select an email address on a lookup card to open a draft email in the email composer in a sub-tab. • Select a phone number on a lookup card to make a call. For more information, see Playbook lookup component.
Case summarization	The case summarization component appears below the lookup component. When an agent opens a case record, the component is collapsed and in the default state. Agents can use this component to do the following: • Summarize case details. • Post the summary to the activity stream. • Refresh the summary. The case summarization component requires the Now Assist for Customer Service Management (CSM) application to be activated and configured. For more information, see Playbook case summarization component.
Record details	The case details component includes collapsible sections for: • Case • Notes • Closure Information • Related Records This component also includes a menu with additional form actions, such as personalizing the form, exporting data, and copying the URL.

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Component	Description
	Agents can view case details by selecting the **Record Details** button in the action bar.
Contextual side panel	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Case playbook: horizontal stages page includes the following tabs. • Activity Stream • Agent Assist • Recommended Actions • Related Items • Attachments • Response Templates • Email Templates • Templates • Record Information For more information about the tabs in the contextual side panel, see Playbook contextual side panel component.
Activity stream	The activity stream component displays a list of activities occurring on a case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. For more information, For more information, see Playbook activity stream component. **Note:** The Case playbook: vertical stages page uses modeless dialogs for composing comments, work notes, and emails.
Compose email and Compose comments modeless dialogs	A modeless dialog is a window that overlays the main window content. You can use modeless dialogs to create and post comments and work notes to the activity stream. You can also compose and send emails as you work through the stages and activities in a playbook. For more information, see Playbook modeless dialogs.

Activate a playbook page or page variant

Activate a playbook page or page variant and set the page order. The system uses the active page with the lowest order number to display records in CSM Configurable Workspace.

Before you begin

Role required: ui_builder_admin, admin

Some playbook pages and page variants are not active by default. You need to activate the pages and set the page order before using the pages in CSM Configurable Workspace.

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Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the Experiences list, select **CSM/FSM Configurable Workspace**.
3. Find one of the following pages by scrolling through the Pages and variants list to the Record section:
   - Case playbook: horizontal stages
   - Case playbook: vertical stages
   - Complaint case process page
   - Onboarding case process page
   - Product Support process page

   Note:
   These pages may be marked as **Inactive**.
4. Display the page settings by selecting **Settings** for the desired page or page variant.
5. Activate the page by selecting the **Active** check box.
6. In the **Order** field, set the order number for the page.
   Each page has an order number. The page with the lowest order number is the default page. When the system displays a record in CSM Configurable Workspace, it uses this default page to display the record information. For more information, see Set record page order.
7. In the **Variant conditions** field, specify the table value.
   Add the table values for the case types where you want to see this page variant.
8. Select **Save**.

Related topics

Create a page from a template

Edit a page

Create a page variant

Edit page variant settings

Customize the page header for a playbook page

Customize the page header by defining the primary and secondary fields that are displayed in CSM Configurable Workspace.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

About this task
Overview information for a record is available in the page header.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Header Configurations**.
2. Select the **CSM/FSM Configurable Workspace Header Config** header configuration.
3. Select a table from the UX Form Headers list.
   You can also create a UX Form Header record. For more information, see Set up a form header in CSM Configurable Workspace.

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4. Select the **Primary field** to display in the form header.
5. In the Secondary values related list, select the secondary values to display in the form header.
   a. In the **Order** field, set the sequential order in which to display the secondary values.
   b. Select **Update** to save the form header record.
6. In the **Order** field, set the sequential order in which to display the secondary values.
7. Select **Update** to save the UX header configuration record.

Related topics

Set up a form header in CSM Configurable Workspace

Display the form ribbon and form header secondary values in the Contextual side panel

Customize UI actions for a playbook page

You can customize the UI actions that appear in the action bar for a playbook page or page variant.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

Note:
Any changes made to the configuration will affect other record pages and page variants where the action bar component is used.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Declarative Actions** > **Form Actions**.
2. Select an **Action label** to display the Action Assignment form.
3. Click **Edit** to include or exclude a particular action on the UI.
4. Click **Update**.

Related topics

UI Action Bar

Set up a form action in CSM Configurable Workspace

Customize content in the left side panel for a playbook page

Components that can be added to the left side panel include Customer360, Timeline, Active SLA, or a custom ribbon component. You can update the ribbon component attributes based on the fields you want to display in the left side panel on the playbook page.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

Note:

Any changes made to the configuration will affect other record pages and page variants where this ribbon setting is used.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Ribbon Setting**.
2. Select a ribbon setting for your table.

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If a ribbon setting doesn't exist for your table, you can create one. For more information, see Set up a ribbon configuration in CSM Configurable Workspace.

3. Select values for the **Ribbon component** and the **Ribbon Component Attributes**.
4. Select **Update**.

Related topics

Set up a ribbon configuration in CSM Configurable Workspace

Customize tabs in the contextual side panel for a playbook page

Add customized tabs in the contextual side panel. Agents can use these tabs to view case information, add attachments, view recommendations, and perform other case-related actions.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. On the UI Builder home page, select the **Page collections** tab.
3. Select the desired page collection.
   A page collection is a group of pages that you can use in multiple experiences.
4. In the Pages and variants section, select the Create new page icon (**+**) to create a new page or add a variant to a page.
5. In the Set up your page details pop-up window, enter a name for the page and then select **Continue**.
6. Create a default page by entering a name for the variant and selecting **Create**.
   The new page appears under the Pages and variants list.
7. Select the newly created page name.
8. Add a component to the page collection by selecting **+Add component**.
   You can create a subpage that gets displayed in the contextual side panel.

Result

The added component gets displayed on the UI. The location depends on where you want to create the custom content on the page.

Related topics

Configure tabs in the contextual side panel

Customize a record page

Set record page order

Customize UI Builder pages using components

Customize the dynamic related records for a playbook page

Customize the dynamic related records for a playbook page to display in the contextual side panel in CSM Configurable Workspace. These records dynamically change depending on the context of the current record or playbook activity.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

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About this task

The definitions for the related records aren't active by default. You must activate these definitions if you want them to appear in the related records.

Any change made to the customer service case dynamic related record context applies to all extensions of the customer service case. For creating custom context, see Configure related record contexts.

You must define an EVAM (Entity View Action Mapper) view configuration for the tables in addition to setting up Dynamic Related Records. For more information, see Define an EVAM view configuration.

Procedure

1. Navigate to **All** > **Dynamic Related Records** > **Related Record Contexts**.
2. Select **Related Record Contexts** for either the Onboarding, Complaint, or Product Support table.
3. Activate all the related record definitions for the Onboarding, Complaint, or Product Support case.
   For more information, see Dynamic related records.
4. Select **Update**.

The following table shows the Dynamic Related Record list for each case type.

Dynamic Related Record list for different case types

Case type	Dynamic related record
Customer service case	○ Blocked By ○ Related Parties ○ Social Logs ○ Appointments ○ Requests ○ Special Handling Notes ○ Child Cases ○ Knowledge Gaps ○ Attached Knowledge ○ Task Skills ○ Emails ○ Draft Emails ○ Interactions ○ Tasks ○ Work Orders ○ Install base ○ Escalations ○ Service Level Agreement (SLA)

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Case type	Dynamic related record
Complaint case	○ Emails ○ Blocked By ○ Involved Parties ○ Tasks ○ Sold Product ○ Active Contracts ○ Active Entitlement ○ Related Cases
Onboarding case	○ Emails ○ Blocked By ○ Related Cases ○ Additional members ○ Tasks ○ Sold Product ○ Active Contracts ○ Approvers

Related topics

Configure dynamic related records

Configure related record definitions

Define an EVAM view configuration

Create a view configuration to combine conditions, database fields, and declarative actions with an associated view template.

Before you begin

Role required: admin or evam_admin

About this task

Entity View Action Mapper (EVAM) is an application that standardizes how different data sources display in cards and lists.

A view configuration combines conditions, database fields, and declarative actions with an associated view template. For more information, see View configurations, view templates, and configuration bundles for EVAM.

Procedure

1. Navigate to **All** > **Entity View Action Mapper (EVAM)** > **EVAM Definitions** > **Configuration Bundles**.
2. Select **dynamic_related_records_bundle** and then select **New**.
3. Fill in the fields on the EVAM view configuration form.

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Field	Description
Name	Name of the EVAM view configuration.
Active	Option to activate the EVAM view configuration.
View Template	Template to associate with the EVAM view configuration. You can create a template or use an existing template.
Application	Application scope of the EVAM view configuration.
Order	Priority that the EVAM view configuration takes over other view configurations. To give higher priority to a view configuration, enter a lower number.
Table	Table to associate with the EVAM view configuration.
Condition	Conditions for when to use the EVAM view configuration.
Table Fields	Table fields to display on the EVAM view configuration. For example: `name,supplier,description,product_category`
Custom Fields	Custom fields to display on the EVAM view configuration. This is a comma-separated list of non-table fields that are required for the template. For example: `price,image_url,delivery_label,delivery_date,product_url`

4. Select **Save**.
5. Create an M2M action assignment or select **Link Existing** and then select the Declarative Action **navigation**.
   For more details, see, View configurations, view templates, and configuration bundles for EVAM.

Related topics

Configure dynamic related records

Configure related record definitions

Configure the app route to use an existing subpage

Create an app route to make an existing page a part of the page collection. For example, the dynamic related record is a global subpage that you can use at any application level.

Before you begin

Role required: admin

About this task

Configuring an app route enables you to utilize an existing page in a page collection. This is applicable to both page templates and page variants.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **Page collection** tab and then select **CSM default record pre-tabs** from the Page Collections list.

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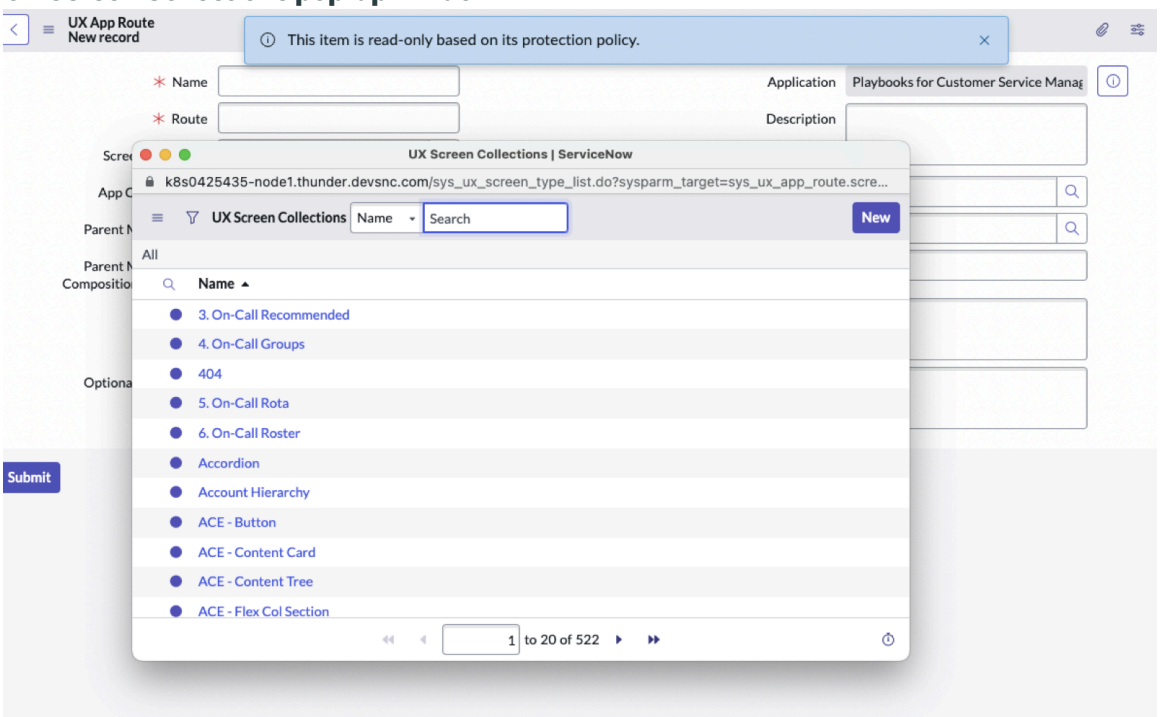
3. In the CSM default record pre-tabs page, select **View page collection settings** in the upper right corner.
4. In the General section, select **Open page collection**.
   The system opens the UX Extension Point page for CSM default record pre-tabs.
5. Navigate to the **UX App Routes** related list.
6. Select **New** to create an app route.
7. Enter a name In the **Name** field, a route in the **Route** field, and then select the **Screen Collection** that you want to reuse.

   The route is the path that the system uses to reach the page collection. For example, some common routes in CSM Configurable Workspace include record, list, and create_case_type for the Create Case modal.

   You can also create a screen collection by selecting **New** on the UX Screen Collections pop-up window and entering the name, route, and screen collection.

UX Screen Collections pop-up window



8. Select **Submit** to create the app route.

Result

The system adds the subpage to the page collection.

Playbook applications

Several playbook applications are available that provide playbooks to onboard customers, manage customer complaints, and resolve issues.

Customer Service Management playbook applications

Application	Description
Case Playbook for Onboarding	Use this application to manage the process for taking on new customers or enrolling

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Customer Service Management playbook applications (continued)

Application	Description
	customers in new products. An onboarding case captures the details of the new customer, including their selection of products and services.
Case Playbook for Complaints	Use this application to manage the process for handling customer complaints. A complaint case captures the details of the problem reported by the customer and the expected resolution.
Case Playbook for Product Support	Use this application to guide agents through the steps that are needed to resolve product issues. A product support case captures information about the customer, the product, and the reported issue.

Case Playbook for Onboarding

Use the Case Playbook for Onboarding to manage the process for taking on new customers or enrolling customers for new products.

The onboarding playbook provides the activities and tasks that agents can perform during the onboarding process. Agents can also create and assign tasks as needed and use the playbook to communicate with the customer.

Use the Case Playbook for Onboarding for cases that were created by using the onboarding case type. This playbook is available for both CSM Configurable Workspace and CSM Agent Workspace. In the CSM Workspaces, the playbook appears in the **Playbook** tab on the case record.

Note:
If you have the admin role, you can configure a playbook to use compact mode in CSM Configurable Workspace. Use the compact mode to move the playbook from a tab in the Workspace to a tab in the contextual side panel.

Case Playbook for Onboarding application

The Case Playbook for Onboarding application (com.sn_csm_onboarding_caseflow) is available from the ServiceNow® Store. For more information, see Playbook plugins.

Case Playbook for onboarding a PAD process definition

The Case Playbook for Onboarding 3.0 includes a new Process Automation Designer (PAD) process definition called **onboarding_playbook_v1**. This process definition contains the optimized stages and activities for the onboarding playbook.

Process definitions are stored in the Process Definitions table (sys_pd_process_definition). As an admin, you can view a list of processes by doing the following task:

1. In the application navigator, enter **sys_pd_process_definition.list**.
2. Configure the list to show the **Name** field.

Only one PAD process per playbook can be active at a time. For more information, see Process definitions.

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Case Playbook for Onboarding features

The Case Playbook for Onboarding 3.0 includes the case features and workspace enhancements that are listed in the following table.

Onboarding Case Playbook 3.0 features

Feature	Description
Create an onboarding case using the Case Playbook for Onboarding	Feature that opens the onboarding playbook and initiates the first activity in the Initiate stage, which is gathering the customer information. The agent can complete and save this activity to create the record. For more information, see Create a record using a playbook.
Focused activity view	Feature that determines how the stages and activities appear in the playbook. The Case Playbook for Onboarding uses the Focused activity view, which enables agents to see • The end-to-end life cycle of the onboarding workflow in the playbook life-cycle panel. • The current stage is expanded and the current activity is highlighted within the playbook life-cycle panel. • The current activity that is displayed in the playbook work area.
Contextual side panel	Feature that displays the following information: • Activity stream • Ribbon information, such as the case overview, customer details, timeline, and SLAs • Dynamic related records The activity stream and ribbon information are available in CSM Configurable Workspace only. For more information about using the contextual side panel, see the following topics: • Using activity stream in the contextual side panel • Viewing the ribbon information in the contextual side panel • Viewing dynamic related records in the contextual side panel

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Onboarding Case Playbook 3.0 features (continued)

Feature	Description
Activity visibility	Feature that enables you to control the activity visibility: • Hide the activities in a stage that the logged-in user can't access. • Hide the pending activities in a stage. For more information about configuring this feature, see Configure playbook stage and activity visibility.
Compact mode	Mode that moves the playbook from a tab in the Workspace to the contextual side panel. Agents can complete the playbook activities in the side panel while they are viewing the other tabs in the record page. This mode is available in CSM Configurable Workspace only. Users with the admin role can configure a playbook to use compact mode in the playbook component configuration in UI Builder. For more information about configuring this feature, see Integrate Playbook with Workspace.
Dynamic related records	Feature that displays the records in the contextual side panel. These records dynamically change based on the context of the current record or playbook activity. From the **Related Records** tab in the contextual side panel, agents can • Filter the list of related records • Open the list in a new tab • Create new records The dynamic related records feature is available in CSM Configurable Workspace only. For more information, see Viewing related records in the contextual side panel.
SLA widget	Activity cards in the playbook work area that can display an SLA widget. The widget appears on the activity card when the playbook activity has an SLA. The widget includes the activities in the following stages:

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Onboarding Case Playbook 3.0 features (continued)

Feature	Description
	• Pre-approval (duration is 3 days) • Data capture (duration is 5 days) • Due diligence (duration is 15 days) • Resolution (duration is 20 days) The color of the widget indicates the time remaining for the SLA: • Green: 0–50% • Yellow: 50–75% • Orange: 75–99% • Red: 100% or breached

Using the playbook stage and activity pickers to navigate the stages and activities

The playbook stage picker enables agents to see the entire onboarding workflow. Agents can navigate the playbook stages and activities by doing the following tasks:

- Expand and collapse the stages to show or hide the activities.
- Use the filter in the stage picker to filter activities by the assigned user or the activity state.
- Click an activity to display the details in the playbook work area.

Using the Playbook Actions menu

The Playbook Actions menu in the playbook header includes the actions that agents can perform at the playbook and activity levels. The agents can select the Playbook Actions icon (⋮) to access this menu.

The Playbook Actions menu includes the following playbook-level actions:

- **Expand All Stages**: Expands all the stages in the playbook.
- **Collapse All Stages**: Collapses all the stages in the playbook.
- **Request Info**: Displays a pop-up window that the agent can use to communicate with the customer and to request information about a case or case task. This action also saves the details to the case or case task activity stream. By using this action, the state of the case or case task changes to Awaiting Info and pauses the SLAs and any timers.
- **Info Received**: Returns the case or case task to the previous state and restarts the SLAs and any timers.

Note:
The **Request Info** and **Info Received** actions can also be configured to appear on the case task activity cards.

The activity-level actions can vary depending on the type of activity and in which stage it appears. For example, actions are available to accept cases, create related cases, create case tasks, and propose solutions.

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Onboarding playbook stages and activities

The following table lists the Case Playbook for Onboarding stages and activities that agents can use to onboard new customers or products.

Playbook activities by onboarding stage

Stage	Activity	Activity Details
Initiate Guides the agent in collecting customer and case information and sending a case for pre-approval.	Collect customer information	When an agent creates an onboarding case, the workspace opens the Create New Onboarding Case form, launches the onboarding playbook, and uses the first activity to gather customer information. The agent enters the information about the channel, account, contact, consumer, product, and service. For more information about the products and services, see Service definitions. Agent actions: **Continue**: Creates the onboarding case and adds the case number to the record tab. It also marks the first activity as complete and moves to the second activity.
	Add additional members	Activity that agents can use to add additional members to the onboarding case: 1. Select **Add new** to open the Create New Related Party form in a new tab. 2. In the **Type** field, select the related party with the correct entity type, such as a beneficiary who is a customer contact. 3. Select the **User**. 4. Select **Save** to add the user to the Member Information list on the activity card. Agent actions: • **Assign to me**: Available if the case is not yet assigned. Assigns the case to the logged-in user. • **Add new**: Adds a user to the Member Information list. • **Send for Pre Approval**: Completes the Initiate stage and moves to the Pre-approval stage.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Initiate stage.

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Playbook activities by onboarding stage (continued)

Stage	Activity	Activity Details
Pre approval Automates the pre-approval process for the customer.	Check approval status	Activity that includes a list of approvals and approvers. **Note:** This activity shows the list of approvals if an approval workflow is manually configured for an onboarding case. The approval workflow configuration is not provided in the base system. If no approval workflow is configured, this activity completes automatically.
	Update customer information	Agents can use this activity to verify the account, contact, or consumer information for the onboarding case. Agent actions: **Save**: Saves any changes made to the customer information.
	Complete pre approval	Agents can use this activity to provide additional information and add notes or attachments. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Initiate Data Capture**: Marks the activity and the Pre approval stage as complete.
	Notify customer	This activity displays the details of the email that was automatically sent to the customer at the completion of the Pre approval stage.
Data capture Organizes the collection of customer information.	Verify document checklist	This activity displays a document checklist. Agents can check off the necessary documents and provide comments or work notes. If the customer type changes after the case is created, a new checklist of the appropriate type replaces the original checklist. Agent actions:

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Playbook activities by onboarding stage (continued)

Stage	Activity	Activity Details
		• **Request info**: Request additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Submit for Review**: Marks the activity and the Data capture stage as complete.
	Notify customer	This activity displays the details of the email that was automatically sent to the customer at the completion of the Data capture stage.
Due diligence Displays case tasks for completing due diligence.	Perform background check	Agents can use this activity to perform background checks on the customer. Agent actions: • **Request info**: Request additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review Complete**: Marks the activity as complete.
	Initiate legal verification	Agents can use this activity to initiate the legal verification process for a customer. Agent actions: • **Request info**: Request additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review Complete**: Marks the activity as complete.
	Review credit history	Activity that the agents can use to review a customer's credit history. Agent actions: • **Request info**: Request additional information from the customer. This action changes the state of the case task to Awaiting Info.

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Playbook activities by onboarding stage (continued)

Stage	Activity	Activity Details
		• **Post**: Posts the comment or the work note to the case task record activity stream. • **Review Complete**: Marks the activity and the Due Diligence stage as complete.
	Notify customer	This activity displays the details of the email that was automatically sent to the customer at the completion of the Due Diligence stage.
Resolve Manages the case resolution activities.	Propose resolution	Activity that displays the fields from the Resolution Notes section on the Case form. Agents can add the resolution details and select **Propose solution**. If the customer rejects the resolution, the agent can return to the Resolve stage and propose another solution. Agent actions: • **Propose solution**: Propose the solution to the customer and mark the Resolve stage as complete. • **Change solution**: This action appears after the agent proposes a solution.
	Notify customer	This activity displays the details of the email that was automatically sent to the customer at the completion of the Resolve stage.
Close Manages the case close activities.	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Close stage.
	Close case	When the customer accepts the resolution, the Resolve stage completes and the Close stage is also marked as complete.

Process-based page variant for onboarding case type

The Case Playbook for Onboarding v5.0 application includes a process-based page variant that you can activate and use with the onboarding case type in CSM Configurable Workspace. This page includes the following features:

- Horizontal stage picker in the record that provides an end-to-end view of the onboarding process.
- Related list tabs that are displayed in the Dynamic Related Records component in the contextual side panel.
- Persistent account and contact information that display in the panel.
- Displays **Email** tab in the **Activity Stream**.

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- Email templates that are displayed in the contextual side panel.
- Customization of the start and end states of the approval flow as fields in the Approval request activity.

Agents can create tasks as needed and view and update the case details. For more information, see Playbook pages.

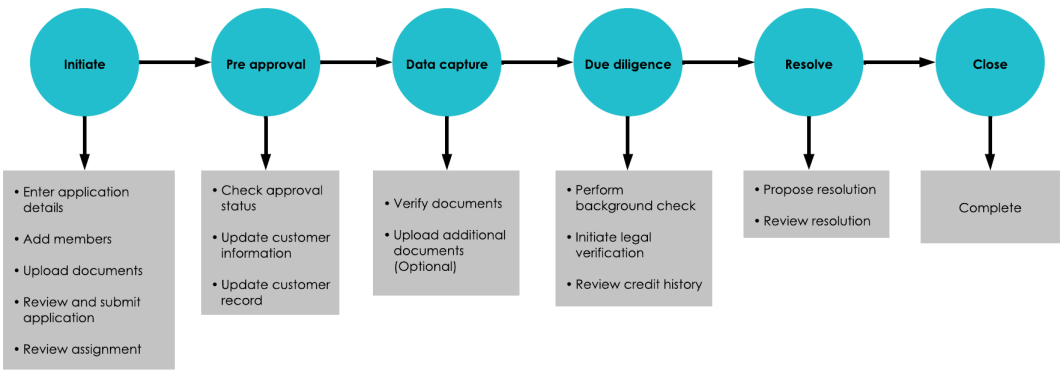
Guided Playbook for Onboarding Request

The Case Playbook for onboarding has undergone modifications in Playbooks for Portals to expose the initiate stage for self-service. This change will provide the guided playbook intake process to end customers as well, previously available only to agents. The experience is initially shipped as inactive to customers.

End customers now have visibility into the entire lifecycle of the onboarding application when viewing the case application. They can perform various tasks based on the specific stage of the case lifecycle. This includes submitting new cases, checking the status of existing cases, and taking actions on tasks that require customer input as the case progresses.

Contributor users, on the other hand, have the ability to submit cases and act on tasks on behalf of the customer. During the initiate stage of the onboarding case type, end customers have the option to save their progress. Additionally, they can view the case process on the case ticket page specifically designed for onboarding cases. The flows within the system guide users through the step-by-step completion of both simple and complex processes, ensuring a smooth and efficient experience.

Guided Playbook for Onboarding Request



As customer, you can:

- Locate the catalog content item 'New Guided Onboarding Request' under the 'Support' category in the service catalog.
- Launch the playbook record generator associated with the selected content item.
- Monitor your progress in the submission process, including the number of remaining steps and the ability to navigate back to previous steps when viewing a playbook.
- Easily populate the required fields with the options provided and input controls.
- Save an application or form before it is ready for submission and resume working on it at a later time.
- Locate the draft case from the case list view to continue where you left off.
- Click **Submit** to complete the initiation stage during the **Review Application**step.

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- Receive a notification if there are any pending tasks due to missing documents.
- Access the case ticket page directly from the email notification, with the process tab open, displaying the **Data Capture** stage and the **Upload Documents** activity.

Known limitations:

- If you switch to the new Process Automation Designer (PAD) with the existing service definition and the old record generator, you may encounter a configuration error page when attempting to create onboarding from the case type selector. You need to update the service definition's references as well to the new record generator.
- The Portal playbook experience only supports the New PAD. Customers may encounter issues if they attempt to use the old PAD, so it is recommended not to use it. Ensure that only one PAD is active at a given time.

Case Playbook for Complaints

Use the Case Playbook for Complaints to guide agents through the steps that are needed to resolve customer complaints.

A complaint case captures the information about the customer, the product, and the details about the complaint. The complaint playbook provides the activities and tasks that agents can perform to research and resolve the complaint. Agents can also create and assign tasks as needed and use the playbook to communicate with the customer.

The Case Playbook for Complaints can be used with cases that are created using the complaint case type. This playbook is available for both CSM Configurable Workspace and CSM Agent Workspace. In the CSM Workspaces, the playbook appears in the **Playbook** tab on the case record.

Note:
If you have the admin role, you can configure a playbook to use the compact mode in CSM Configurable Workspace. Use the compact mode to move the playbook from a tab in the Workspace to a tab in the contextual side panel.

Case Playbook for Complaints application

The Case Playbook for Complaints 3.0 application (com.sn_csm_complaint_caseflow) is available from the ServiceNow® Store. For more information, see Playbook plugins.

Case Playbook for Complaints PAD process definition

The Case Playbook for Complaints 3.0 includes a new Process Automation Designer (PAD) process definition called **complaint_playbook_v1**. This process definition contains the optimized stages and activities for the complaint playbook.

The process definitions are stored in the Process Definitions table (sys_pd_process_definition). To view a list of processes, do the following task:

1. In the application navigator, enter **sys_pd_process_definition.list** in the application navigator.
2. Configure the list to show the **Name** field.

Only one PAD process per playbook can be active at a time. For more information, see Process definitions.

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Case Playbook for Complaints features

The Case Playbook for Complaints 3.0 includes the case features and enhancements that are listed in the following table.

Case Playbook for Complaints 3.0 features

Feature	Description
Create a complaint case using the Case Playbook for Complaints	Feature that opens the complaint playbook and initiates the first activity in the Intake stage, which is gathering complaint details. The agent can complete and save this activity to create the record. For more information, see Create a record using a playbook.
Focused activity view	Feature that determines how the stages and activities appear in the playbook. The Case Playbook for Complaints uses the Focused activity view, which enables agents to see • The end-to-end life cycle of the complaint workflow in the playbook life-cycle panel. • The current stage is expanded and the current activity is highlighted within the playbook life-cycle panel. • The details of the current activity that is displayed in the playbook work area.
Contextual side panel	Feature that displays the following information in the contextual side panel: • Activity stream • Ribbon information, such as the case overview, customer details, timeline, and SLAs • Dynamic related records **Note:** The activity stream and ribbon information are available in CSM Configurable Workspace only. For more information about using the contextual side panel, see

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Case Playbook for Complaints 3.0 features (continued)

Feature	Description
	• Using activity stream in the contextual side panel • Viewing the ribbon information in the contextual side panel • Viewing dynamic related records in the contextual side panel
Activity visibility	Feature that uses the following settings to control activity visibility: • Hide the activities in a stage that the logged-in user can't access. • Hide the pending activities in a stage. For more information about configuring this feature, see Configure playbook stage and activity visibility.
Compact mode	Mode that moves the playbook from a tab in the Workspace to the contextual side panel. Agents can complete the playbook activities in the side panel while they're viewing the other tabs in the record page. **Note:** This mode is available in CSM Configurable Workspace only. Users with the admin role can configure a playbook to use the compact mode in the playbook component configuration in UI Builder. For more information about configuring this feature, see Integrate Playbook with Workspace.
Dynamic related records	Feature that displays the records in the contextual side panel. These records dynamically change based on the context of the current record or playbook activity. From the **Related Records** tab in the contextual side panel, agents can • Filter the list of related records • Open the list in a new tab • Create records

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Case Playbook for Complaints 3.0 features (continued)

Feature	Description
	Note: The dynamic related records feature is available in CSM Configurable Workspace only. For more information, see Viewing related records in the contextual side panel.
SLA widget	Activity cards in the playbook work area that can display an SLA widget. The widget appears on the activity card when the playbook activity has an SLA. This widget includes the activities in the following stages: • Triage • Research • Respond The color of the widget indicates the time remaining for the SLA: • Green: 0–50% • Yellow: 50–75% • Orange: 75–99% • Red: 100% or breached

Using the playbook stage and activity pickers to navigate stages and activities

The playbook stage picker enables agents to see the entire complaint workflow. Agents can navigate the playbook stages and activities by doing the following tasks:

- Expand and collapse stages to show or hide activities.
- Use the filter in the stage picker to filter activities by the assigned user or the activity state.
- Select an activity to display the details in the activity viewer.

Using the Playbook Actions menu

The Playbook Actions menu in the playbook header includes the actions that agents can perform at the playbook and activity levels. The agents can select the Playbook Actions icon (⋮) to access this menu.

The Playbook Actions menu includes the following playbook-level actions:

- **Expand All Stages**: Expands all the stages in the playbook.
- **Collapse All Stages**: Collapses all the stages in the playbook.
- **Request Info**: Displays a pop-up window that the agent can use to communicate with the customer and to request information about a case or case task. This action also saves the

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details to the case or case task activity stream. By using this action, the state of the case or case task changes to Awaiting Info and pauses the SLAs and any timers.

- **Info Received**: Returns the case or case task to the previous state and restarts the SLAs and any timers.

Note:
The **Request Info** and **Info Received** actions can also be configured to appear on case task activity cards.

The activity-level actions can vary depending on the type of activity and in which stage it appears. For example, actions are available to accept cases, create related cases, create case tasks, and propose solutions.

Complaint playbook stages and activities

The following table lists the Case Playbook for Complaints stages and activities that agents can use to resolve customer issues.

Case Playbook for Complaints stages and activities

Stage	Activity	Activity Details
Intake Guides the agent to collect the information needed to create the complaint case.	Gather complaint details	When an agent creates a complaint case, the workspace opens the Create New Complaint Case form, launches the complaint playbook, and uses the first activity to gather complaint details. The agent can enter the information about the customer, the service, the complaint, and the expected outcome for the case. As the agent enters the complaint details, additional fields appear on the activity card such as the **Category** and **Subcategory** fields. **Note:** For more information about the service, see Service definitions. Agent actions: **Continue**: Creates the complaint case and adds the case number to the **Record** tab. It also marks the first activity as complete and moves to the second activity.
	Add involved parties	Activity that the agent can use to add involved parties to the complaint case: 1. Select **Add new** to open the Create New Related Party form in a new tab. 2. In the **Type** field, select the related party with the correct entity type, such as a co-complainant who is a customer contact.

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Case Playbook for Complaints stages and activities (continued)

Stage	Activity	Activity Details
		3. Select **User**. 4. Select **Save** to add the user to the Involved Parties list on the activity card. Agent actions: • **Assign to me**: Available if the case isn't yet assigned. Assigns the case to the logged-in user. • **Add new**: Adds a user to the Involved Parties list (see the previous steps).
	Verify primary address	Activity that shows the fields from the Primary Correspondence Address form section on the **Details** tab. Agents can accept this address or select a different address. Agent actions: • **Save**: Saves the updates to the Primary Correspondence Address fields. • **Move to triage**: Completes the Intake stage, marks the activities in the stage as complete, and moves to the next stage in the complaint playbook.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Intake stage.
Triage Enables the agent to do the initial troubleshooting on the case.	Verify complaint	Case task that agents can use to review any available related search results in the contextual side panel and add notes or attachments. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Submit for review**: Marks the case task and the Triage stage as complete.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Triage stage.
Research Orchestrates sending the case to different	Review legal implications	Case task that agents can assign to a different user for legal review.

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Case Playbook for Complaints stages and activities (continued)

Stage	Activity	Activity Details
back-office teams for follow-up.		To assign the task: **1.** Select the View Task icon in the activity card. This action opens the case task in a new tab. **2.** Select the user in the **Assigned to** field. **3.** Add information to the other fields on the Case Task form as needed and select **Save**. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review complete**: Marks the case task as complete.
	Product owner review for other similar issues	Case task that an agent can assign to a different user for a review of similar issues. To assign the task: **1.** Select the View Task icon in the activity card to open the case task in a new tab. **2.** Select the user in the **Assigned to** field. **3.** Add information to the other fields on the Case Task form as needed and click **Save**. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review complete**: Marks the case task as complete.
	Verify check entitlement	Case task that an agent can assign to a different user for an entitlement review. To assign the task:

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Case Playbook for Complaints stages and activities (continued)

Stage	Activity	Activity Details
		1. Select the View Task icon in the activity card to open the case task in a new tab. 2. Select the user in the **Assigned to** field. 3. Add information to the other fields on the Case Task form as needed and select **Save**. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review complete**: Marks the case task as complete.
	Billing review for any refunds	Case task that an agent can assign to a different user for a billing review. To assign the task: 1. Select the View Task icon in the activity card to open the case task in a new tab. 2. Select the user in the **Assigned to** field. 3. Add information to the other fields on the Case Task form as needed and select **Save**. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review complete**: Marks the case task and the Research stage as complete.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Research stage.
Respond Guides the agent in drafting a response to the case.	Compose email	Activity that the agent can use to communicate with the customer. Agent actions:

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Case Playbook for Complaints stages and activities (continued)

Stage	Activity	Activity Details
		• **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review complete**: Marks the case task and the Respond stage as complete.
Resolve Manages the activities for case resolution.	Propose resolution	Activity that shows the fields from the Resolution Notes section on the Case form. An agent can add the resolution details and select **Propose solution**. If the customer rejects the solution, the agent can return to the Resolve stage and propose another solution. Agent actions: • **Propose solution**: Proposes the solution to the customer and marks the Resolve stage as complete. • **Change solution**: This action appears after the agent proposes a solution.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Resolve stage.
Close Manages the activities for closing the case and sending a survey to the customer.	Close case	When the customer accepts the resolution, the Resolve stage completes and the Close stage is also marked as complete.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Close stage.

Process-based page variant for complaint case type

The Case Playbook for Complaints v5.0 application includes a process-based page variant that you can activate and use with the complaint case type in CSM Configurable Workspace. This page includes the following features:

- Horizontal stage picker in the record that provides an end-to-end view of the complaint process.
- Related list tabs that are displayed in the Dynamic Related Records component in the contextual side panel.
- Persistent account and contact information that is displayed in the panel.

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- **Email** tab that is displayed in the **Activity Stream**.
- Email templates that are displayed in the contextual side panel.
- Customization of the start and end states of the approval flow as fields in the Approval request activity.

Agents can create tasks as needed as well as view and update case details. For more information, see Playbook pages.

Case Playbook for Product Support

Use the Case Playbook for Product Support to guide agents through the steps that are needed to resolve product issues.

A product support case captures the information about the customer, the product, and the reported issue. The product support playbook provides the activities and tasks that agents can perform to research and resolve the issue. Agents can also create and assign tasks as needed and use the playbook to communicate with the customer.

The Case Playbook for Product Support is available for both CSM Configurable Workspace and CSM Agent Workspace. In the CSM Workspaces, the playbook appears in the **Playbook** tab on the case record.

Note:
If you have the admin role, you can configure a playbook to use the compact mode in CSM Configurable Workspace. Use the compact mode to move the playbook from a tab in the Workspace to a tab in the contextual side panel.

Case Playbook for Product Support application

The Case Playbook for Product Support 3.0 application (com.sn_csm_product_caseflow) is available from the ServiceNow® Store. For more information, see Playbook plugins.

Case Playbook for Product Support PAD process definition

The Case Playbook for Product Support 3.0 includes a new Process Automation Designer (PAD) process definition called **product_playbook_v1**. This process definition contains the optimized stages and activities for the product support playbook.

The process definitions are stored in the Process Definitions table (sys_pd_process_definition). To view a list of processes, you can do the following task:

1. In the application navigator, enter **sys_pd_process_definition.list**.
2. Configure the list to show the **Name** field.

Only one PAD process per playbook can be active at a time. For more information, see Process definitions.

Case Playbook for Product Support features

The Case Playbook for Product Support 3.0 includes the case features and enhancements that are listed in the following table.

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Case Playbook for Product Support features

Feature	Description
Focused activity view	Feature that determines how the stages and activities appear in the playbook. The Case Playbook for Product Support uses the Focused activity view, which enables agents to see • The end-to-end life cycle of the product support workflow in the playbook life-cycle panel. • The current stage is expanded and the current activity is highlighted within the playbook life-cycle panel. • Details of the current activity that is displayed in the playbook work area.
Contextual side panel	Feature that displays the following information in the contextual side panel: • Activity stream • Ribbon information, such as the case overview, customer details, timeline, and SLAs • Dynamic related records **Note:** The activity stream and ribbon information are available in CSM Configurable Workspace only. For more information about using the contextual side panel, see • Using activity stream in the contextual side panel • Viewing the ribbon information in the contextual side panel • Viewing dynamic related records in the contextual side panel For more information about configuring this feature, see Configure playbook stage and activity visibility.
Activity visibility	Feature that uses the following settings to control the activity visibility:

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Case Playbook for Product Support features (continued)

Feature	Description
	• Hide the activities in a stage that the logged-in user can't access. • Hide the pending activities in a stage.
Compact mode	Mode that moves the playbook from a tab in the Workspace to the contextual side panel. Agents can complete the playbook activities in the side panel while they're viewing the other tabs in the record page. **Note:** This mode is available in CSM Configurable Workspace only. Users with the admin role can configure a playbook to use the compact mode in the playbook component configuration in UI Builder. For more information about configuring this feature, see Integrate Playbook with Workspace.
Dynamic related records	Feature that displays the records in the contextual side panel. These records dynamically change based on the context of the current record or playbook activity. From the **Related Records** tab in the contextual side panel, agents can • Filter the list of related records • Open the list in a new tab • Create new records **Note:** The dynamic related records feature is available in CSM Configurable Workspace only. For more information, see Viewing related records in the contextual side panel.
SLA widget	Activity cards in the playbook work area can display an SLA widget. The widget appears on the activity card when the playbook activity has an SLA. The color of the widget indicates the time remaining for the SLA: • Green: 0–50% • Yellow: 50–75%

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Case Playbook for Product Support features (continued)

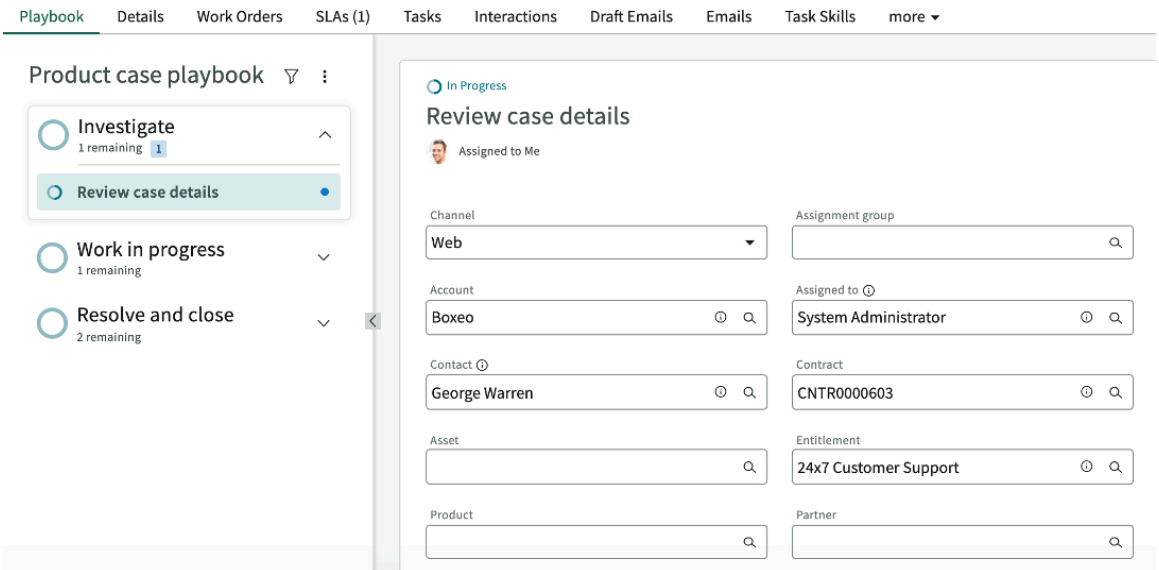
Feature	Description
	• Orange: 75–99% • Red: 100% or breached

Using the playbook stage and activity pickers to navigate stages and activities

The playbook stage picker enables agents to see the entire product support workflow. Agents can navigate the playbook stages and activities by doing the following tasks:

- Expand and collapse the stages to show or hide activities.
- Use the filter in the stage picker to filter activities by the assigned user or the activity state.
- Select an activity to display the details in the playbook work area.

The following example shows the different stages and activities in a playbook.



Using the Playbook Actions menu

The Playbook Actions menu in the playbook header includes the actions that agents can perform at the playbook level. The agents can select the Playbook Actions icon (⋮) to access this menu.

The Playbook Actions menu includes the following playbook-level actions:

- **Expand All Stages**: Expands all the stages in the playbook.
- **Collapse All Stages**: Collapses all the stages in the playbook.
- **Request Info**: Displays a pop-up window that the agent can use to communicate with the customer. This action also saves the details to the case activity stream. By using this action, the state of the case changes to Awaiting Info and pauses the SLAs and any timers on the case.
- **Info Received**: Returns the case to the previous state and restarts the SLAs and any timers on the case.

The activity-level actions can also appear in the Playbook Actions menu. These actions vary depending on the type of activity and in which stage it appears. For example, actions are available to accept cases, create related cases, create case tasks, and propose solutions.

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Case Playbook for Product Support stages and activities

The following table lists the Case Playbook for Product Support stages and activities that agents can use to resolve customer issues.

Case Playbook for Product Support stages and activities

Stage	Activity	Details
Investigate Guides the agent in collecting customer information and performing some initial research about the product issue.	Review case details	A case is in the Investigate stage when the case state is New or Open. This activity displays information about the case, including the customer and product details and any contracts or entitlements. The agent can add details about the issue and review the information and related search results, such as knowledge articles or similar cases. Agent actions: • **Assign to me**: Assigns the case to the current agent. • **Accept**: Enables the agent to accept the case. • **Save**: Saves any changes made to the case details. • **Mark Complete**: Saves the information, marks the activity as complete, and moves to the next activity or stage.
Work in progress Create case tasks as needed and assign tasks to users.	Create case tasks	A case is in the Work in progress stage when the agent completes the initial research and begins working on the issue. This activity includes a list of case tasks. Agents can create tasks as needed to complete the work for a case. Agent actions: • **Add New**: Creates a case task. Add information to the task and select **Save** to add the task to the Case Tasks list. • **Mark Complete**: Marks the activity as complete and moves to the next activity or stage.
Resolve and close Case tasks are complete and the agent is ready to	Resolve	Add details to the **Resolution code** and **Resolution notes** fields on the activity card and select **Save**. This information is added to the case record. Agent actions:

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Case Playbook for Product Support stages and activities (continued)

Stage	Activity	Details
propose a solution to the customer.		• **Propose Solution**: Notifies the customer of the proposed solution. • **Change Solution**: Appears after the agent proposes a solution. Use this action to add information to the case resolution fields.
	Close case	This activity shows the following read-only fields: • **Closed by**: the agent who closed the case. • **Closed**: the date and time that the case was closed. The system closes the case when the customer accepts the resolution or when the agent selects **Close Case**.

Process-based page variant for cases

The Case Playbook for Product Support v5.0 application includes a process-based page variant that you can activate and use with cases in CSM Configurable Workspace. This page includes the following features:

- A horizontal stage picker at the top of the record that provides an end-to-end view of the complaint process. Activities within each stage are stacked in the activity viewer.
- Displays the related list tabs in the Dynamic Related Records component in the contextual side panel.
- Displays persistent account and contact information in the left side panel.
- Displays **Email** tab in the **Activity Stream**.
- Displays the email templates in the contextual side panel.
- Supports case summarization card on the left panel.

Agents can create tasks as needed as well as view and update case details. For more information, see Playbook pages.

Configure Playbooks for Customer Service Management

Configure different playbook settings, such as selecting the activity view and determining activity visibility.

Some of the configuration for a playbook is performed in UI Builder as part of the playbook component configuration. Additional settings can be configured in the playbook experience configuration record. These settings include selecting the playbook activity view and configuring playbook stage and activity visibility.

Playbook configuration tasks

Configuration task	Description
Create or customize a playbook record page	A record page provides the base structure for how a record is displayed in CSM Configurable Workspace. The

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Playbook configuration tasks (continued)

Configuration task	Description
	following playbook record pages are available with the Playbooks for Customer Service Management application [com.sn_csm_playbook]: • Case playbook: horizontal stages page • Case playbook: vertical stages page For more information, see Manage UI Builder pages and page variants.
Configure the playbook record page settings	Each UI Builder record page includes the following settings: • **Active**: Enabling this check box makes the page available to the selected audience. • **Order**: This value indicates the page priority. The page with the lowest order value is the default page. • **Conditions**: Determine when a page variant is displayed. • **Audience**: Determines who can see the page. For more information, see the following topics: • Case playbook: horizontal stages page variant settings • Case playbook: vertical stages page variant settings
Select a playbook activity view	The activity view determines how the stages and activities are displayed in the playbook. • **Stacked**: <add description> • **Focused**: <add description> Users with the system administrator role can select a playbook activity view in the playbook component configuration in UI Builder.
Configure playbook stage and activity visibility	The following fields control the visibility of playbook stages and activities. • **Hide Inaccessible Activity**: Accessibility is determined by user permissions. When enabled, the user cannot see an activity if they do not have permissions to view the data associated with the activity. If all activities in a stage are inaccessible to the user, the stage is also hidden. • **Control Activity Display**: Pending activities are those activities that have not yet been triggered. Select one of the options in this field to show or hide pending activities. Users with the system administrator role can in the playbook experience configuration record.

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Playbook configuration tasks (continued)

Configuration task	Description
Configure a playbook to use compact mode	Compact mode moves the playbook from a tab in the Workspace to the contextual side panel. Agents can complete playbook activities in the side panel while viewing other tabs in the record page. Users with the system administrator role can configure a playbook to use compact mode in the playbook component configuration in UI Builder. For more information about configuring this feature, see Integrate Playbook with Workspace.
Preview a playbook	Users with the playbook experience admin role [playbook_experience.admin] can preview a playbook in real time within a non-production environment. With this feature, playbook experience administrators can easily see and test different playbook settings.
Select a playbook experience	A playbook experience is a defined set of configurations that determines how the system renders a playbook in Workspace. You can use playbook experiences to customize the look and feel of a playbook, map user actions, and override activities. The Playbook Experience plugin (com.playbook_experience) includes the Global Playbook Experience record, which defines a default playbook configuration. The Playbooks for Customer Service Management plugin (com.sn_csm_playbook) includes the following additional playbook experience records: • CSM Configurable Workspace Playbook • CSM Agent Workspace Playbook Users with the system administrator role can select a playbook experience when adding a playbook to a page in UI Builder. Different playbooks for the same record type can use different playbook experiences. For example, if a complaint case uses two playbooks, each playbook can use a different playbook experience. For more information, see the following topics in the Workspace administrator documentation: • Create Playbook experience configurations • Preview a playbook
Set up a record generator for a case type	Create a record for a case type by using a playbook record generator. With a record generator, the system creates a record as the first step in the playbook.
Confgure an optional activity for a playbook	Configure optional playbook activities so that agents and fulfillers can insert activities during a playbook run. For example, a customer may want to schedule an optional activity such as making an appointment to visit a location.

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Playbook experiences

Playbook experiences are used to customize the look and feel of a playbook. Settings in a playbook experience control how UI Builder renders a playbook in the CSM workspaces. System administrators can configure settings in the playbook experience record that determine the playbook stage and activity visibility.

Within UI Builder, system administrators can configure playbook component settings such as:

- Selecting a playbook experience
- Selecting an activity view
- Enabling compact mode

For more information, see Configuring playbooks for Customer Service Management.

Select a playbook activity view

The activity view determines how the stages and activities are displayed in the playbook.

Before you begin

Role required: admin

About this task

Users with the system administrator role can select the playbook activity view in the playbook component configuration in UI Builder.

Procedure

1. Navigate to UI Builder and open the playbook component.
2. Select the playbook component.
3. In the Config tab, select a view in the **Activity View** field.
4. Select **Save**.

Configure playbook stage and activity visibility

Configure the visibility of playbook stages and activities that are pending or that a user cannot access.

Before you begin

Role required: admin

About this task

Use the following fields in the playbook experience configuration record to control the visibility of playbook stages and activities.

- **Inaccessible Data Visibility**: Accessibility is determined by user permissions. When enabled, the user cannot see an activity if they do not have permissions to view the data associated with the activity. If all activities in a stage are inaccessible to the user, the stage is also hidden.
- **Pending Item Visibility**: Pending activities are those activities that have not yet been triggered. Select one of the options in this field to show or hide pending activities.

Procedure

1. Navigate to **All** > **Playbook Experience** > **Playbook Experiences**.
2. Select a Playbook experience.

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3. In the Configurations related list, click the desired configuration.
4. Select **Hide Inaccessible Activity** from the **Inaccessible Data Visibility** field drop-down list to hide the activities in a stage that the logged-in user cannot access.

   The default value for this field is false.
5. In the **Pending Item Visibility** field, select one of the following options.
6. Click **Update**.

Related topics

Create Playbook experience configurations

Configure an optional activity for a playbook

Set up a record generator for case type

Create a record for a case type by using a playbook record generator. With a record generator, the system creates a record as the first step in the playbook.

Before you begin

Role required: playbook_experience.admin

About this task

A record generator is set up for a specific table. You can specify the name of the record generator activity, the form view, and the playbook that a user sees before a record is created. You can also configure the declarative action that are used to submit the form. For more information on declarative actions, see Declarative actions.

Procedure

1. Navigate to **All** > **Playbook Experience** > **Record Generators**.
2. Select **New**.
3. Fill in the fields on the form.

Playbook Experience Record Generator form fields

Field	Description
Table	Table that the new record page should use for the record generator entry.
Process Definition	Process definition that you want to display before a record is created. All activities are marked pending. If no process is running after the record is created, a playbook manually triggers this process definition.
Create Record Activity Name	Name to display on the record generator activity that is inserted as the first step within the specified process definition.
Active	Option to activate the record generator.
Order	Integer that determines the precedence of this configuration in relation to other activities in a Playbook experience. The lower the number

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Field	Description
	means that it's more likely a user selects it over another configuration. Use numbers that are in the hundreds. For example, 100, 200, 300, or 400.
Create Record Form View	Form view for the new record form embedded within the inserted activity.
Template Fields	Optional field values that can be pre-filled in the new record form.

4. Select **Submit**.

Configure an optional activity for a playbook

Configure optional playbook activities so that agents and fulfillers can insert activities during a playbook run. For example, a customer may want to schedule an optional activity such as making an appointment to visit a location.

Before you begin
Role required: playbook_experience.admin

About this task
Configure optional playbook activities in Process Automation Designer (PAD).

Although you can insert global optional activities anywhere in the playbook, you can only insert stage-specific optional activities when a specified stage is active in the playbook. You can also add other global optional activities such as similar records, similar documents, and managed documents.

Note:
Some optional activities may require additional plugins. For example, for the Approval Request activity, if the approval action needs to be exposed to the customer via the service portal, you must install the plugin portal store app (com.snc:app-customer-service-portal) release version 23.2.4. To display the activities for the similar and managed documents in PAD, you must install the document management plugin (com.snc.platform_document_management).

Procedure
1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select the Playbooks tab at the top of the page.
3. Select a playbook from the Label column.
4. See the optional activities under all the stages by turning on the toggle for **Optional activities**.
5. Under **Add activity**, select **Playbook for Customer Service Management** > **Approval Request**.
   A new approval request optional activity is created.
6. Select the **Approval Request** optional activity.
7. Under **Edit activity properties**, in the **Details** tab, add a **Label**, **Description**, **Activity Definition**, and set **Start Rule** to **Manual**.
   This setting is the Optional Activity indicator.
8. Save the new activity record.
9. Select **View all properties**.

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10. Navigate to **Automation tab** > **parent records** and select the parent record.
11. **Optional:** Go to the **Automation** tab and set the values of the starting state and ending state. The values for the starting and ending states are derived from the value field of the sys_choice table.

    (Optional) To create a custom state flow, see Create a state flow. Ensure that the class of the state flow is “Customer Service Case Flow." You can also configure more declarative actions for the optional activity. For more information, see Creating new declarative action assignments.
12. Select **Done**.
13. Select **Activate**.

Playbooks for Portals

With Customer Service Management (CSM) playbooks on service portals, you get the step-by-step guidance for the case flow process and the contextual information that you need to successfully complete each stage of the flow and its associated activities.

Guided intake with playbooks makes it effortless to fill out a form or provide information for a case. Playbooks offer a clear roadmap that indicates your progress in the submission process and the remaining steps that you need to complete. If needed, you can navigate back to a previous step. You’re also presented with the options and input controls that enable you to quickly and accurately input information. Additionally, you can save an application or form that is not yet ready for submission and resume work on it later.

Get started

1. Set up predefined Playbooks for Portals
2. Set up custom Playbooks for Portals
3. Using Playbooks for Portals
4. Activate a new onboarding playbook with self-service
5. Enable a reflow for your UI Builder pages

Set up predefined Playbooks for Portals

Set up predefined Playbooks for Portals to provide end users with the playbook experience on your service portal.

Overview of Playbooks

Playbooks guide users through complex processes and enable them to save their progress and resume their work when convenient. They can also get the information that they need for each stage of the flow and its associated activities with the Customer Service Management (CSM) playbooks on service portals.

You can activate Playbooks for Portals if you have the admin role. The base system is delivered in an inactive state. You must activate it in the Playbooks (PAD) for the user to see it.

Plugins required:

- Playbooks for Customer Service Management: sn_csm_playbook
- Playbook Experience: sn_playbook_exp

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- Case Playbook for Onboarding: sn_onboarding (required if you need the predefined playbook experience)
- Case Playbook for Product Support: sn_product (required if you want to use the product case playbook and record generator)

Plugins are available from the ServiceNow® Store. For more information, see Playbook plugins.

Summary of steps for setting up predefined Playbooks for Portals

You can set up Playbooks for Portals using the following high level steps.

1. Activate the draft state in the onboarding case type state. For more information, see Activate the draft state in the onboarding case type state.
2. Activate the Record Generator
3. Activate a new onboarding playbook with self-service
4. Activate guided onboarding in the playbook content items. For more information, see Activate guided onboarding in Playbook content items.
5. Add a **Process** tab to the Portal so that users can see where they are in the Playbook process. See Add the Process tab to the Portal for more information.

Activate the draft state in the onboarding case type state

A portal user can save a case during the intake process and continue later with the draft state.

About this task

Activate a draft state for the onboarding case type so that the case remains in the draft state during the intake stage until the case is submitted.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **sys_choice.list**.
2. Select the record with **Table name** - **sn_onboarding_case** with the **Element** field value as **state**, and the **Label** field name as **Draft**.
3. Select **Edit**.
4. Clear the **Inactive** check box.
5. Select **Update**.
6. Navigate to **System Definition** > **Scheduled Job** and search for **sys_id** - **ba5ba3d8944e7110f87759453e4c7084** or **Name** - **Update My Lists URL for draft cases**.
7. Select **Execute Now**.
   This action excludes the Draft cases from the list filter on the **My List** tab on the initial page load.
8. **Optional:** If you're using a custom case type table and you do not see the relevant state upon filtering, you might have to assign requisite ACLs for the state field and its associated values.

Activate the Record Generator

Activate the record generator to the portal case and display the new guided playbook to the user. Portal users can navigate through the playbook steps to complete the case intake.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Playbook Experience** > **Record Generators**.
2. In the list, select the **Table name** - **sn_onboarding_case** with **Process Definition** name - **Onboarding with Self-Service**.
3. Select **Edit**.
4. Select the **Active** check box.
5. Select **Update**.

Activate a new onboarding playbook with self-service

Activate a new onboarding playbook with self-service in Playbooks (PAD) to ensure that the new playbook is visible.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Process Automation Designer**.
2. On the Processes tab, select the label **Onboarding with Self-Service**.
3. From the More actions menu, select **Activate**.
   Verify that the previous PAD process is deactivated.

Activate guided onboarding in Playbook content items

Activate guided onboarding in playbook content items and verify that the new content item launches the playbook record generator that is associated with it.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Playbook Experience** > **Playbook Content Items**.
2. Select **New Guided Onboarding Request**.
3. Select **Edit**.
4. Select the **Active** check box.
5. Select **Update**.

Add the Process tab to the Portal

Add a **Process** tab to the CSM ticket page so that users can track the playbook process.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
2. Open the configuration for your table.

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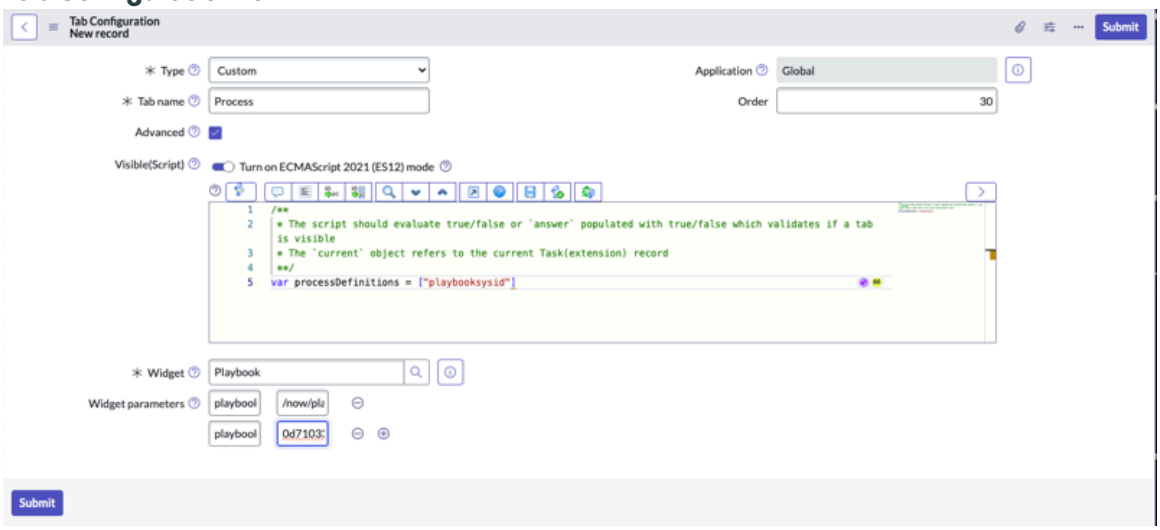
3. In the **Tabs** related list, click **New**.
4. In the **Tab Configuration** form, fill in the fields as follows.

Tab Configuration form



Tab configuration form fields

Field	Data
Type	Custom
Tab name	Process
Advanced	Toggle to active
Visible script	Add one or more playbook sysIds
Widget	Playbook
Widget parameters	Widget 1: Name: playbook_uib_page_url Value: /now/playbook-portal/csm_case_process Widget 2: Name: playbook_experience_id Value: 0d71033773f220109edbc1f52ff6a741

5. Select **Submit**.

Note:

For the user to view the process tabs in the portal, ensure you have assigned the requisite ACLs.

Set up custom Playbooks for Portals

Create custom Playbooks for Portals to provide end users with the playbook experience on your service portal.

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Overview of Playbooks

Playbooks guide users through complex processes and enable them to save their progress and resume their work when convenient. They can also get the information that they need for each stage of the flow and its associated activities with the Customer Service Management (CSM) playbooks on service portals.

You can activate Playbooks for Portals if you have the admin role. The base system is delivered in an inactive state. You must activate it in the Playbooks (PAD) for the user to see it.

Plugins required:

- Playbooks for Customer Service Management: sn_csm_playbook
- Playbook Experience: sn_playbook_exp
- Case Playbook for Onboarding: sn_onboarding (required if you need the predefined playbook experience)
- Case Playbook for Product Support: sn_product (required if you want to use the product case playbook and record generator)

Plugins are available from the ServiceNow® Store. For more information, see Playbook plugins.

Summary of steps for setting up Playbooks for Portals

You can set up Playbooks for Portals using the following high level steps.

1. Define your process using Workflow Studio. See Create a playbook for more information.
2. Activate the record generator. For more information, see Activate the Record Generator.
3. Set up ACLs (Access Control Lists) to provide the appropriate read, write, and create permissions for users. See Explicit Roles in CSM for more information.

   Note:
   Add write and create roles with a condition based on "State=draft" so that users can only edit the fields in the draft state.

4. Create a Playbook Content Item so that users can navigate to the Playbook experience. See Create a Playbook Content Item for more information.
5. Set up a redirection widget so that users are redirected to the playbook intake experience once the state changes from "draft" to "new." See Set up a redirection widget for more information.

Create a Playbook Content Item

Create a content item of Playbook type on portal so that users can navigate to the playbook experience. These content items are specifically configured to enable the playbook experience on portals.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Playbook Content Items** > **New**.

   Content item form

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2. In the form, fill out the fields.

Relevant Content Item form fields

Field	Definition
Name	The name of the content item you are creating
Table	Map your table here
Record ID	Always enter -1
Playbook experience	The name of your playbook experience
Playbook experience record generator	Map your record generator
Portal page	`csm_intake` standard with the Playbooks for Customer Service Management application. **Note:** You can clone the `csm_intake` page and modify it per your requirements.
Title	Title that appears at the top of the page.

3. Select **Submit**.

What to do next
After completing this step, you can navigate to the portal where the catalog is mapped and execute the content item. The playbook intake experience opens, with the record generator mapped as the first activity.

Set up a redirection widget

You can set up a widget to reroute the user to the `csm_ticket` page once the record state changes from draft to new, indicating that the user has completed the intake process.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Service Portal** > **Widgets**.
2. Open the widget **CSM Intake Redirect**.
3. Add the following code the in the client controller section.

Note:
As a best practice, clone the **CSM Intake Redirect** widget to modify and replace it on the `csm_intake` page, or on your custom page.

```
spUtil.recordWatch($scope, 'sn_customerservice_case',
 c.data.filter, function(response) { //replace
 sn_customerservice_case with your table.

        if (response.data.operation ==
 "update" && response.data.record.state &&
```

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```
response.data.record.state.value != "0") { //checking if the
state is not draft

            if
(($window.location.href).indexOf('?id=csm_ticket&') == -1);
            $window.location = "?id=csm_ticket&table=" +
c.data.table + "&sys_id=" + c.data.sys_id;
        }
    });
```

4. Select **Update**.

Enable a reflow for your UI Builder pages

Enable a reflow for your UI Builder pages. This way, when you're resizing a window, you don't have to scroll horizontally.

Before you begin

Role required: admin

About this task

The reflow feature adjusts the properties of the components when you're resizing a window. It accommodates smaller screen sizes and changes the component's properties for the different screen sizes.

Procedure

1. Navigate to **All** > *UI Builder*.
2. Under **Experiences**, select **Playbook Experience Portal**.
3. Open a specific page or variant: Either **CSM Create Case Process** or **CSM Case Process**, for which you want to adjust the reflow.
4. Edit the **Playbook Activity Viewer** component settings.
5. On the **Styles** tab in the UI Builder, set the height of the activity viewer to 100vh.
6. Navigate to the component **Resizeable Panes** > **Panes configuration** and copy the code in the default displayed pane by editing the scripted property value.

```
// Resizable Panes default displayed pane scripted value
// when in left/right pane position
function evaluateProperty({api, helpers}) {
    if(!api.data.playbook_custom_layout.compactMode) return
 "both";
  return (api.data.playbook_custom_layout.selectedItem ||
 {}).stageContextId ? "right" : "left";
}
// when in top/bottom pane position
function evaluateProperty({api, helpers}) {
    if (!api.data.playbook_custom_layout.compactMode) return
 "both";

  return (api.data.playbook_custom_layout.selectedItem ||
 {}).stageContextId ? "bottom" : "top";
}
```

7. Select **Done**.
   For more details, see Reflow for playbook components.

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Configure dynamic related records

System administrators can configure the dynamic related records feature to display related records in the contextual side panel in CSM Configurable Workspace. These records dynamically change based on the context of the current record or playbook activity.

Configuring the dynamic related records feature involves several types of records. See the following table for details about these record types.

- Related record contexts
- Related record definitions
- Context related record definitions

Dynamic related record types

Record type	Description
Related record context	Defines the context in which related records appear in the Related Records tab. You can create a related record context for the following types of records: • A source record, such as a customer service case • A playbook activity, such as adding additional members to an onboarding case A context record identifies the following information: • The table that contains the type of record for which related records are being configured. • Additional conditions that apply to the selected table. These conditions determine if the related record definitions for the selected table are executed at runtime. • The types of related records to display, such as SLAs or emails.
Related record definition	Identifies one specific type of data to be retrieved, such as SLAs or active contracts. You can create a related record definition for each type of data to include in the Related Records tab and then associate one or more definitions with a context record.
Context related record definition	Defines the relationship between a context record and its associated definition records. When you open a context record, you can see the associated definition records in the Context Related Record Definitions related list.

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For more information about these tables, including field descriptions, see Dynamic related record tables.

How the context and definition records work

The context record defines the context in which related records appear in the Related Records tab. This includes conditions to apply to the selected record type. For example, to create a context record for an onboarding playbook activity:

1. Select the table that stores the activity: **Activity Execution [sys_pd_activity_context]**.
2. Define additional conditions that apply to the selected table:
   - **[Activity.Process definition] [is] [Onboarding playbook]**
   - **[Activity] [is] [Add additional members]**
   These conditions determine if the related record definitions for the selected table are executed at runtime. If the conditions evaluate to true, the definitions are executed. If false, the definitions are ignored. If a context has no conditions, this evaluates to true.
3. Select the related record definitions to execute: **Additional Members**

At runtime, the system checks to see if there are related record contexts that match the current record or playbook activity.

- When it finds a match, the system evaluates the conditions defined in the context.
- If the conditions evaluate to true, the system executes the related record definitions for the context.

To continue with the example above, an agent using the Case Playbook for Onboarding is currently working on the activity to add additional members. The system performs the following actions to display the correct related records:

- Checks the active contexts and finds **Onboarding Additional Members**.
- Evaluates the conditions in the context and determines that they evaluate to true.
- Executes the **Additional Members** related record definition.
- Retrieves and displays the correct set of records from the table identified in the **Additional Members** related record definition. In this case, the Related Party [sn_customerservice_related_party] table.

The definition record uses a script to define which related records are retrieved based on the context. This record also includes the table where the related record data is stored. At runtime, the script evaluates the context of the current record or playbook activity, along with any conditions, and dynamically displays the related record data.

Dynamic related record configuration tasks

Configuring the dynamic related records feature includes the following tasks:

- Configure the related record contexts and definitions to identify which related records to display in the Related Records tab.
- Configure the card layout for the records displayed in the Related Records tab.
- Configure the maximum number of related records to display.

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Related Records list card layout

Records appear in the Related Records tab in a card format. This format is created with Entity View Action Mapper (EVAM), a ServiceNow AI Platform application that standardizes how different data sources display in cards and lists.

EVAM uses view configurations and view templates to determine how information for each type of related record is displayed.

- EVAM view configuration: Combines conditions, the table and table fields, and declarative actions with an associated view template.
- EVAM view template: Contains the JSON used to give the necessary information for the card display and use.

EVAM view configurations can be grouped together to create configuration bundles. The Dynamic Related Records for Configurable Workspace plugin includes a configuration bundle, *dynamic_related_records_bundle*, which contains view configurations and view templates for the dynamic related records feature.

The system administrator can modify the view configurations in the *dynamic_related_records_bundle* or create new view configurations. This includes selecting the fields that are displayed on the card for each type of record. For more information, see:

- Define an EVAM view configuration
- Define an EVAM view template

Related record definitions included with the plugin

The Dynamic Related Records for Configurable Workspace plugin includes several related record definitions for case records. To view a list of definitions, navigate to **Dynamic Related Record** > **Related Record Definitions**.

The system administrator can make any of these definitions available to agents by adding them to the related records shared page in UI Builder.

Related Record Definitions table

Related record definition	Description
SLAs	Displays SLAs for a case, including information from the following fields: • Stage • SLA definition • Start time • Business time left
Emails	Displays emails for a case, including information from the following fields: • Notification type • Subject

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Related Record Definitions table (continued)

Related record definition	Description
	• Recipient • Date created
Escalations	Displays escalations for a case or for the account and contact or consumer, including information from the following fields: • State • Number • Escalation severity • Source record
Blocked By	Displays blocking tasks for a case, including information from the following fields: • Blocking task • Blocking reason
Child Cases	Displays child cases related to a case, including information from the following fields: • Number • Short description • Account and contact • Consumer

Dynamic related records

Display related records in the Contextual side panel in CSM Configurable Workspace that dynamically change based on the context of the current record or playbook activity.

The dynamic related records feature provides customer service agents with easy access to the information they need when they need it. Agents can view related records in the Contextual side panel without navigating away from the current tab and searching for information in other related lists. This feature also enables users to display related records without requiring any type of reference or parent-child relationship.

Different types of agents can use dynamic related records to see different information. For example:

- A front-line agent creating a new case can see similar, recently opened cases.
- A middle-office agent reviewing a complaint case can see active contracts for the customer.
- A back-office agent can view emails for a selected playbook activity.

To view related records, click the Related Records tab in the Contextual side panel in CSM Configurable Workspace. Records appear in the Related Records list as read-only cards.

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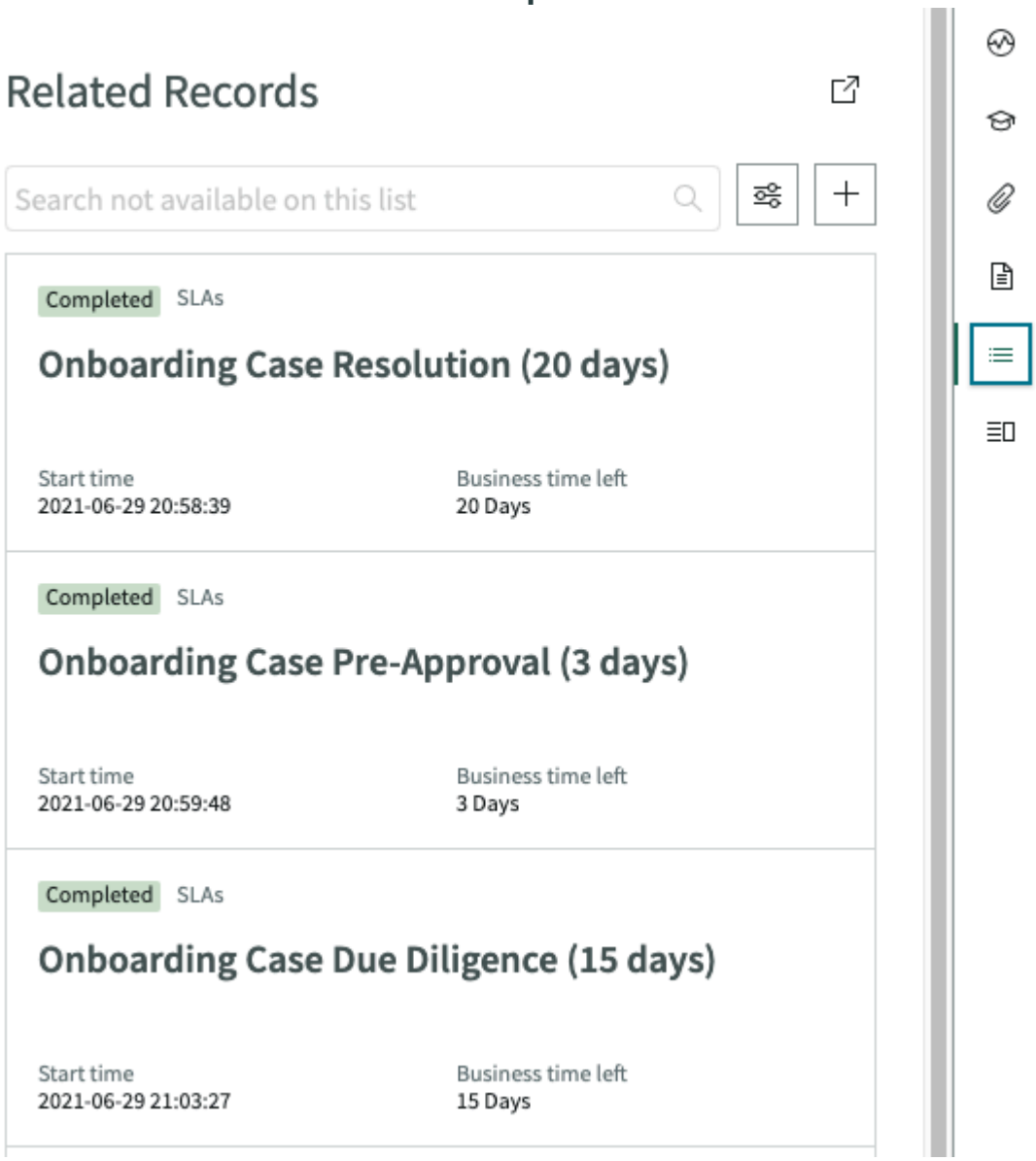
Related Records tab in the Contextual side panel



Configuring dynamic related records

System administrators can configure the dynamic related records feature and define the following information:

- Context records that specify the type of record for which related records are displayed, such as a case record or a playbook activity. A context can also specify any conditions for the record type that must be met in order for related records to be displayed.
- Definitions for each specific type of related record to display, such as SLAs or contracts.
- Relationships between context records and their associated definition records.

System administrators can also configure the related record card format. For more information, see Configuring dynamic related records.

Using dynamic related records

Agents can search the Related Records list by entering text in the search field or filter the list to display records of a specific type, such as SLAs or active customer contracts. Agents can expand

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a card to show more a more detailed view or open the list in a sub-tab. If agents have create permission, they can also create new related records of the selected type.

For more information about these agent actions, see Using the Related Records tab in the contextual side panel.

Dynamic related records plugin

The Dynamic Related Records for Configurable Workspace plugin (com.snc.uib.sn_dyn_rel_rec) is available from the ServiceNow Store.

Install any ServiceNow Store applications by requesting them 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.

This plugin provide agents with access to related information based on the context of the current record or playbook activity. System administrators can configure related record definitions that make data available in context to the action that the agent is performing.

This plugin adds the Dynamic Related Record menu and the following modules to the application navigator:

- Related Record Contexts
- Related Record Definitions

This plugin also adds several related record definitions. For more information, see Related record definitions included with the plugin.

Using dynamic related records with Playbooks for Customer Service Management

The Playbooks for Customer Service Management plugin (sn_csm_playbook) adds the dynamic related records feature to CSM Configurable Workspace. It also includes the Case context record and several related record definitions.

The Case Playbook for Onboarding, Case Playbook for Complaints, and Case Playbook for Product Support applications include additional context records and related record definitions.

Related topics

Configure dynamic related records

Using the Related Records tab in the contextual side panel

Using the Related Records tab in the contextual side panel

Agents can view, search, and sort the records in the Related Records tab in the contextual side panel.

The Related Records tab displays related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the Related Records tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

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Related Records tab in the contextual side panel

Task	Steps
View related records in the contextual side panel	Click the Related Records tab (☰) to view the Related Records list. Related records appear in the list in a card format. The initial set of records displayed in the list is determined by the record type selected in the filter at the top of the list.
Select the type of related record to view	Use the filter at the top of the Related Records list to select the type of related records to view. Agents can also use the filter to see the current selection. **1.** Click the filter icon ( ). **2.** Select a record type from the dropdown menu. The dropdown menu includes the related lists that have been configured for the parent record.
Search the related records list	Use the search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. **1.** Enter the search text in the search field at the top of the Related Records list. **2.** Click the search icon. **Note:** The search field is grayed out if search is not available for the selected type of related records.
Open a related record in a sub-tab	Click a card in the Related Records list to open the record in a sub-tab under the parent record. In the sub-tab, the agent can view the record details and perform available actions.
Open the related record list in a list view in a sub-tab	Click the list view icon ( ) to display the related records in a list view in a sub-tab under the parent record.
Create a new record for the selected related list	Create a new record for the record type currently selected in the Related Records list. This action opens a new record form in a sub-tab under the parent record. **1.** Click the create record icon ( ) at the top of the Related Records list. **2.** Fill in the fields on the record form and click **Save**.

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Related records shared page

The Related Records shared page enables you to view records that are related to the current record or playbook activity in the contextual side panel.

The ui_builder_admin role or administrator role can configure a record page in UI Builder and use the Related Records shared page to add a Related Records tab on the contextual side panel. The Related Records tab shows the list of related records in card format.

Use the Related Records shared page to display records from tables that have a configured relationship to the main record. This can include multiple types of related records such as SLAs, active contracts, and emails.

The Related Records shared page:

- is part of the Base Agent Workspace app shell.
- is a public page that is available in the page templates.
- is a generic page that can be embedded in the contextual side panel for any page.

For more information about the Related Records shared page, see the Related Records component information on the ServiceNow Developer Site.

Dynamic related record tables

The dynamic related records feature uses different tables to store context and definition information.

The following tables support the configuration of the dynamic related records feature. These tables extend the sys_metadata table.

Related Record Context table

Records in the Related Record Context [sn_related_record_context] table define the context in which related records appear in the Related Records tab. This includes the following information:

- The selected table. You can create context records for source records (such as customer service cases) or playbook activities (such as adding additional members to an onboarding case).
- Additional conditions that apply to the selected table. These conditions determine when the related record definitions for the selected table are executed.
- The related record definitions to execute. These definitions identify the data to be retrieved, such as SLAs or emails.

Related Record Context table fields

Field	Description
Name	The unique name of the context record.
Applies to table	The table that stores the record type for the context record. To display related records for a source record, select the table that stores the source record. For example, Case [sn_customerservice_case].

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Related Record Context table fields (continued)

Field	Description
	To display related records for a playbook activity, select the table that stores the activities: Activity Execution [sys_pd_activity_context].
Primary reference field	The primary field from the **Applies to table** that is passed to the Context Related Record Definition for evaluation. The value is used by the scripted query in the definition. The following data types are supported: • Sys ID • Doc ID • Reference
Secondary reference field	The secondary field from the **Applies to table** that is passed to the Context Related Record Definition for evaluation. The value is used by the scripted query in the definition. The following data types are supported: • Sys ID • Doc ID • Reference
Application	The application to which the context record applies. This is a read-only field.
Active	Enables the context record.
Inherited	When enabled, the context record also considers tables that extend from the **Applies to table**.
Conditions	Conditions that are applied to the records in the **Applies to table**.

Related Record Definition table

Records in the Related Record Definition [sn_related_record_definition] table identify one type of data to be retrieved, such as active contracts, case tasks, or SLAs. A definition record includes:

- The display label, which appears in the filter dropdown list in the Related Records tab.
- The table to be queried from. For example, the Email [sys_email] table.
- If needed, primary and secondary reference tables.
- Scripted conditions that further specify which fields to query from.

You can create definition records for each type of data to include in the Related Records tab and then associate the definitions with one or more context records.

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Related Record Definition table fields

Field	Description
Display label	The unique name of the related record definition. This label appears in the filter list in the Related Records tab.
Primary reference table	The primary table used in the definition script. At runtime, the script expects to get passed a record of this type. If you entered a data type in the **Primary reference field** in the related record context, enter the table for that data type.
Secondary reference table	The secondary table used in the definition script. At runtime, the script expects to get passed a record of this type. If you entered a data type in the **Secondary reference field** in the related record context, enter the table for that data type.
Application	The application to which the definition record applies. This is a read-only field.
Queries from	The table that stores the related record data to be retrieved.
Active	Enables the definition record. A definition must be active for the related records of that type to be displayed in the Related Records tab.
Script	Create a script that defines which records are retrieved based on the context.

Context Related Record Definition table

The Context Related Record Definition [sn_m2m_context_related_record_defn] table defines the relationship between a context record and its associated definition records.

When you open a context record, you can see the associated definition records in the Context Related Record Definitions related list.

Context and associated definition records

Field	Description
Related record context	The context record.
Related record definition	The name of the related record definition associated with the context record. The system uses this definition to determine which records to retrieve.
Application	The application to which the context record applies. This is a read-only field.
Order	The order determines where the related record type appears in the filter list in the Related Records tab. The order for this related record definition is compared with the order of the other definitions associated with the **Related record context** to determine the order of appearance in the filter list.

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Context and associated definition records (continued)

Field	Description
	If more than one context applies to a record, the system evaluates the order for all of the related record types. If there is a duplicate related record type, the system takes the record type with the lowest order value.
Active	Enables the **Related record definition** for this context record.

Configure related record contexts

This type of configuration record defines the context in which related records appear in the Related Records tab.

Before you begin

Role required: admin

About this task

In a related record context, the system administrator configures the following information:

- The table that stores the record type for the context. You can create a context for a source record, such as a case, or for a playbook activity.
- Conditions to apply to the selected table. These conditions determine if the related record definitions associated with this context are executed at runtime.
  - If the conditions evaluate to true, the system executes the related record definitions.
  - If the conditions evaluate to false, the system ignores these definitions.

  Note:
  If a context has no conditions, this evaluates to true.

- The related record definitions to execute. Associate a definition for each type of related record to display for this context.

Procedure

1. Navigate to **All** > **Dynamic Related Record** > **Related Record Contexts**.
2. Click **New**.
3. Enter a **Name** for the context record.
4. Select the table that stores the record type for the context in the **Applies to table** field.
5. In the **Primary reference field**, select the field from the **Applies to table** that is passed to the Context Related Record Definition for evaluation.
   The following data types are supported:
   - Sys ID
   - Doc ID
   - Reference
6. **Optional:** If desired, select another reference field from the **Applies to table** in the **Secondary reference field**.
7. Enable the **Inherited** field if you want the context record to also consider tables that extend from the **Applies to table**.

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8. Use the condition builder to select conditions that are applied to the records in the **Applies to table**.
   For example, if you are creating a context for a playbook activity, you can use the condition builder to identify the playbook and then the specific activity within that playbook.
9. Click **Submit**.
   The context is added to the Related Record Contexts list.

Associate related record definitions with a related record context

Associate the desired related record definitions with a context record to determine which related records appear for the selected record type.

Before you begin
Role required: admin

About this task
A related record context includes the following information:

- The table that stores the record type for the context (source record or playbook activity).
- Conditions to apply to the selected table which determine if the associated related record definitions are executed at runtime.
- The related record definitions to execute.

Procedure

1. Navigate to **All** > **Dynamic Related Record** > **Related Record Contexts**.
2. Click the desired context.
3. In the Context Related Record Definitions related list, click **New**.
   You may need to change the application in order to see the **New** button:
   a. Click the system settings icon in the upper right corner.
   b. Click **Developer**.
   c. Select the **Application** and close the pop-up window.
4. Click the lookup icon in the **Related record definition list**.
5. Select a definition from the Related Record Definitions list.
6. Assign an order number to the definition in the **Order** field.
   The order determines where the related record type appears in the filter list in the Related Records tab.
7. Click **Submit**.

Configure related record definitions

Related record definitions identify the types of records that the dynamic related records feature can display in the Related Records tab.

Before you begin
Role required: admin

About this task
The system administrator can create relate definitions and associate the desired definitions with a related record context. For example, the admin can associate SLA and escalation definitions with the Case related record context. Definitions can be associated with multiple contexts.

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The Dynamic Related Records for Configurable Workspace plugin includes several related record definitions for case records. For more information, see Related record definitions included with the plugin.

Procedure

1. Navigate to **All** > **Dynamic Related Record** > **Related Record Definitions**.
2. Click **New**.
3. Enter a name for the definition in the **Display label** field.
   This label appears in the filter dropdown list in the Related Records tab. Agents click the filter icon and select the type of related record to view in the Related Records list.
4. In the **Queries from** field, select the table that stores the related record data to be retrieved.
5. Select a table in the **Primary reference table** field.
   The primary table used in the definition script. At runtime, the script expects to get passed a record of this type. If you entered a data type in the **Primary reference field** in the related record context, enter the table for that data type.
6. **Optional:** If desired, select a table in the **Secondary reference table** field.
   The secondary table used in the definition script. At runtime, the script expects to get passed a record of this type. If you entered a data type in the **Secondary reference field** in the related record context, enter the table for that data type.
7. Use the **Script** field to define which records are retrieved based on the context.

   At runtime, the script evaluates the current record's context, along with any selected conditions, and dynamically displays the related records.
8. Click **Submit**.

Configure the maximum number of related records to display

Configure the maximum number of related records to display in the Related Records tab in the contextual side panel in CSM Configurable Workspace.

Before you begin

Role required: ui_builder_admin, admin

About this task

As part of configuring the Related Records shared page, the administrator can define the maximum number of related records that are displayed in the Related Records tab in the contextual side panel. This is defined as part of the UI Builder data transform configuration. The default value is 100 records.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the My experiences list, click the desired workspace.
3. In the Page menu, select **Record**.
   The Page menu is in the upper left corner of the UI Builder interface.
4. Click **Edit in original scope**.
5. In the Content list below the Page menu, click the **Contextual sidebar** component.
6. In the contextual sidebar configuration panel on the right side of the UI Builder interface, click the Config tab.
7. In the Tabs list, click **Related Record**.

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8. Click **Edit Content**.
9. Click the Data icon in the bar on the left side of the UI Builder interface.
10. Under Local data resource instances, click **Look Up Related Records**.
11. In the Configuration tab for the data resource, enter a value in the **Max results** field.
12. Click **Save**.

Configure Customer Central

Provide customer service agents with all the information about a customer in one central place by configuring the Customer Information and Customer Activity views for Customer Central.

Before you begin

Role required: admin

About this task

Customer Central provides customer service agents with all the information about the customer in one central place. It enables them to quickly zoom in on the customer issue and provide efficient and empathetic service to their customers.

Customer Central consists of two views, Customer Information and Customer Activity.

Note:
If you are using CSM Agent Workspace, Customer Central is displayed on the Interaction record. If you are using CSM Configurable Workspace, Customer Central is displayed on the interaction, account, contact, or consumer records. Both views are highly configurable and can be adapted to suit the needs of your business.

For more details, see Customer Central.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**.
3. In the Customer Central - Customer Information or Customer Central - Customer Activity category, view the list of tasks to configure the feature.

Customer central configuration tasks

Task	Description
Activate Customer Central	The Customer Central application (com.sn_csm_customer_central) is activated with the CSM Configurable Workspace application (com.snc.uib.csm_agent_workspace). The CSM Configurable Workspace application is activated with the Customer Service plugin (com.sn_customerservice). **Note:** Starting with the Yokohama release, the Customer Central application (com.sn_csm_customer_central) has moved to the ServiceNow Store.

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Task	Description
Configure the Customer Information view using the CSM Configurable Workspace	Configure the display of the Customer Information view using CSM Configurable Workspace.
Configure the Customer History view	Configure the display of the customer activity view.
Configure the Customer History component	Starting with the Yokohama release, the Customer History component displays customer activity information on some record pages in CSM Configurable Workspace.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Activate Customer Central

Activate the Customer Central plugin to use Customer Central.

About this task

Starting with the Yokohama release, the Customer Central application (com.sn_csm_customer_central) is activated with the CSM Configurable Workspace application (com.snc.uib.csm_agent_workspace). The CSM Configurable Workspace application is activated with the Customer Service plugin (com.sn_customerservice).

Starting with the Yokohama release, the Customer Central application (com.sn_csm_customer_central) has moved to the ServiceNow Store.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.sn_csm_customer_central.
3. Select **Activate**.

Note:
To use Customer Central demo data, activate the Customer Service Management Demo Data (com.snc.customerservice.demo) plugin.

Create data for Customer Central

When upgrading from an existing release, customers must run a fix script to create data for Customer Central.

Before you begin

Role required: admin

About this task

This task applies to customers who are upgrading their release version and installing Customer Central for the first time. Running the fix script creates data in the Activities table for Customer Central.

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Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Select the **Create activities for last N days data** fix script.
3. Select **Run Fix Script**.

Configure Customer Central properties

Set how many days you want to display data from in Customer Central.

Before you begin
Role required: admin

About this task
This property applies to both the Customer Information and Customer History views.

Procedure

1. Navigate to **All** > **Customer Central** > **Administration** > **Properties**.
2. Enter the number of days you want to display data from in Customer Central.
   The default is set to 30.

Configure the Customer Information view using CSM Agent Workspace

Configure the display of the Customer Information view using the CSM Agent Workspace.

Before you begin
Role required: admin

About this task
The Customer Information view displays all touch points that a customer has had with a contact center in the form of information cards.

Note:
The following steps can be used to configure the Customer Information view in the CSM Agent Workspace. This is the workspace that is configured using the ServiceNow AI Platform interface.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Customer Central - Customer Information category, view the list of tasks to configure the feature.

Customer Central - Customer Information configuration tasks

Task	Description
Configure your settings for the Customer Information view	Set the Customer Central properties as required.
Configure customer information lists	Configure the lists to display on the Customer Information view. For example, a list can be recent cases or recent chat interactions.

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Task	Description
Configure customer information reports	Configure which reports to display on the Customer Information view.
Configure customer information records	Configure the records to display on the Customer Information view. For example, a record could provide information on the contact or consumer.
Configure customer information report groups	Configure the groups of reports to display in a single section on the Customer Information view.
Configure customer information contexts	Associate each list, record, report, and report group configuration you created with a consumer or contact context, depending on who you want to display the information for.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Configure lists for the Customer Information view

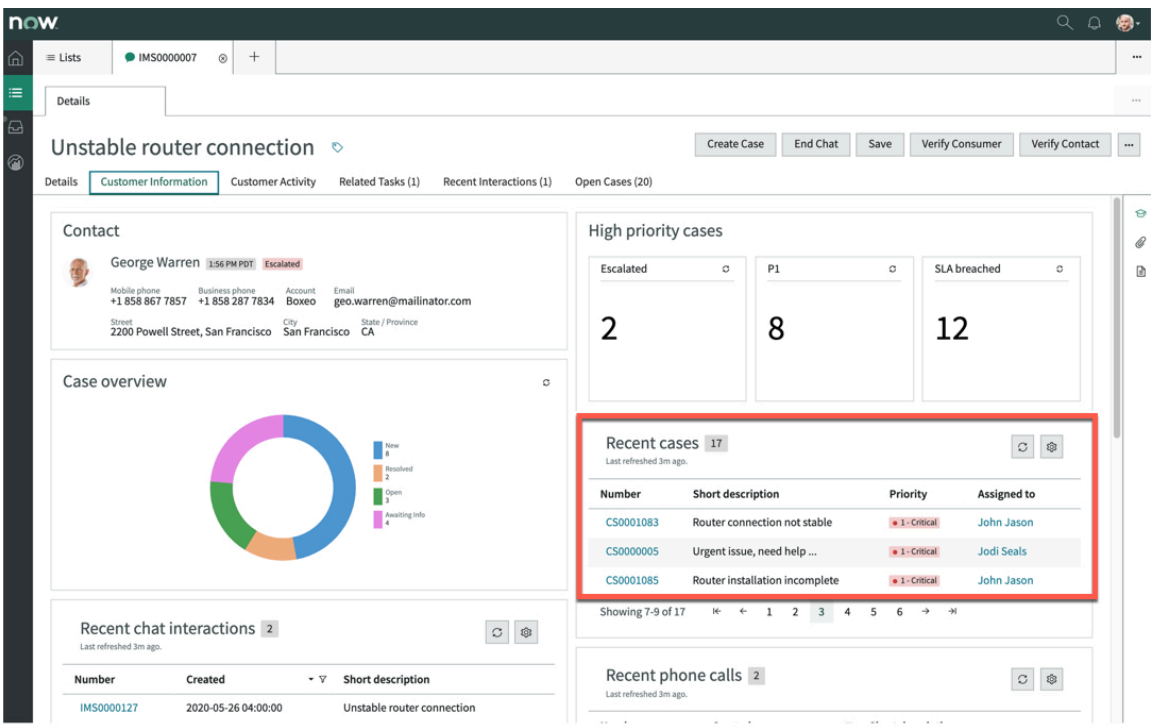
Configure lists for the Customer Information view.

Before you begin

Role required: admin

About this task

Lists are displayed in the Customer Information view in Agent Workspace.



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Procedure

1. Navigate to **All** > **Customer Central** > **Customer Information** > **List Configurations**.
2. Select **New**.
3. Fill out the fields, as required.

New lists configurations field description

Field	Description
Title	Enter a title for the list configuration.
Context table	Select a context table.

Relationship	Enter the relationship between the context and the list.
	a. To create a new relationship, click the Lookup icon and then New.
	b. Enter a name for the relationship.
	c. In the Applies to table, select either the contact or consumer context table.
	d. In the Queries from table select the table from which this list retrieves data.
	e. In **Query with**, type a script to specify the records to include from the table for the relationship queries. For example:
	`current.addQuery("contact", parent.sys_id);`
	`“contact” => is the name of the column in the list table that stores the context ID, for example, contact ID.`
	`“parent.sys_id” => is the unique key in the contact table that holds the contact record.`
	`Note: If building a new relationship, ensure that the exact column name from the list table that stores the context ID is specified here.`

View	Select the name of the view that has the set of columns to display for this list. For information on how to create a view, see Configure the list layout.

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Field	Description
List limit	Enter the number of records to display in the list. You can access the remaining records using pagination.

4. Select **Submit**.

Configure reports for the Customer Information view

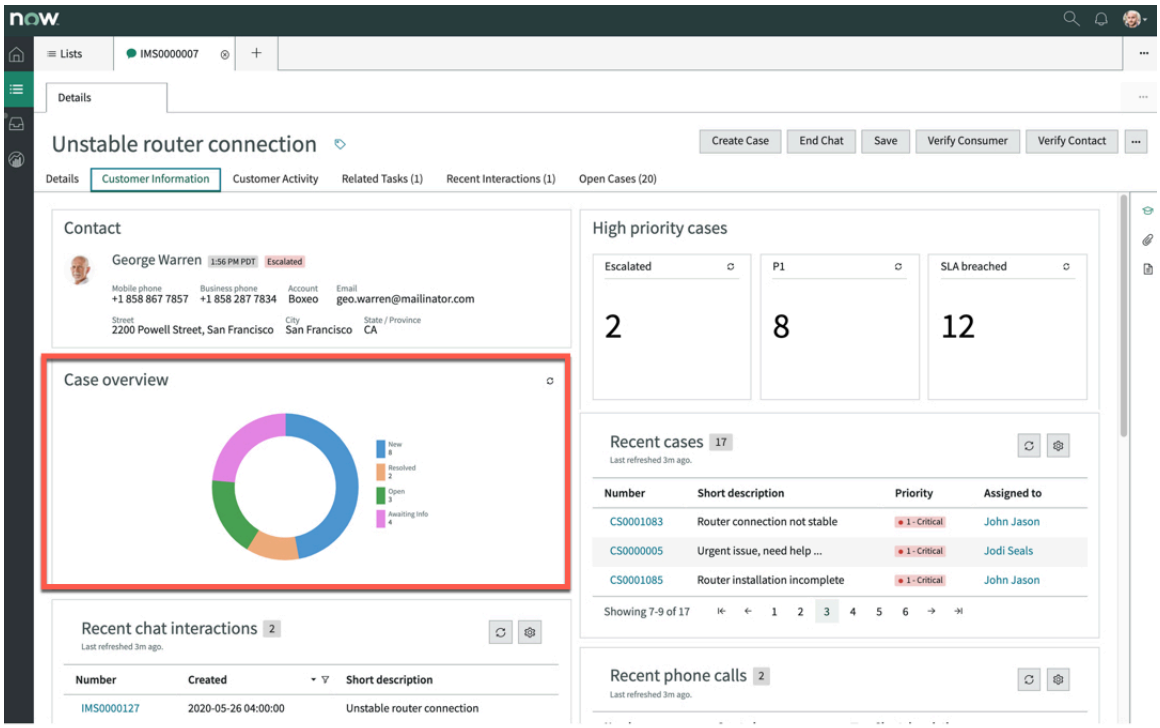
Configure which reports to display on the Customer Information view.

Before you begin

Role required: admin

About this task

Reports are displayed in the Customer Information view in Agent Workspace.



Procedure

1. Navigate to **All** > **Customer Central** > **Customer Information** > **Report Configurations**.
2. Select **New**.
3. Fill out the fields, as required.

Field	Description
Title	Enter a title for the report.
Context table	Select a Context table.

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Field	Description
	Note: For example, enter Contact if you want to display all the information about a customer contact.
Report	Select a report. **Note:** Only pie charts, doughnuts, and single score charts are supported.

Relationship	Enter the relationship between the context and the report.
	a. To create a new relationship, click the Lookup icon and then New.
	b. Enter a name for the relationship.
	c. In the Applies to table, select either the contact or consumer context table.
	d. In the Queries from table select the table from which this list retrieves data.
	e. In **Query with**, enter a script to build the relationship between the context table and the report table. You can also specify any filter conditions if needed. For example:
	`current.addQuery("contact", parent.sys_id);`
	`“contact” => is the name of the column in the report table that stores the context ID, for example, contact ID.`
	`“parent.sys_id” => is the unique key in the contact table that holds the contact record.`
	`Note: If building a new relationship, ensure that the exact column name from the report table that stores the context ID is specified here.`

4. Select **Submit**.

Configure records for the Customer Information view

Configure the records to display on the Customer Information view. For example, a record could provide information on the contact or consumer.

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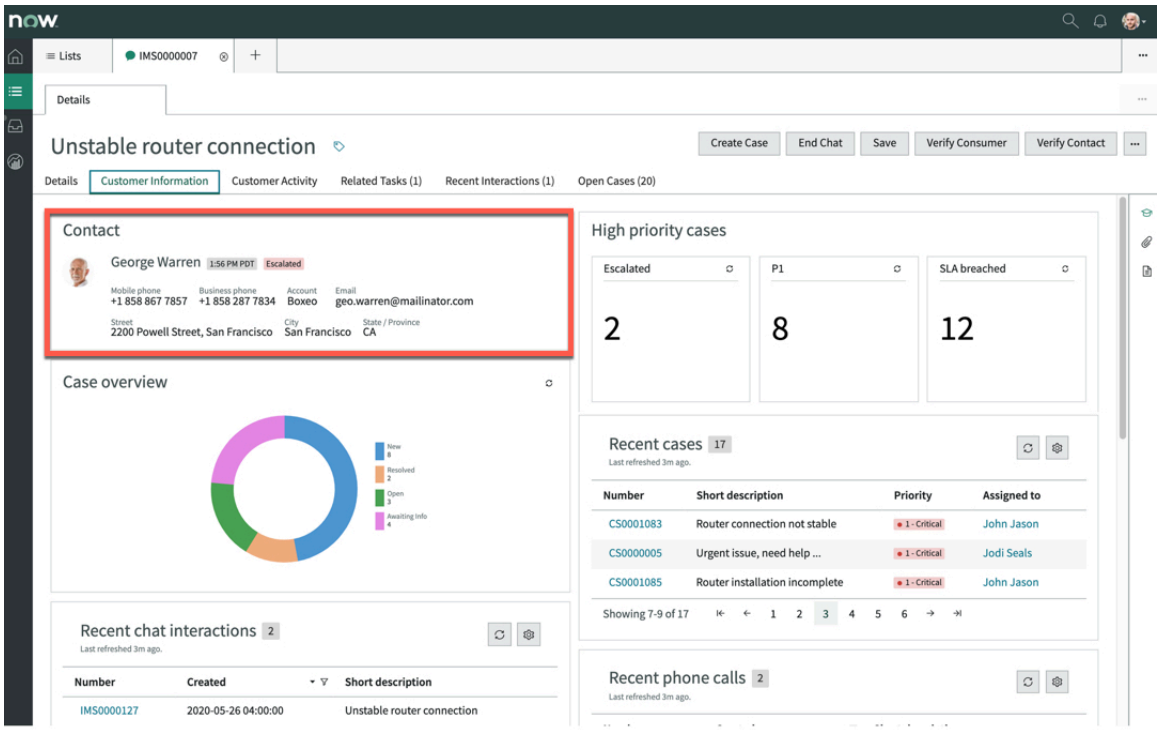
Before you begin

Role required: admin

About this task

Records are displayed in the Customer Information view in Agent Workspace.



Procedure

1. Navigate to **All** > **Customer Central** > **Customer Information** > **Record Configurations**.
2. Select **New**.
3. Fill out the fields, as required.

New record configurations field description

Field	Description
Title	Enter a title for the record.
Context table	Select a Context table. **Note:** For example, enter Contact if you want to display all the information about a customer contact.
Relationship	Enter the relationship between the context and the record. **a.** To create a new relationship, click the Lookup icon and then New. **b.** Enter a name for the relationship. **c.** In the Applies to table, select the table on which the list appears.

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Field	Description

	Note:
	Enter either contact or consumer.
	
	d. In the Queries from table select the table from which this list retrieves data.
	
	e. In **Query with**, enter a script to build the relationship between the context table and the record table. You can also specify any filter conditions if needed. For example:
	
	`current.addQuery('sys_id', parent.sys_id);`
	
	`“sys_id” => is the name of the column in the record table that stores the context ID, for example, contact ID.`
	`“parent.sys_id” => is the unique key in the contact table that holds the contact record.`
	`Note: If building a new relationship, ensure that the exact column name from the record table that stores the context ID is specified here.`

Fields	Select the fields to display on the record.

4. Select **Submit**.

Configure report groups for the Customer Information view

Configure the groups of reports to display in a single section on the Customer Information view.

Before you begin
Role required: admin

About this task
Report groups are displayed in the Customer Information view in Agent Workspace.

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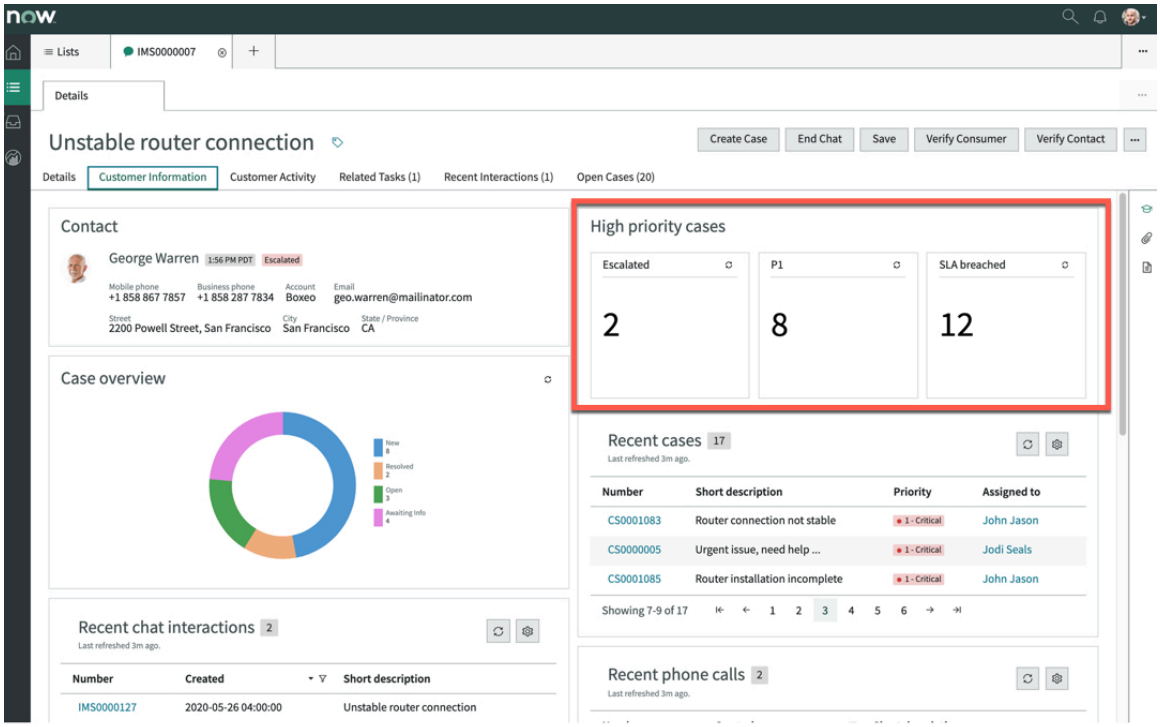

Procedure

1. Navigate to **All** > **Customer Central** > **Customer Information** > **Report Group Configurations**.
2. Select **New**.
3. Fill out the fields, as required.

Report Group configurations form fields and descriptions

Field	Description
Title	Enter a title for the report group.
Context table	Select a Context table. **Note:** For example, enter Contact if you want all the information about a customer contact to be displayed.
Report configurations	Select the list of reports to be displayed in the group.

4. Select **Submit**.

Configure customer information contexts for the Customer Information view

Associate each list, record, report, and report group configuration you created with a consumer or contact context, depending on who you want to display the information for.

Before you begin

Role required: admin

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About this task
Configure customer information cards to display each of the list, record, or report configurations for a consumer or contact. Each customer information card corresponds to a card on the Customer Information view.

Procedure
1. Navigate to **All** > **Customer Central** > **Customer Information** > **Customer Information Contexts**.
2. Select the contact or consumer record that you want to add your configuration to.
3. On the Customer Information Cards related list, select **New**.
4. Add your configuration to create a customer information card.
5. Select **Submit**.

Note:
Repeat these steps for every configuration that you want to add to the contact or consumer record. You can also change the layout and order in which to display the cards on the Customer Information view.

Configure the Customer Information view using the CSM Configurable Workspace

Configure the display of the Customer Information view using the CSM Configurable Workspace.

Before you begin
Role required: admin

About this task
The Customer Information view displays all touch points that a customer has had with a contact center in the form of information cards.

Note:
The following steps can be used to configure the Customer Information view in the CSM Configurable Agent Workspace. This is the workspace that is configured using UI Builder, introduced in the Quebec release.

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Customer Central - Customer Information for CSM Configurable Workspace category, view the list of tasks to configure the feature.

Customer Central - Customer Information for CSM Configurable Workspace configuration tasks

Task	Description
Configure your settings for the Customer Information view	Set the Customer Central properties as required.
Configure customer information lists	Configure the lists to display on the Customer Information view. For example, a list can be recent cases or recent chat interactions.
Configure customer information reports	Configure which reports to display on the Customer Information view.

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Task	Description
Configure customer contact cards	Configure the contact card to display contact information on the Customer Information view. For example, a contact card could provide information on the contact,consumer, or account.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Configure the Customer History view

Configure the display of the Customer History view.

Before you begin

Role required: admin

> **Note:**
> Customer Activity has been renamed to Customer History, with no changes to its functionality. References to the previous name will be updated in a future release.

About this task

The Customer History view provides customer service agents an overview of all interaction that a customer has had with a contact center in the form of an activity feed.

There are two panels on the Customer History view. On the left, the facets categorize the customer touch points and a customer service agent can filter to display the data they want. On the right, the activity feed displays more detailed information on each of the facets in reverse chronological order.

Procedure

1. Navigate to **All** > **Customer Central** > **Customer Activity** > **Guided Setup**.
2. On the Customer History Configuration page of the guided setup, view the list of tasks listed in the following order.

   Select **Get Started** beside each block to configure the features.

   a. Customer History Properties

   b. Activity Feed

   c. Activity Contexts

Customer History configuration tasks

Task	Description
Configure Customer Central properties	Set the Customer History view system properties as required.
Configure activity types	Create an activity type to display in the activity feed on the Customer Activity view.
Configure activity groups	Create an activity group and then add activity types to the activity group.

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Task	Description
Configure activity type templates	Create an activity type template to define how to display the activity type data on each of the activity tiles in the activity feed.
Configure activity contexts	Add the activity groups and activity types you created to an activity context, depending on who you want to display the information for and create facets to group the data.
Create facets for activity contexts	Create facets to group the data and enable customer service agents to filter and display the data they want to see in the activity feed.

3. To perform a task, select **Configure**.

Configure activity types for the Customer History view

Create an activity type to display in the activity feed on the Customer History view.

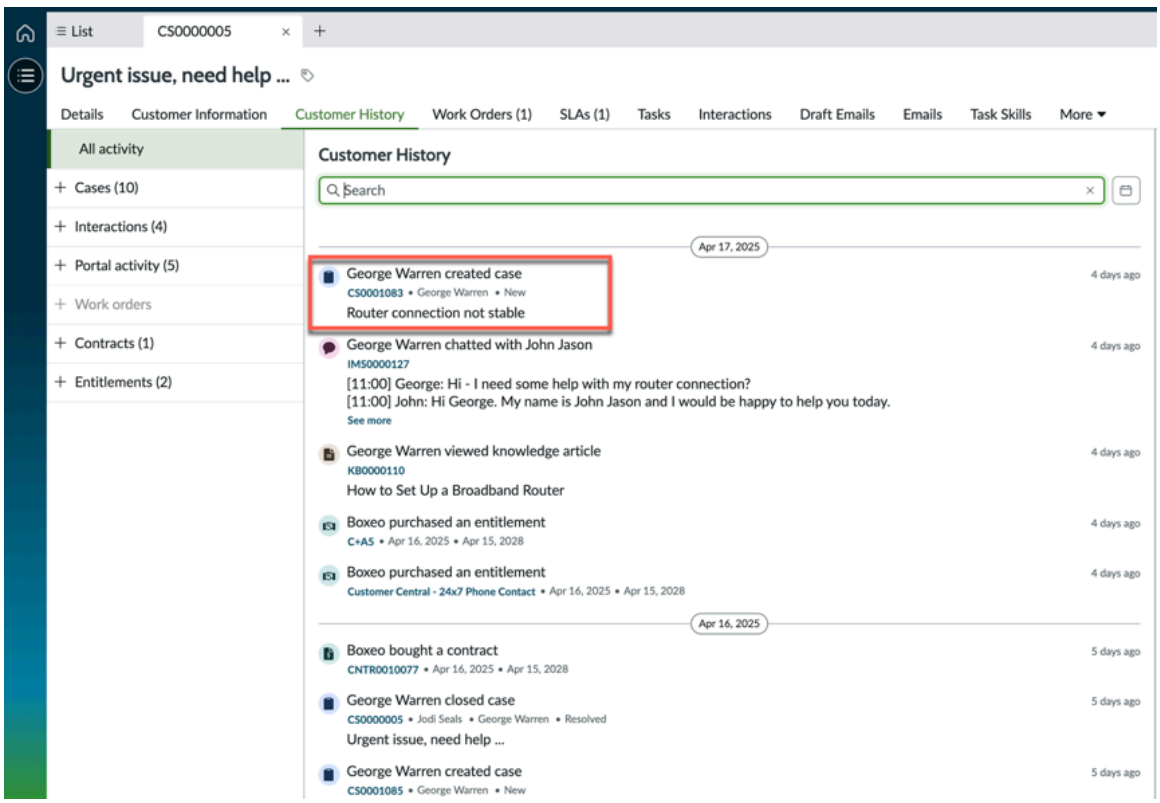
Before you begin

Role required: admin

Note:
Customer Activity has been renamed to Customer History, with no changes to its functionality. References to the previous name will be updated in a future release.

About this task

An activity type is an action that a contact or consumer performs. These actions are displayed in the activity feed on the Customer History view.
Activity types are displayed in the Customer History view in Agent Workspace.



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Procedure

1. Navigate to **All** > **Customer Central** > **Customer Activity** > **Guided Setup**.
2. Select **Get Started** under Activity Feed.
3. Select **Configure** beside Activity Types.
4. Select **New**.
5. Fill out the fields, as required.

New Activity Types field description

Field	Description
Short description	Enter a name for the activity.
Activity message	Enter the message that is displayed on the activity tile in the activity feed. **Note:** If the message is not yet defined, you can create a message. Refer to the video above on how to create a message.
Activity source	Enter the table on which the activity is performed. For example, if creating a case is the activity, the Case table is the Activity Source.
Actor	Enter the person performing the activity.
Object	Select an Object, which is the unique key that identifies the object on which the activity is performed.
Filter conditions	Specify any condition that must be met for the activity to be displayed in the activity feed.
Active	Deselect the **Active** check box to not display the activities corresponding to this type in the activity feed. **Note:** If you deselect this check box, deselect the corresponding facet. If not, the facet displays with no data.
Verb	Select a verb that describes the activity performed. **Note:** If the verb is not yet defined, you can create a verb. Refer to the video above on how to create a verb.

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Field	Description
Target	Select the second person involved in the activity. Not all activities have a second person.

6. Select **Submit**.

Note:
Once you create a new activity type, a new business rule is created.

7. After submitting, you can configure the business rule in one of two ways:
   - Select the link to the business rule in the notification message.
   - Go to the Activity Feed page and select **Configure** beside the Business Rule section.

Note:
Configuring the business rule is optional. The business rule is required to create a record in a central activity table each time the action is performed. The central activity table improves the performance of rendering the feed during runtime. Create a business rule for each activity type.

8. In the Advanced tab, update the script.
   The following is an example script.

```
var actSubCtx =
 global.ActivitySubscriptionContext.getContext();
if (current.contact) {
    actSubCtx.getActivityService().createActivity(current,
 verb, "", "", "", module);
}
current: current variable in business rules holds the
 GlideRecord of the table on which the business rules is
 triggered. If this business rule is on Case table, current
 will hold the GlideRecord of the case.
verb: verb that is configured in the Verb field of the created
 activity type
module: module that is configured in the Module field of the
 created activity type
Note: If there is already a Create Activity business rule, a
 notification message will also be displayed. You can update
 the script as required.
```

Configure activity groups for the Customer History view

Create an activity group and then add activity types to the activity group.

Before you begin

Role required: admin

Note:
Customer Activity has been renamed to Customer History, with no changes to its functionality. References to the previous name will be updated in a future release.

About this task

An activity group is a logical grouping of activity types. An activity group is displayed in the activity feed based on the facet selected.

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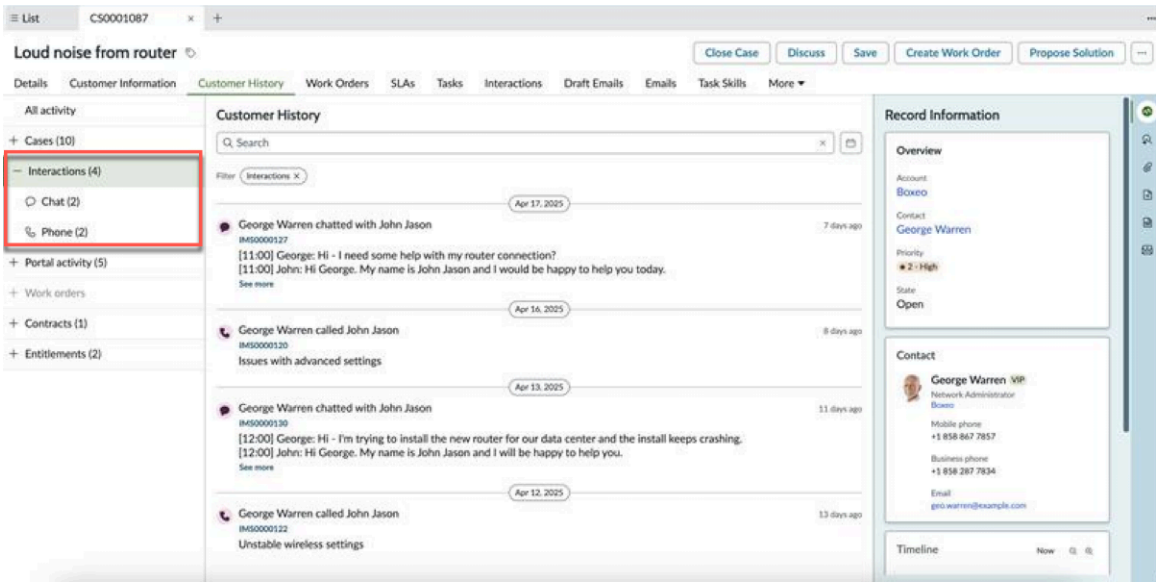
Activity groups are displayed in the Customer History view in Agent Workspace.



Learn more about configuring activity groups from the following video tutorial. Configure activity groups

Procedure

1. Navigate to **All** > **Customer Central** > **Customer Activity** > **Guided Setup**.
2. Select **Get Started** under Activity Feed.
3. Select **Configure** beside Activity Groups.
4. Select **New**.
5. Fill out the fields, as required.

New Activity Groups field description

Field	Description
Name	Select a name for the activity group.
Table name	Select the table that stores the object on which the activities in this group are performed. Usually, it is the same as the Activity Source selected in the Activity Type.

6. Once you have created an activity group, select it from the Activity Group list and add the activity types to the group.
7. On the Activity Types related list, select **New**.
8. Fill out the fields, as required.

New Activity Types field description

Field	Description
Activity type	Select the activity type you want to add to the activity group.

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Field	Description
Activity group field	Select the field from the Activity Source table that identifies the object in the table associated to the Activity Group.

9. Select **Submit**.

Configure activity type templates for the Customer History view

Create an activity type template to define how to display the activity type data on each of the activity tiles in the activity feed.

Learn more about configuring activity type templates from the following video tutorial. Configure activity type templates

Before you begin
Role required: admin

Note:
Customer Activity has been renamed to Customer History, with no changes to its functionality. References to the previous name will be updated in a future release.

About this task
You can define which fields are displayed, where it is displayed on the tile, and the order of the display.

Procedure
1. Navigate to **All** > **Customer Central** > **Customer Activity** > **Guided Setup**.
2. Select **Get Started** under Activity Feed.
3. Select **Configure** beside Activity Type Templates.
4. Select **New**.
5. Fill out the fields, as required.

Activity Type templates field description

Field	Description
Name	Enter a name for the template.
Activity Type	Select the activity type to add the template for.
Icon	Select an icon to use for the activity type.

6. Select **Submit**.
7. Once you have created an activity type template, select it from the Activity Type Template list to configure the fields and order of fields to display.
8. Select New to create template fields for the activity type.
9. Fill out the fields, as required.

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New Activity Type template field description

Field	Description
Type	Select a Type to determine whether you want to select fields from the activity source or activity group table.
Field	Select the field you want to add. **Note:** You cannot configure HTML fields for display in the subheader on the activity tile.
Show label	Select this check box to show the field label on the activity tile.
Position	Select the Position to determine whether the field should appear as content or as a sub-header on the activity tile. **Note:** Only one field is displayed as content on the activity tile.
Order	Select the order the field should appear on the activity tile.
Enable link to activity group record	Select this check box to display the field as a link to the activity group record.
Display as time ago	Select this check box to display the field in time ago format. **Note:** This field only applies to fields including time or date information.
Content icon	Icon for the content displayed on a tile. **Note:** This field is only displayed when Content is selected in the Position field.
Content tooltip	Tooltip for the icon displayed on a tile. **Note:** This field is only displayed when Content is selected in the Position field.
Condition	Condition that applies to the selected field. For example, in the transcript activity type template, you can configure a condition to

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Field	Description
	show transcript when the Chat Summary field is empty.

10. Select **Submit**.

Associate activity groups and activity types to activity contexts

Add the activity groups and activity types that you created to an activity context, depending on who you want to display the information for.

Associate an activity group to an activity context

Learn more about associating an activity group to an activity context from the following video tutorial.

Associate an activity type to an activity context

Learn more about associating an activity type to an activity context from the following video tutorial.

Before you begin

Role required: admin

Note:
Customer Activity has been renamed to Customer History, with no changes to its functionality. References to the previous name will be updated in a future release.

About this task

An activity context is the person or user who is interacting with the customer service agent. There are two predefined activity contexts: consumer and contact. Add the activity groups and activity types that you created to the activity context, depending on who you want to display the information for.

Procedure

1. Navigate to **All** > **Customer Central** > **Customer Activity** > **Guided Setup**.
2. Select **Get Started** under Activity Contexts.
3. Select **Configure** beside Activity Context Groups.
4. Open the contact or consumer record that you want to add your configuration to.
5. On the Activity Context Groups related list, select **New**.
6. Add the activity group.
7. On the Activity Context Types related list, select **New**.
8. Fill out the fields, as required.

Activity context types related list field description

Field	Description
Activity type	Add the activity type.
Fetch from activities	Deselect Fetch from Activities if a business rule isn't defined for this activity type.

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Field	Description
Filter conditions	Add filter criteria to apply filter conditions on the source table.
Source mapping field	Select the field in the Source table that is related to the context.
Context mapping field	Select the field in the Context table to map to the field selected in **Source mapping** field.
Advanced mapping	Select Advanced Mapping and write a script in the **Advanced mapping script** field if the source and context mapping isn't sufficient.

9. Select **Submit**.

Create facets for activity contexts

Create facets to group the data and enable customer service agents to filter and display the data they want to see in the activity feed.

Defining and associating facets to contexts

Learn more about configuring facets from the following video tutorial.

Before you begin

- Role required: admin
- Ensure that the application scope is set to Customer Central.

Note:
Customer Activity has been renamed to Customer History, with no changes to its functionality. References to the previous name will be updated in a future release.

About this task

An activity context is the person or user who is interacting with the customer service agent. There are two predefined activity contexts: consumer and contact. Facets group the data, which enables customer service agents to filter and display the data they want to see in the activity feed. Each facet represents an activity group.
Facets are displayed in the Customer History view in Agent Workspace. Dynamic facets display record details associated with the facet.

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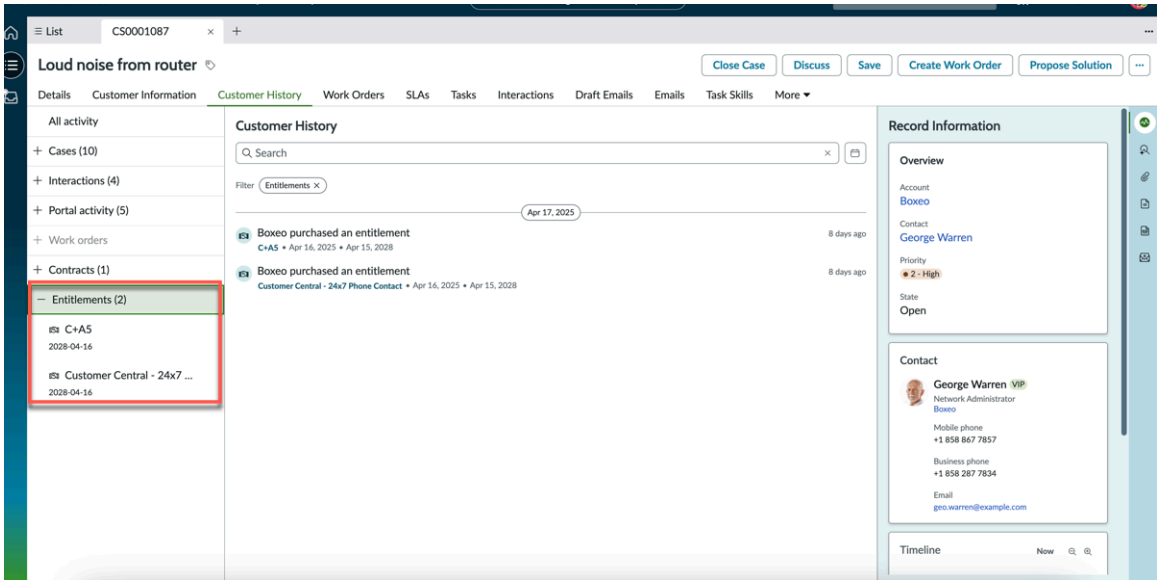
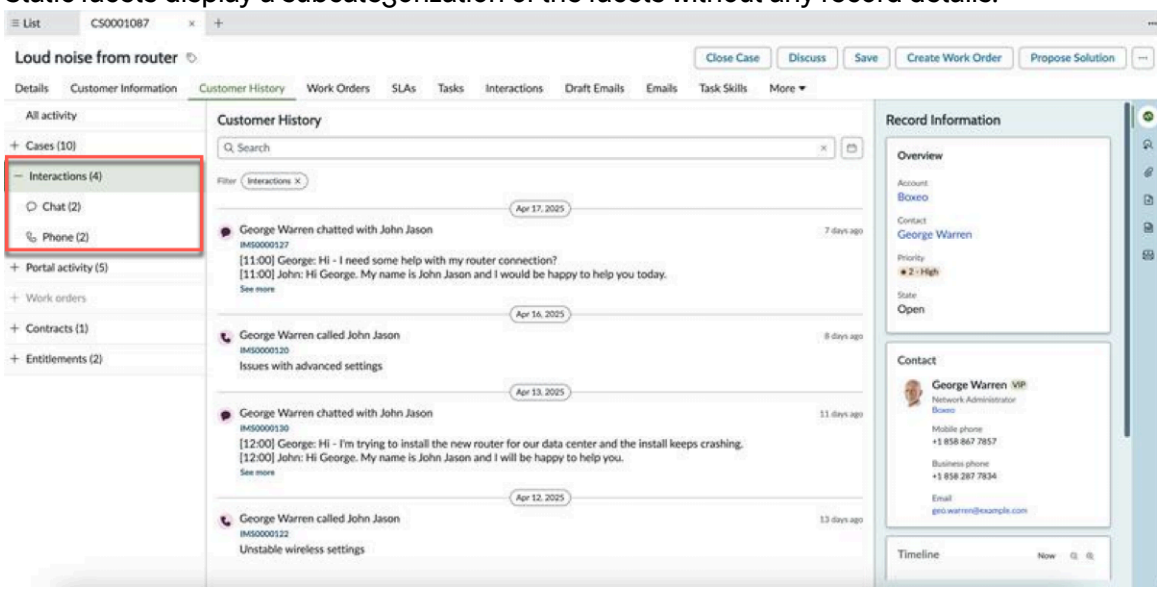


Static facets display a subcategorization of the facets without any record details.



Procedure

1. Navigate to **All** > **Customer Central** > **Customer Activity** > **Guided Setup**.
2. Select **Get Started** under Activity Contexts.

> **Note:**
> The Get Started button becomes active only after you complete all configurations and select Mark as Complete in the previous sections.

3. Select **Configure** beside Facets.
4. Open the contact or consumer record that you want to create facets for.
5. On the Facets related list, select **New**.

> **Note:**
> Ensure that the application scope is set to Customer Central. The New button only appears under this scope.

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6. Fill out the fields, as required.

New activity contexts field description

Field	Description
Name	Enter a Name for the facet. This is the name of the facet that appears on the Customer Activity view.
Activity context group	Add an activity context group for the facet.
Facet type	Select whether the facet is dynamic or static. Dynamic displays record details associated with the facet. Static displays a subcategorization of the facets without any record details. Static facets can also be associated to a facet group.
Order	Enter the order the facet should appear in.
Facet group	If you selected facet type Static, associate the facet to a group. If you associate the facet to a facet group, this facet becomes a subcategory of the facet group you selected.
Icon	Select an icon for the facet.
Facet title	If you selected facet type Dynamic, choose the field of the record to display as the facet title.
Facet fields	If you selected facet type Dynamic, select the fields to display for each record.

7. Select **Submit**.

Configure the Customer Service mobile application

Configure the Customer Service mobile application and customize it for agents who use the application instance on their mobile devices.

Before you begin

Role required: admin

About this task

The Customer Service Mobile plugin (com.sn_csm_mobile) enables the Customer Service mobile application.

Procedure

1. Navigate to **All** > **System Applications** > **Studio**.
2. In the **Select Application** pop-up window, click **Customer Service Mobile**.

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The Customer Service mobile application opens in the Studio, which is a guided app creator. For more information about using the Studio, Legacy - ServiceNow Studio.

3. Customize the application to display the desired applets and data and configure agent actions and notifications.

Enable communication channels

Set up multiple communication channels so that customers can contact you through their preferred methods.

Communication channels

Configure communication channels, such as email, call, chat, or social media.

Chat Zoom Connector

Use Chat Zoom Connector to enable customers to engage better using video and screen sharing options.

Omnichannel Callback

Set up Omnichannel Callback for Customer Service Management to enable your customers to request a voice or video callback.

Engagement Messenger

Set up Engagement Messenger to enable your users to find the information or service that they need from third-party web applications.

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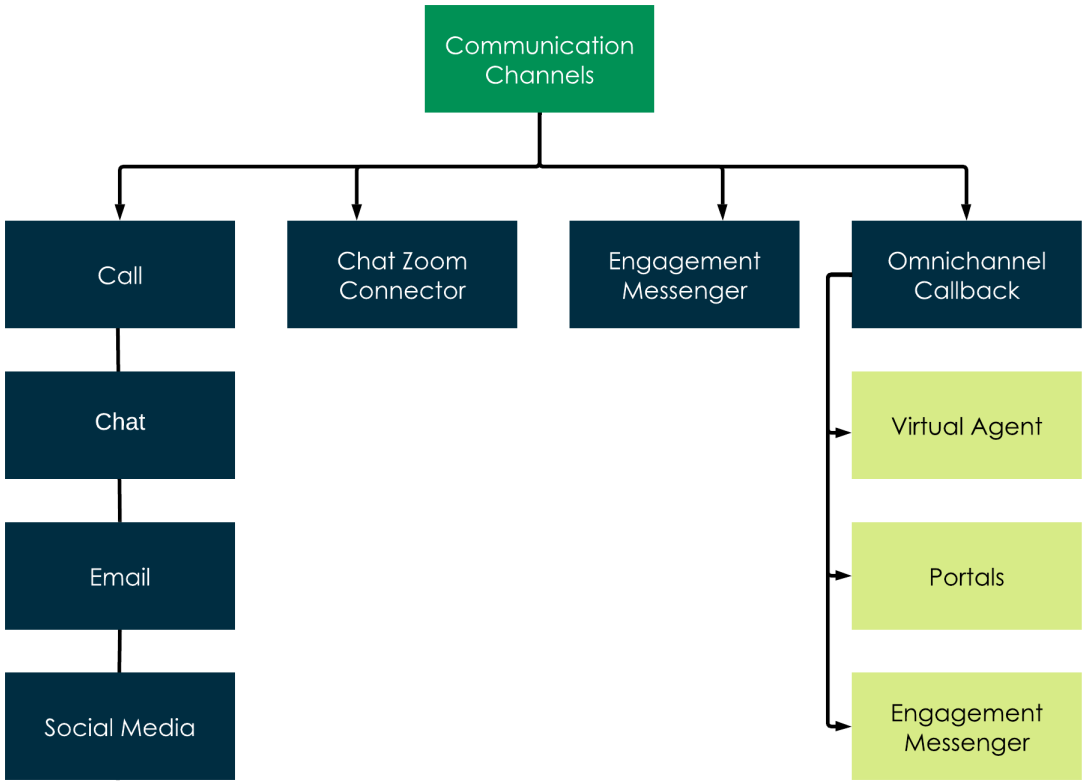
Communication channels overview



Communication channels

Configure communication channels for users to email, call, or chat, and integrate social media channels. This ensures users can reach your team through their preferred method for assistance.

Chat Zoom connector

Install and set up the Chat Zoom Connector to enhance customer engagement with video and screen sharing options. This application enables you to start Zoom meetings directly from a chat for more effective communication.

Engagement Messenger

Learn about the stages to set up Engagement Messenger, then install and configure it to access information and services from third-party web applications via your customer portal. This setup helps streamline your workflow and enhance your experience.

Omnichannel Callback

Set up and configure Omnichannel Callback for Customer Service Management to enable customers to request voice or video callbacks. Customize the feature to meet your organization's needs, enhancing customer experience and optimizing case resolution efficiency.

Configure communication channels

Configure communication channels to provide users with options to email, call, or chat with your teams for help. You can also integrate with social media.

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Before you begin
Role required: admin

About this task
You have the following options for setting up communication channels:

Procedure
- Set up the Customer Service email channel.
  Customers can send emails to create new cases and update current cases as well as receive email updates from agents as cases progress. Customer Service Management uses the ServiceNow email accounts feature to create and maintain email accounts.
  - Configure one or more email addresses.
  - Configure an email address for a product.
  - Configure an email subject line prefix
  - Set email communication channel properties
  - Create an email client template.
  - Create quick messages.
  - Create rules for incoming emails and create and assign cases.
- Set up the Customer Service phone channel.
  External customers can reach out to customer service agents using the phone communication channel. Customer Service Management uses both Computer Telephony Integration (CTI) and OpenFrame to provide phone support for customers, as well as the Notify application and the Twilio Voice product.

  OpenFrame is included with Customer Service Management. The CTI Softphone plugin (com.snc.cti) and the Customer Service CTI Demo Data (com.snc.customerservice_cti_demo) plugin must be activated separately. The Notify plugin (com.snc.notify) is activated as part of the CTI Softphone plugin.
  - Set up the phone communication channel.
  - Associate a phone number with a workflow.
  - Create an OpenFrame configuration.
- Set up the Customer Service chat channel.
  The chat communication channel uses the Connect Support feature to provide chat capability from the Customer Service Portal and Consumer Service Portal. You can also enable Virtual Agent to create or use predefined chatbot topics (conversations) for your users.
  - Configure the customer service chat queue.
  - Add an agent to the chat support assignment group.
  - Activate Virtual Agent for CSM
  - Activate Customer Service Virtual Agent conversations.
  - Integrate Customer Service Virtual Agent with Facebook Messenger.
- Set up the social media integration feature to support case resolution through social media channels.
  - Create a social media profile for an account, contact, or consumer.
  - Create a social media log entry for a case.

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Configuring the chat channel

Configure the chat channel with the ServiceNow® Connect Support feature. You can also enable Virtual Agent to create or use predefined chatbot topics (conversations) for your users. You can also give users the option of switching to a live agent from a virtual agent.

Agents must be added to the Customer Service chat support assignment group before they can receive chat requests. This assignment group is used by the Customer Service chat queue to route the chat requests.

For more information, see Connect Support and Virtual Agent.

Pre-chat surveys

Use pre-chat surveys to capture preliminary information from a customer. From the responses received, Advanced Work Assignment (AWA) routes chat conversations to appropriate queues and groups. Before entering into a chat conversation, the assigned agent can review the context of the issue.

Pre-chat features

Pre-chat surveys provide the following advantages that help agents efficiently handle chat conversations:

Preconfigured pre-chat surveys

Pre-chat surveys determine the pre-chat questions presented to users. Preconfigured surveys are activated by default in the base system, but in order to avoid conflicts with previous configurations, customers who have upgraded have to manually activate them. These preconfigured surveys are:

- CSP Pre-Chat Survey - Collects preliminary information for logged-in customers.
- CSP Anonymous Pre-Chat Survey – Collects preliminary information for users who are not logged in.

You can define a different survey or modify these predefined surveys. For more information, see Create chat surveys.

Routing chats to the correct queue

Advanced Work Assignment (AWA) leverages information captured through pre-chat surveys to route a chat to the right queue. For more information, see Work item queues.

Identifying topics related to the chat issue

When customers enter a response to the standard pre-chat question "Please briefly describe your issue," Natural Language Understanding can help determine the appropriate Virtual Agent conversation topic. Relevant topics are automatically displayed to end users (requesters) rather than prompting them to choose from a list of conversation topics. For more information, see Define context topic intent configurations.

Configuring Pre-chat if you have upgraded

Some settings need to be configured if you have upgraded your ServiceNow® instance. For more information, see Configure Pre-chat after upgrading.

Plugins

You must activate the Consumer Service Portal (com.glide.service-portal.consumer-portal) and Glide Conversation Server (com.glide.cs) plugins. To activate the plugins, see Activate a plugin.

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Related topics

Pre-chat from the Consumer Service Portal

Configure the customer service chat queue

Define the customer service agents, default chat messages, schedule, and escalation path for the customer service chat queue.

Before you begin

Role required: admin

About this task

The Customer Service Management chat communication channel uses the ServiceNow Connect Support feature.

Procedure

1. Navigate to **All** > **Collaborate** > **Administration** > **Queues**.
2. Select **Customer Service** from the Chat Queues list.
3. Fill in the fields, as appropriate.

Chat Queue form

Field	Description
Name	Name of the queue.
Active	Not used in Connect.
Assignment group	User group that contains the support staff for the queue. Any user in the group can view the queue in the Connect sidebar and accept chats. No other users can access the queue. This field must be populated.
Average wait time	Average time it takes for an agent to accept a chat in the queue. This value is automatically calculated. Do not manually edit.
Confirm problem	Not used in Connect.
Escalate to	Different queue to which an agent can escalate a chat. For example, there is a queue for high priority support chats. When a queue is defined in this field, agents can access the **Escalate** option in conversations.
Initial agent response	Message that users see when an agent accepts their chat. For example, **Thank you for contacting support. We are looking into your question now and will be with you shortly.**
Not available	Message that users see when they attempt to start a chat outside the defined queue **Schedule**. You can use HTML to format the message and include links or media.
Question	Initial phrase that users see when they start a new chat in the queue. For example, **How can I help you?**
Schedule	Schedule that defines when the queue is available. Leave the field blank to make the queue available all the time. Users cannot start a new conversation in the queue outside the schedule hours.

4. Click **Submit**.

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Related topics

Connect Support

Activate Virtual Agent for CSM

Activate Virtual Agent for CSM to use the predefined Customer Service Virtual Agent topics (chatbot conversations) designed to help your customers complete common self-service tasks.

Before you begin

The Virtual Agent plugin (com.glide.cs.chatbot) must be activated. If the Virtual Agent isn't currently activated, contact ServiceNow to activate it.

Role required: admin

Procedure

Activate the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent) to access the predefined Customer Service topics.

Customer Service Virtual Agent conversations

Predefined Customer Service Virtual Agent chatbot conversations enable your customers to get help with the product. Integrating Natural Language Understanding (NLU) models with your virtual agent chatbot topics enables chatbots to analyze, understand, and navigate the user to the right topic based on the inferred intent.

A conversation topic defines the dialog between the Virtual Agent (chatbot) and the user to accomplish a specific goal.

Activating Virtual Agent conversations

The system administrator or a virtual agent admin must do the following to enable the chatbot conversations:

- Enable the Glide Virtual Agent plugin (com.glide.cs.chatbot).
- Enable the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent).
- Publish the following read-only pre-defined virtual agent chatbot topics and topic blocks:

  Note:
  You can duplicate a topic and then customize it.

  - Check Case Status (Template)

    Users can search cases and check the status of an existing case.

  - Get Help with a Product (Template)

    Users can get help on an issue with a product, search relevant knowledge articles, or create a case for the issue.

  - Get Help (Template)

    This topic is for users who are not logged in and want to chat anonymously. Users can use keywords and search relevant knowledge articles or choose to be transferred to a live agent. You can integrate this topic with the Virtual agent - Facebook messaging integration to enable chat using your messaging application.

  - Get Help with an Order (Template)

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Users can get help on an issue with an existing order, search relevant knowledge articles, or create a case for the issue.

- Submit Request (Template)

  Users can submit a request for searching and using one of the catalog items.

- Create Case

  Creates a case from Virtual Agent when no relevant topics for the issue you have are displayed.

- Update Case

  Users can update a case from Virtual agent.

Your users can run the published topics in your chat support client.

Activating Virtual Agent conversations with NLU

- The Customer Service NLU Model for Virtual Agent Conversations (com.sn_csm.nlu) plugin is automatically enabled when you enable the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent).

  After you enable the plugin, you can view the following read-only intents for the Customer Service NLU for VA models in Studio:

  - CheckCaseStatus
  - GetHelp
  - GetHelpWithProduct
  - GetHelpWithOrder
  - SubmitRequest

  Each intent corresponds to a chatbot topic. To customize an intent, you can import an existing intent from the Customer Service NLU for Virtual Agent model and then link the NLU model with the associated intent for the topic.

- Enable ServiceNow NLU in the general settings.

Related topics

Get help using virtual agent conversations

Natural Language Understanding in Virtual Agent

Integrate Customer Service Virtual Agent with Facebook Messenger (Legacy)

Integrate the Customer Service Virtual Agent with Facebook Messenger to enable bot conversations in the messenger.

Before you begin

Role required: virtual_agent_admin or admin

- Install the Customer Service (com.sn_customerservice) plugin.
- Install the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent).

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- Make sure Virtual Agent is integrated with Facebook Messenger.
- Make sure you have the token and secret for the messenger.

For information on integrating the Virtual Agent with Facebook Messenger and for retrieving the messenger token and secret, see Set up Virtual Agent integration for consumer messaging apps.

About this task

With this integration, you can get help using Virtual Agent chatbot conversations. For more information on getting help, see Customer Service Virtual Agent conversations .

Procedure

1. In the application navigator, enter `sys_cs_adapter_configuration_page_messenger_list.do`
2. Select **sample-fb-messenger-app**.
   You have to be in the **Customer Service Virtual Agent Conversations** application to edit the record.
3. In the **Messenger Page ID** field, enter your company's Facebook page ID.
4. Right-click and select **Save**.
5. In the **Provider Auth** field, click the information icon and open the **Message Auth** record:
   - Go to the **Outbound message creation** field, click the information icon and open the **Token Verification** record.
   - In the **Token** field, enter the token for the messenger application.
   - Click **Update**.
6. In the **Message Auth** record:
   - Go to the **Inbound message verification** field, click the information icon, and open the **Hash Message Verification** record.
   - In the **Secret** field, enter the app secret for the messenger application.
   - Click **Update**.

Configure Pre-chat after upgrading

If you have upgraded, some settings need to be configured to use Pre-chat effectively.

Before you begin

Role required: admin

About this task

For information about using pre-chat surveys to capture preliminary information from a customer, see Pre-chat surveys. If you have upgraded, you must manually adjust some settings to use Pre-chat most effectively.

Procedure

1. Make the predefined pre-chat surveys active.
   a. Navigate to **Conversational Interfaces** > **Pre-Chat Survey**.
   b. Select the CSP Pre-Chat Survey, which collects preliminary information for logged-in customers.
   c. In the form, select **Active**.

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d. Click **Submit**.

e. Repeat this process for the CSP Anonymous Pre-Chat Survey, which collects preliminary information for users who are not logged in.

2. Disable the legacy form-based chat widget from appearing in the portal header.

a. Type *sys_properties_list.do* from your instance.

b. Search for the *csp.legacy_chat* property.

c. Set the property value to **true**.

d. Click **Update**.
The **Chat** option from the portal header is disabled.

3. Include the chat widget to appear on the Consumer Service Portal page.

a. Navigate to **Service Portal** > **Agent Chat**.

b. Click **CSP Chat**.

c. Select **Active**.

d. Click **Submit**.
The Open chat window icon that customers can use to initiate the pre-chat survey and connect with an agent will appear in the portal header.

Configuring the email channel

You can configure an email channel to either create interactions or cases from incoming emails. Email Interaction creates interactions from emails. Email to Case automatically creates cases from emails. The setup process involves configuring email properties, defining flows, and setting up notifications.

Email Interaction

Email Interaction creates an interaction from customer email. It associates the email conversation between agent and the customer with the interaction record. If the customer request requires investigation and resolution, a case is created. Subsequently, email communication is tracked through the case record.

Email to case

Email to Case creates cases from incoming customer emails to streamline issue tracking and resolution.

Email Interaction

Like chat and phone channels, Email Interaction enables agents to manage email conversations with customers using interaction records. Agents can create cases when further investigation is needed. This approach reduces unnecessary cases and provides a consistent design for omnichannel interactions.

To enable Email Interaction for Customer Service Management (CSM), configure system properties and define flows for processing incoming emails. These flows determine how emails are converted into interactions and, if necessary, into cases.

Additionally, enabling notifications for interactions helps keep agents informed about email responses received from customer, providing timely responses to customer inquiries.

Activate Email Interaction for CSM

Activate the Email Interaction for CSM plugin (sn_eaai_csm) for new or existing CSM customers. This plugin includes demo data and activates related plugins if they aren't already active.

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Before you begin
Role required: admin

About this task
The flows are deployed with Email Interaction for CSM and are enabled by default for new CSM customers. The flows aren't enabled by default for existing CSM customers. To manually activate the flows, Activate a flow for Email Interaction for CSM

Procedure
1. Navigate to **All** > **System Definition** > **Plugins**.
   The Review Installation Details dialog is displayed.
2. Find the Email Interaction for CSM using the filter criteria and search bar.
   The app is available in the Store applications section.
3. Start the installation process by selecting **Install**.
   The Review Installation Details dialog box is displayed.
4. Review the details of the installation.
5. Verify that the **Install now** option is selected.
6. **Optional:** If you want to get the demo data, select the **Load demo data** check box.
7. Select **Install**.

Result
The Email Interaction for CSM plugin is successfully installed.

View the service channel configured with Email Interaction for CSM

View the service channel configured during the installation of the Email Interaction for CSM application. This service channel facilitates the routing of email interactions through Advanced Work Assignment.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Advanced Work Assignment** > **Settings** > **Service Channels**.
2. View the **Email** service channel.

Configure Advanced Work Assignment route email interactions

Configure Advanced Work Assignment#(AWA) to route email interactions automatically to your agents, based on their availability, capacity, and optionally, skills.

Before you begin
Role required: admin

About this task
The Service channel **Email** is configured during the installation of the Email Interaction for CSM application.#If you want to create service channels for email, follow the procedure.

You can use the#Advanced Work Assignment (AWA) feature to automatically assign work items to users based on their availability and capacity.

AWA assigns work items using assignment groups, so it's important that your users and groups are set up correctly.

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- Determine the assignment group to use in the AWA service channel configuration and add users to this group.
- Confirm that the users have at least one of the roles: sn_customerservice.consumer_agent or sn_customerservice_agent.

Setting up a service channel involves multiple steps, which are detailed in the procedure. Once the service channel setup is complete, you can use AWA to assign newly created email interactions that either unassigned or satisfy the conditions specified in the service channel.

Procedure

1. Create the email service channel.

   a. Navigate to#**All** > **Advanced Work Assignment** > **Settings** > **Service Channels** > **New**

   b. Fill in the fields on the Service Channel form.

Service channel form

Field	Description
Name	Name of the service channel that you're configuring. For example, Custom-Email.
Inbox order	Order in which channel items appear in the user inbox. The#**Inbox Order**# field is an integer#field type. This field can store whole numbers.
Application	Name of the application. For the Email Interaction channel, select Email Interaction for CSM.
Active	Option for activating the service channel. When you select this option, the associated queues for the service channel can start accepting work items.
Short description	Brief description of the service channel.
Table	Table that stores the service channel records. To route email interactions, select the Interaction table.
Assign to field	Field that references the user that the item is assigned to. For the Interaction table, this field is the **#Assigned to#field** (assigned_to) field.
Assignment group field	Field that references the assignment group that the item is assigned to. For the Interaction table, this field is the #**Assignment group#field** field.
Advanced condition	Advanced conditions that apply to the channel.
Default work item size	Amount of a user's capacity that is used if this work item is assigned. The default is 1.

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Field	Description
Default capacity	Number of items automatically assigned to agents (pending overrides). The default for this field depends on the type of work item.
Utilization condition	Condition that determines what constitutes an active item that counts toward user workload/capacity.

c. Select **Submit**.

The system adds the Email Interaction channel to the Service Channels list. For more information, see#Create or configure a service channel.

2. Configure the layout for the email interaction inbox card.

Note:
The Inbox layouts are configured during the installation of the Email Interaction for CSM application.

#If you want to create Inbox layouts follow the procedure in Create or modify an inbox layout for **Email** service channel, available by default, or **Custom-Email** service channel.

3. Create a queue for the email interaction service channel.

a. In the Queue related list of the service channel, select#**New**.

b. On the form, fill in the fields.

Queue form

Field	Description
Name	Name of the queue. For example, Email Queue.
Short description	Brief explanation of the queue. For example, "Assign email interactions to front-office users".

For more information about configuring a queue, see#Create a work item queue.

c. Select **Submit**.

4. Create an assignment rule for the queue.

a. Navigate to#**All** > **Advanced Work Assignment** > **Settings** > **Assignment Rules**.

b. Select **New**.

c. On the form, fill in the fields.

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New assignment rules field description

Field	Description
Name	Name of the assignment rule.
Short description	Brief description of the assignment rule. For example, Assign the email interactions based on this configuration.
Assign by	Type of assignment. Select **Most Capacity**, which routes a work item to the user who has the greatest availability for handling the work.
Allow agents to reject	Option to enable agents to reject work items in their inbox.

For more information about creating an assignment rule, see#Configure agent assignment rules .

5. Create a group for the queue.

   a. Navigate to#**All** > **Advanced Work Assignment** > **Management** > **Groups.**

   b. Select **New**.

   c. On the Group form, fill in the fields.
   For more information about creating a group, see Create or change groups for Advanced Work Assignment queues .

   d. Select **Submit**.

   e. Select the group to display the Group form.

   f. In the Group Members related list, add users to the group.

   The users that you add to the group for the Email Interaction Assignment queue require the roles.

   - Customer agent (sn_customerservice_agent)
   - Consumer agent (sn_customerservice.consumer_agent)
   - AWA agent (awa_agent)

6. Associate the assignment rule with the queue.

   a. Navigate to **All** > **Advanced Work Assignment** > **Settings** > **Queues**.

   b. Select the queue.
   For example, Email Queue.

   c. In the Assignment Eligibility related list on the Queue form, select **New**.

   d. In the **Agent assignment rule** field, select the assignment rule.

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e. In the **Groups** field, select the assignment group.

f. Select **Submit**.

7. Activate the service channel.
   a. Navigate to **All** > **Advanced Work Assignment** > **Settings** > **Presence States**.
   b. Select the **Available** presence state.
   c. Add the email service channel to the **Selected** column.
   d. Select **Update**.

Result
After the service channel is activated, you can use it to assign work items. For more information, see Service channels.

Creating flows for incoming emails that create and update interactions

The default email flows are available once you activate the Email Interaction for CSM application. Enable the email flows to activate email processing for automatic creation and updating interactions.

- **Create Interaction from Email**: Creates an interaction of type Email for each new inbound email from a customer.
- **Update Interaction from Email**: Updates the interaction with the reply email received from the customer.

  If a reply email is received on a closed interaction, a new interaction of type Email is created. It includes the link to the previous closed interaction.
- **Update Case via Reply for Email**: Updates the case record with the reply email received from Customer on the case.

  This flow creates an interaction of type Email if a reply email is received on the closed case record. The new interaction includes a link to the closed case.

Alternatively, customers can use Inbound Actions to create and update email interactions.

The execution order of the Inbound Flows takes a higher precedence over Inbound Actions meaning that when an email flow executes, it helps prevent execution of Inbound Actions.

Activate a flow for Email Interaction for CSM

Activate flows for customers who have the Email Interaction for CSM application configured, enabling efficient workflow automation.

Before you begin
Role required: admin

About this task
For new CSM customers, the flows are activated by default. Existing CSM customers should activate email interaction related flows and deactivate the case related flows.

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Open a flow from the available flows.

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- Create Interaction from Email
- Update Interaction from Email
- Update Case via Reply for Eaal

3. Activate the selected flow by selecting **Activate**.

Result
All the available flows are activated.

Define a custom flow to create or update email interactions

Define email-related business processes using Workflow Studio. This tool enables you to manage emails along with your customer service processes through a visual interface without having to design or request complex scripts.

Create an interaction

Create an interaction record to capture customer details.

Before you begin
Role required: workspace_admin, awa_agent, sn_customerservice_consumer_agent, or sn_customerservice_agent

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Create a flow.
   a. Select **Flows**.
   b. Select **New**.
   c. Select **Flow**.
   d. In the **Flow name** field, enter the flow name.
   e. Select the application scope from the Application list.
   f. In the **Description** field, enter the description.
   g. Select **Show additional properties**.
   To know more about additional properties, see Create a flow in Workflow Studio.
   h. Select **Build flow**.
3. Create a trigger.
   a. Select **Add a Trigger**.
   b. Search and select **Application**.
   c. Select **Inbound Email**.
   d. Select Email conditions with **AND** operator.

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- Select **Type** is **received**.
- Select **Receive type** is **New**.

e. Leave the Reply Record Type as empty.

f. Select **Done**.

4. Select **Add an Action, Flow Logic, or Subflow** and select any of the following.
   - Action
   - Flow Logic
   - Subflow

> **Note:**
> After you have created action entries, you can select multiple actions using **Select multiple**.

5. **Optional:** Add error handler.
   a. To enable the error handling, slide the **ERROR HANDLER** toggle switch.
   b. Select **Add an Action, Flow Logic, or Subflow** and select any of the following.
   - Action
   - Flow Logic
   - Subflow
6. Verify the email flow and modify it if necessary.
7. Select **Save**.
8. Select **Activate**.
9. From the confirmation dialog box, select **Activate**.

Related topics

Create a flow in Workflow Studio

Update an interaction

Modify existing interaction records, verifying that all email communication details are updated.

Before you begin

Role required: admin, workspace_admin, awa_agent, sn_customerservice_consumer_agent, or sn_customerservice_agent

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Create a flow.

a. Select **Flows**.

b. Select **New**.

c. Select **Flow**.

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d. In the **Flow name** field, enter the flow name.

e. Select the application scope from the Application list.

f. In the **Description** field, enter the description.

g. Select **Show additional properties**.
To know more about additional properties, see Create a flow in Workflow Studio.

h. Select **Build flow**.

3. Create a trigger.

a. Select **Add a Trigger**.

b. Search and select **Application**.

c. Select **Inbound Email**.

d. Select Email conditions with **AND** operator.
- Select **Type** is **received**.
- Select **Receive type** is **Reply**.

e. Leave the Reply Record Type as empty.

f. Select **Done**.

4. Select **Add an Action, Flow Logic, or Subflow** and select any of the following.
   - Action
   - Flow Logic
   - Subflow

Note:
After you have created action entries, you can select multiple actions using **Select multiple**.

5. **Optional:** Add error handler.
   a. To enable the error handling, slide the **ERROR HANDLER** toggle switch.
   b. Select **Add an Action, Flow Logic, or Subflow** and select any of the following.
   - Action
   - Flow Logic
   - Subflow
6. Verify the email flow and modify it if necessary.
7. Select **Save**.

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8. Select **Activate**.
9. From the confirmation dialog box, select **Activate**.

Related topics

Create a flow in Workflow Studio

System properties for configuring Email Interaction

You can manage certain workflows based on the system properties, such as enabling or disabling the creation of email interactions for guest users. You can set an inactivity period after which email interactions are automatically closed.

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

Alternatively, in your instance, enter `sys_properties.list` in the filter navigator and customize the Email Interaction system properties.

System Properties for Email Interaction

Property	Description
sn_eaai_csm.create_interaction_for_non_matched_user	Enable or disable interaction creation for a non-matched user. • Type: Boolean (true | false) • Value: true • Location: **All> System Properties> All Properties**.
sn_eaai_csm.period_of_customer_inactivity_to_close_interaction	Set the inactivity period (in days) after which an interaction is closed if no email is received from the customer.

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System Properties for Email Interaction (continued)

Property	Description
	• Type: Integer • Value: 5 • Location: **All> System Properties> All Properties**.

Configure an ongoing notification for email interactions

Configure an ongoing notification for email interactions. Configure the ongoing menu item on the toolbar in the CSM Configurable workspace for agents.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Settings** > **Presence States**.
2. From the Service channels section, from the Available list, select **Email** (or a custom email channel) and **Chat – Asynchronous**.
3. Add the selected items to the Selected list.
4. Select **Update**.

Enable agents to respond to customers with email activity history

Enable agents to respond to customers with email activity history, which is created by embedding a mail script in an email client template.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Email Client** > **Email Client Templates**.
2. View **Email response to the customer**.
3. Select **Email response to customer**.
4. In the#**Body HTML** field, enter `<div id="collapsible-content"> ${mail_script:get_email_interaction_activity_history_for_reply}</ div>`.
   This script, get_email_interaction_activity_history_for_reply (available by default), retrieves and formats email activity history, adding it to the email client in the agent workspace. The content is hidden behind ellipses within a DIV tag with the ID “collapsible-content".

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The number of emails in the activity history matches the value set in the system property, number_of_activities_in_notification.

Note:
You can also create a client template and map it to the Interaction table. For more information, see Create an email client template.

Configure email notifications for an interaction

Configure email notification to determine whether they should be sent to the contact, consumer, or guest.

Before you begin
Role required: admin

About this task
Email notifications that are available by default:

- Interaction created for consumer
- Interaction created for guest
- Interaction created for contact

You can customize the existing notification or create a notification. For more information, see Email and SMS notifications.

Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Notifications**.
2. Select the Show column search row icon ( ).
3. In the#**Name** column, search for any of the following notification.
   - Interaction created for consumer
   - Interaction created for guest
   - Interaction created for contact
4. If you want to disable notifications, update **Active** to False.
   a. Select **here**.
   b. Clear the **Active** check box.
   c. Select **Update**.
5. If you want to include different content, update the email template.
   a. Select **What it will contain**.
   b. From the **Email template** field, remove the existing template.
   c. Search and select the email template.
   Alternatively, in the **Message HTML** field, enter the content for the email template.
   d. Select **Update**.

Result
Email notifications are disabled for contact, consumer, or guest.

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Enable recommended actions for an email interaction

Help the agent to find relevant resources based on the context of an email by enabling recommended actions.

Before you begin
Role required: admin

About this task
For more information, see Configuring Recommended Actions.

Procedure
1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select **CSM Interaction context**.
3. Set the **Active** column as true.

Customize the email interaction experience

Customize the Email Interaction record page in UI Builder for agents.

Before you begin
Role required: admin

About this task
For more information on UI Builder, see UI Builder.

Procedure
1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select **Experiences**.
3. **CSM/FSM Configurable Workspace** from the list or search for `CSM/FSM Configurable Workspace`
4. Navigate to **Pages and variants** > **Record** > **Email Interaction Page**.
5. Select the Open menu icon ( ).
6. Select **Duplicate variant**.
   For more information, see Create a page variant.
7. On the Tell us about your variant screen, enter `Custom Email Interaction Page` in the **Name** field.

   Note:
   Don't change the **Conditions** field.

8. Select **Create**.
   The Page variant opens.
9. Select the **Settings** tab.
10. Enter a lower value in the **Order** field.
    For example, -1100.
11. Select **Save**.

Result
You can customize the page in the UI builder.

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Email to case

Set up email addresses that customers can use to submit cases to your team. To help direct cases to specific teams, you can designate email addresses to specific products. While agents work on the cases, they can also email customers with updates and proposed solutions.

Customer Service Management uses the Email Accounts application to create and maintain email accounts. The system administrator can create multiple incoming email addresses that customers can use to communicate with customer service agents. The system administrator can also create one outgoing email address.

After the incoming and outgoing email addresses are created, the system administrator can set the following properties for the email communication channel:

- Establish one of the incoming email addresses to automatically create a case.
- Enable a prefix to include in the subject line of an email to any of the incoming email addresses that automatically creates a case.
- Create cases for customers who are not currently in the system.

The system administrator can also create a channel configuration to associate any of the incoming email addresses with specific products.

Related topics

Configure an email address for a product

Email accounts

Configure an email address for a product

Configure an email address that creates a case for a specific product.

Before you begin

Role required: admin

About this task

Create a configuration that links a product to a specific email address. This configuration is created in the Channel Configuration (sn_customerservice_channel_config) table.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Channels**.
2. Select **New**.
3. On the Channel Configurations form, fill in the fields.

Channel Configurations form

Field	Description
Name	Name of the email configuration.
Channel Type	Configuration type. Set this field to **Email**
Product	Product model associated with this email configuration.
Active	Option to activate the email configuration.

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Field	Description
Email address	Email address for this configuration. Enter one of the incoming email addresses that the administrator created using the Email Accounts application.

4. Select **Submit**.

Configure an email subject line prefix

Configure a prefix to include in an email subject line that creates a case.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Properties**.
2. In the **Email subject prefix format for new case** field, enter the prefix.
   The default prefix is **Case:**.
3. Select **Save**.

Customer service email properties

Users with the system administrator role can set several properties for the Customer Service Management email communication channel.

After creating the incoming and outgoing email addresses that customers use to communicate with customer service agents, the system administrator can set the following email-specific properties.

Navigate to **Customer Service** > **Administration** > **Properties** to access these properties.

Customer Service Management email properties

Property	Definition
Case email address [glide.cs.email.case_queue_address]	One of the incoming email addresses that automatically creates a customer service case. For incoming email, the system checks the address to see if it matches the address in the **Case email address** property. If yes, the system creates a customer service case. If it does not match, or if this property is not set, the system then checks the **Email subject prefix format for new case** property.
Email subject prefix format for new case [glide.cs.email.new_case_prefix]	The prefix included in the subject line of an email to any of the incoming email addresses that automatically creates a customer service case. This field is automatically set to **Case:** as the default prefix.
Create case for non matched user [sn_customerservice.email.create_case_for_non_matched_user]	Enable the creation of new customer service cases when emails are received from users with email addresses that do not currently exist in the system.
Number of activities	Indicates the number of activities (emails and comments) in the activity history that are included in the email notifications and replies. The default value is 3.

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Customer Service Management email properties (continued)

Property	Definition
[number_of_activities_in_notification]	
Include system emails in email notifications [include_system_emails_in_notification]	Indicates whether system emails are included in email notifications. The default value is false.
Number of activities in reply number_of_activities_in_reply	Number of additional comments and emails included in Reply/Reply-All templates (-1 means all)
Email history notifications	By default, the email history shows the last three messages in the case record. To show all activities on a case record in email replies and email notifications, add this script `${mail_script:get_emails_comments_activity_history` to the email reply system property (reply-received) and the case commented system property (case.commented.for.customer). For more information, refer to Configure email and comment notifications .

Disable email responses from the case activity stream

Disable email responses from the case activity stream. Stop agents from interacting with customers directly.

Before you begin

Role required: admin

About this task

By default, customer service agents can respond to cases using options within a customer email thread instead of having to use another email client. Agents can use the **Reply**, **Reply All**, and **Forward** buttons in the case activity stream to respond to customer emails.

You can disable this feature and hide these buttons from the Agent Workspace or Configurable Workspace application.

Procedure

1. Navigate to **All** and enter `sys_properties.list`.
   The System Properties page opens.
2. Select **New**.
3. Create a system property with the name *`sn_agent_workspace.activity_email_options_enabled`*.
4. Set the value to false.
5. Select **Submit**.

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Result
Users with the role sn_customerservice_agent are now unable to reply to or forward emails.

Creating rules for incoming emails that create and assign cases

Create your email-related business processes using Inbound Email Flows. After you receive an email on a specified support email address, you can define rules to create cases and assign the cases to specific teams.

In previous releases, incoming emails were processed through inbound email actions. Admins created separate email actions to support different business flows using scripts.

Inbound Email Flows provide powerful configuration capabilities to manage emails along with your customer service processes through a visual Flow Designer interface. Business managers can define inbound email flows without having to depend on admins or developers to write complex scripts. Email flows use conditional logic to incorporate multiple business processes in one flow.

Note:
The **Email conditions** under the **Inbound Email** trigger are case-sensitive. Review your flow designer conditions and consider lowercase and uppercase options depending on how the sender puts the email address in the headers.

The following example email flows are available by default after you activate the Customer Service Management plugin. Enable the email flows for activating the email processing rules to automatically create and update cases.

- Create case from email
- Update case using Reply

Note:

- The execution order of the inbound email flows takes a higher precedence than inbound actions (that is if an email flow executes, it avoids execution of inbound actions).
- The user who sends an email should have the necessary roles to perform operations specified in the flow, or else the operation stops while executing.

The following example email flows are installed with the platform. These flows aren't required for any of the CSM email processing rules:

- Handle email replies
- Logging a problem

Related topics

Define rules to process incoming emails

Activate Customer Service Management

Define rules to process incoming emails

Define your email-related business processes using Inbound Email Flows. Manage emails along with your customer service processes through a visual **Flow Designer** interface without having to design or request complex scripts.

Before you begin
Role required: admin, sn_customerservice_manager

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About this task

Email flows use conditional logic to incorporate multiple business processes in one flow. When designing inbound email flows, note the following:

- The execution order of the inbound email flows takes a higher precedence than inbound actions.That is, if an email flow executes, it prevents the execution of inbound actions.
- The user who sends an email should have the necessary roles to perform operations specified in the flow or the operation will stop.

Procedure

1. Create an inbound email flow.
   a. Navigate to **All** > **Process Automation** > **Flow Designer**.
   b. Select one of the following flows.
      - **Create Case from Email**: Creates a case when a user sends a new email.
      - **Update Case via Reply**: Updates a case when you use the reply option.
   c. Select **Edit Flow**.
   d. Select the **Inbound Email** trigger.
   e. Modify the default email filter conditions or select **New Criteria** to add conditions.
   f. Select a Reply Record Type table.
   g. Select **Done**.
2. Edit the flow.
   a. Select an existing action and expand it.
   b. Provide information for the action or select the add icon (+) to add a new action, flow logic, or subflow.
   c. Select **Done**.
3. Finalize the rule.
   a. Verify the email flow and modify it if necessary.
   b. Select **Save**.
   c. Select **Activate**.
4. Select **Activate**.
   The defined inbound email flow is activated.

Result

The defined inbound email flow is activated.

Related topics

Building flows

Building custom actions

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Configure email and comment notifications

Add a script to the email reply or case comment template to include all activities (emails and comments) on a case record in email replies and in email notifications.

Before you begin
Role required: admin

Procedure

1. Update comment notifications.
   a. Navigate to **All** > **System Notifications** > **Notifications**.
   b. In the **Email template** column, enter `case.commented.for.customer`.
   c. In the *`case.commented.for.customer`* system property, add the following script to the **Message HTML** field: `${mail_script:get_emails_comments_activity_history}`.
   d. Save the field.
2. Update email notifications.
   a. Navigate to **All** > **Email client templates** > **Reply**.
   b. In the *`reply-recieved`* system property, add the following script to the **Body HTML** field: `${mail_script:get_emails_comments_activity_history}`.
   c. Save the field.

Result
All emails and comments are now included in the email replies and notifications.

Configuring the phone channel

Configure phone support for customers with Computer Telephony Integration (CTI) and OpenFrame.

Create an OpenFrame configuration

This configuration specifies the OpenFrame window settings as well as the URL to be launched within OpenFrame.

Configure OpenFrame events

Use OpenFrame events to achieve better integration between Advanced Work Assignment (AWA) and Computer telephony integration (CTI) and aide in improved call routing.

Related topics

Notify

Create an OpenFrame configuration

This configuration specifies the OpenFrame window settings as well as the URL to be launched within OpenFrame.

Before you begin
Role required: admin

About this task
As part of the OpenFrame configuration, users with the admin role can select one or more user groups. Access to the configuration is limited to the users that have the OpenFrame user role and that belong to the selected groups.

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Procedure

1. Navigate to **All** > **OpenFrame** > **Configurations** to display the OpenFrame Configurations list.
2. Select **New**.
3. Fill in the fields, as appropriate.

OpenFrame Configuration form

Field	Description
Name	The name of the OpenFrame configuration.
Title	The title that appears in the OpenFrame window header.
Subtitle	The subtitle that appears in the OpenFrame window header.
Order	The order number for the configuration. If users have multiple OpenFrame configurations, they can only access the configuration with the lowest order number. **Note:** When upgrading, the **Order** field for the existing default OpenFrame configuration is set to 1.
Enable collapsed view	Enables the expand and collapse capability for the OpenFrame window. When collapsed, users can still access call control actions. The default setting is **False**.
Show presence indicator	Enables the indicator that displays agent availability.
User Group	The user groups selected for this configuration. Access to this configuration is limited to the users that have the OpenFrame user role and that belong to the selected groups. **Note:** If you do not select any groups, the configuration is available to all users with the OpenFrame user role.
URL	The URL to be launched within OpenFrame. This URL can be an absolute path or a path that is relative to the ServiceNow instance.
Active	Denotes this configuration as active.
Width	The width of the OpenFrame window.
Height	The height of the OpenFrame window, not including the OpenFrame header height.
Icon Class	The class of icons used for the OpenFrame window (retina-icons.css). Only supports icon-phone and icon-video values.
Title Icon	The icon displayed on the OpenFrame window header.
Configuration	Can be used to store any JSON-encoded string.

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Note:
Several fields on the OpenFrame Configuration form can also be set by using the OpenFrame API. These fields include: **Title**, **Subtitle**, **Width**, **Height**, and **Title Icon**.

4. Select **Submit**.

Related topics

openFrameAPI - Client

OpenFrame events for work items, agent presence, and interactions

Use OpenFrame events to achieve better integration between Advanced Work Assignment (AWA) and Computer telephony integration (CTI) and aide in improved call routing.

OpenFrame events are enabled by default when your administrator installs the Openframe plugin (com.sn_openframe) and Advanced Work Assignment for CSM plugin (com.sn_csm.awa).

Note:
The Advanced Work Assignment for CSM (com.sn_csm.awa) plugin is automatically installed with the Customer Service plugin (com.sn_customerservice).

As a CTI developer, ensure that you subscribe to the following events by using the subscribe method of the openFrameAPI. For more information, see openFrameAPI - Client.

OpenFrame events

Event	Description
openframe_awa_agent_presence	Events are sent to OpenFrame when an agent's presence state changes.
openframe_awa_workitem_offered	Events are sent to OpenFrame when a work item is offered to an agent.
openframe_awa_workitem_accepted	Events are sent to OpenFrame when a work item is accepted by an agent.
openframe_awa_workitem_rejected	Events are sent to OpenFrame when a work item is rejected by an agent.
openframe_agent_off_interaction	Events are sent to OpenFrame indicating the presence of an agent on chat as off or available.

Add and activate an OpenFrame configuration by navigating to **OpenFrame** > **Configurations**. For more information, see Create an OpenFrame configuration.

Sample payloads

Refer to the sample payloads for each event as described in the following table.

Events and their sample payloads

Event	Sample payload

openframe_awa_agent_presence	{
	"result":{
	"presence":{

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Events and their sample payloads (continued)

Event	Sample payload

	"name":"Available",
	
	"sys_id":"0b10223c57a313005baaaa65ef94f970",
	"available":true,
	"channels":[
	{
	"name":"Case",
	"available":true,
	
	"sys_id":"d4a675e3739713004a905ee515f6a7e7",
	
	"restrict_update":false
	},
	{
	"name":"Phone",
	"available":true,
	
	"sys_id":"f6281cc39335330090813a53177ffb32",
	
	"restrict_update":false
	},
	{
	"name":"Chat",
	"available":true,
	
	"sys_id":"27f675e3739713004a905ee515f6a7c3",
	
	"restrict_update":false
	}
	]
	}
	}
	}

openframe_awa_workitem_offered	{
	"result": {
	"workItem": {
	"sys_id":
	"14c86c40a1650610f87701807d9bc0be",
	"size": 1,
	"serviceChannel": {
	"name": "Chat",
	"sys_id":
	"27f675e3739713004a905ee515f6a7c3"
	},

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Events and their sample payloads (continued)

Event	Sample payload
	"document": { "sys_id": "aa582040a1650610f87701807d9bc076", "table": "interaction" }, "previousWorkItem": "7c78a440a1650610f87701807d9bc02b", "isQueueTransferred": true, "isAutoAccepted": true } } }
openframe_awa_workitem_accepted	{ "result": { "workItem": { "sys_id": "14c86c40a1650610f87701807d9bc0be", "size": 1, "serviceChannel": { "name": "Chat", "sys_id": "27f675e3739713004a905ee515f6a7c3" }, "document": { "sys_id": "aa582040a1650610f87701807d9bc076", "table": "interaction" }, "previousWorkItem": "7c78a440a1650610f87701807d9bc02b", "isQueueTransferred": true, "isAutoAccepted": true } } }
openframe_awa_workitem_rejected	{ "payload":{ "workItem":{ "sys_id":"66c4071d1bf66410b8e3ea06624bcb59",

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Events and their sample payloads (continued)

Event	Sample payload

	"size":1,
	"serviceChannel":{
	"name":"Case",
	"sys_id":"d4a675e3739713004a905ee515f6a7e7"
	},
	"document":{
	"sys_id":"b6a4c31d1bf66410b8e3ea06624bcb93",
	"table":"sn_customerservice_case"
	},
	"rejection":{
	"reason":"Not my expertise",
	"sys_id":"31e3fa29b38023002e7b6e5f26a8dc17"
	}
	}
	}

openframe_agent_off_interaction	{
	"result":{
	"interaction":{
	"sys_id":"da1dc9651bbe6410b8e3ea06624bcb51",
	"number":"IMS0000050",
	"type":"chat",
	"reason":"INTERACTION_INACTIVE"
	}
	}
	}

Related topics

OpenFrame overview

Social media integration

Support case resolution through social media communication channels.

When working with customers or consumers to create and resolve cases, agents can select **Social** as the communication channel and add a social profile to the Case form. Any

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communication with customers or consumers that takes place through social media is recorded on the Case form in the **Social Logs** related list.

Customer service managers can create one or more social profiles for a user by recording a user's social profile information on a specific social media channel such as Twitter or Facebook. Managers can create social profiles for accounts, contacts, and consumers from the **Social Profiles** related list on the entity form. Agents have read-only access to these profiles.

Integration with Customer Service Management

The social media communication channel is integrated with the following Customer Service Management forms: Case, Account, Contact, and Consumer.

On the Case form, the **Channel** field includes the **Social** option. Selecting this option adds the **Social Profile** field to the Case form, in which you can select a specific social media channel. The **Social Logs** related list captures the details of social media conversations.

The Account, Contact, and Consumer forms include the **Social Profiles** related list. Customer service managers can create one or more profiles for each of these entities.

Plugins

The Customer Service Social Integration plugin (com.sn_cs_social) is activated as part of the Customer Service Management plugin.

Tables

The Customer Service Social Media plugin adds the following tables.

Customer Service Management Social Media Plugin Tables

Table	Description
Social Channels [sn_app_cs_social_social_channel]	Stores the social channels, which are brought in by the social integration tool.
Social Profiles [sn_app_cs_social_social_profile]	Stores the social profiles created for each customer contact or consumer.
Social Logs [sn_app_cs_social_social_log]	Stores the details of social media conversations related to cases.

Configure Chat Zoom Connector

Install and set up the Chat Zoom Connector application to interact with customers using Zoom meetings initiated from a chat.

Before you begin

Role required: admin

About this task

This task provides general steps to set up the Chat Zoom Connector application for initiating Zoom meetings from a chat.

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Procedure

1. Integrate the Zoom account of your company with your ServiceNow instance using the Zoom spoke.
   For more information, see Set up the Zoom spoke.
2. Set up the Notify Zoom connector in Zoom for associating the Notify communication channel with Zoom meetings.
   The conference call details of the Zoom meetings are stored in the Notify Conference Calls [notify_conference_call] table. For more information, see Set up Notify Zoom connector.
3. Install the Chat Zoom Connector application.
   For more information, see Install a ServiceNow Store application.

   Note:
   The Chat Zoom Connector application installs the `CSMZoomInteractionImpl` script include, which is preconfigured for the Customer Service application. It also installs the `sn_chat_zoom.ZoomInteractionExtPoint` extension point, which enables the copying of any application-specific fields from the parent chat interaction record to the Zoom interaction record. For more information, see Configure application-specific field values for Zoom interactions.

4. Activate the Zoom quick action.
   For more information, see Activate the quick action for Zoom meetings.

Related topics

Chat Zoom Connector

Using Chat Zoom Connector

Chat Zoom Connector

Resolve issues quickly and engage better with customers with video and screen sharing options in Zoom using the ServiceNow® Chat Zoom Connector application.

Request apps on the Store

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

Overview

The Chat Zoom Connector application integrates the chat communication channel with the Notify communication channel by managing and initiating a Zoom meeting directly from a chat. An interaction record is created for each Zoom meeting initiated from a chat.

As an agent, you can use the Chat Zoom Connector application to initiate Zoom meetings from a customer chat and optionally record the meeting.

As an agent manager, you can access an interaction record of type Zoom to view the meeting details such as the meeting URL, participants, and recording.

As a customer, you can join a Zoom meeting with an agent regardless of whether you have a Zoom account.

To get started with the Chat Zoom Connector application, see Configure Chat Zoom Connector.

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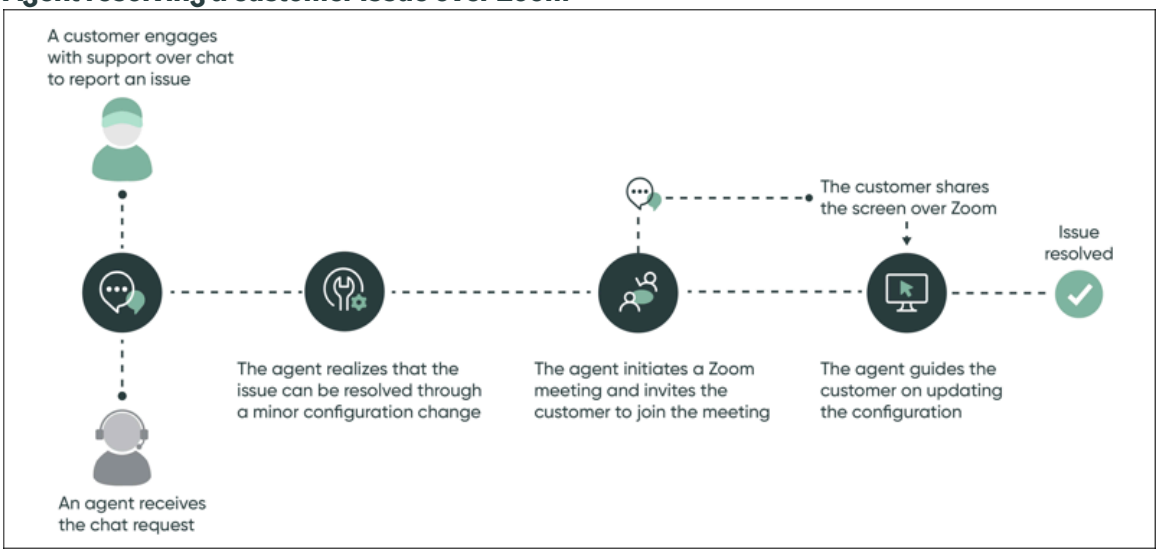
Key features

- Initiate Zoom meetings using the Quick Actions list in chats.
- Track Zoom meetings as interactions on the ServiceNow platform.
- Track participants in Zoom meetings.
- Post the meeting recording to the interaction activity stream.

Example scenario

The following example scenario shows the use of the Chat Zoom Connector application in resolving a configuration issue with an agent initiating a Zoom meeting directly from a customer chat.

Agent resolving a customer issue over Zoom



1. A customer engages with Support over chat to report an issue for a product.
2. An agent receives the chat request and realizes that the issue can be resolved through a minor configuration change.
3. The agent initiates a Zoom meeting using the Quick Actions list in the chat and invites the customer to join the meeting.

   Note:
   The customer does not need a Zoom account to join the meeting.

4. The customer shares the screen over Zoom and the agent guides the customer on updating the configuration and resolves the issue.

Configure application-specific field values for Zoom interactions

Use scripted extension points to enable the copying of application-specific field values to interaction records for Zoom meetings initiated from chats.

Before you begin
Role required: admin

Install the Chat Zoom Connector application. For more information, see Install a ServiceNow Store application.

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About this task

You can enable the copying of any application-specific fields from a parent chat interaction record to its Zoom interaction record by using the `sn_chat_zoom.ZoomInteractionExtPoint` extension point. The parent chat is the chat from which the Zoom meeting was initiated.

By using extension points, you can easily integrate customizations without having to alter the base code. You can extend standard base functionality using customized scripts. For more information, see Using extension points to extend application functionality.

An implementation is available in the base system for scripted extension points. You can modify the data and add additional fields.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** column, search for and select **sn_chat_zoom.ZoomInteractionExtPoint**.
3. On the Extension Point form, select a script include to use the `sn_chat_zoom.ZoomInteractionExtPoint` extension point.
   - Create and register a custom script include.

     For more information, see Registering custom script includes against the scripted extension points.
   - Modify the existing script include by going to the Implementations related list and selecting a script include in the **Class** column. The script includes are displayed in the **Class** column.

     Note:
     By default, the `ZoomInteractionExtPoint` and `CSMZoomInteractionImpl` script includes that use the `sn_chat_zoom.ZoomInteractionExtPoint` extension point are available for Global and Chat Zoom Connector applications.
     - The `ZoomInteractionExtPoint` script include for the Global application copies the field values from the parent chat interaction record to the Zoom interaction record.
     - If the Customer Service application is installed, the `CSMZoomInteractionImpl` script include for the Chat Zoom Connector application copies the value of the **Consumer**, **Account**, and **Contact** fields from the interaction record of the parent chat to the Zoom interaction record. The `CSMZoomInteractionImpl` script include is available only when the Customer Service application is installed.
4. Include application-specific fields by adding the `sn_chat_zoom.ZoomInteractionExtPoint` extension point in the script include. You can create multiple implementations for an extension point and provide an order number for each implementation. The implementation that has the lowest order number is executed first.
5. On the Extension Point form, select **Update**.

Activate the quick action for Zoom meetings

Activate the Zoom quick action to initiate Zoom meetings using the quick action from a chat.

Before you begin

Install the Chat Zoom Connector application. For more information, see Install a ServiceNow Store application.

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Role required: admin

About this task

By default, the Zoom quick action is inactive. Activate this quick action to enable agents to initiate Zoom meetings from a chat.

Procedure

1. Navigate to **All** > **Quick Actions** > **Actions**.
2. In the **Name** column, search for and select **Zoom**.
3. On the Quick Action form, select the **Active** check box.
4. Click **Update**.

Result

By default, the Zoom quick action is associated with chats when the Chat Zoom Connector application is installed. In addition, if the Conversational SMS service channel application is installed, the quick action is also associated with SMS conversations. For more information, see Conversational SMS service channel and Quick actions .

Set up Engagement Messenger

Understand the stages involved in setting up Engagement Messenger before you add it to your customer service web portal.

After you install the Engagement Messenger application in your instance, you're ready to configure it. You can also watch the academy video to understand the overall functionality of Engagement Messenger.

The configuration process involves the following tasks:

1. Install the Engagement Messenger application from the ServiceNow® Store.
2. Create Engagement Messenger module.
   - Configure the theme and styling of how Engagement Messenger appears to your customers
   - Configure how Engagement Messenger behaves when your customer uses it
   - Configure how Engagement Messenger works for your customers

   For more information, see Configure Engagement Messenger.
3. Create identity providers to enable an authenticated user experience. See Create an identity provider (IdP) for Engagement Messenger.

   If you want to enable only a guest user experience for your customer service portal, you can ignore this step and move on to step 4.
4. Create cross-origin resource sharing (CORS) rules for the REST API. See Configure a CORS rule for Engagement Messenger.
5. Add HTTP response headers for your Engagement Messenger. See Create HTTP response headers for Engagement Messenger.
6. Configure the system properties to enable virtual agent chat, multi-provider SSO, and to set a user session time-out value. For more information, see Engagement Messenger properties.
7. Configure a custom URL to load Engagement Messenger on third-party websites. For more information, see Enable Engagement Messenger on a website when third-party application cookies are blocked.

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8. Configure the deep linking feature to launch a specified feature in Engagement Messenger. For more information, see Deep linking feature in Engagement Messenger.
9. Activate an Engagement Messenger module.
10. Embed Engagement Messenger in your web application.
11. Embed messenger in your native iOS mobile app using Now Mobile® SDK. For information, see the Embed Engagement Messenger in a native iOS app using Now Mobile SDK [KB1587276] article in the Now Support Knowledge Base.
12. Embed messenger in your native android mobile app using Now Mobile® SDK. For more information, see the Embed Engagement Messenger in a native android app using Now Mobile SDK [KB1587611] article in the Now Support Knowledge Base.

Engagement Messenger for Customer Service Management

By using the ServiceNow® Engagement Messenger application, your customers use self-service to find the information or service that they need from your third-party web applications that are outside of the ServiceNow environment.

Request apps from the ServiceNow Store

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

Engagement Messenger benefits

With the Engagement Messenger application, you can manage how your customers use your web applications and services from one central location. You can also configure the behavior and styling of the messenger and deploy the configuration on the websites or mobile sites of your choice.

Engagement Messenger provides the following benefits:

- Let your customers access your services from within an integrated messenger in your third-party websites.
- Integrate customer support capabilities via a no or low-code configuration.
- Meet your customer needs faster with these pre-packaged features:
  - Case management including case types
  - Service catalog requests
  - Virtual and live agent chat
  - Field service management
  - Appointment booking for field service
  - Walk-up appointment booking
  - Knowledge article search that is powered by ServiceNow® AI Search

For more information about the Engagement Messenger application, see Features of Engagement Messenger.

To get started with the Engagement Messenger application, see Set up Engagement Messenger.

Features of Engagement Messenger

Understand what the Engagement Messenger application can provide to your customers.

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After you create and configure the Engagement Messenger module, you can customize it for your customers. For example, you can change the display order of any of these features on the home page of the messenger. Also, you can enable or disable any of these features to suit your customer's needs.

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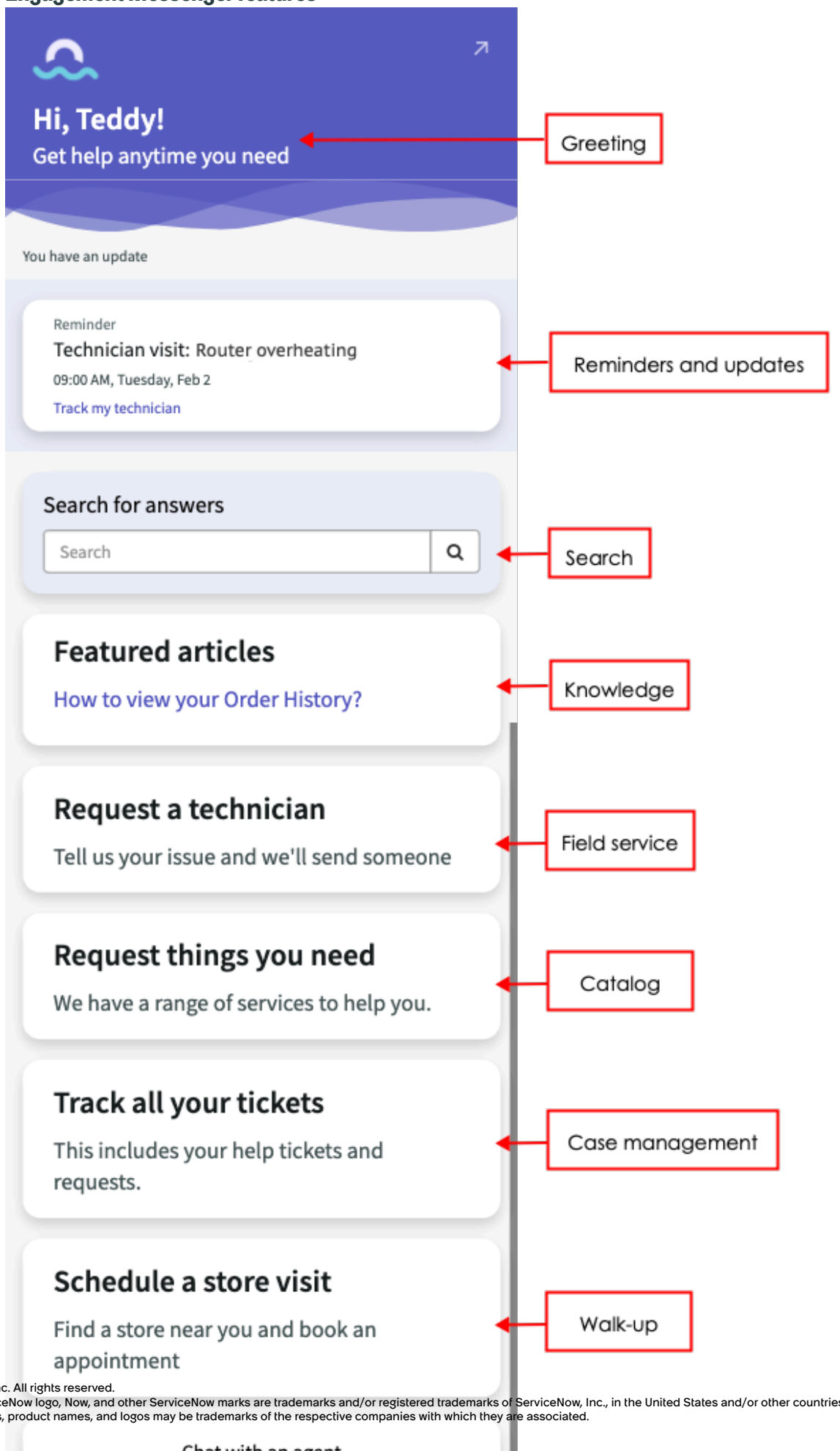
Engagement Messenger features



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Greeting

You can display the user greeting, which also includes a greeting message, on the header of the messenger. You can customize the way you want to greet your guest users and the users who sign in to your website.

Knowledge

You can select a knowledge base for your search results or choose to display featured articles on the home page of the messenger. You can also add multiple knowledge bases to suit your customer base.

Note:
To add knowledge bases to the Engagement Messenger module, you must manually assign the knowledge_admin role to the Engagement Messenger admin [sn_csm_ec.ec_admin] user.

Search

The ServiceNow® AI Search capability that is used in the Engagement Messenger application uses the knowledge bases that you selected for your messenger.

When a customer searches for information using the Search widget on the messenger, the displayed results are from the articles in the knowledge bases that are associated with your messenger module.

Customers can open the articles from the search results to get the information they need. They can also provide feedback to the article directly from the messenger to indicate whether the article was helpful or not. This feedback helps you to understand which articles are the most helpful so that you can improve those articles that weren't helpful.

Note:

- If the Service Portal - Restricted Pages plugin (com.glide.service-portal.pages.restricted) is activated in your ServiceNow instance, an AI Search functionality will not work in Engagement Messenger for unauthenticated users.

  If this plugin isn't activated, then the AI Search functionality works for both unauthenticated and authenticated users.

- You must configure AI Search in your ServiceNow instance and then enable Typeahead Search and AI Search Assist widgets so that the unauthenticated users can use the AI search feature from Engagement Messenger.

  For more information on enabling Typeahead Search and AI Search Assist widgets for Engagement Messenger, see Enabling AI search in the Customer and Consumer Service Portals for unauthenticated users.

  For more information of AI Search configuration, see Configuring AI Search.

Case management

You can manage your customer cases on the messenger. This feature is available only for authenticated users of your website.

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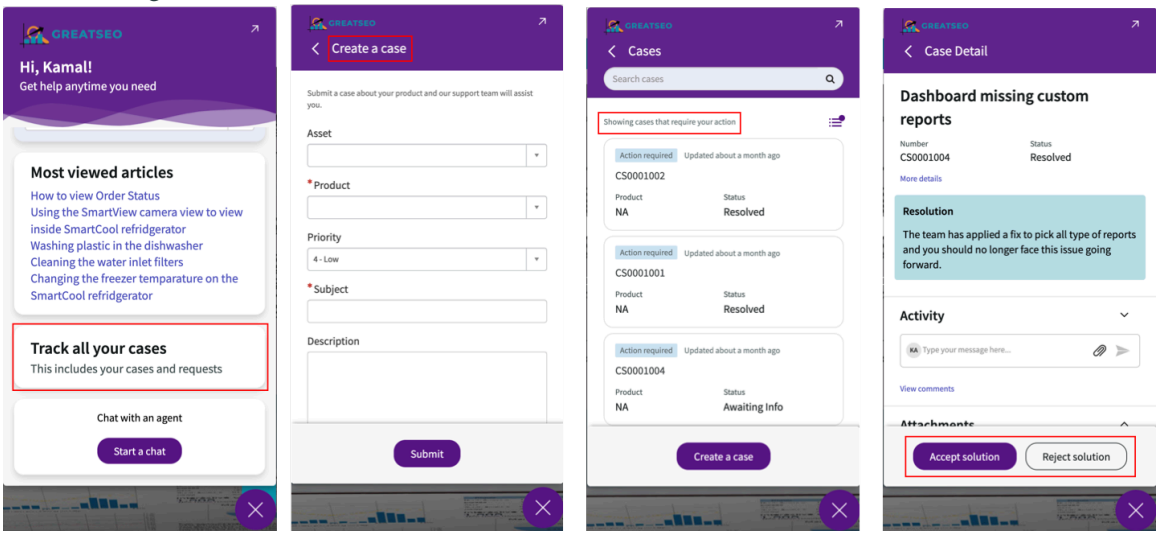
By using the Cases widget on the messenger, your customers can submit a case to request help with something or to report an issue. Submitted cases can be assigned to a customer service agent and tracked to a resolution.

Case management



Whenever your customers return to the customer portal and log in, they're notified of any updates to the cases that they created. They can also view the details of all the cases and requests that they have previously submitted and track their status.

Some cases would require action from the submitted user, asking them to provide more information about the help they need or to review a solution that the support team has provided. Customers can perform all these actions directly from within the messenger.

Catalogs

You can associate pre-defined catalogs with your Engagement Messenger. Customers can browse through the list of available catalog items. From this list of catalog items, they can choose to request a service or create a ticket. The requests that the customer makes can be tracked to a resolution using the case management feature.

Whenever your customers return to the customer portal and log in, they are notified of any updates to the requests that they have previously submitted.

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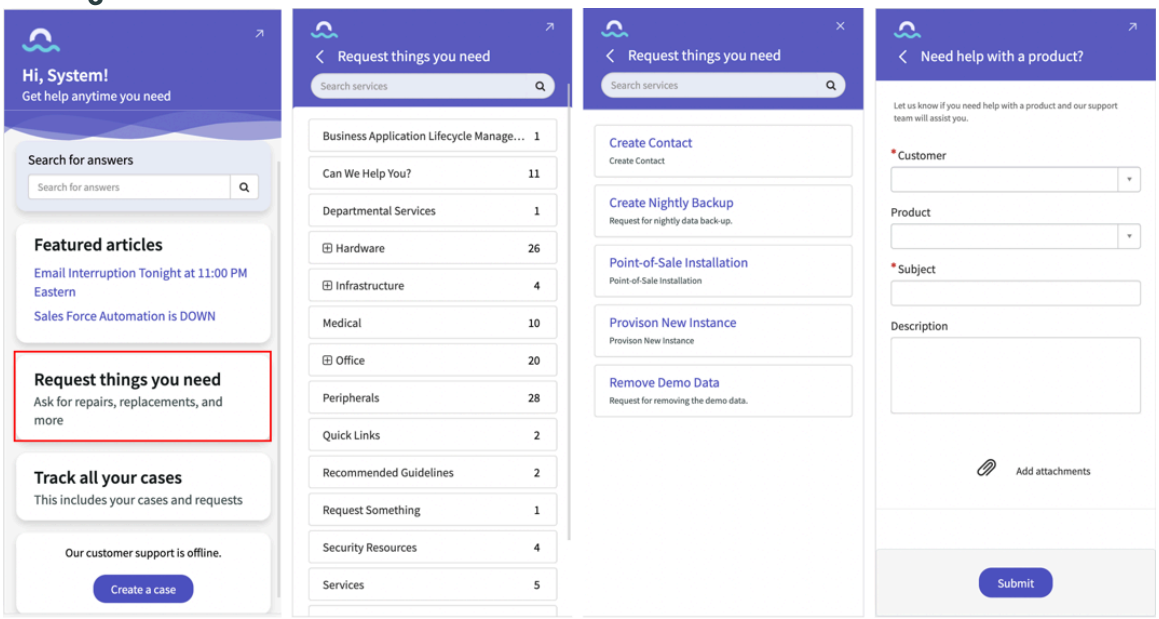
Catalog feature



Field service management

The field service feature enables your customer to request a technician visit to service their issue. By selecting a product or service that they need help with and their location, customers can submit a request for a technician visit. While submitting the request, customers can also add any supporting attachments that they think might help the support team understand the issue before a technician is allotted for the visit.

All technician requests are stored as work orders in your ServiceNow instance so that they can be tracked to completion.

The Work Order will have the location where the customer has raised a request. Geo-location services must be enabled for the technicians so that customers can track the live location and know the estimated time of arrival (ETA) of their technician. For more information, see Field service feature configuration.

Note:

- Verify that the Field Service Management - Customer Experience plugin (com.snc.fsm_customer_experience) is active in your ServiceNow instance.
- The field service feature is available only for users who log in to the Engagement Messenger and not for guest users.

Walk-up appointments

The walk-up feature enables your customers to book an appointment to visit one of your stores, service centers, and the like. Customers can view the support centers near them and select one to schedule an appointment to visit. Once an appointment is scheduled, customers receive a confirmation email.

Customers who log in into your website can view a list of scheduled appointments directly from this widget on the Engagement Messenger home page. They can modify or cancel existing appointments. They also receive notification emails on the following status of their walk-up appointment:

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- They’re ready to be assisted by an associate of the support center
- A walk-up interaction is assigned to an associate of the support center
- A walk-up interaction is closed

Customers who don’t log in can use the confirmation email to view and modify their appointments.

Note:
To enable a walk-up feature for your customers, verify that you activate the following plugins in your ServiceNow instance:

- Walk-up for CSM plugin (com.snc.walkup_for_csm) for authenticated users
- Guest Walk-up Experience for Customer Service plugin (sn_guest_walkup_cs) for unauthenticated users

Virtual and live agent chat

The chat feature enables support agents to interact with customers to resolve their issue by creating incident or case records or to transfer chats to another agent or queue if needed. Chat feature support is enabled for both authenticated and guest (unauthenticated) users.

Virtual and live agent chat

Customers can use the Chat widget on the messenger to interact with a virtual or live customer support agents in your organization. This way, your customers can get immediate responses to their queries or issues.

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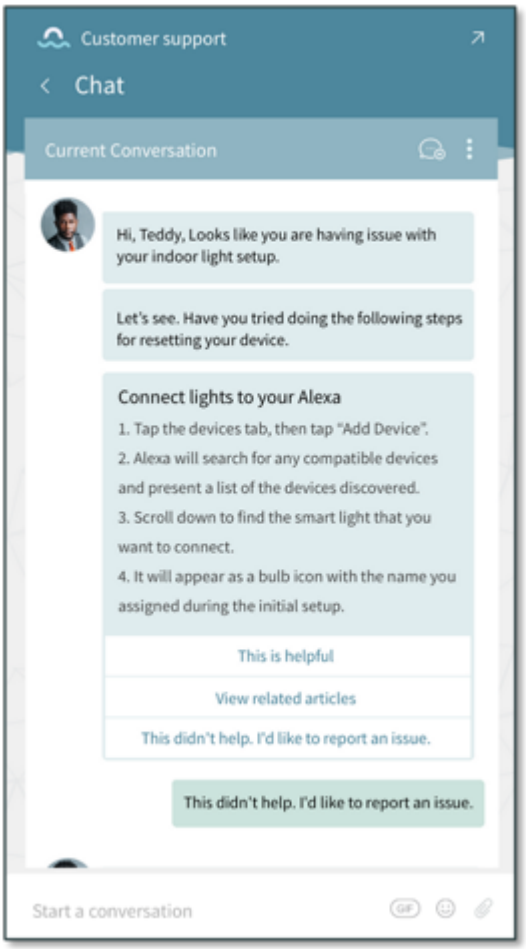
Live agent chat



Engagement Messenger also provides contextual chat functionality. From any case details page, your customers can directly start a chat that opens with the context of that specific case.

Note:
Chat is available when you activate the Glide Virtual Agent plugin (com.glide.cs.chatbot) and set the *com.glide.cs.embed.csp_frame_ancestors* system property value to **'self' <your website URL>**.

Now Assist in Virtual Agent with Engagement Messenger

Now Assist in Virtual Agent offers a conversational support experience that improves the chat experience in Engagement Messenger by delivering prompt answers to user questions. When enabled, Now Assist in Virtual Agent provides your users with an interactive generative AI experience. A friendly and natural language conversation that is easier to understand and helps users to be more comfortable with chatting to a bot.

By integrating generative AI chat capabilities, Now Assist in Virtual Agent enhances the user experience in Engagement Messenger. It improves asynchronous messaging, enabling users to resolve issues more quickly and efficiently. These capabilities help speed up issue resolution and increase efficiency by reducing the number of incoming

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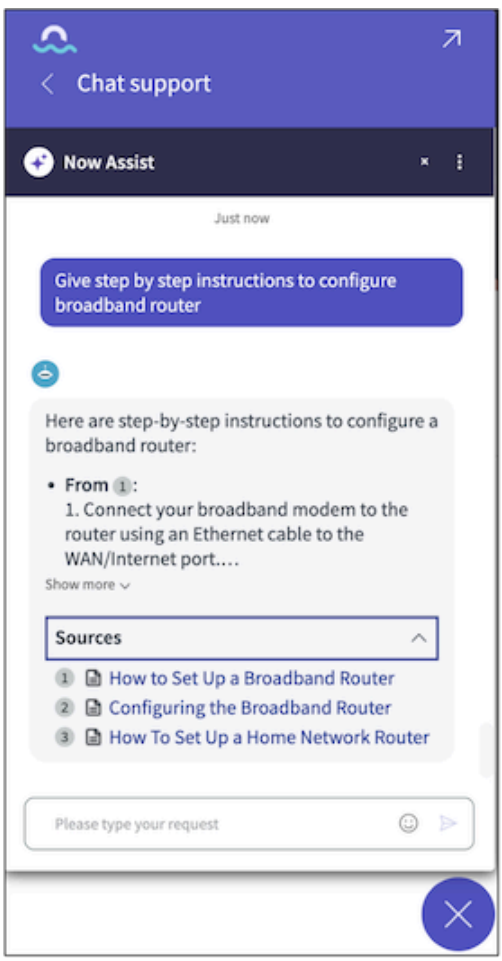
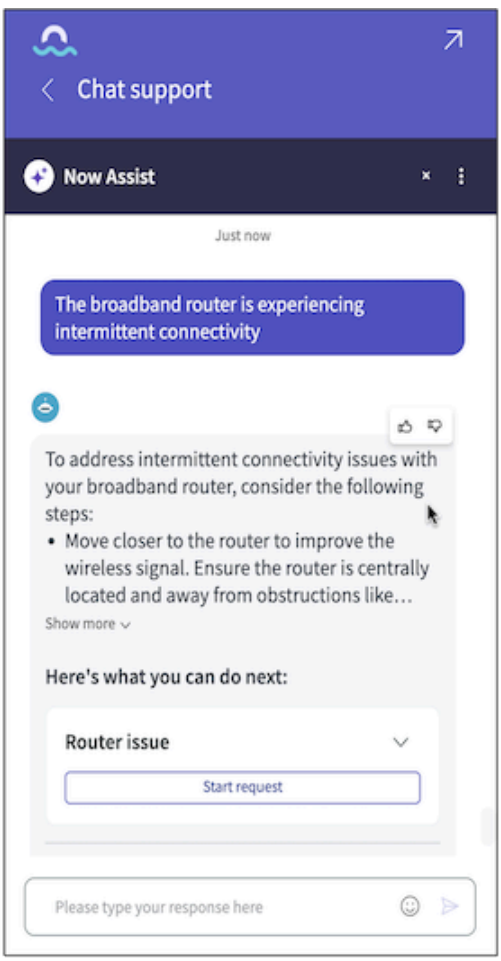
queries that must be diverted to a live agent. To know more about Now Assist in Virtual Agent, see Exploring Now Assist in Virtual Agent.

Getting started with Now Assist in Virtual Agent in Engagement Messenger:

- To enable Now Assist in Virtual Agent chat support in Engagement Messenger, verify that the Now Assist in Virtual Agent experience is configured by virtual_agent_admin or admin. For more information, see Configuring assistants overview.
- You can create or use an existing assistant by navigating to **All** > **Conversational Interfaces** > **Assistants**. For more information, see Create a chat assistant.
- Once you select an assistant navigate to the **Display experience** tab to configure the Engagement Messenger module. In the **Portals** tab, select the Engagement Messenger module from the **Add portal** list and select the **Standard chat** as the experience. For more information, see Display your chat assistant on a portal, channel, or mobile app.

Note:
Each assistant comes with its own search configuration. For a smooth experience, if the assistant appears on a portal or mobile app that already has AI search configured, consider duplicating that setup to maintain consistency.





Asynchronous chat

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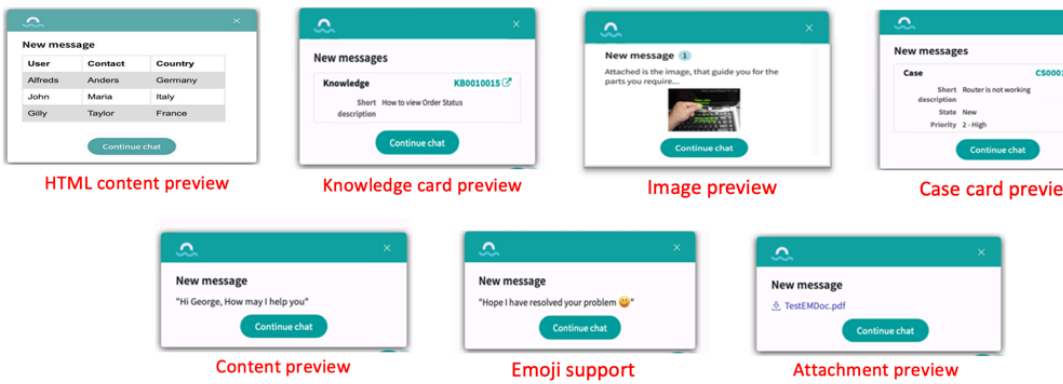
Engagement Messenger supports communication at different time intervals, enabling your support agents and end users to participate in long-running conversations without having to be online at the same time. For more information about asynchronous conversation, see Asynchronous Chat.

Configure asynchronous chat on Engagement Messenger by setting the web client as a messaging channel. For more information, see Configure asynchronous chat for the web channel.

Message preview

- Enable preview to see previews of unread chat message text, tables, links, HTML content, cases, knowledge cards, and images shared by the support agent without opening a message. The complete HTML content or video, and multiple unread messages, can be seen only when the user accesses the message.
- Asynchronous chat supports emojis sent by an agent in the message preview for a more interactive conversation. For more information on how to use emojis in Agent chat, see Using emojis in Agent Chat.

Previews



Offline message support

Offline chat support enables users to view messages sent by the support agent while they were offline. The chat widget notification shows the total number of unread messages in real-time when the user revisits the website.

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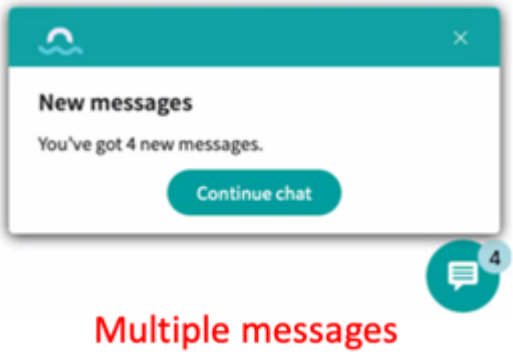
Offline message support



Chat messages history

Users can close and reopen the chat window as needed without losing context or progress so an accidental messenger closure doesn't reset the chat session.

Note:
You can set a specific timeout to manage the idle conversation. By default, if the requester doesn't respond to an agent message within two days, the conversation status changes to Closed Abandoned and the chat session is ended. As an admin, you can override the conversation idle timeout period for a web channel by setting the value in the Conversation Idle Timeout field in the Messaging Channels [sys_cs_channel] table. For details, see Closing Virtual Agent and Live Agent conversations.

Configurable Cards

The Configurable Cards enables you to add custom features to Engagement Messenger. It enables Engagement Messenger to serve as a one-stop solution for accessing all the information. You can embed portal page, featured links, and data from any table on the messenger using the Configurable Cards.

Portal page feature card

Enables you to embed any portal page or catalog item on Engagement Messenger. The embedded page opens within the messenger when the user selects the feature card.

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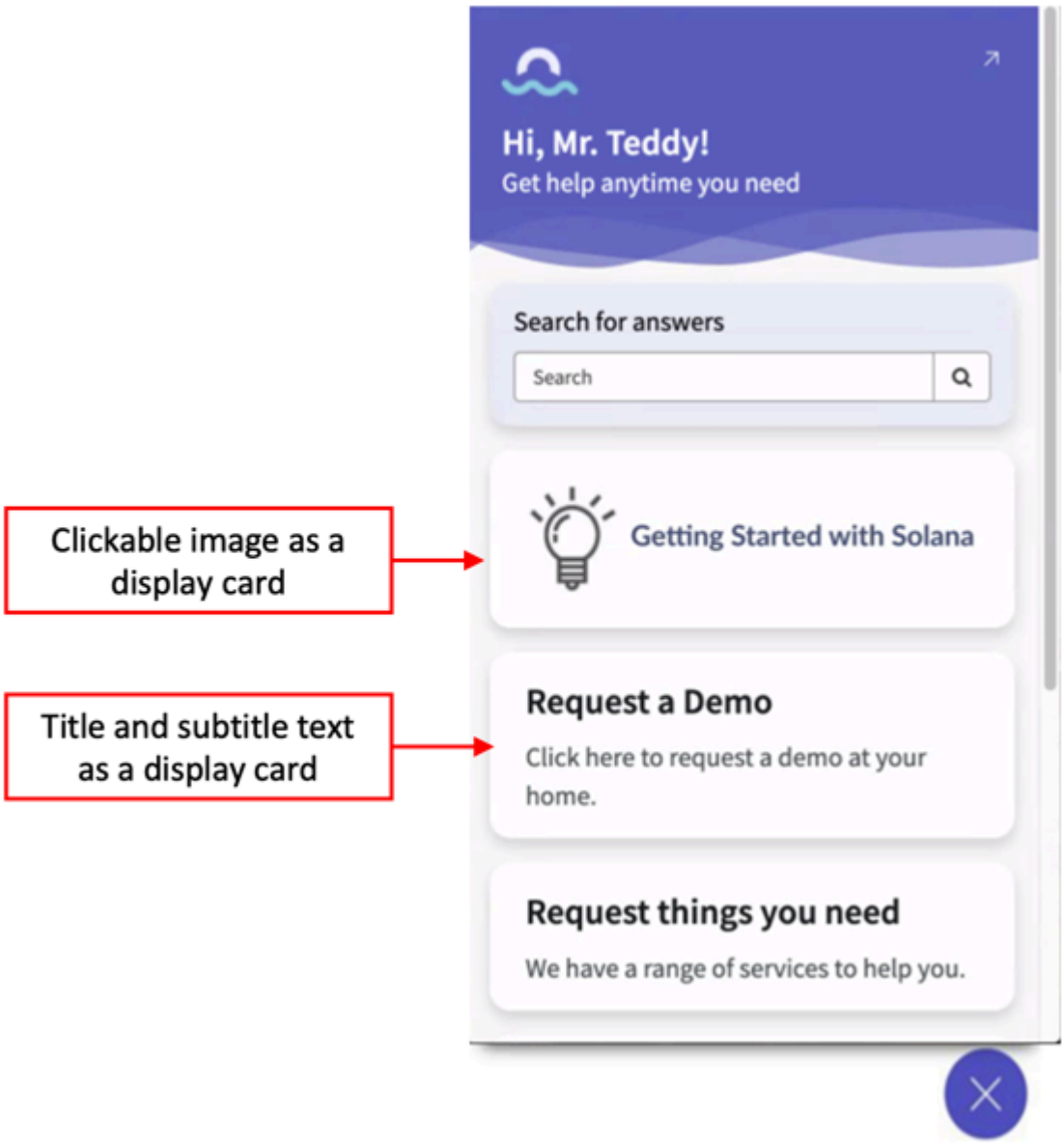

Featured links

Enables you to add a list of links to the website on Engagement Messenger. The link opens in a new browser tab when accessed using the feature card on messenger's home page.

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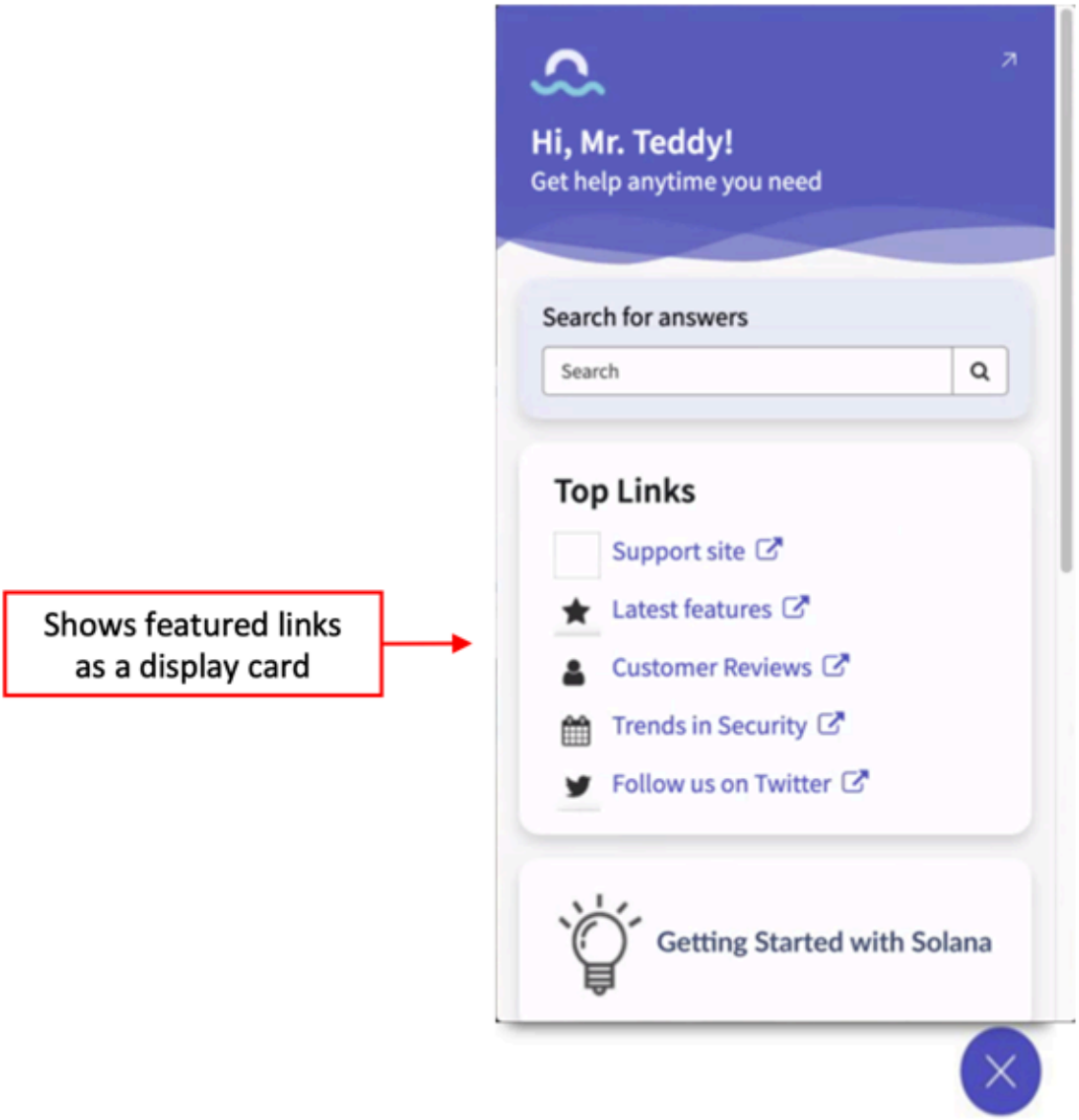
Featured links



Data from any table feature card

The feature card enables you to embed data from any table on Engagement Messenger. The added records appear as a card with a title or links on a messenger's home page.

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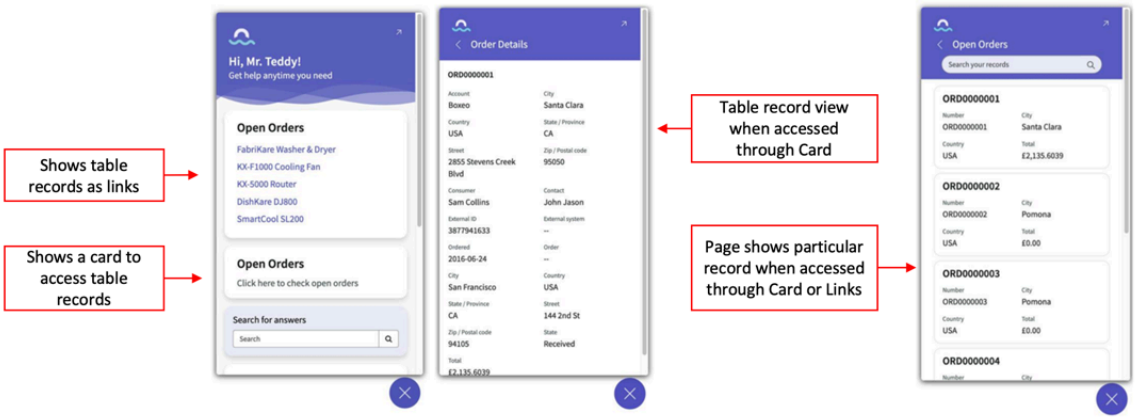
Data from any table



Proactive updates and reminders

Engagement Messenger provides your customers' updates and reminders in the following scenarios so that you can keep your customers updated even if they aren't accessing the messenger directly.

- Reminder for an upcoming walk-up appointment, according to the walk-up feature configuration
- Reminder for an upcoming technician visit
- Updates on a case
- Update on a chat

According to the configuration of Engagement Messenger behavior, the count of the updates is displayed on the messenger widget on your customer support webpage. If the customer navigates away from your website, the count of updates is also displayed on the browser tab.

To learn how to start configuring Engagement Messenger for your third-party website, see Set up Engagement Messenger.

Related topics

- Exploring AI Search
- Case management for Customer Service Management
- Virtual Agent
- Using Walk-up Experience
- Knowledge Management
- Field Service Management

Install the Engagement Messenger application

Install the Engagement Messenger application from the ServiceNow Store if you have the admin role.

Before you begin

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

Role required: admin

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Engagement Messenger application (sn_csm_ec) using the filter criteria and search bar.

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

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they'll be installed, are currently installed, or must be installed. If any plugins or applications must be installed, you must install them before you can install the Engagement Messenger application.
4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Result

The following items are installed with Engagement Messenger:

- Plugins
- Roles
- Tables

For more information, see Components installed with Engagement Messenger.

What to do next

- If you want to enable Virtual Agent chat support in the Engagement Messenger, activate the Glide Virtual Agent plugin (com.glide.cs.chatbot).

  For more information, see Activate Virtual Agent.
- Get started with Engagement Messenger. For more information on how to get started, see Set up Engagement Messenger.

Configure Engagement Messenger

Create a Engagement Messenger module and configure its behavior, appearance, and styling. By creating a messenger module, you can customize the appearance and behavior according to your organizational branding and to suit your customer needs.

Before you begin

- Install the Engagement Messenger application.
- Gather or prepare the following items:

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- Image files for your logo and messenger launcher icon. The images must be in .jpg, .png, .bmp, .gif, .jpeg, .ico, or .svg file format.
- Color names and hex codes for branding to configure the styling of the messenger user interface.

- Role required: sn_csm_ec.ec_admin

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. Choose to create an Engagement Messenger module or edit an existing module.
   - To create a module, select **New**.
   - To edit an existing module, select **Edit** in the Edit module column of your messenger module. The guided configuration view is displayed.
3. In the guided configuration view, navigate through Module, Appearance, Behavior, Features, and Implement.
4. On the form, fill in the fields.

Engagement Messenger module form

Field	Description
Module	
Module name	Unique name for your messenger module.
Short description	Brief description of the messenger module.
Appearance	
Logo	Logo that is displayed in the header of the messenger on your website. The recommended size and dimensions are: ○ Size (in bytes): approximately equal to 2 KB ○ Height (in pixels): 30–55 ○ Width (in pixels): 30–55 **Note:** If no logo is selected, the Home icon ( ) is displayed as a default logo in the header of the messenger.
Launcher icon	Icon that is displayed as the messenger option on your website. On your website, selecting this icon launches the messenger. The recommended size and dimensions are: ○ Size (in bytes): approximately equal to 1 KB ○ Height (in pixels): 24–60

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Field	Description
	○ Width (in pixels): 24–60 ○ Use a circular icon with a transparent background **Note:** The grid size range of a launcher icon is from 24X24 to 60X60. Any deviation from the defined range rescales automatically to fit the launcher icon size.
Launch icon position	Position of the messenger launch icon on your website.
Allow module to expand to full-height	Option for enabling the messenger module to expand to the full height of the browser tab.
Horizontal margin (in pixels)	Distance from the right or left of the browser tab for the placement of the messenger launcher icon. The distance is calculated from right or left based on your input for the field **Launch icon position**. For example, if you set the launch icon position as **Right** and the **Horizontal offset** as **50**, then the launch icon is placed at a distance of 50 px from the right of the browser tab. The maximum value for this field is 70 px.
Vertical margin (in pixels)	Distance from the bottom of the browser tab for the placement of the messenger launch icon. The maximum value for this field is 70 px.
Primary color	Primary color for styling the header or buttons in your messenger. For example, this color is used for user action buttons such as the **Submit**, **Yes**, or **OK**.
Primary font color	Text color that is used on UI elements that use the primary color.
Secondary color	Secondary color for styling your messenger.

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Field	Description
	For example, this color is used for user action buttons such as **Cancel** or **No**.
Secondary font color	Text color that is used on UI elements that use the secondary color.
Tertiary color	Tertiary color for styling your messenger. For example, this color is used to mark customer cases with tags such as **Action required**.
Tertiary font color	Text color that is used on UI elements that use the tertiary color.
Theme	Theme for other styling options of the messenger. This field is automatically set to **CWF Engagement Messenger Theme**. If you want to select a different theme, ensure that the theme that you select here must match certain criteria. For more information, see Engagement Messenger module theme requirements.
Note: If the value for the **Primary color**, **Secondary color**, or **Tertiary color** fields is set to color names, such as **Pink**, the Engagement Messenger UI doesn't display these colors correctly. As a workaround, you can enter the hexadecimal values of these colors. For example, use #FFC0CB for **Pink**.	
Behavior	
Notification	
Enable notifications on launcher icon	Option to enable in-app pop-up notification alert message when a new message is received.
Enable sounds	Option to get the notification alert sound.
Enable notifications in browser tab	Option to get the notification alert on the browser tab when the concerned web page isn't opened.
Enable user behavior tracking	Option for enabling the collection of user experience analytics from users of your Engagement Messenger. This option is available only if you activate the Service Portal Analytics plugin

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Field	Description
	(com.glide.service-portal.analytics) in your ServiceNow instance. **Note:** If you update your Engagement Messenger module name after user behavior tracking is enabled, the User Experience Analytics dashboard would show the original module name, not the updated name.
As an administrator, you can configure the Proactive Recommendations feature for Engagement Messenger. For more information, see Proactive Recommendations configuration for Engagement Messenger.	
Features	
See Configure the feature configuration of Engagement Messenger.	
Implement	
Website URLs	Comma-separated list of URLs of the websites where you want to deploy the messenger. For example, `https://www.example.com, https://www.yourwebsiteurl.com`
Authentication type	Authentication type for this embedded messenger. Select one of the following options: ○ None ○ Security assertion markup language (SAML)-based ○ Open ID connect (OIDC)-based If you want to enable only the guest user experience for the messenger in your website, set this field to **None**. Ensure that you create an identity provider (IdP) for the authentication type you select in this field. For more information, see Create an identity provider (IdP) for Engagement Messenger.
Advanced branding	
Hyperlink text color	Text color used for hyperlinks in messenger.
Navigate-back icon	The icon appears in the messenger header that enables the user to navigate to the previous page. The icon size is 24X24.

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Field	Description
Close icon	This icon appears in the messenger header that enables the user to close messenger. The icon size is 16X16.
List search icon	The icon appears in the messenger header that enables searching through a list. The icon size is 16X16.
Expand icon	The icon appears in the header that enables the user to expand the messenger to access information. The icon size is 16X16.
Collapse icon	The icon appears in the messenger header that enables the user to collapse an expanded messenger. The icon size is 16X16.
Start-chat icon	The icon appears in the messenger header that enables the user to start a chat with an agent regarding their ticket or technician visit. The icon size is 16X16.
Filter menu icon	The icon appears at the top of the list page that enables the user to apply filters to get desired result. The icon size is 24X24.
Applied-filters icon	The icon appears at the top of the list page and shows applied filters icon in messenger. The icon size is 24X24.

Note:
The advanced branding configuration is only available in the form view.

5. Select **Save**.
6. Select **Email instructions** to notify your security administrator to complete the following tasks:

   a. Create an identity provider (IdP) for Engagement Messenger.

   b. Configure a CORS rule for Engagement Messenger.

   c. Create HTTP response headers for Engagement Messenger.

Note:
Engagement Messenger extends service portal capabilities that don't support domain separation. For more information, see Domain separation and Service Portal. However, other tables that are used in Engagement Messenger may support domain separation according to the configurations with which they're created.

https://player.vimeo.com/video/1073656709?h=9f18f942f3&badge=0&autopause=0&player_id=0&app_id=58479

Result
A new messenger configuration is created and listed in the Modules module of Engagement Messenger application.

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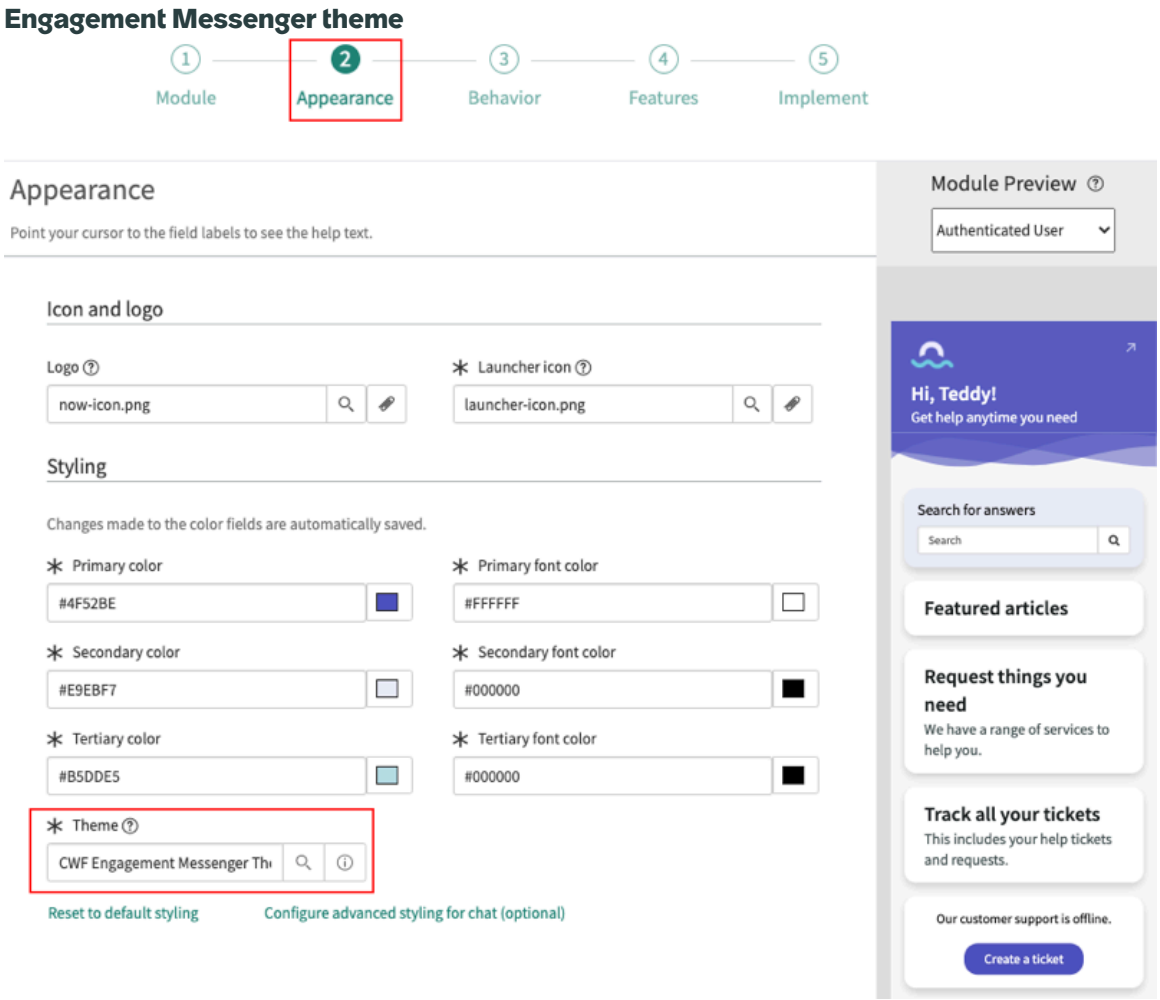
What to do next

1. Engagement Messenger properties.
2. configure the features of Engagement Messenger.
3. Share the messenger module code with your developer using the **Email code** to embed Engagement Messenger in your website.
4. Following are the advanced formatting changes that are available as an optional configuration in Engagement Messenger:
   - Engagement Messenger module theme requirements to reuse Service Portal theme to customize the visual appearance in Engagement Messenger.
   - Default font sizes for search result text in Engagement Messenger.

Engagement Messenger module theme requirements

You can set a theme that you can apply to an Engagement Messenger module. A theme enables you to define additional styling of Engagement Messenger in your website.

You can select the theme for your Engagement Messenger in the Appearance section of the guided configuration.



A theme that you want to use for your messenger module must meet the following criteria:

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- The header must be set as **CWF EC Header**
- It must contain the JS include */scripts/sn_csm_ec.js*
- It must contain the CSS includes *cwf_ec_theme_inline_css* and *sp-theme-la-jolla.css*

Default font sizes for search result text in Engagement Messenger

Define normal and genius search result font sizes to change text appearance in Engagement Messenger on different devices.

Note:
The ec_admin role is required to change the default configuration.

Search types and default configurations in Engagement Messenger

Search type	Default configuration
Normal search for Knowledge Base and Catalog	The default normal search result font size settings are: • Large for title • Medium for summary **Note:** • This setting for knowledge bases is found in the *em_kb_search_template* template script. • This setting for Catalog is found in the *em_catalog_search_template* template script. The default auto-spell correction text font size is medium. **Note:** The default configuration is set in the Faceted Search widget.
Genius search for Knowledge Base and Catalog	The default genius search result font size settings are: • Small for identifier • Large for heading • Medium for summary

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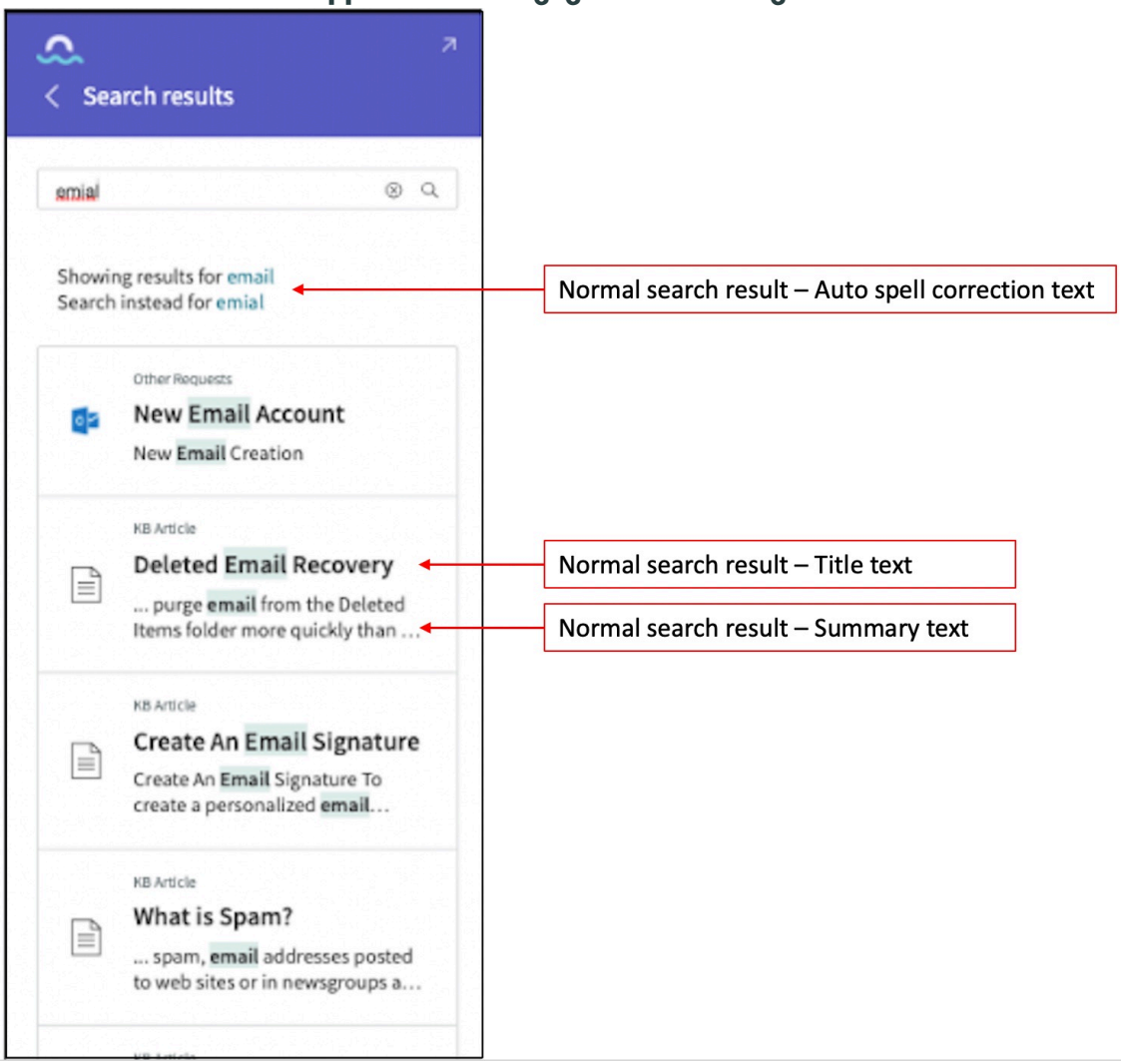
Search types and default configurations in Engagement Messenger (continued)

Search type	Default configuration
	Note: • This setting for knowledge bases is found in the *em_qa_genius_results_template* template script. • This setting for Catalog is found in the *em_catalog_genius_results_template* template script.

Normal search result text appearance in Engagement Messenger



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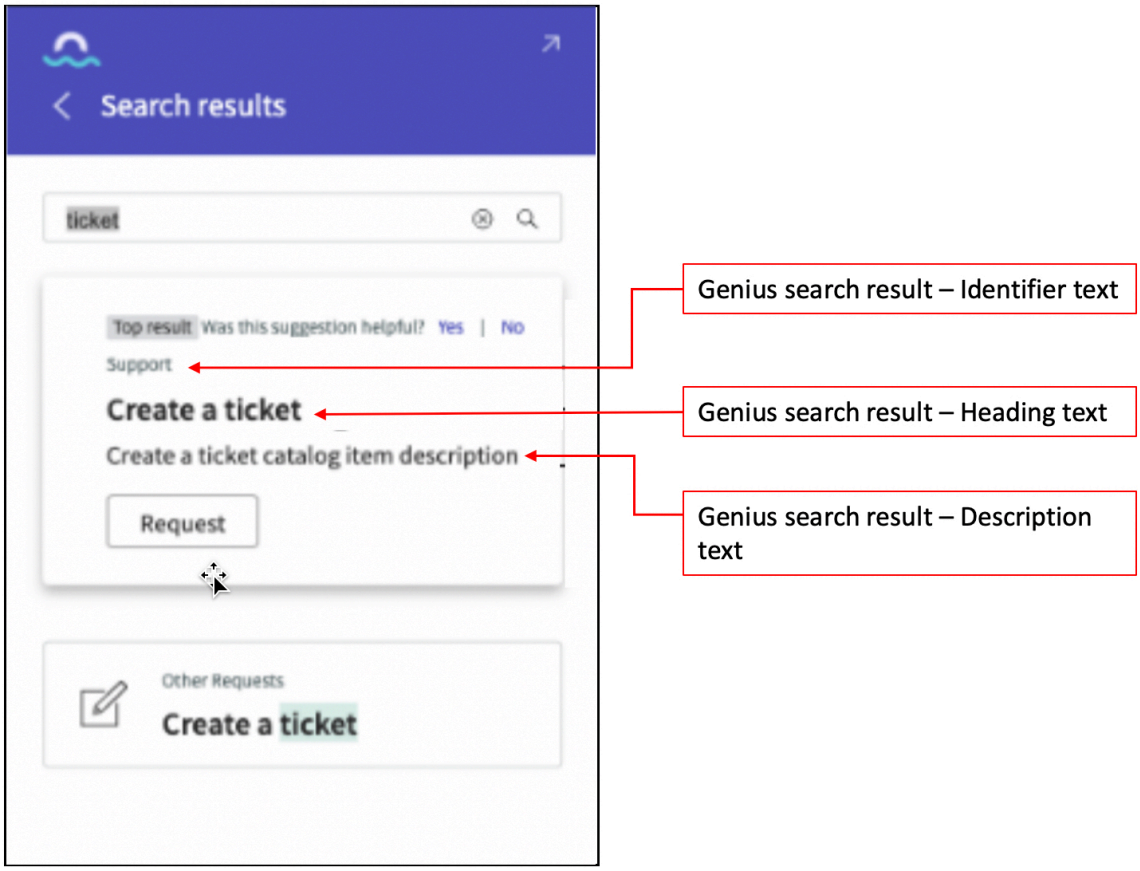
Genius search result text appearance in Engagement Messenger



Change the default chat mode for the Chat feature

Set either asynchronous chatting through a chat window or synchronous mode through messaging as the default chat mode of the Chat feature.

Before you begin

Role required: sn_csm_ec.ec_admin

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. On the Engagement Messenger Modules page, in the **Edit module** column, select **Edit**.
3. On the Configure Engagement Messenger Module page, select **Features**.
4. Enable the Chat feature by turning on **Chat** in the Feature settings pane.
5. On the Chat form, in the **Global chat settings** section, select **Change the default mode for chatting**.
   The Messaging Channel page opens in a new tab.
6. In the Type field, select the default chat mode.
   - To enable synchronous chat to engage in real-time conversation through a chat window, select **Chat**.
   - To enable asynchronous chat to engage in long-running conversations through messaging without being online concurrently, select **Messaging**.

     For more information, see Configure asynchronous chat for the web channel.
7. Select **Update**.

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Configure email notifications for unread chat messages

Send email summaries with all unread messages when the user isn't active during a chat conversation for a specified duration.

Before you begin
Role required: sn_csm_ec.ec_admin

About this task
You can send email summaries to an authenticated user or users who are verified by a live agent.

Procedure
1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. On the Engagement Messenger Modules page, in the **Edit module** column, select **Edit**.
3. On the Configure Engagement Messenger Module page, select **Features**.
4. Enable the Chat feature by turning on the **Chat** in the Feature settings pane.
5. On the Chat form, in the **Global chat settings**, select **Email notifications for unread messages**.
   The Missed activity emails page opens in a new tab.
6. Enable the sending of chat email notification by turning on the **Missed activity email** option.
7. In the Offline threshold drop-down list, set the time duration that the user is inactive before sending the email notification.
   - 15 minutes (default)
   - 2 hours
   - 8 hours
   - Custom
8. Select **Save**.

Result
Automatically sends email notifications of missed chat messages at the specified time interval.

Enable Engagement Messenger on a website when third-party application cookies are blocked

Configure a custom URL for the ServiceNow instance that helps prevent web browsers from blocking Engagement Messenger when cross-origin iframes and third-party cookies are blocked.

Before you begin
You must activate the Custom URL (com.snc.customurl) plugin. For more information, see Activate custom URLs.

Role required: admin

About this task
The latest versions of browsers including Safari and Chrome have enhanced browser security features. By default, the browser security features block third-party cookies that help prevent the loading of a third-party application on a website. If you don't use a custom URL, the browser treats the messenger as a third-party application when embedded inside a parent website. To prevent messenger from getting blocked by the browser, you need to set a custom URL for the ServiceNow instance to match the messenger domain with the website domain. Using custom URL, browser treats messenger as a first-party application rather than a third-party application. The web browser's security restrictions block messenger for the following reasons:

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- Web browser blocks cross-origin iframes when the domain of the URL used in the iframe does not match the domain of the website itself.

  Note:
  Engagement Messenger uses an iframe to load messenger's#nterface on a third–party website.

- Web browser treats messenger's cookies as the third-party cookies and blocks them.

  Note:
  Engagement Messenger uses cookies to enable features like authentication, recommendations, proactive help and so on.

Note:
Custom URL is primarily configured to get a branded URL for the ServiceNow instance, Portals, and EM module that matches with your domain URL.

You must add a CNAME record to your website domain's DNS records where Engagement Messenger is embedded and set it as your ServiceNow instance URL. For example, in the name server for `acme.com`, create an entry

```
support.acme.com 300 IN CNAME acme.servicenow.com
```

where `acme.service-now.com` is the ServiceNow instance and `acme.com` is your website on which Engagement Messenger is integrated.

Procedure

1. Navigate to **All** > **Custom URL** > **Custom URLs**.
2. Select **New**.
3. On the Custom URL form, in the **Domain name** field, enter the CNAME record (your custom URL) that you have set as the ServiceNow instance URL.
4. Select **Create**.

   Note:
   The new custom URL takes approximately six hours for activation.

5. **Optional:** After the custom URL is active, on the Custom URL form, select the **Set instance URL** check box to enable the custom URL as an instance URL.
6. In a text editor, open the HTML file of the web page on your website where you integrate Engagement Messenger.
7. In the code, replace the existing website URL with a custom URL.
8. Save the file.

Result
Engagement Messenger loads on a third-party website.

Example:
The following code includes a sample URL that contains `support.acme.com` as a custom URL.

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Custom URL in code

```
<script src="https://support.acme.com/scripts/sn_csm_ec.js?v=4.0.1"></script>
<script>
SN_CSM_EC.init({
      moduleID: "https://support.acme.com/#<module_id>,
      loadFeature: chatFeatureContext()
});
</script>
```

Related topics

- Set a custom URL as the instance URL
- Custom URLs association to your instance
- Custom URL errors and fixes

Before you begin
Role required: admin

Procedure

Navigate to **All** > > .

Result

Update Engagement Messenger launch URLs to the latest version

Update the version of Engagement Messenger in the code used to embed Engagement Messenger in your website or to launch features automatically with Engagement Messenger.

Before you begin
Role required: Website administrator

Procedure

1. Open the HTML file of the web page on the website where you integrate Engagement Messenger.
2. Change the existing version number to `v=3.1`.
   For example:

```
<script src="https://example.service-now.com/scripts/sn_csm_ec.js?v=3.1"></script>
<script>
SN_CSM_EC.init({
       moduleID: "https://example.service-now.com/#aeff0547dd393010f87734cef087e2ba",
       loadFeature: SN_CSM_EC.loadEMFeature()
});
</script>
```

3. Save the file.

Engagement Messenger properties

You can configure the system properties for your Engagement Messenger module so that you can enable Virtual Agent chat, multi-provider SSO, and set a user session time-out value.

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Properties installed with Engagement Messenger

After you configure an Engagement Messenger module, set the following system properties that are based on your configuration of the messenger module.

Tip:
In the navigation filter, enter `sys_properties.list` to view the list of all the system properties and search for the property that you want to update.

Properties and descriptions of the Engagement Messenger module

Property	Description
com.glide.cs.embed.csp_frame_ancestors	After activating the Glide Virtual Agent plugin (com.glide.cs.chatbot), you must use the *com.glide.cs.embed.csp_frame_an* system property to enable the configuration o frame-ancestors policy for the website where to host Engagement Messenger. Set the value of the *com.glide.cs.embed.csp_frame_an* system property 'self' <`your website URI` example, 'self' `https://www.example.c` • Type: string • Value: self • Location: System Properties
glide.authenticate.multisso.enabled	Set the *glide.authenticate.multisso.ena* system property to true to enable multiple pro SSO. • Type: true | false • Value: self • Location: System Properties **Note:** If you want to enable only a guest user ex for your customer service portal, you can this configuration.
User session time-out *glide.ui.session_timeout*	Set a user session timeout value for the *glide.ui.session_timeout* system pr to a value that is greater than or equal to your time-out. • Type: integer • Value: 30 • Location: System Properties

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Properties and descriptions of the Engagement Messenger module (continued)

Property	Description
	Note: If you want to enable only a guest user ex for your customer service portal, you can this configuration.
sn_customerservice.emails.customportal	Set the URL of your third-party customer supp so that the notification emails that your custor contain URLs that redirect them to the exact re record that they submitted. These notification emails are sent in scenario submitting a case, requesting a service, reque field technician, or booking a walk-up appoint • Type: string • Value: None • Location: System Properties For example, if your customer support portal i `https://www.example.com/support` then set the property value to `https://www.example.com/support`.
sn_csm_ec.proactive_inactivity_time	Set the inactive period (in seconds) to trigger help in Engagement Messenger. • Type: integer • Value: 2 • Location: System Properties
glide.knowman.serviceportal.use_numbered_url	The property contains a comma-separated lis service portal record sys_ids. For any portal re specified in this property, the article link will b displayed with the sysparm_number URL para instead of sys_kb_id. • Type: string • Value: None • Location: System Properties

Configure the feature configuration of Engagement Messenger

Configure the features of Engagement Messenger so that you can change the default settings to suit your customer needs.

Before you begin

Role required: sn_csm_ec.ec_admin

You must configure Engagement Messenger before configuring its features. For more information, see Configure Engagement Messenger.

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About this task

Configure how the features of Engagement Messenger appear to your customers, their display arrangement, and their behavior.

Use the Features section of the guided configuration to customize the messenger configuration. View a live preview of how the Engagement Messenger would look like in your third-party website. You can also watch the academy video to understand the overall functionality of Engagement Messenger.

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. In the Edit module column of the messenger module that you want to configure, select **Edit**.
   The guided configuration view is displayed.
3. From the Features section of the guided configuration, enable or disable a feature by using the toggle ( ) on the feature card.
4. Open one of the following features and modify the values:
   - Greeting: See Greeting feature configuration.
   - Knowledge: See Knowledge feature configuration.
   - Search: See Search feature configuration.
   - Case: See Case management feature configuration.
   - Catalog: See Catalog feature configuration.
   - Field service: See Field service feature configuration.
   - Walk-up: See Walk-up feature configuration.
   - Chat with an agent: See Chat feature configuration form fields.

     Note:

     - The knowledge article, catalog item, and case links sent by an agent can be opened within Engagement Messenger. You can configure how links should be open in a messenger. For more information, see Create a smart link preference.
     - You can also enable the Now Assist in Virtual Agent in Engagement Messenger by Configuring assistants overview and then Display your assistant in Engagement Messenger.

   - Configurable Cards: See Configurable Cards feature configuration.
   - Callback: See Callback feature configuration form.
5. **Optional:** You can also add a feature in the **Features** section using Configurable Cards.
   a. Select **Add custom feature**.
   b. Enter the feature name and select the feature type.
   c. Select **Add**.
   For more information, see Configurable Cards feature configuration.
6. Select **Update**.
7. **Optional:** Change the display order of the features by reordering the feature cards.
   You can see the modified home page layout of your Engagement Messenger in the live preview of the module.

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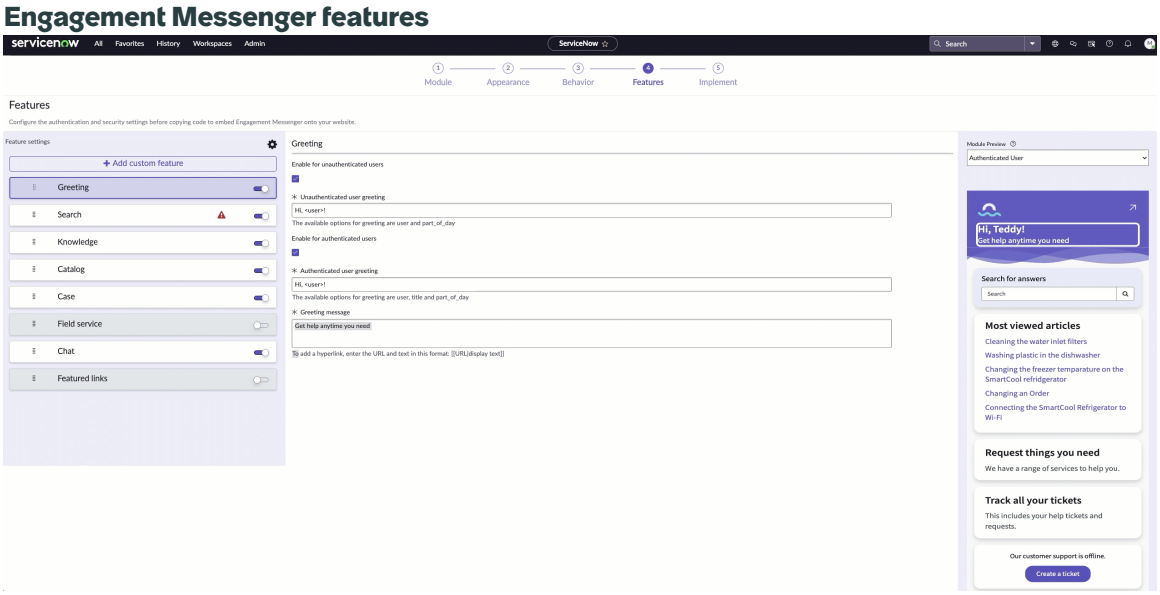

Note:
Engagement Messenger extends service portal capabilities that don't support domain separation. For more information, see (Domain separation and Service Portal). However, other tables that are used in Engagement Messenger may support domain separation according to the configurations with which they're created.

What to do next
Create an identity provider (IdP) for Engagement Messenger.

Enable AI Search in Engagement Messenger for unauthenticated users

Enable the AI Search experience in Engagement Messenger so unauthenticated users can see the most relevant set of search results.

Before you begin
You must configure AI Search for the Engagement Messenger before enabling AI Search for an unauthenticated user. For more information, see Search feature configuration.

Role required: admin

About this task
As an admin, you must enable the EC AI Homepage Search, Typeahead Search, and AI Search Assist widgets in Engagement Messenger to enable the AI Search capability for unauthenticated users.

Procedure
1. Navigate to **Service Portal** > **Widgets**.
2. Search for and open the **EC AI Homepage Search** widget.
3. Select the **Public** check box.
4. Select **Update**.

What to do next
Enable the Typeahead Search and AI Search Assist widgets. For information, see Enable AI search in the Customer and Consumer Service Portals for unauthenticated users.

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Configure the default behavior of Engagement Messenger

Configure the default behavior of Engagement Messenger to set the default settings for Notification, Recommendations, and Proactive.

Before you begin

Configure Engagement Messenger.

Use Engagement Messenger embed Code to integrate proactive recommendations on a web page.

Role required: sn_csm_ec.ec_admin

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. Select the Engagement Messenger module you want to install on your website.
3. In the Edit module column, select **Edit**.
4. In the Configure Engagement Messenger module, select the **Behavior** tab.
5. In the **Behavior** tab, configure the **Recommendations** and **Proactive** settings to define the Engagement Messenger functions.
   For more information, see Proactive Recommendations configuration for Engagement Messenger.

   Note:
   For information about how to customize the Notification behavior, see Configure Engagement Messenger.

6. Select **Save**.

Proactive Recommendations configuration for Engagement Messenger

The Proactive Recommendations feature enables you to show context-based suggestions in real time and to configure the recommendations experience on Engagement Messenger.

Note:
To integrate Proactive Recommendations on a web page, you need to enable recommendations in the embed code of Engagement Messenger.

Recommendations setting configuration form

Field	Description
Enable recommendation	Option to show or hide the recommendations.
Title text	Title of the recommendation screen in the messenger.
Subtitle text	Helpful text about the recommendations that displays at the top of the recommendations screen.
Show the search bar	Option to display the search bar on the Recommendation page that enables you to search content in addition to the provided recommendations.

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Recommendations setting configuration form (continued)

Field	Description
Maximum number of recommendations	The maximum number of recommendations to be shown on the recommendations screen.
Link text for additional recommendations	Text for the link that enables the user to view an additional recommendations.
Link text for Engagement Messenger	Text displayed in the footer of the messenger to enable navigation to the Engagement Messenger home page. Use the `[[display text]]` format to add a clickable link to messenger.
• If AI Search does not return any recommendations, then the Engagement Messenger home page is displayed. • You need to enable AI Search to make Recommendations available to users.	

Proactive setting configuration form

Field	Description
Type	Type of display to show the suggestions proactively on messenger after 30 seconds of inactivity. Select **None** to disable proactive behavior.
Choose an animation type	The type of animation for the launcher icon that activates when the user is inactive. • Ripple (like a wave) • Bounce
Show a tooltip above the icon	Option to show the tooltip message above the launcher icon.
Tooltip text	The message displayed on the tooltip.
Offer search	
Title text	Title of the widget that appears when **Offer search** is selected as the proactive help type.
Subtitle text	Description of the widget that appears on the widget body and appears below the title text.
Placeholder text	Placeholder text that appears in the search box.
Offer chat	
Title text	Title of the widget in the messenger.
Subtitle text	Description of the widget in the messenger.

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Proactive setting configuration form (continued)

Field	Description
Chat button label	Label of the button that is displayed for the user to start the conversation.
Offer the recommendation you configured	
Select the **Offer the recommendation you configured** option to show the knowledge article and catalog items recommendations proactively as per the configuration in the Recommendations section.	
Note: AI Search needs to be enabled for Offer search and Offer the recommendation you configured options.	

Use Engagement Messenger embed Code to integrate proactive recommendations on a web page

Modify the embed code of Engagement Messenger to enable recommendations and pass the search query for recommendations based on AI Search.

Before you begin

- Embed Engagement Messenger in your web application.
- Activate an Engagement Messenger module.
- Role required: sn_csm_ec.ec_admin

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. Select the Engagement Messenger module that you want to install on your website.
3. In the Edit module column, select **Edit**.
4. In the Configure Engagement Messenger module, select the **Implement** tab.
5. In a text editor, open the HTML file of the web page on your website where you integrate Engagement Messenger.
6. In the **Implement** tab, copy the code from the Embed code section.
7. Paste the code that you copied into the text file before the closing body tag.
8. Enable recommendations for a specific page in messenger by adding the parameter `enableRecommendations: true` in the embed code.

   When a user enters a search term in Engagement Messenger, the website's URL slug (the last part of the URL) is included in the search query by default. The URL slug conditions for the search query entered in the messenger search bar are as follows:

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- If a single forward slash is at the end of the URL, then no search term is picked. For example, `https://example.service-now.com/`.
- If a term is surrounded by forward slashes at the end of the URL, the enclosed text is considered to be a search term. For example, in the URL `https://example.service-now.com/product-xyz/`, product xyz is considered a search term.
- If a single forward slash is followed by text, that text is considered to be a search term. For example, in the URL `https://example.service-now.com/search_string` search string is considered as a search term.

The URL slug is used to deduce the search query as follows:

- All the special characters are replaced by a space. For example, in the URL `https://example.service-now.com/product-xyz`, the search term is "product xyz."
- Any file extension is ignored. For example, in the URL `https://example.service-now/product.html`, the search term is "product."

9. Enable recommendations at the module level.
   a. Navigate to **All** > **Engagement Messenger** > **Modules**.
   b. Select your Engagement Messenger module.
   c. Select **Edit**.
   d. In the Configure Engagement Messenger module, select the **Behavior** tab.
   e. Enable the **Enable recommendations** toggle switch.
10. **Optional:** Add custom logic when passing a search query parameter to the AI Search by passing a function callback as the value for a parameter `getAISRecommendationsContext`.
    The following example shows the modified code to generate proactive recommendations with the custom logic for passing a search context query.

```
‹script
 src="https://
example.service-now.com/scripts/sn_csm_ec.js"></script>
  ‹script>
  SN_CSM_EC.init({

 moduleID:"https://instancename.service-now.com/<sys_id>",
              loadFeature: SN CSM EC. loadEMFeature(),
              enableRecommendations: true,
              getAISRecommendationsContext: function
 getSearchQuery(){
              //Insert your code here to fetch the search
 query string return product xyz
}

  };
  </script>
```

11. Save and publish the HTML file.

Result

Engagement Messenger shows recommendations based on the context provided by the third-party website.

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Example:
The following example shows the modified code to generate default proactive recommendations for the default context.

```
‹script
 src="https://
example.service-now.com/scripts/sn_csm_ec.js"></script>
  ‹script>
  SN_CSM_EC.init({

 moduleID:"https://instancename.service-now.com/<sys_id>",
              loadFeature: SN CSM EC. loadEMFeature(),
              enableRecommendations: true
             }

  };
  </script>
```

Create an identity provider (IdP) for Engagement Messenger

Create an IdP for your Engagement Messenger so that you can enable customer authentication. You can create an IdP for either the OpenID Connect (OIDC) or Security Assertion Markup Language (SAML) authentication type.

Before you begin
Role required: admin

About this task
If you previously configured an IdP, you can ignore this task and reuse the existing IdP.

Note:
If you have configured multiple IdPs on your instance and want to select a specific IdP for your Engagement Messenger module, do the following:

- Enable Engagement Messenger on a website when third-party application cookies are blocked
- Custom URL with Identity Provider
- If you have multiple IdPs on your instance:
  - In case of OIDC authentication type, the generated ID token should contain the client ID of a IdP record against which authentication is required.
  - In case of SAML authentication type, set the particular IDP record as Auto-redirect IdP.

Note:
For more information, see Setting up auto login and logout for Engagement Messenger.

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Administration** > **Identity Providers**.
2. Select **New**.
3. Select either **OpenID Connect** or **SAML**.
   - If you select **OpenID Connect**, follow the procedure in Create an OpenID Connect (OIDC) configuration for Single Sign-On (SSO).
   - If you select **SAML**, follow the procedure from step 3 in Create and update identity providers.

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What to do next

- When customers sign in to your website where the Engagement Messenger module is deployed, they must also be authenticated within the messenger. User authentication is done by using the same IdP that authenticated the customer's login into your website.

  You must verify that the customers of your website are also added in your OIDC or SAML authentication provider for the ServiceNow instance.

- Enable cross-domain requests between Engagement Messenger and your website. For more information, see Configure a CORS rule for Engagement Messenger.

Related topics

How to set up OIDC provider on ServiceNow instance

Configure a CORS rule for Engagement Messenger

Configure a cross-origin resource sharing (CORS) rule to enable cross-domain requests between Engagement Messenger and your website where you want to deploy the messenger.

Before you begin

Role required: admin

You must complete the following tasks:

- Configure Engagement Messenger.
- Create an identity provider (IdP) for Engagement Messenger.

About this task

Use the Engagement Messenger API and your website URL to create a CORS rule.

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Administration** > **CORS Rules**.
2. Click **New**.
3. On the form, fill in the fields.

CORS Rule form

Field	Description
Name	Unique name for the CORS rule.
Application	Application scope for this record.
REST API	Engagement Messenger REST API that this CORS rule applies to. Set this field to **Engagement Center API [sn_csm_ec/engagement_center_api]**.
Domain	Domain that sends the request to this REST API. Set this field value to the URL of the website where you want to deploy the messenger. For example, **https://www.example.com**.

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Field	Description
Max age	Number of seconds to cache the client session. After an initial CORS request, further requests from the same client within this time do not require a preflight message. If you do not specify a value, the default value of 0 indicates that all requests require a preflight message.
HTTP Methods	Allowed HTTP methods. Enable the GET and POST methods.
HTTP Headers	Comma-separated list of HTTP headers to send in the response. You can leave this field empty.

4. Select **Submit**.

What to do next
Create HTTP response headers for Engagement Messenger.

Create HTTP response headers for Engagement Messenger

Configure a name-value pair for HTTP response headers for the Engagement Messenger module. The ability to configure and pass response headers enables special handling of the page content by a client, which is most typically a browser.

Before you begin
- Configure Engagement Messenger.
- Create an identity provider (IdP) for Engagement Messenger.
- Configure a CORS rule for Engagement Messenger.
- Role required: admin

About this task
Use the Engagement Messenger API and your website URL to create a CORS rule.

Procedure
1. Navigate to **All** > **Engagement Messenger** > **Administration** > **HTTP Response Headers**.
2. Select **New**.
3. On the form, fill in the fields.

HTTP Response Header form

Field	Description
Active	Option for indicating that this HTTP response header configuration is active.
Application	Application scope for this record.

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Field	Description
Applies to	Type of record that the HTTP response header configuration applies to. Select **Specific Type** to indicate that this HTTP response header configuration is for the specific type and record that you select in the **Type** and **Record** fields.
Type	Type of record that the HTTP response header configuration applies to. Select **Service Portal** to indicate that the records are related to the Service Portal.
Record	Engagement Messenger module record that the HTTP response header configuration applies to. Select a record: **a.** Select the Search ( ) icon to access the Select the document pop-up form. **b.** In the **Table name** field, ensure that the value is set to **Service Portal**. **c.** In the **Document** field, select the Search ( ) icon. **d.** From the list of Service Portal records, select the messenger module that you configured. **e.** Select **OK**.
Name	Name for the name-value pair for the HTTP response header. Set this field value to **Content-Security-Policy**.
Value	Value for the name-value pair for the HTTP response header. Set this field value to **frame-ancestors 'self' <enter your website URL>**. For example, **frame-ancestors 'self' https://www.example.com**.
Description	Detailed description for the HTTP response header.

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What to do next

Activate an Engagement Messenger module

.

Related topics

HTTP Response Headers

Activate an Engagement Messenger module

Activate the Engagement Messenger module that you configured so that you can embed it in your website.

Before you begin

Role required: sn_csm_ec.ec_admin

Perform the following tasks:

- Configure Engagement Messenger.
- Create an identity provider (IdP) for Engagement Messenger.
- Configure a CORS rule for Engagement Messenger.
- Create HTTP response headers for Engagement Messenger.

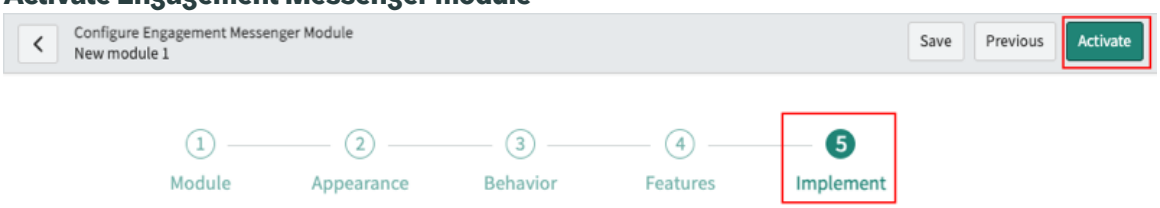
About this task

Unless you activate a messenger module, it would not be available for your customers to use from within your third-party website.

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. In the Edit module column of the messenger module that you want to activate, click **Edit**. The guided configuration view is displayed.
3. Select the **Implement** step.
4. Select **Activate**.

Activate Engagement Messenger module



What to do next

Embed Engagement Messenger in your web application.

Embed Engagement Messenger in your web application

Embed the source code of the messenger module that you configured in your website so that you can enable your customers to start using Engagement Messenger in your website.

Before you begin

- Activate an Engagement Messenger module.
- Role required: sn_csm_ec.ec_admin

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About this task

Copy the source code of the messenger module that you activated and paste it in the HTML file of the website where you want to deploy the messenger.

Next, depending on the authentication type that you selected for your configured messenger module, you may have to write code for functions to get the ID token and to start and stop the session for a logged-in user in the messenger.

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. In the Edit module column of the messenger module that you want to install in your website, click **Edit**.
   The guided configuration view is displayed.
3. Click the **Implement** tab.
4. If you have done any changes to the Security settings section, click **Save**.
   The code of the Engagement Messenger module is updated.
5. Scroll down to the Embed code section and click **Copy code**.
6. Open the HTML file of your website and paste the copied code before the closing body tag.
7. For a messenger module with OIDC-based or SAMI-based authentication, complete the following configuration.

   Note:
   For more information about setup for OIDC and SAML-based authentication, see Setting up auto login and logout for Engagement Messenger [KB1560205] article in the Now Support Knowledge Base.

8. If you enabled the walk-up feature for unauthenticated users, uncomment the `//guestWalkupBaseUrl` code line and complete the configuration by entering the base URL of your customer support portal.

   For example, if your customer support portal is **https://www.example.com/support**, then update the code to **guestWalkupBaseUrl = https://www.example.com/support**

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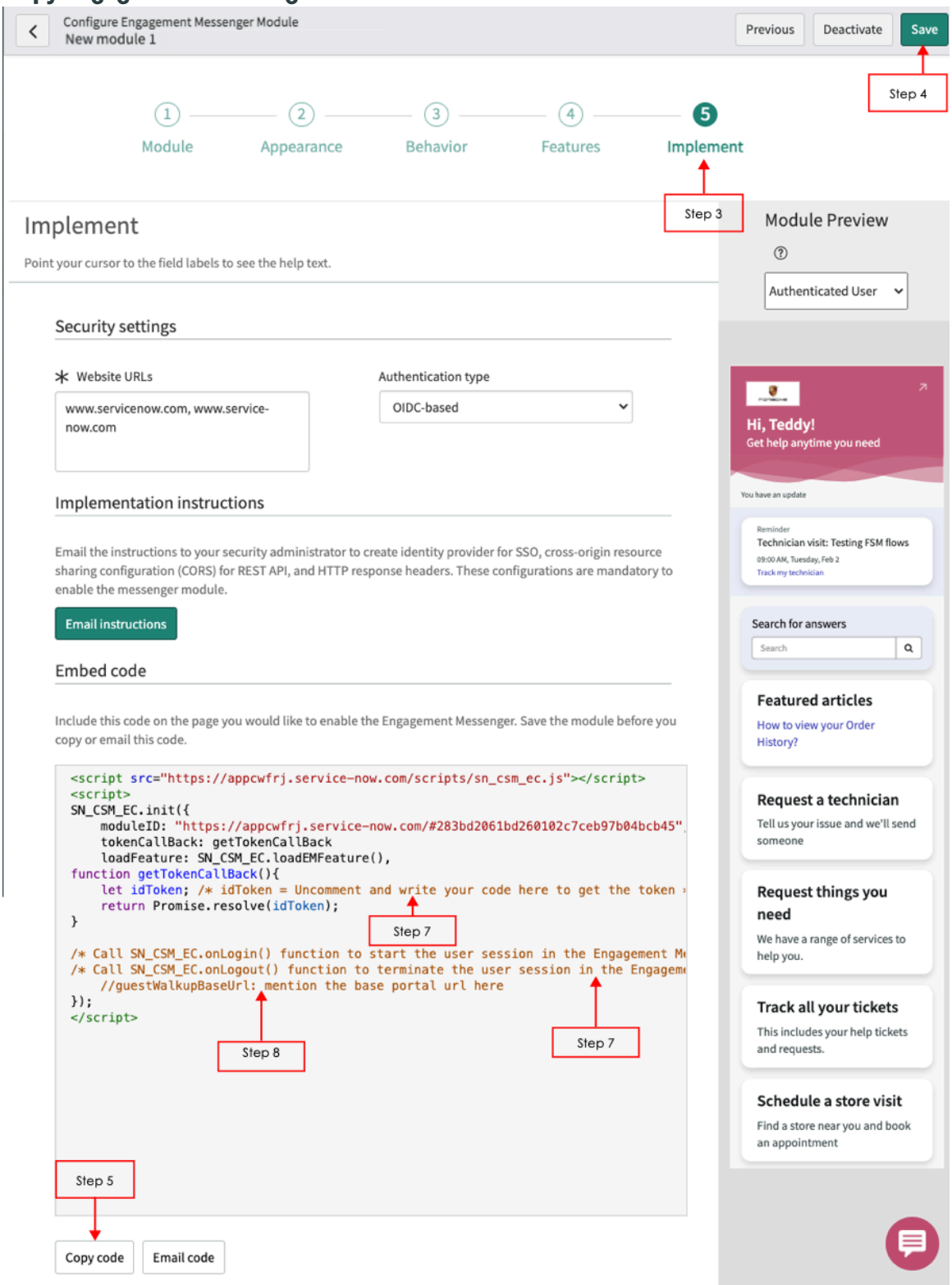
Copy Engagement Messenger code



9. **Optional:** To modify the embed code to set the preferred language in which Engagement Messenger is displayed, do one of the following.

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The `setLang : getEMLanguage` function takes preference when both parameters are available. However, if the user has set the preferred language in the [sys_user_preference] table, Engagement Messenger will be displayed in that language.

Note:
Beginning with the Yokohama release, the upgraded customers can also modify the embed code to enable language switching.

10. **Optional:** Open the website to which you added the Engagement Messenger code to verify that the launcher icon is available and click the icon to verify that it launches Engagement Messenger.
11. **Optional:** Modify the embed code of Engagement Messenger to integrate Proactive Recommendations on a web page.
    For more information on using Engagement Messenger to integrate Proactive Recommendations on a web page, see Use Engagement Messenger embed Code to integrate proactive recommendations on a web page.

What to do next

Open the website that you added the Engagement Messenger code to and verify that the launcher icon of the messenger is available. Click the icon to launch the Engagement Messenger.

You can also embed Engagement Messenger in your native iOS and android applications using Now Mobile SDK:

- Embed Engagement Messenger in a native iOS app using Now Mobile SDK [KB1587276]
- Embed Engagement Messenger in a native android app using Now Mobile SDK [KB1587611]

Deep linking feature in Engagement Messenger

Set a workflow as a default launch screen in Engagement Messenger either using custom code or a parameterized URL.

The deep linking capability enables you to customize the home page of Engagement Messenger so that you can launch a specified feature every time the messenger is accessed. The feature is launched through variables in a structured URL or in custom code through launch entries that contain substitution variables.

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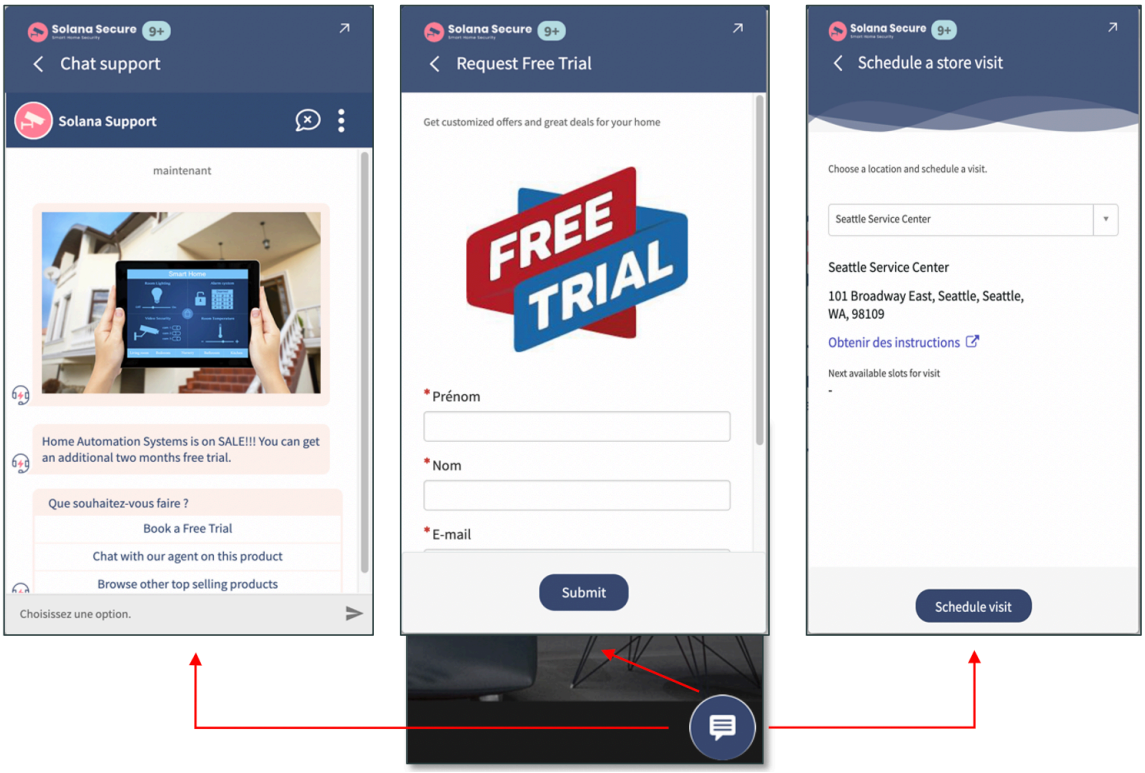
Deep linking launch screens



The deep linking capability supports the launch of View Article, New Case, Case List, Search, Case Search, Catalog Item, New Appointment, New Work Order, Default Home, Work Order, Virtual Agent and Live Agent chat features and display in Engagement Messenger.

Note:
Beginning with the Yokohama release, in Virtual Agent and Live Agent chats, if a user is engaged in an ongoing conversation and tries to contextually open a topic then the following options are shown:

- Continue chat
- New Chat

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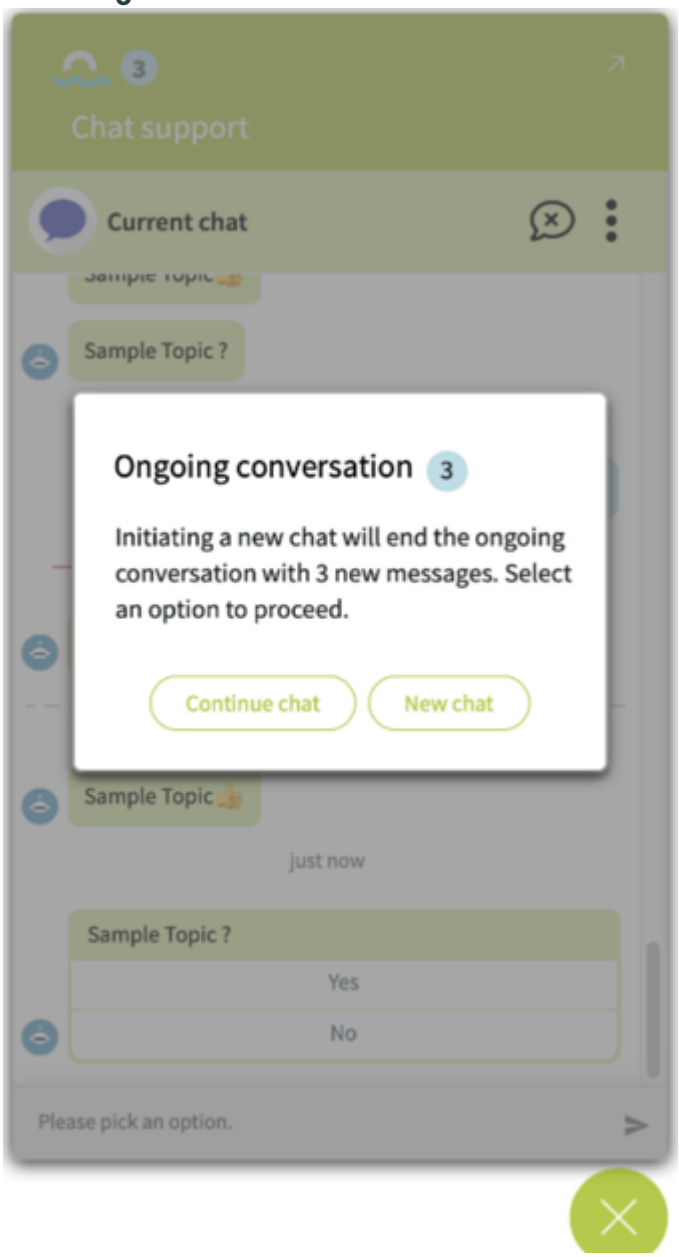
Switching chat



Launch a feature in Engagement Messenger using custom code

Use the custom code to enable the deep linking and launch a feature in Engagement Messenger integrated with your website.

Before you begin

Configure Engagement Messenger.

Embed Engagement Messenger in your web application.

Role required: ec_admin and website administrator

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About this task

Note:

If you're using existing code, verify that you update the script to show `v=3.1`. For example:

```
<script
 src="https://
example.service-now.com/scripts/sn_csm_ec.js?v=3.1"></scri
pt>
<script>
SN_CSM_EC.init({
      moduleID:
 "https://example.service-now.com/#aeff0547dd393010f87734cef
087e2ba",
      loadFeature: SN_CSM_EC.loadEMFeature()
});
</script>
```

Procedure

1. Navigate to **Engagement Messenger** > **Modules**.
2. In the Configure Engagement Messenger Module, open the Implement tab.
3. Copy the code from the Embed code section.
4. In a text editor, open the HTML file of the web page on your website where you integrate Engagement Messenger.
5. Paste the code that you copied before the closing body tag.
6. Define the feature context and specify the variables for the feature.
   Use the following format to define a feature context:

```
{
 feature: "<feature_name>",
 openOnLoad: <true/false>,
 params: {
  "<param_name>": "<param_value>",
  "<param_name>": "<param_value>
 }
}
```

   In the format, specify the feature variables.

   feature

   The feature name. For more information, see Feature context parameters supported in Engagement Messenger .

   openOnLoad

   Include this option and set it to true only if you want Engagement Messenger to open automatically. The default setting for this option is for Engagement Messenger not to open automatically.

   <param_name>": "<param_value>

   Name and value of a parameter associated with the feature. For more information, see Feature context parameters supported in Engagement Messenger.

7. Create a custom wrapper function to pass the feature context to the `SN_CSM_EC.init` function of the embed code.

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For example, the following code uses the `chatFeatureContext()` custom wrapper function for the chat feature context.

```
function chatFeatureContext(){
 return {
   feature: "CHAT",
   openOnLoad: false,
   params: {
    "topic_id": "8708db281bd5b81080df6247b04bcb79",
    "language": "fr"
    }
    }
}
```

8. Replace the `SN_CSM_EC.loadEMFeature()` function with a custom wrapper function that you created in step 7.
   For example, in the following code, the `chatFeatureContext()` wrapper function is passed as the value of the `loadFeature` attribute.

```
SN_CSM_EC.init({
  moduleID: "https://example.service-now.com/#<module_id>",
  loadFeature: chatFeatureContext()
});
```

9. Save the file.
10. **Optional:** Verify that the designated feature launches.
    a. Open the website in which you embedded Engagement Messenger.
    b. Select the launcher icon.
    c. Verify that Engagement Messenger launches feature you configured in the embed code.

Result

The feature you specified in the embed code is launched by default when Engagement Messenger is opened in the website in which it's embedded.

Example:

The following code initiates the chat feature by default. It also shows how to trigger a Virtual Agent topic by default when chat is loaded by passing the system identifier (sys_id) of the topic. You can also specify a language to initiate chat in that language.

```
<script
 src="https://
example.servicenow.com/scripts/sn_csm_ec.js?v=3.1"></script>
<script>
function chatFeatureContext(){
 return {
   feature: "CHAT",
   openOnLoad: false,
   params: {
    "topic_id": "8708db281bd5b81080df6247b04bcb79",
    "language": "fr"
    }
    }
}

SN_CSM_EC.init({
```

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```
 moduleID:
 "https://example.service-now.com/#d27c94d6db403810a2a6a0ced3961
9da",
 loadFeature: chatFeatureContext()
});
</script>
```

function

chatFeatureContext(): The wrapper function for chat context.

feature

CHAT: The chat feature for initiating Virtual Agent or Live Agent chat.

openOnLoad

false: Disable the automatic launch of Engagement Messenger.

topic_id

8708db281bd5b81080df6247b04bcb79: The module system identifier (sys_id).

language

fr: Sets the default chat language to French.

Launch a feature in Engagement Messenger using URL parameters

Use URL parameters in your website's URL to enable the deep linking and launch a feature in Engagement Messenger integrated with your website.

Before you begin

Configure Engagement Messenger.

Embed Engagement Messenger in your web application.

Role required: ec_admin and website administrator

About this task

You can use URL parameters to display specific feature in Engagement Messenger. When the URL is accessed, it opens your website and automatically loads the specified feature in Engagement Messenger. For example, you can embed the URL in an email to share a knowledge article from Engagement Messenger.

Note:

If you are using existing Embed code, ensure that you update the script to include `v=3.1`. For example:

```
<script src="https://example.service-now.com/scripts/sn_csm_ec.js?v=3.1"></script>
<script>
SN_CSM_EC.init({
       moduleID: "https://example.service-now.com/#aeff0547dd393010f87734cef087e2ba",
       loadFeature: SN_CSM_EC.loadEMFeature()
});
</script>
```

Procedure

1. Navigate to **Engagement Messenger** > **Modules**.
2. In the Configure Engagement Messenger Module, open the Implement tab.

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3. Copy the code from the Embed code section.
4. In a text editor, open the HTML file of the web page on your website where you integrate Engagement Messenger.
5. Paste the code you copied before the closing body tag.
6. Save the file.
7. Modify the website URL to include the feature.

```
https://website/page.html?feature=<FEATURE_NAME>&<PARAM_NAME1>=
<PARAM_VALUE1>&<PARAM_NAME2>=<PARAM_VALUE2>
```

<FEATURE_NAME>

The feature name. For information, see Feature context parameters supported in Engagement Messenger.

<param_name1>=<param_value1>

Name and value of a parameter associated with the feature. To define multiple parameters, use the same format. For more information, see Feature context parameters supported in Engagement Messenger.

8. **Optional:** Verify that the URL launches the designated feature automatically.

Result
The feature you included in the URL is set as the default launch screen in Engagement Messenger.

Example:
The following sample URL includes a system identifier (sys_id) for a knowledge article that will automatically display when the website is launched.

```
https://mywebsite/page.html?feature=VIEW_ARTICLE
 &sys_kb_id=ec7617461b01f01080df6247b04bcbaf
```

Configuring Omnichannel Callback for Customer Service Management

Configure various aspects of Omnichannel Callback for Customer Service Management to enable callback feature based on the specific requirements of your organization.

Installing and configuring Omnichannel Callback for Customer Service Management enables your customers to request a callback from various channels such a Virtual Agent, the Customer Service Portal, and Engagement Messenger.

The configuration process consists of the configuration tasks listed in the following table.

Configuration tasks

Task	Description
Install Omnichannel Callback for Customer Service Management	Install the Omnichannel Callback application (sn_callback).
Configure the callback behavior for Omnichannel Callback for Customer Service Management	Configure the various aspects of callback such as max retry attempts and expire time.
Publish the virtual agent topics for callback	Publish the callback virtual agent topics to display the callback option to customers on Virtual Agent clients.

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Configuration tasks (continued)

Task	Description
Callback feature configuration form	Configure the callback feature in Engagement Messenger.

Omnichannel Callback for Customer Service Management

Omnichannel Callback for Customer Service Management enables a callback option to be provided for customers when there is a long wait time for a live agent.

Omnichannel Callback for Customer Service Management offers an option for customer service agents to call customers back when the wait time for agents is long or agents are unavailable. For more information, see Omnichannel Callback.

Install Omnichannel Callback for Customer Service Management

You can install the Omnichannel Callback for Customer Service Management application (sn_callback) if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Omnichannel Callback for Customer Service Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with the Omnichannel Callback for Customer Service Management application:

- Plugins
- Store applications
- Scheduled jobs - Send reminder for scheduled Callback tasks

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Omnichannel Callback for Customer Service Management application (sn_callback) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

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5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Publish the virtual agent topics for callback

Publish the Virtual Agent topics for callback to help your customers request a callback from agents when there's a long wait time to reach a live agent or agents are unavailable.

Before you begin

Ensure that the Conversational appointment booking application is installed.

Role required: virtual_agent_admin or admin

About this task

Deploy the inactive topic to save it and make it available to users on Virtual Agent clients.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
2. In the Topics page, publish the following topics.
   - Request a callback
   - Reschedule a callback
   - Cancel a callback
3. In the Header bar for the topic, select **Publish**.

   If you're using NLU discovery, the Choose what to publish dialog box appears. Select the available items to publish with the topic, such as the NLU model and language mappings, and then click **Publish**.

   Note:
   If the **Publish Model** option is unavailable, the model may need some work. For example, the model may not have enough intents or may need more utterances for some intents. Fix these issues before proceeding. Also, if a model language is unavailable, the language-specific model has never been published. Publish it from NLU Workbench. For more information, see Model management.

   For topics, the topic state is Active and the Published state changes to **just now**.
4. If you published a conversation topic, verify that your keywords or NLU utterances for the topic work as expected.

   a. Return to the Topics page, and then click **Test Active Topics**.

   b. In the conversation window, enter keywords or NLU utterances that correspond to the topic intent to verify that the topic opens.
   For the pre-built Virtual Agent topics, the bot returns a list of topics that match the entered keyword or utterance.

Result

The topics are published and are available for use in calling topics.

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Configure the callback behavior for Omnichannel Callback for Customer Service Management

Configure the callback behavior of the callback, such as the maximum number of retry attempts or the expiration time, in Omnichannel Callback for Customer Service Management.

Before you begin
Role required: admin

Procedure

1. In the navigation filter, enter `sys_properties.list`.
2. In the **Name** search field, enter `sn_callback`.
3. Configure any of the properties listed in the following table.

Callback properties field description

Property	Default value	Description
sn_callback.callback_expire_time	60	Callback timeout in minutes after which the callback task is closed.
sn_callback.callback_max_retry_attempts	5	Maximum retry attempts after which the callback task is closed.
sn_callback.enable_scheduled_callback	true	Option to enable scheduled callbacks by enabling customers to select a time slot for callback.

Implement the Interaction Controls Component (ICC) for contact center integration

Implement prebuilt, certified integrations with Contact Center as a Service (CCaaS) providers using the ServiceNow® voice reference architecture.

About this task
The Interaction Controls Component (ICC) feature enables CCaaS providers to display native voice integrations so agents can manage customer calls directly from their configurable workspace.

For more information, see Integrating contact centers with Interaction Controls Component (ICC) for voice calls.

The voice controls display under the following conditions:

- The interaction is a phone call.
- The **Enable interaction controls** field is enabled on the OpenFrame Configuration record that allows the admin to configure the Agent Workspace to display voice interaction components.
- The agent is a member of the user group specified on the OpenFrame Configuration record. If no user group is specified, all agents can access the CSM voice interaction record page.
- Ensure the certified third-party App Store plugin is installed. For Example:
  - Unified Experience from Genesys
  - Unified Experience from Genesys - Core

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Before you begin

Ensure the Interaction Controls Component (ICC) plugin (com.app_interaction_control) is installed to use the ICC voice features for CCaaS.

Role required: admin

Procedure

1. Navigate to **All** > **OpenFrame** > **Configurations**.
2. Create a new configuration record for the specific CCaaS provider.
   Some CCaaS providers can include OpenFrame configurations for their plugin.
3. Turn on the interaction controls for OpenFrame by selecting the **Enable interaction controls** check box.
4. From the **User Group** column, select a group and move it to the selected column.
   This is the group of users to whom the OpenFrame configuration applies.
5. Unlock the URL field.
6. In the URL field, enter a third-party URL.
   CaaS providers have specific configuration requirements for their plugins. Refer to the relevant contact center documentation for setup instructions.
7. Select **Update**.

Plugin requirements for external call routing integration with contact centers

For the Interaction Controls Component (ICC) call features to work, you must have a combination of plugins that can be downloaded from the ServiceNow® Store and CCaaS providers.

The CCaaS providers must integrate with the ServiceNow platform . Additionally, they must submit their plugins for certification, to be made available for use from the ServiceNow® Store.

Note:
Verify plugin dependencies against the store listing to ensure you're using the latest compatible versions.

The following plugins are required to deploy the call control integration with the contact center platform:

- Advanced Work Assignment plugin
- Customer Service Management (CSM)
- IT Service Management (ITSM)
- Agent Workspace, as well as any workspace that works with Agent Chat, Email Interaction, or Messages.
- Plugin dependency: com.sn_openframe
- App dependency: sn_openframe, sn_timer, sn_ct_ctr_it_core
- Products with Contact Center Integration Core Plugin
  - Application Spoke Selector
  - External Agent Management Util Pack
- OpenFrame
-

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Implement Intelligence

Integrate intelligence features to automate routine tasks and provide relevant content, enabling a quicker, more personalized customer experience.

Recommended Actions

Set up recommended actions and field recommendations to help agents resolve cases effectively and efficiently.

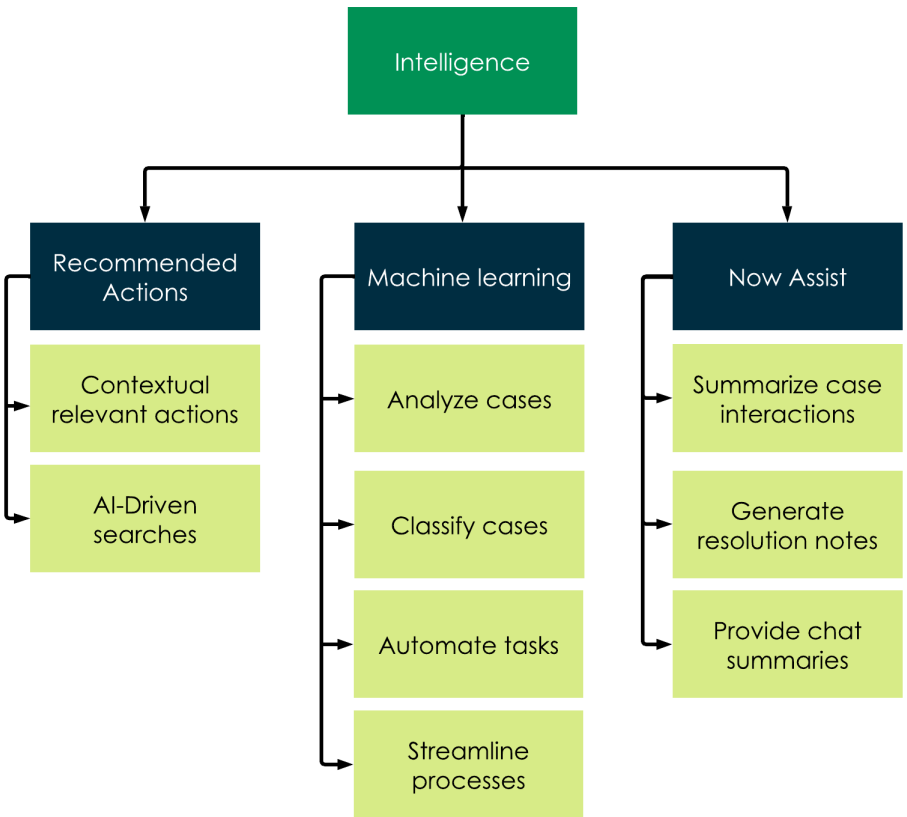
Machine learning

Utilize machine learning solutions to analyze and classify cases and automate tasks.

Now Assist for Customer Service Management (CSM)

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

Implement intelligence overview



Recommended Actions

Set up recommended actions and field recommendations to resolve cases more effectively. The Recommended Actions application displays relevant actions based on the context of a record and enables you to perform AI-driven searches for

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pertinent resources. This functionality helps you quickly access and act on the most relevant information, enhancing your efficiency in addressing customer issues.

Machine learning

Use machine learning solutions in Customer Service Management to handle case creation, assignment, and resolution. Implement these solutions to analyze and classify cases, automate tasks, and streamline processes.

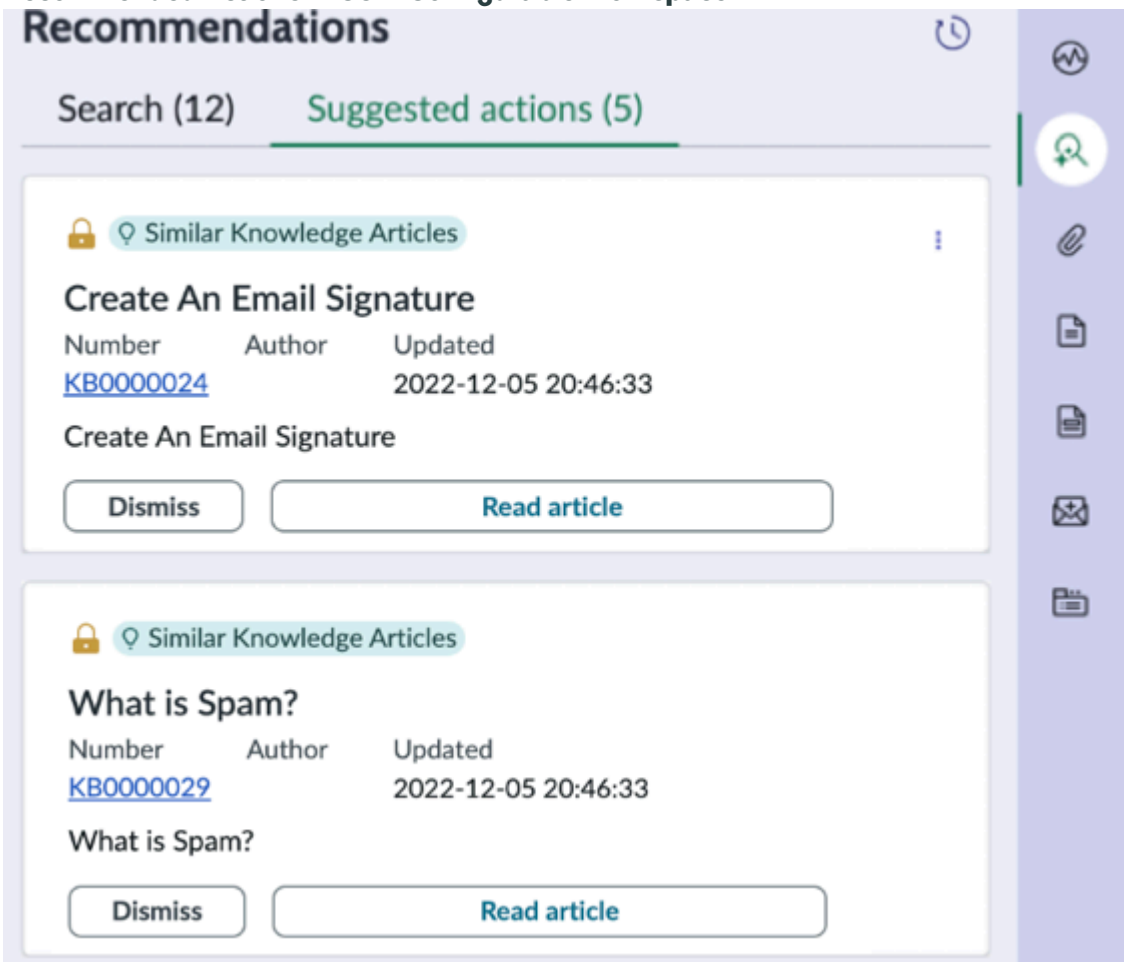
Now Assist for Customer Service Management

Use the Now Assist for Customer Service Management (CSM) to boost productivity and efficiency with generative AI. This tool enhances user interactions by summarizing case information, generating resolution notes, and providing chat summaries. It also helps you quickly understand chat and case context, enabling faster and more accurate customer resolutions.

Configuring Recommended Actions

Use the Recommended Actions application to display relevant actions to agents based on a context of a record or enable agents to perform an AI search to find relevant resources. Agents can quickly and easily take action to help customers and resolve their issues.

Recommended Actions in CSM Configurable Workspace



With Recommended Actions:

- Provide agents with optimal action in a context of a record.
- Enable agents to focus their attention to the critical call-to-action.
- Allow agents to take an action in a contextual side panel or in a subtab.

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- Enable agents to troubleshoot and provide a resolution to customers.
- Rank actions that agents can take based on a configurable logic.
- Recommend a value for a field on a form.
- Enable agents to use AI search to find the most relevant resources.

Example scenarios for implementing Recommended Actions

Use Recommended Actions to provide the following recommendations:

- Apply resolution from a solved case: Recommend agents to apply resolution from a similar solved case and then close the case.
- Reassign case: Recommend a field value for the Assignment group field so that the case is assigned to the relevant team.
- View and attach article: Recommend a Knowledge article relevant to the customer issue so that agents can view and attach the article to the current case.
- Review a refund request. Recommend a decision tree for agents to work through to determine if the customer is eligible for a refund.

For end-to-end configurations of recommended actions for specific scenarios, see Example configurations of recommended actions.

Action types for Recommended Actions

With the Recommended Actions application, you can create the following types of actions for agents to take. For more information, see Recommended Actions.

Action type	Description
Guidance	An action that an agent can take or information they can share. For example, guidance can recommend that an agent can attach a knowledge article in comment, work note, or mail of a case or create a work order.
Guided decision tree	A guided flow to follow. A decision tree is a multi-step process that includes a series of questions and answers and results in guidance.
Field recommendation	A recommended value to use for a field. For example, this type of action can recommend the assignment group based on the text in the case short description.

AI search

Agents can enter their queries in the search bar to access AI-powered search results. The most relevant answers for the search query appear as genius result cards. Agents can take the actions from the search cards directly to resolve an issue. For more information, see AI search in Recommended Actions.

Benefits of AI search integration with Recommended Actions

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- Unified search and recommendations: This integration combines AI-driven search capabilities with proactive recommendations, providing a unified toolset for agents.
- Contextual intelligence: The system leverages contextual data to deliver highly relevant search results and recommendations tailored to each case.
- Proactive recommendations: Agents receive actionable suggestions to accelerate case resolution, based on real-time case context.
- Seamless workflow: The integration streamlines the user workflow by providing access to search and recommendations within a single interface.

Using recommended actions

Agents can access recommended actions in a workspace such as CSM Configurable Workspace by selecting the Recommended Actions icon ( ) in the contextual side panel. For more information, see Using the Recommended Actions application.

Setting up recommended actions

Set up the Recommended Actions application so that you can create actions of type guidance or field recommendation. An admin can complete the following setup tasks.

Steps to set up the Recommended Actions application

Setup task	Description
Install the Recommended Actions application	Download the Recommended Actions application from the ServiceNow® Store.
Assign roles to Recommended Actions users	Assign roles to your users to control access to Recommended Actions features and information.
Configuring the Recommended Actions application	Configure recommended actions to create a context, rule, and recommendations with action types such as guidance and field recommendation. **Note:** The Guided Decisions application (sn_gd_core) is required to create guided decision trees.

Integrating decision trees in recommended actions

Optionally, set up the Guided Decisions Experience application so that you can create decision trees and then integrate them in recommended actions. Admins can complete the following setup tasks.

Steps to integrate decision trees in recommended actions

Setup task	Description
Install the Guided Decisions Experience application	Install the Guided Decisions Experience application from the ServiceNow® Store. This

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Steps to integrate decision trees in recommended actions (continued)

Setup task	Description
	application enables you to configure decision trees that you can use as recommendations.
Configuring decision trees	Configure decision trees that agents can use to troubleshoot solutions for customer issues.
Add Guided Decisions to Recommended Actions	Add decision trees to recommended actions, so that agents can take relevant action during troubleshooting based on a record context.

Request apps from the ServiceNow Store

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

Recommended Actions

Use Recommended Actions to display relevant actions to agents based on a context of a record or recommend a value for a field.

Action types in Recommended Actions

Action type	Description	Use cases
Guidance	A guidance is an action that an agent can take or information that an agent can share. • Guidances appear as cards in the contextual side panel in a workspace. • Agents can access these cards by selecting the Recommended Actions icon in the side panel. • Agents can perform the action by selecting the button on the card.	• Mary created a case to report an issue with a router. The agent assigned to this case is recommended to apply a resolution from a solved case to resolve the customer issue. The resolution notes and a resolution code from the solved case are copied into the Closure Information section of the current case. • Paul, who has an account with StellarVest bank created a case to report a loss of credit card. The agent assigned to this case is recommended to create a work order to dispatch a new credit card for Paul.
Field recommendation	A field recommendation is a value that is recommended for a field. Depending on the configuration, the recommended field values are auto-filled or shown as messages underneath the fields for the new records. The recommended field	• An agent wants to reassign the case to a different team who is better equipped to resolve a customer issue. A field recommendation can recommend the assignment

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Action type	Description	Use cases
	values are shown as messages only underneath the fields for the existing records. • You can configure the fields with the text and values that appear in the messages. • You can also configure a confidence threshold to auto-fill a recommended value. • You can configure a preference to auto-fill a recommended value.	group based on the text in the case short description. • While interacting with a customer, an agent creates a case on behalf of the customer. Based on the short description the agent enters in the case form, the values for the fields **Product**, **Assignment group**, and **Assigned to** are recommended to the agent.
Decision tree	A decision tree is a guided flow for agents to follow. A decision tree is a multi-step process that asks a series of questions. Based on the answers that an agent enters, a guidance is provided. **Note:** The Guided Decisions application (sn_gd_core) is required to create decision trees.	Rina created a case to report that their phone isn't charging. The agent assigned to the case is recommended to use a decision tree that asks a series of questions to troubleshoot the issue with the phone and provides a guidance in the end.

Actions of the type **Guidance** and **Guided Decision Tree** are displayed as cards within the contextual side panel.

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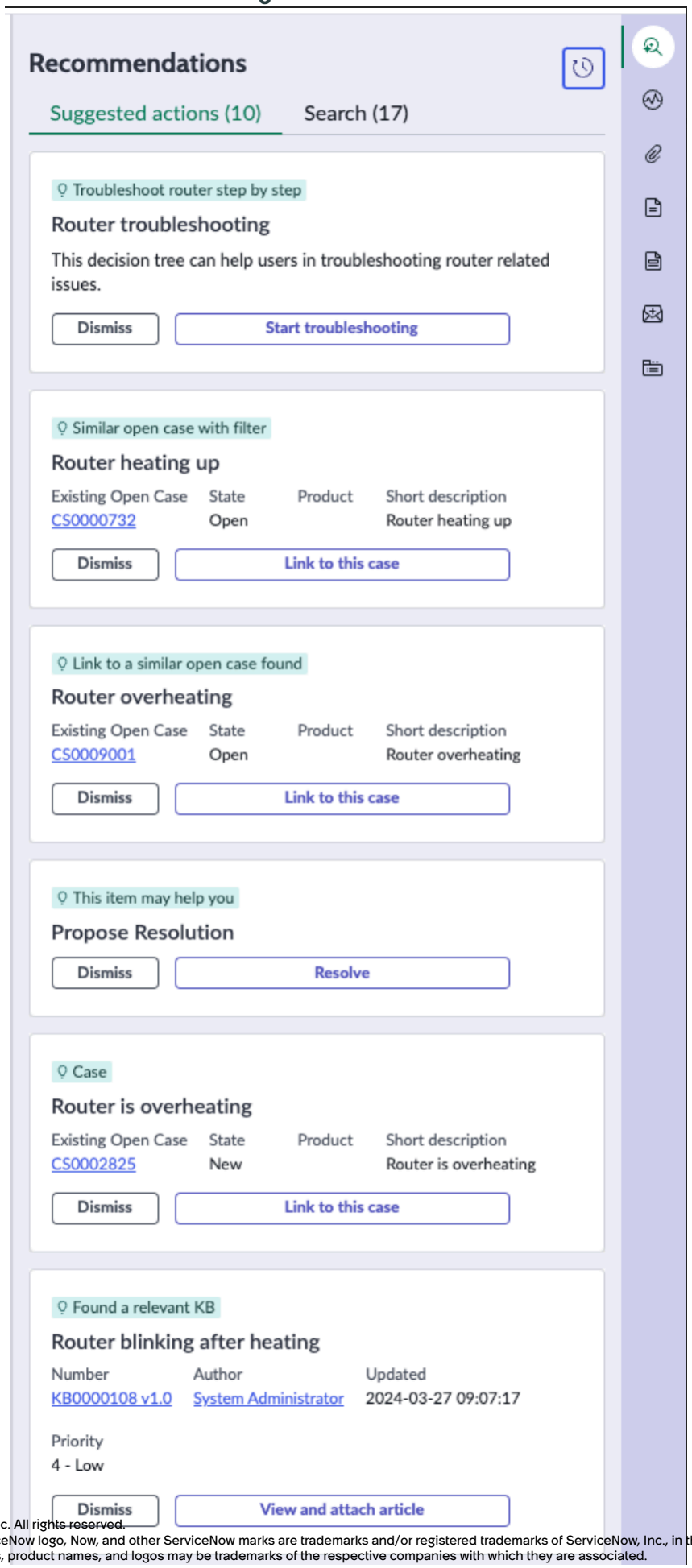
Recommended actions - guidance card



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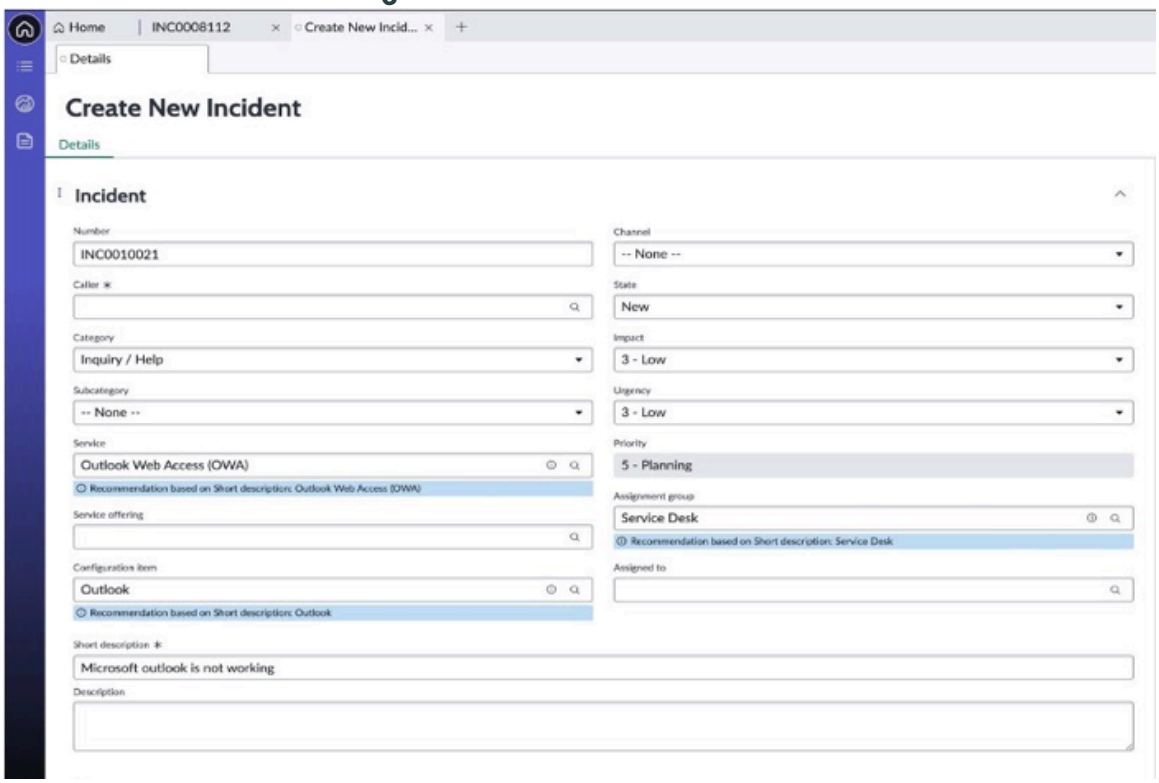
Actions of the type **Field Recommendation** are auto-filled in the fields or appear as messages under the fields on a record form. Agents can follow the recommendations and select these field values.

Field recommendation messages in the Incident form



For more information, see Creating guidance and field recommendation in Recommended Actions.

Elements for configuring recommended actions

Configuring a recommended action is a multi-step process that involves:

Context

A context enables agents to see recommended actions for a record in that table when certain rules are met. For more information, see Contexts in Recommended Actions.

Context input

A context input enables you to utilize the entities other than the context table to define rules, recommendations, and resource generators so that recommendations are updated dynamically as the context changes. For more information, see Context inputs in Recommended Actions.

Rule

A rule is a set of conditions that applies to a context and determines when a recommended action appears for records in the context table. For more information, see Rules in Recommended Actions.

Recommendation

A recommendation is a way to suggest an action to an agent. You can create recommendations with action types of guidance and field recommendation. For more information, see Recommendations in Recommended Actions.

Resource generators

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Resource generators provide helpful information for guidance and field recommendations. The resource generators use decision table, flow, scripts, Predictive Intelligence framework, or AI search capabilities to generate resources. For example, a resource generator can provide a knowledge article link that can then be used as a recommended action for a case. For more information, see Resource generators in Recommended Actions.

Arbitration parameters

Arbitration parameters determine the frequency of issues or the priority order of the recommended actions so that agents get the guidance that they must help resolve customer issues.

Contexts in Recommended Actions

A context enables agents to see recommendations for records from a table when certain rules are met. These recommendations can help agents by suggesting actions to take based on the record context.

Contexts are created for tables, such as the Case [sn_customerservice_case] table or the Incident [incident] table. Creating a context includes the following steps:

- Selecting a table.
- Creating Context inputs. A context input enables you to utilize the entities other than the context table to define rules, recommendations, and resource generators.

Note:
Creating context inputs is not mandatory.

- Creating rules for the context. A rule shows recommendations to agents with certain roles for records that meet certain conditions.
- Creating recommendations for the rules. A recommendation is a way to suggest a helpful action to an agent.

The Recommended Actions application includes a context record, Case Context, that you can use to create recommendations for cases.

The Recommended Actions application supports multiple context records per table, enabling users to create different experiences based on criteria such as user attributes or domains.

The Recommended Actions component can be configured in UI Builder to use the active context record. The recommendations and AI Search results adjust dynamically according to the configured active context.

Context form

You can access context records by navigating to **All** > **Recommended Actions** > **Contexts**. The Contexts list displays a brief description of each context and the table that the context applies to.

The Context form includes the name and description of the context, the selected table, and a search application configuration for AI search. When you create a context, provide this information and save the record. After saving, the Context form displays the following related lists.

- **Rules**: Displays the rules that have been created for the context, including the selected user roles. You can create a rule only from the Rules related list on the Context form. For more information on rules, see Rules in Recommended Actions.
- **Recommendations**: Displays the recommendations associated with the context rules, including the action type and action. You can create a recommendation only from the

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Recommendation related list on the Rule form. For more information on the recommendations, see Recommendations in Recommended Actions.

- **Search result mapping**: Displays mappings between AI search outputs and Recommended Actions inputs.
- **Inherited rules**: Displays the rules inherited from the parent context. The Inherited rules related list appears only for the contexts that have the parent context assigned. For more information on how the parent context rules are inherited by the child context, see Apply rules to tables extended from the context table.
- **Extended contexts**: Displays all the contexts which use the current context as a parent context. This related list appears only for the parent contexts.
- **Context Inputs**: Displays all the context inputs which can be used in defining rules, recommendations, and resource generators. This related list appears only when a parent context is not defined.

The Contexts list includes an Active column. You can use this column to view and set the Active value for a context record. The Context form includes an **Active** field that you can use to activate or deactivate a context record.

Refresh interval field

The **Refresh interval** field on the Context form determines how frequently recommendations are refreshed for the context. The default value for this field is 12 hours and the minimum value is 10 minutes.

Note:
You must configure the form view to display the **Refresh interval** field.

Synchronous and asynchronous modes of evaluation for Recommended Actions

As an admin, you can configure the loading behavior at the context level for Recommended Actions, by choosing between synchronous and asynchronous modes. In synchronous mode, recommendations are loaded before the page becomes interactive, ensuring a complete view is available before any action is taken. In asynchronous mode, recommendations load in the background without blocking the user interface, allowing agents to start interacting with the record immediately. Each mode is tailored to meet different performance and user experience requirements.

The **Asynchronous Evaluation** check box in the Context form, when selected enables the agents to make updates and perform actions on the case or incident record while the recommendations load on the contextual side panel. By selecting this field, an admin or RA author can enable asynchronous processing for recommended actions.

The *sn_nb_action.async_ra_timeout* system property specifies the timeout duration (in seconds) for an asynchronous process to generate the recommendations. This value serves as a guideline for managing execution time and preventing excessive delays. The default value is set to 30 seconds, and the maximum value can be 180 seconds. If the generation of recommended actions takes more than 30 seconds, the **Retry** button on the contextual side panel appears. The retry process starts in synchronous mode - it runs directly during user interaction instead of processing asynchronously.

Inheriting the rules and recommendations from hierarchical contexts

The Parent context field appears only when the table selected in the Table field has one or more parent tables for which context is defined. Using the Parent context field, you can import it's active rules and recommendations into the extended context. When you click the search icon

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in Parent context field, the list of contexts of parent tables is displayed. You can select any one parent context from the list. The rules that are inherited appear in the Inherited Rules related list. For more information on how to configure rules so that the recommendations are inherited by the extended context, see Apply rules to tables extended from the context table.

Note:

- If you configure context inputs for a context, you cannot add a parent context. To add a parent context, you must delete the already existing context inputs.
- When a parent context is defined, the Context inputs related list does not appear.

For more information on how context inputs limit the inheritance of the parent context's rules and recommendations, see Context Input configuration limitations.

Example: Inheriting the rules and recommendations from hierarchical contexts

Consider the following tables and their contexts, rules, and recommendations. Table 1 is the parent table for Table 2 and Table 3. Table 3 is the parent table for Table 4. Table 2 is the parent table for Table 5.

Tables and their contexts

Table	Context	Rule	Recommendation
Table 1	Context 1 (Active)	Rule 1 (Active)	Recommendation 1
Table 2	Context 2 (Inactive)	Rule 2 (Inactive)	Recommendation 2A and Recommendation 2B
Table 3	Context 3 (Active)	Rule 3 (Active)	Recommendation 3
Table 4	Context 4 (Active)	Rule 4 (Active)	Recommendation 4
Table 5	Context 5 (Active)	Rule 5 (Active)	Recommendation 5

In the Context form:

- Scenario 1: When you add Context 3 in the Parent context field of Context 4, the Rule 3 and Recommendation 3 are inherited by Context 4.
- Scenario 2: When you add Context 2 in the Parent context field of Context 5, the Rule 2 and its recommendation 2A and 2B aren't inherited by Context 5 as the Rule 2 is inactive.

Creating multiple context records for the same table

Starting with v14.0 of Recommended Actions, the *`Avoid duplicate active entry for context`* business rule allows the creation of more than one context per table. You can create more than one context for the same table. This enables you to configure precise recommendations for various types of records in the same table.

The following are use cases where you can create different contexts for the same table:

Use case 1: Different roles may interact with the same table but need tailored actions or views.

Consider the Interaction table. The same interaction data can be worked upon differently based on the user persona.

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- Context A: Show field recommendations for resolution, or related change tasks/ catalog items, or standard knowledge articles for the IT Support Agent on the Interaction record page.
- Context B: Surface similar resolved case or relevant knowledge article recommendations for the Customer Service Support Agent on the Interaction record page.

Use case 2: Each context may use a different Predictive Intelligence model or AI model variant for recommendations.

Enables testing and adoption of ML models in parallel without conflict.

- Context A: Use similarity model for Recommended Actions.
- Context B: Use classification model for categorization or assignment.

Use case 3: Users may access the same record through different channels—chat, email, voice, etc., requiring tailored recommendations.

Entry points provide different signals and user intent.

- Context A: When the case is created via Chat Agent, recommend and share the KB article in chat action.
- Context B: When the case is accessed via Phone Support, surface KB articles and enable sharing via SMS channel.

Configuring a context record for the Recommended Actions component

When configuring the Recommended Actions component in UI Builder, users with the Recommended Actions admin role (next_best_action_admin) can set a component input property to map the active context record to the component.

On the Config tab for the Recommended Actions component, enter the sys id of the active context record in the **Context Sys id** field. For more information about configuring UI Builder components, see Components documentation.

Note:
If the **Context Sys id** field is empty, the system uses the latest context record for that entity to map to the Recommended Actions component.

Case Context record

The Recommended Actions for Customer Service application adds the Case Context record for the Case table [sn_customerservice_case]. This record is active by default (Active=true). For more information on the Case Context record, see Contexts in Recommended Actions for Customer Service.

If an upgrade customer has one or more context records for the Case table available on their instance, the system runs a fix script that deactivates the out-of-box Case Context record (sets the **Active** field to false).

Note:
Ensure that the correct context record for the Case table is active.

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Related topics

- Create a context in Recommended Actions
- Create a rule in Recommended Actions
- Create a recommendation in Recommended Actions

Context inputs in Recommended Actions

A context input enables you to associate entities beyond just the context table with a context ensuring that recommendations are updated dynamically as the context evolves.

You can create a context input from the Context inputs related list in the Context form. These dynamic JSON-based context inputs enable you to include real-time updates such as user selections, additional table records, and so on, to refine recommendations and support multiple active contexts. This enhances recommendation relevance and operational efficiency. For example, you can create a context input for the Incident table and use in the Case context record.

Note:
You can create multiple active context inputs for a context.

The following data types are supported for a context input:

- String
- List
- Integer
- Long
- Choice
- True- false
- Reference
- Reference dot walked
- Sys id

Configuring a context using a context input

Configuring a context using context inputs includes the following steps:

- Creating a context input. For more information on how to create a context input, see Create a context input in Recommended Actions.

  Note:
  - If a context has a parent context defined, you can't create context inputs for it.
  - You can have multiple active context inputs simultaneously.

- Mapping the context input to the following according to your requirement:
  - default search term by adding it in the Contextual AI Search Config section on Context form.
  - rules by using it in the condition builder on Rules form.

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  - recommendations by adding it in fields of the Action inputs section on Recommendations form.
  - resource generators by adding it in the fields of Generator inputs section on Resource Generators form.
- Adding the JSON-format of the context inputs to the Recommended Actions component for the required record pages in the UI Builder. For more information, see Configuring Recommended Actions UIB component for context inputs.

The context inputs appear along with the context table in the appropriate fields of Rule, Recommendation and Resource generator forms so that you can include the data other than that of the context table to update the recommendations.

Configuring Recommended Actions UIB component for context inputs

As an RA author or admin, you must add the JSON-format of the context inputs in the **Context input** field of Recommended Actions UIB component to pass the values. You can get the JSON-format of the context input by selecting the **Copy input JSON** button on the Context input related list in the Context form. The JSON-format includes all the active context inputs. When a context input is deleted or deactivated after configuring the Recommended Actions UIB component, an empty value is passed for these context inputs in UIB from the upcoming iterations.

Context Input configuration limitations

The limitations for context inputs configuration are as follows:

- You can either define a parent context or configure context inputs for a context.
- When context inputs are defined for a parent content, then it's rules and recommendations cannot be inherited by its child contexts. In other words, the parent context does not appear in the Parent context field of the Child context.
- To define context inputs for a context which has a parent context defined already, delete the parent context in the Parent context field so that the Context inputs related list appears. And in the Context inputs related list, select the New button to create context inputs.
- When a context input is defined for a parent context which has a child context associated, then the parent-child context link is broken. In the child context, the inherited rules and recommendations will be removed from the Inherited Rules and Recommendations related list respectively.

Rules in Recommended Actions

A rule is a set of conditions that applies to a context. A rule shows recommendations to agents with certain roles for records that meet certain conditions.

Creating a rule includes the following steps:

- Selecting the user roles that can see the recommendations associated with the rule.
- Defining the conditions that apply to the context records and context inputs.
- Creating recommendations for the rule. A recommendation is a way to suggest a helpful action to an agent. A rule can have multiple recommendations.

The Recommended Actions application includes one context record, case context, that you can use to create recommendations for cases. For example, following are some guidance recommendations:

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- Case field level recommendations: This rule includes one recommendation to predict a value for the **Assignment group** field on the Case form.
- Case side panel recommendations: This rule includes recommendations to view and attach a knowledge article to a case and to attach and add a link to a knowledge article in a comment, work note, or email.

Apply rules to tables extended from the context table

The rule created in the parent context are inherited by the extended context when you select the Apply to tables extended from the context table check box in a rule. The rules inherited from the parent context appear in the Inherited Rules related list of the extended context. Therefore, the recommendations of these rules are passed on to the extended context. Along with the recommendations of the context table, the recommendations of the active rules from the parent context are inherited by the extended context.

Rule form

The Rule form provides information about the rule, including a description, the selected user roles, and conditions that apply to the table in the associated context.

When you create a rule, provide this information and save the record. After saving, you can see the Recommendations related list.

You can access the rule records by navigating to **All** > **Recommended Actions** > **Rules**. New rules can only be created from within a context. For more information, see Create a rule.

Rule form fields

Field	Description
Name	The name of the rule.
Context	The context that this rule is associated with. This field is auto-populated from the Context form.
Roles	The user roles that can see recommendations for this rule.
Description	A brief description of the rule.
Advanced Condition	The conditions that apply to the records from the context table. If a context input is available for the context, you can build conditions on it along with the context table.
Fields affecting this rule	Fields from the context table that need to be monitored. Changes to these fields generate recommended actions of the type field recommendation for unsaved records.
Active	When enabled, the rule is active.
Apply to tables extended from the context table	When enabled, the rule is applied to tables that are extended from the context table.

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Rule form fields (continued)

Field	Description
Order	Determines the order in which the rule is applied.

Related topics

Create a rule in Recommended Actions

Recommendations in Recommended Actions

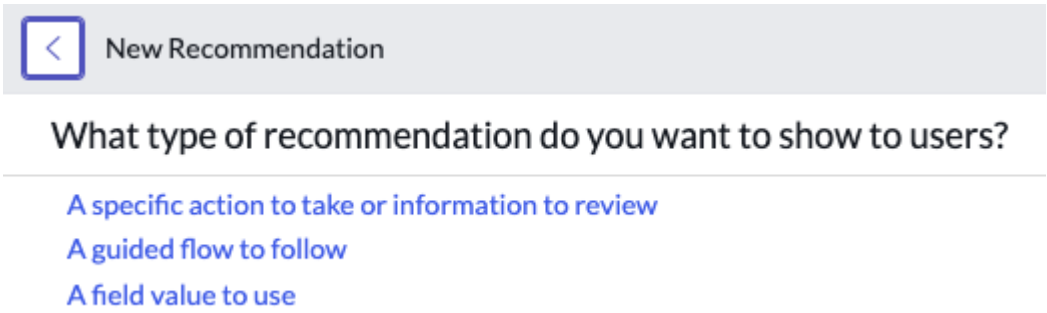
A recommendation is a way to suggest a helpful action to an agent. A recommendation includes the action and any relevant resources and inputs.

There are three types of recommendations that are provided to agents:

- **Guidance**: An action that an agent can take or information that they can share.
- **Decision tree**: A guided flow to troubleshoot an issue and provide a solution.
- **Field recommendation**: A recommended value to use for a field.

Creating a recommendation

When you create a recommendation, you can select the type from the New Recommendation screen. This screen lists the available types.



Selecting a type on the New Recommendation screen takes you to the Recommendation form. The selected type is added to the **Action type** field on the Recommendation form.

Recommendation form

The Recommendation form provides information about a recommendation, including the selected action and any inputs and resource generators that the action requires.

When you create a recommendation, you select an action type and an action. The next steps depend on the action type that you select. For example, guidances and field recommendations require action inputs while decision trees don't.

When you create a recommendation, provide this information and save the record. After saving, you can see the Action inputs form section. Inputs are parameters that go into an action and enable agents to complete that action. You can select relevant inputs manually, from the context record, context inputs, or from the resource generator.

You can access the recommendation records by navigating to **All** > **Recommended Actions** > **Recommendations**. New recommendations can be created only inside the rules. For more information, see Create a recommendation.

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Recommendation form fields

Field	Description
Rule	The name of the rule for the context. This field is read-only.
Context	The name of the context that the **Rule** belongs to. This field is read-only.
Name	The name of the recommendation.
Action type	The type of recommendation: • Guidance • Decision tree • Field recommendation This field is automatically filled with the selection from the New Recommendation screen.
Action	The action to select for the recommendation. The available actions are determined by the selection in the **Action type** field. You can also create an action for the selected action type of guidance, decision tree, or field recommendation.
Resource generator	The resource generator to select from the Resource generators list. You can also create a resource generator. Guidances and field recommendations can use resource generators to find relevant resources for the action inputs. If you change the value in the **Resource generator** field, you must save the recommendation to use the resource generator.
Recommendation hint	Text that tells the agent why a recommendation is being suggested. Hints apply to action types of guidance and decision tree. The hint appears at the top of the action cards in the Recommended Actions side panel.
Order	The order of the recommendations inside the rule.
Active	When enabled, the recommendation is active.
Action inputs	Action types and actions require inputs. These inputs are the parameters that enable agents to complete an action. You can choose static values for action inputs, or you can use a resource generator to supply values. If a context input is available for the context, it appears in the pill picker of the fields in Action inputs section.
Group	Group created by a defined grouping strategy that displays relevant recommendations together.

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Recommendation form fields (continued)

Field	Description
	Note: You might need to configure the Recommendation form to display the **Group** field. This field is available by default for Workforce Optimization for ITSM users.

Note: The **Action type**, **Action**, and **Recommendation hint** fields aren't shown for the AI search resource generator. You can configure the **Action type** and **Action** fields, and mapping between AI search outputs and guidance actions inputs in the Search result mapping related list.

Guidances in Recommended Actions

A guidance is an action that an agent can take or information that an agent can share as they work to resolve tasks, such as customer service cases.

Guidances appear as cards in the contextual side panel in a workspace. Agents can access these guidance cards by selecting the Recommended Actions icon in the contextual side panel. Agents can then perform the actions by selecting a button on a card.

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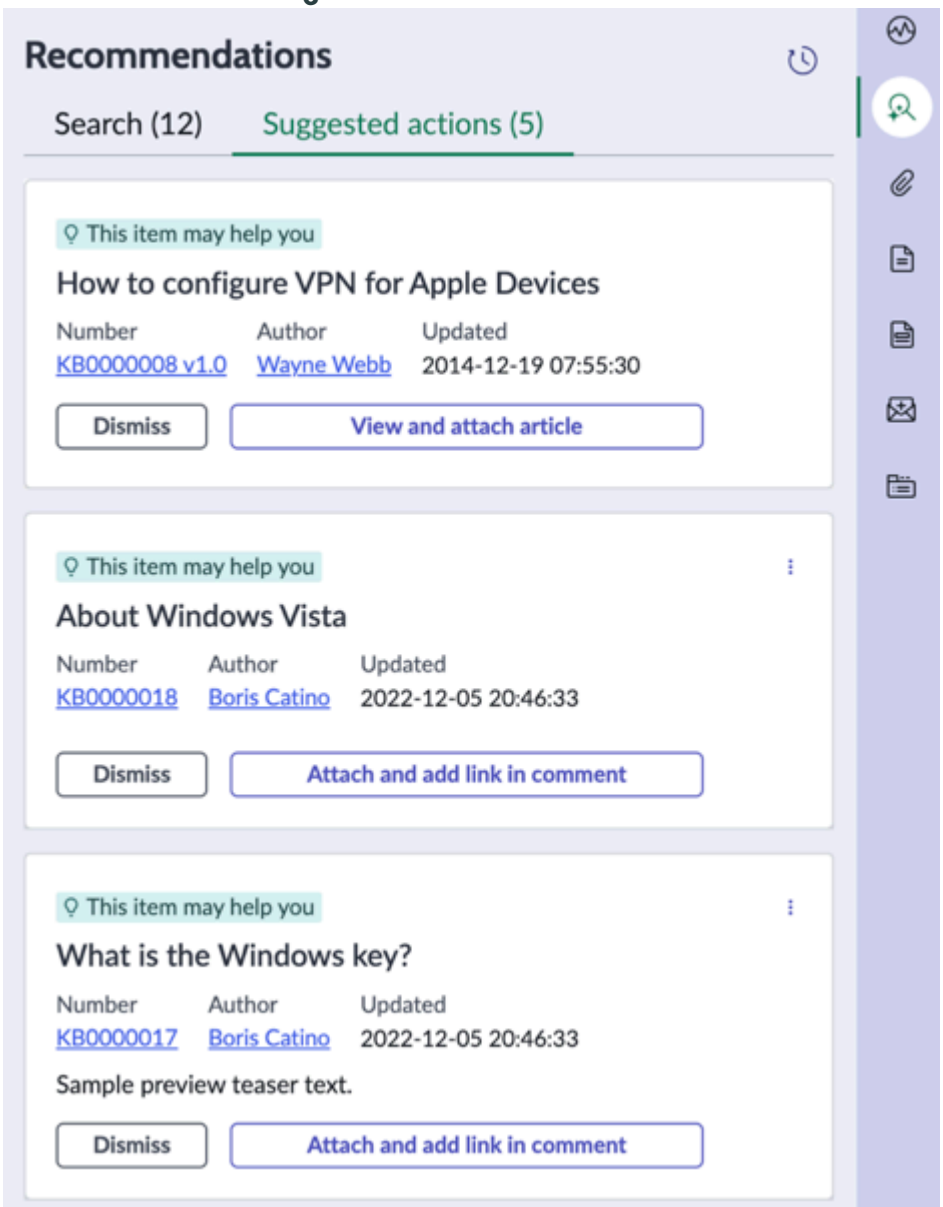
Recommended actions guidance cards



Guidances include actions such as sharing a knowledge article, creating a case task or a work order, or copying the resolution notes from a similar case. For a detailed list of guidances, see the following table.

Guidances in Recommended Actions

Guidance	Description
Apply resolution from a solved case	Applies the resolution from an existing solved case.
Attach and share article	Enables the agent to attach a knowledge article to a case and share the article with the customer.
Communicate workaround	Communicates a workaround to the customer.

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Guidances in Recommended Actions (continued)

Guidance	Description
Copy resolution notes	Copies the resolution notes from the recommended case to the current case.
Create work order	Creates a work order for a case.
Default guidance for search results	Default guidance that can be used for any search sources that don't have dedicated mapped guidances. For more information, see the following topics: • Automatically map AI search results with guidance inputs • Default guidance for search results .
Link case	Links the current case as a child of the recommended case.
Link case to existing defect	Links a case to an existing defect.
Open collab chat	Opens the collaboration chat modal.
Propose major issue	Proposes the current case as a major case.
Propose resolution	Proposes a resolution for a case.
Read message to customer	Directs the agent to read a message to the customer.
Reassign case	Reassigns the case to a different assignment group.
Review and attach article	Enables the agent to review and attach a knowledge article to a case.
Share KB in chat interactions	Shares a knowledge article in the chat window in an interaction record.
Similar major case	Displays similar major cases.

Attaching and sharing knowledge articles

Agents can use two different guidances to view and attach knowledge articles to task records and chat interaction records and share articles with customers.

Guidances for attaching and sharing knowledge articles

Guidance	Description
Attach and share article	This guidance recommends knowledge articles to an agent who is working on a task, such as a case record. The guidance displays relevant articles and enables the agent to select an article and share it in a comment, a work note, or an email:

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Guidances for attaching and sharing knowledge articles (continued)

Guidance	Description
	• Attach and add link in comment • Add link in work note • Attach and add link in email
Share KB in chat interactions	This guidance recommends knowledge articles to an agent who is working on a chat interaction. The guidance displays relevant articles and enables the agent to select an article and share it in the chat conversation.

Configuring Recommended Actions guidances

Recommended Actions is a component that you can add to a record page in UI Builder. You can find information about configuring the Recommended Actions component, including the properties and events, in the Next Experience Components documentation.

The Recommended Actions component includes two views: a preview view (card view) and a detail view (full article view). How these views are displayed is determined by the Recommended Actions configuration. For more information, see the following topics:

- Create a guidance in Recommended Actions
- Configure a guidance preview experience
- Customize a guidance preview experience in UI Builder
- Customize a guidance detail view in U Builder

The Recommended Actions component includes **Recommended Action Specific Configuration** property. Users with the administrator role can use this property to configure the following settings:

- Select which type of experience to uptake on a record page: modal or modeless dialog.
- Select which of the guidance actions to show or hide.
- Order the guidance actions to determine the primary action (displayed as a button on the guidance card) and secondary actions (displayed on the overflow menu).

The **Recommended Action Specific Configuration** property is available in the Configure tab of the Recommended Actions component and includes expandable sections for each guidance.

Access to internal field values for predicted records

When accessing data for a predicted record within the Recommended Actions framework, the system provides the internal field values, in addition to display values, through standard guidance inputs. The system does so without requiring data brokers or custom scripts. By enabling direct access to internal values, the framework can support more complex logic, reduce performance bottlenecks, and verify consistent UI behavior across languages.

For catalog items:

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- When the catalog item type field is used in a catalog item prediction, the system returns the internal value (for example, the catalog item or order guide) along with the sys_id.
- When the catalog item type field is accessed in a translated environment, the system relies on the internal field value instead of the display value to verify the language settings do not affect condition fulfillment.

For custom guidances based on the incident state:

- When custom guidance logic is applied to a predicted incident with a specified state, the system accesses the internal value of the incident's state field directly.
- When the state field is required for custom actions like linking an incident as a parent or copying resolution notes, the internal value should be accessible without causing UI performance issues or delays.

Attach and share article guidance

The Attach and share article guidance recommends relevant knowledge articles to customer service agents and enables them to share the selected articles in comments, work notes, or email.

The Attach and share article guidance recommends relevant knowledge articles based on the text in the case short description. Agents can view the recommended articles and share a selected article with the customer.

The agent can view the knowledge articles in card format in the contextual side panel or expand a selected card to see an article in the detail view. The card view provides a condensed view of articles for quick scanning. The detail view provides the full content of the selected article for further reading.

Each card contains a primary action. The default primary action is Attach and add link in comment. Secondary actions are available in the More actions menu in the upper right corner of the card:

- Add link in work notes
- Attach and add link in email

The same primary and secondary actions are available in the expanded detail view. The system administrator can configure the primary and secondary actions in the **Recommended action specific configuration** property. For more information, see Configuring guidances in UI Builder.

The relevancy score displays on the Attach and share article guidance in the Search tab of the Recommended Actions contextual side panel. It indicates how well a search result matches the agent's query.

Modal and modeless dialog experiences

The agent can share the article in a comment, a work note, or an email using the primary and secondary actions. Two different experiences are available for this guidance depending on the record page you are using in the CSM Configurable Workspace:

- **Modeless dialogs**: This experience is available for record pages that support modeless dialogs (for example, the Front-line case page). Modeless dialogs are windows that overlay the main window content. Agents can move modeless dialogs around the window so they can interact with the window content and overlay content at the same time.
- **Modals**: This experience is available for record pages that support modals (for example, the CSM default record page). With modals, agents must complete the action within a modal before continuing to interact with the window content, which is the default experience.

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The system administrator can configure the modal and modeless dialog experiences in the **Recommended Action Specific Configuration** property. For more information, see Configuring guidances in UI Builder.

If a record page supports the modeless dialog experience, selecting an action on a guidance card opens the corresponding modeless dialog. If a record page does not support the modeless dialog experience, the guidance uses the modal experience.

Note:
The result of guidance actions is the same in the modeless dialog and modal experiences, but when the actions are completed differs.

Public and private knowledge articles recommendations for case records

Some knowledge articles that appear in the search results display a lock icon in the upper left corner. The presence or absence of the lock icon determines the audience for the article and how an agent can share the article.

The *KnowledgeGuidanceUserResolver* extension point is shipped with the base system. This extension point allows business units (BUs) to return the requester and primary action based on their logic by creating the implementation in this extension point. You can create an implementation by selecting the **Create Implementation** link in the *KnowledgeGuidanceUserResolver* extension point. The CSMKnowledgeGuidanceUserResolver implementation for the Case table and its extended tables is shipped with the base system. This implementation identifies the primary requesters for a case record based on the Contact, Partner Contact, Consumer and Internal user fields in the Case table. The primary action is determined based on the channel type of the case record.

Note:
The Internal user field is checked only when the Service Organization (com.snc.service_organization) plugin is installed.

Lock icon

Agents can't share locked articles with customers as the customers do not have access to these locked article. The **Attach and add link in email** and **Attach and add link in comment** actions are not available when a lock icon is present on a guidance card. The following table shows the primary and secondary actions in preview and detail view on the guidance card:

Primary and secondary actions in preview and detail view on the guidance card

Action type	Description
Preview	
Primary actions	The default primary action is **Read article**.
Secondary actions	• Share in work notes • Copy Link
Detail view	

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Primary and secondary actions in preview and detail view on the guidance card (continued)

Action type	Description
Primary actions	The default primary action on the guidance card is **Read article in full view**.
Secondary actions	• Share in work note • Copy Link • Flag article • Mark as helpful

No lock icon

Agents can share these articles with both customers and internal users. The following table shows the primary and secondary actions in preview and detail view on the guidance card:

Primary and secondary actions in preview and detail view on the guidance card

Action type	Description
Preview	
Primary action	The default primary action by channel: • Email channel: Attach and add link in email • Other channels: Attach and add link in comment
Secondary actions (available in the more options menu)	• Read article • Attach and share in work notes • Share in email • Flag article • Mark as helpful
Detail view	
Primary action	The default primary action: • Email channel: Attach and add link in email • Other channels: Attach and add link in comment

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Primary and secondary actions in preview and detail view on the guidance card (continued)

Action type	Description
Secondary actions (available in the more options menu)	• Read article • Attach and share in work notes • Share in email • Flag article • Mark as helpful • Read article in full view

Attach and add links in comments

Use this action to attach a knowledge article to a case record and share the link in the activity stream. The behavior of the action depends on the modal or modeless dialog experience.

Experience	Description
Modal	This action does the following: • Opens the Compose a comment modal. • Inserts the article link in the **Comments** field. The agent can add information to the **Comments** field and select **Post Comments**. • The knowledge article is attached to the case record. • The activity stream is updated with the article attachment (as an internal post). • The comment and the link are posted to the activity stream (as an external post). • The guidance is marked as complete and moved to the Recommended Actions History tab. This action is available as the primary action on the knowledge article card. **Note:** This guidance is available by default.
Modeless dialog	This action does the following: • Attaches the article to the case record. The article is available in the Attached Knowledge related list. • Updates the activity stream with the article attachment as an internal post. • Marks the guidance as complete and moves it to the History tab.

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Experience	Description
	• Opens the Compose a comment modeless dialog. • Inserts the article link in the **Comments** field. The agent can add information to the **Comments** field and select **Post Comments**. The comment is posted to the activity stream as an external post.

Add link in work note

Use this action to attach a knowledge article to a case record in the work notes. The behavior of the action depends on the modal or modeless dialog experience.

Experience	Description
Modal	This action does the following: • Opens the Compose a work note modal. • Inserts the article link in the **Work notes** field. The agent can add information to the **Work notes** field and select **Post work notes (private)** to post the work note and the link to the activity stream as an internal post. • The activity stream is updated with the article attachment as an internal post. • The guidance is marked as complete and moved to the Recommended Actions History tab. This action is available as a secondary action in the More actions menu. **Note:** This guidance is available by default.
Modeless dialog	This action does the following: • Opens the Compose a work note modeless dialog. • Inserts the article link in the **Work notes** field. The agent can add information to the **Work notes** field and select **Post work notes (private)** to post the work note and the link to the activity stream as an internal post. The guidance is marked as complete and moved to the History tab.

Attach and add links in emails

Use this action to attach a knowledge article to a case record and share the link in an email. The behavior of the action depends on the modal or modeless dialog experience.

Experience	Description
Modal	This action does the following:

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Experience	Description
	• Opens the Email compose modal. • Inserts the article link in the body of the email. • If available, an email template auto-fills modal fields. The agent can add information to the email and select **Send email**. • The email is sent. • The knowledge article is attached to the case and is available in the Attached Knowledge related list. • The activity stream is updated with the article attachment (as an internal post). • The guidance is marked as complete and moved to the Recommended Actions History tab. This action is available as a secondary action in the More actions menu. **Note:** This guidance is available by default with the modeless dialog experience. For the modal experience, it must be configured by the system administrator.
Modeless dialog	This action does the following: • Attaches the article to the case record. The article is available in the Attached Knowledge related list. • Updates the activity stream with the article attachment as an internal post. • Marks the guidance as complete and moves it to the History tab. • Opens the Email compose modeless dialog. • Inserts the article link in the body of the email. • If available, an email template auto-fills email fields. The agent can add information to the email and select **Send email**.

More actions menu

The More actions menu on a guidance card includes several actions in addition to **Add link in work notes** and **Attach and add link in email**.

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In the card view, these actions include:

- Read article
- Copy link

In the detail view, these actions include:

- Read article in full view
- Copy link
- Mark article as helpful
- Flag article

Share KB in chat interactions guidance

The Share KB in chat interactions guidance recommends relevant knowledge articles to customer service agents and enables them to share the articles in chat conversations on chat interaction records.

The Share KB in chat interactions guidance recommends relevant knowledge articles to agents who are working on chat interactions. The guidance surfaces relevant knowledge articles based on the text in the interaction short description. Agents can view the recommended articles and share a selected article in the chat conversation.

The Share KB in chat interactions guidance enables automatic search results for knowledge articles by using the text in the interaction **Short description** field. The first article listed is the most relevant result. Agents can also manually search for articles.

Note:
If there's no text in the **Short description** field, no search results are displayed.

This guidance includes the following actions for sharing:

- **Send in chat**: Agents can share the article with customers.
- **Send in private chat**: Agents can only share the article with internal users such as other agents or managers. Customers can't access locked articles. Private chat messages use a yellow background.

Public and private knowledge articles

Some knowledge articles that appear in the search results display a lock icon in the upper left corner. The presence or absence of the lock icon determines the audience for the article and how the agent can share the article.

- Lock icon: The guidance card has a **Send in private chat** action. Agents can't share locked articles with customers.
- No lock icon: The guidance card has a **Send in chat** action. Agents can share these articles with both internal users and customers.

Send in chat

When an agent selects **Send in chat**:

- An information message is displayed.
- The number of the knowledge article is inserted in the chat.
- The knowledge article preview card is inserted in the chat. The card includes a link to the article and the article short description.

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Send in a private chat

When an agent selects **Send in private chat**:

- The number of the knowledge article is inserted in the chat along with the lock icon.
- The knowledge article preview card is inserted in the chat along with the lock icon. The card includes a link to the article and the article short description.
- The entries use a yellow background indicate that it's a private chat.

Default guidance for search results

The Default guidance for search results is a guidance that can be used for any search sources that don't have mapped guidances.

Using AI search results in Recommended Actions requires a search application configuration. For each search source in that configuration, the admin creates a mapping from the search result to an action.

Starting with the Yokohama release, the Recommended Actions application automatically creates the mapping between search results and actions.

When an admin creates or updates the search application configuration for a context record, the system automatically creates search result mapping records for each of the search sources in that configuration.

- If a search source does not have an existing mapping to an action, the system maps the search source to the default guidance.
- If a search source has an existing mapping to a specific action, the system keeps that mapping and does not overwrite it with the default guidance.

The default guidance enables agents to view search results for any type of record. The agent can view the search results in the Recommended Actions tab in the contextual side panel in CSM Configurable Workspace. Search results are displayed in a card format.

Default guidance card

The preview card for the default guidance displays information about the search result.

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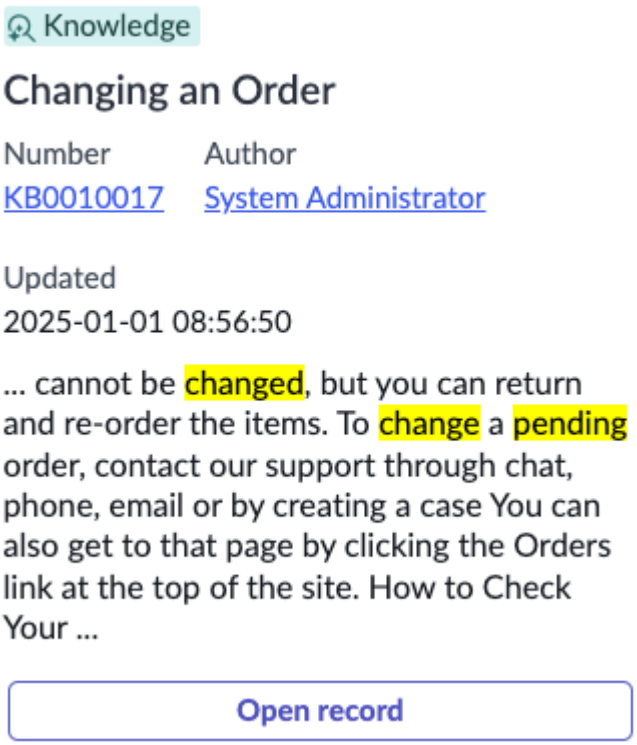
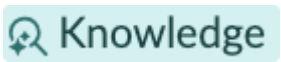


The preview card for the default guidance includes the following elements.

Element	Description
Search icon	The search icon appears at the top of the card along with the hint text. The icon is made up of a magnifying glass with a sparkle. This icon makes it easy for customers to identify search results from suggested actions. 
Hint text	Text that provides context for the guidance. The icon and hint text appear together at the top of the card above the title.
Title	The title appears at the top of the card.
Relevancy score	The relevancy score displays on the Share KB in chat interactions guidance in the Search tab of the Recommended Actions contextual side panel. It indicates how well a search result matches the agent's query.
Record fields	Relevant fields related to the guidance content are displayed on the card. These fields provide key information about the guidance content. For example, a preview card for a knowledge article includes fields for the article number and author while the preview card for a case includes fields for the case number, state, and priority.
Dismiss	Agents can use this action to move the guidance from the Suggested actions tab to the Actions history tab. After

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Element	Description
	selecting **Dismiss**, the agent receives a notification that the guidance has been moved. To view the Actions history tab, click the clock icon in the upper right corner of the Recommendations panel.
Open record	Agents can use this action to open the associated record in a sub tab. Agents can view the record details in the sub tab without navigating away from the main window.

Related topics

Automatically map AI search results with guidance inputs in Recommended Actions

Resource generators in Recommended Actions

Resource generators in Recommended Actions provide resources that you can use as inputs to actions such as guidances and field recommendations.

Resource generators provide resources such as a knowledge article, a set of cases, or a field value that you can use in recommendations. Agents can use these recommendations in the Recommended Actions panel in a workspace such as CSM Configurable Workspace.

Another way to think of a resource generator is as a function with inputs and outputs. For example, you can create a resource generator that predicts a knowledge article and then use that knowledge article as a recommended action for a case.

You can select a resource generator from the list or create a resource generator. For a complete list of resource generators that are included with the Recommended Actions application, see Components installed with Recommended Actions.

Resource generator types

The Recommended Actions application provides the following resource generator types:

- Decision table
- Flow
- Scripting
- AI search

The Recommended Actions - Advanced application provides the following additional resource generator types:

- Classification
- Similarity
- Similarity with Trend
- Task Intelligence Classification
- Task Intelligence Similarity
- Task Intelligence Similarity with Trend

These resource generator types are based on the Predictive Intelligence framework that you can use to create machine learning solutions.

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Resource generator type	Definition
Decision table	Returns the results of the selected decision table. Use decision tables to help you resolve a complex decision that depends on multiple inputs and predetermined outputs. For example, a decision table might require inputs such as age, location, and health history to provide suggestions for different aspects of health insurance. You can use these suggestions, which are the outputs of the decision table, as action inputs for a recommendation. For more information, see Decision Tables.
Flow	Returns recommendations generated by executing the selected subflow. Use subflows to define logic and automate outputs for the resource generators. For example, you can find relevant KB articles using inputs such as product name, activation state, and publishing status. You can then propose to attach these KB articles as a recommended action. For more information, see Flow Designer.
Scripting	Returns recommendations generated by executing the selected script include. You must create an implementation of the ScriptingGeneratorFactory template to use a script include in the Scripting resource generator type. For more information, see Script includes.
AI search	Returns the AI search results and genius results based on real-time data and insights regardless of the search source. These results are relevant to the context of a record. This resource generator type requires the following inputs: • **Search field** - The field on which the AI search is performed. • **Top N results** - The number of records to return from the AI search. For example, you can configure AI search to recommend a KB article or similar case based on the relevancy and context of the short description. For more information, see AI Search.
Classification	Uses machine learning algorithms to recommend field values during record creation. This resource generator type requires the following inputs: • **Classification definition** - The Predictive Intelligence classification model to return the predicted values or record references for a field on a table. • **Top N Results** - The number of values or records to return from the relevant records predicted by the classification definition. For example, you can configure the classification solution to recommend a value for the category or assignment group

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Resource generator type	Definition
	based on the short description. For more information, see Predictive Intelligence.
Similarity	Identifies existing records with similar values to a context record. You must create a word corpus that acts as a vocabulary for the machine learning system to compare trained records. This resource generator type requires the following inputs: • **Similarity definition** - The similarity solution definition to return records that are relevant to the context record. • **Top N Results** - The number of records to return from the relevant records predicted by the similarity definition. For example, you can find similar resolved cases to propose a resolution as a recommended action. For more information, see Predictive Intelligence.
Similarity with Trend	Uses a trend definition to find commonality in the records returned by the similarity solution. You can configure the trend definition using a common condition, common field, or common reference, and a threshold value for the minimum number of records that must follow a trend. This resource generator type requires the following inputs: • **Similarity definition** - The similarity solution definition to return records that are relevant to the context record. • **Trend definition** - The trend definition to filter the relevant records that follow a trend. For example, you can find similar major incidents with a trend. Then, you can propose to link the current context record to this major incident.
Task Intelligence Classification	Uses machine learning models created in Task Intelligence Admin Console to recommend field values. The models provide flexible options to either auto-fill values on the record form or to provide recommendations depending on the sensitivity of those fields. **Note:** The field values are not recommended for fields when the TI model is in the background mode. This resource generator type requires the following inputs: • **Solution**: The solution contains configuration for recommended input fields and recommended output fields for prediction. The solution also contains preference whether the fields are auto-filled or a recommendation message is displayed. The Task Intelligence classification

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Resource generator type	Definition
	model predicts multiple values or record references for fields on a table. • **Top N Results** - The number of values or records to return from the relevant records predicted by the solution definition. For example, you can configure the Task Intelligence classification solution to recommend a value for the category or assignment group based on the short description. For more information, see Task Intelligence. **Note:** The Task Intelligence Admin Console (com.sn_ti_admin) plugin must be installed for selecting the Task Intelligence Classification resource generator type.
Task Intelligence Similarity	Identifies existing records with similar values to a context record. Uses machine learning models created in the Admin Console to recommend field values. This resource generator type evaluates the results of the Task Intelligence Admin Solution and returns the predicted values/ records for multiple fields. This resource generator type requires the following inputs: • **Model**: Reference to the Task Intelligence Admin Similarity model. • **Top N Results**: The number of values or records to return from the relevant records predicted by the solution definition. This resource generator type returns the following outputs: • **Predicted value**: For non-reference type fields, the Task Intelligence Admin Solution returns a predicted value. • **Predicted record**: For reference type fields, the Task Intelligence Admin Solution returns a predicted record. For more information, see Task Intelligence.
Task Intelligence Similarity with Trend	This resource generator evaluates the trend on the results of TI Similarity prediction. Using the solution (sn_ti_admin_solution) and trend (sn_nb_action_trend_definition) definitions, this resource generator type identifies records similar to the context record. Further, it analyzes these similar records to determine if they follow the specified trend. This resource generator type requires the following inputs:

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Resource generator type	Definition
	• **Solution**: Reference to the Task Intelligence Admin Similarity Model. • **Top N Results**: Specifies the number of predicted values/ records to be sent to the similarity prediction server. • **Trend definition**: Reference to the Trend Definition (sn_nb_action_trend_definition) table. This resource generator type returns the following outputs: • **Count**: Number of total records found in the trend. • **Oldest created record**: Oldest record in the trend. • **Highest confidence record**: Reference of the highest confidence ML result record. • **Qualified Records Sys IDs**: List of sys IDs of all qualified records. For more information, see Task Intelligence.

Timeout handling for resource generators

The Recommended Actions application uses a subflow API with a defined timeout when calling Machine Learning (ML) resource generators. This timeout ensures the RA generation engine prioritizes faster response times by terminating stalled ML prediction calls.

The subflow has a timeout setting of 1 second. If there is a delay and the predict call times out, the system generates a message.

The subflow applies to the following ML-based resource generators:

- Similarity
- Task Intelligence Similarity
- Similarity with Trend
- Task Intelligence Similarity with Trend

The *sn_nb_action_adv.similarity_prediction.timeout* system property controls the timeout value of the subflow. The default value is set to 1000ms.

Related topics

Create a resource generator in Recommended Actions

Domain separation and Recommended Actions

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

Support level: Basic

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

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview

The tables and data in the application are domain separated. Recommendation authors can only see the context applicable to them based on the domain. In runtime, recommendations are evaluated in the user context and data is created in the corresponding domain applicable to the user.

How domain separation works in Recommended Actions

To use domain separation in the Recommended Actions application, you can create separate Context records for each domain. Context serves as a starting point in Recommended Actions. All other configurations such as Rule, Recommendation, and Resource Generator can then be associated with the domain of the corresponding context record.

Runtime evaluation and generation of recommendations are user-specific. The user's domain is selected and the corresponding Rules applicable to the user are evaluated to give final recommendations to the end user. Execution records created use the same domain of the context that are applicable for the given user.

Domain-separated tables

When you create related entities for a context, the domain for the related entities is set to the domain of the context. The following tables in the application are domain separated:

- Context
- Recommended Action Rule
- Recommendation
- Resource generator
- Recommendation group
- Search result recommended action mapping
- Recommended Action Context
- Recommended Action Execution
- Recommended Action Order
- Field recommendation
- Field recommendation input
- Field recommendation definition
- Resource generator type
- Resource generator type input

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- Recommendation grouping strategy
- Action Type Definition
- Trend Definition

Related topics

Domain separation for service providers

AI search in Recommended Actions

Enable agents to use AI search in Recommended Actions to find relevant resources or resolutions for customer issues.

AI search results and genius results are displayed in the Search tab of the Recommended Actions component in the contextual side panel. Agents can initiate actions from the search cards directly to resolve an issue.

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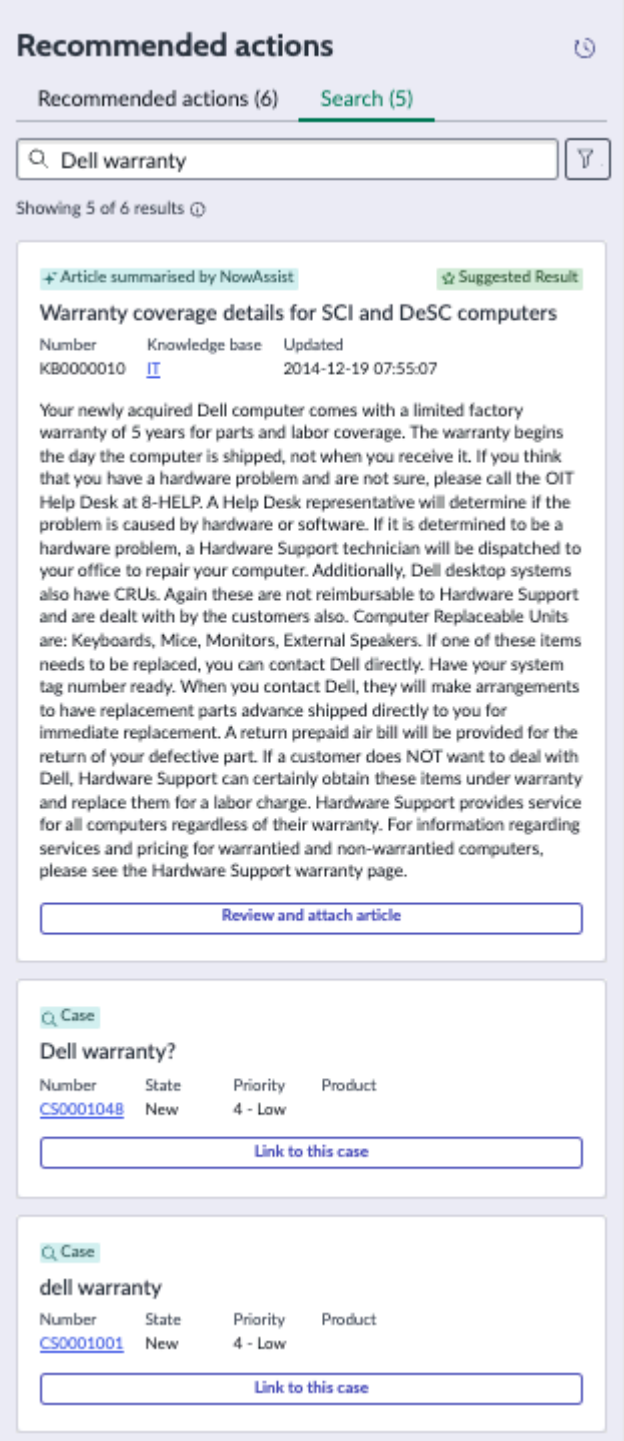

The search results from the configured search sources are displayed in the form of cards. These cards are previews of search records. You can select the card to view the record details or directly take actions through the cards. The most relevant answers are displayed as top results in the form of genius result cards.

AI search harnesses advanced machine learning algorithms and natural language processing capabilities to comprehend user queries and provides the most relevant search results that can be employed to resolve issues effectively. For more information on:

- AI search and its features, see AI Search.
- enabling AI search for Next Experience, see Enable AI Search for Next Experience.

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AI search features

- Highlights search query terms that appear in the search results.
- Displays the most relevant results first with machine learning relevancy. Machine learning automatically tunes and improves the search result relevancy score for each search profile based on the answers agents select.
- Displays the best answers as genius result cards.

AI search benefits

- Maximizes efficiency: Use AI search integration to reduce task resolution time and improve agent productivity.
- Leverages contextual intelligence: Make the most of context-aware searching to provide accurate and timely responses.
- Provides summarization: Configure genius results to get large language model-based knowledge summarization to align with your content and information needs.

Configuring AI search in Recommended Actions

Steps to configure AI search in Recommended Actions include enabling the AI search tab, mapping the AI search results with guidance inputs, and customizing the Recommended Actions component. Advanced customization options include adjusting the number of results to view on a page, identifying genius results to add to the search profile, and configuring search sources. For more information, see Configuring AI search in Recommended Actions.

Using AI search in Recommended Actions

Enable customer service agents to use AI search for faster access to relevant information and take appropriate actions to resolve customer issues. For more information, see Use AI search in Recommended Actions to resolve cases.

- Accessing AI search: Agents can access the AI search tab in the contextual side panel of the workspace.
- Finding context-aware results: Agents can enter their search queries in the search bar. AI search uses natural language processing to understand user queries and considers task context to produce relevant results.
- Showing AI search results: Review AI search results and take actions directly from the search cards.
- Showing genius results: Agents can view the most relevant results at the top based on criteria defined in the genius results configuration, drawing their attention to the most relevant information first.
- Narrowing search results: Agents can select a search source from the **Search filter** field to display results only from that search source and then return to viewing all matching records.
- Viewing results count: The search tab shows counts of the total number of matching search results. The search filters show the number of matching results for each search source.

> **Note:**
> Search results displayed and the total search count may vary due to security permissions or if the search result has already been executed. The executed guidances are added to the Activity stream and moved to the Actions history. Executed guidances will be included in the total search count but will not show up in the search results.

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AI Search event and action logs for AI Search usage in Recommended Actions

AI search event and action logs capture user interactions and search activities, providing data for AI search analytics dashboards.

Search event and action logs

The logging of search-related events within a search system focuses on how search queries, results, and user interactions are recorded in various tables for analytics purposes.

- Search event logging: The search events logging, including search queries, results, and user actions, by queuing events and processing them into dedicated tables. The search events are queued in the Queued Signal Events table first and then when they're processed, they're moved into the search events table.
- Event logging triggers: The search events, search source events, and search signal events tables capture details like query changes, sources of results, and applied facet filters. The logging occurs not only when searches happen but also when filters, facets, or sorts are applied, ensuring comprehensive capture of user interactions with search features.

  Events are queued and then processed into the following tables:

  - Search Events table [sys_search_event]: Logs search queries, user info, and result status.
  - Search Source Events table [sys_search_source_event]: Captures the origin of the query (for example, catalog item).
  - Search Signal Events table [sys_search_signal_event]: Logs facet filters the facet filters applied on the results for a search query and source mappings.

  For more information on the preceding tables, see Search Suggestions tables.

- Search result action logging: Separate tables exist for logging clicks and actions on search results, including distinctions between normal and genius result actions, with multiple entries for multiple actions on a single source. When you interact with a search result, such as clicking on a link or performing an action, these actions are recorded. For the preview experience, actions like drill down are automatically logged to avoid duplication. This data is then used to populate analytics dashboards, either prebuilt or custom, enabling you to track and analyze the interactions with search results effectively.

  For custom guidances, you must emit the log search result event with the appropriate payload structure, which includes action-related data. Emitting action details in the payload is optional. Without it, events are still logged but lack specific action information, preventing duplication by using unique action IDs. Custom guidance actions require emitting events with a provided payload structure to log action details, while out-of-the-box guidances handle this automatically. For payload structure, see Custom action log payload structure.

  - Search Result Events table [sys_search_signal_result_event]: Stores signal data for search results that you select.
  - Search Result Event Actions table [sys_search_signal_result_event_action]: Stores signal data for user interactions with search results.
  - Genius Result Actions table [sys_search_genius_result_event_action]: Stores signal data for user interactions with Genius Result answer cards.

  For more information on the preceding tables, see Search signal tables.

- AI search analytics: The logged data is then used to populate the AI search analytics dashboards, either prebuilt or custom, enabling you to track and analyze the interactions with search results effectively. For more information on the AI search analytics dashboard, see AI Search analytics dashboard. You can view the CSM workspace-related AI Search usage

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within Recommended Actions in the AI Search Analytics dashboard by selecting the **[CSM AIS] Configurable Workspace Search Config** option in the application drop-down on the top-right.

Custom action log payload structure

For custom action logging, that is, for the action you create on a guidance preview experience, you must emit an event with a payload structure that includes action-related data. Other common fields such as applied filters and views are handled by the system. If the payload is empty, the event will still be logged, but the action details won't be available. This structured payload is crucial for building detailed analytics dashboards, as it provides specific information about user interactions with custom actions.

```
api.emit(LOG_SEARCH_RESULT_EVENT, {actionData: {actionName:
 actionId}})
```

For more details on how to configure the payload for custom actions, see Customize a guidance preview experience in the UI Builder.

Example configurations of recommended actions

This example documentation demonstrates end-to-end configurations of recommendations with actions of type guidance, decision tree, or field recommendation to help you get started with Recommended Actions.

Recommended actions examples

Scenario	Description
Troubleshoot a failed credit card transaction	A decision tree that helps agents troubleshoot a failed credit card transaction. This decision tree asks a series of questions and based on the answers entered, provides a resolution, such as track the failed transaction, dispatch a new credit card, or provide further assistance.
Recommend an assignment group for a router issue	A field recommendation that recommends a value for the Assignment group field so that the agent can assign the case to the appropriate team to resolve the customer issue faster.
Link the current case to the similar major case	A guidance that recommends linking the current case to the recommended similar major case so that the business owner can identify the trend and take corrective actions.

Example: Troubleshoot a failed credit card transaction

Learn how process analysts or business owners configure a recommended action that uses a decision tree to troubleshoot a failed credit card transaction.

Problem scenario

Paul was trying to purchase a smart watch using his StellarVest bank credit card. But the transaction failed at the time of payment. Paul created a case in the StellarVest bank customer support portal seeking assistance.

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In this scenario, the agent assigned to the Paul's case is recommended to use a decision tree to troubleshoot the failed credit card transaction. The decision tree collects user, credit card, and transaction details. If money was debited, transaction tracking is initiated. However, if no money was debited, the agent provides a failure code, which determines what guidance is provided. Examples of potential guidances include: reassigning the case, creating a work order, or assigning the case to an IT technician.

Configuring a recommended action for troubleshooting a failed credit card transaction

Help process analysts configure a recommended action of type decision tree that enables agents to troubleshoot a failed credit card transaction reported by customers.

Task	Description
Creating a decision tree	Create a decision tree that enables agents to ask a series of questions to customers. Based on the answers provided, agents can troubleshoot and provide resolution to customer issues. For more information about how to configure a decision tree in Decision Tree Builder, see Troubleshoot a failed credit card transaction decision tree.
Create a rule from the Case context record	Create a rule to show recommendations for active cases that meet the condition specified in this rule.
Create a recommendation with the decision tree as an action type	Create a recommendation that uses decision tree to troubleshoot a failed credit card transaction.

Create a recommendation with the decision tree as an action type

Create a recommendation to select Troubleshoot credit card transaction failure decision tree as an action type.

Before you begin
Role required: sn_nb_action.next_best_action_author, admin

About this task
New recommendations can only be created inside the rules.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select the Case context.
3. Select Active rule from the Rules related list.
4. In the Recommendations related list, select **New**.
5. In the New Recommendation screen, select **A guided flow to follow** to create a recommendation of type decision tree.
   A new Recommendation form is displayed with the **Rule**, **Context**, and **Action type** fields auto populated.
6. In the **Name** field, enter `Troubleshoot credit card transaction failure`.
7. In the **Action** field, select the action.

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The available actions are determined by the selection in the **Action type** field.

a. In the **Action** field, select the lookup icon.
In the resulting pop-up window, the **Table name** field is auto populated with the table that stores the available actions for the selected action type.

b. In the **Document** field, select the Troubleshoot credit card transaction failure decision tree by clicking the lookup icon.
For more information about how to create this decision tree, see Create Troubleshoot credit card transaction failure decision tree.

c. Select **OK**.

8. In the **Recommendation hint** field, enter `Troubleshoot credit card transaction failure`.
The hint explains to agents why a recommendation is being suggested.
9. Select **Update**.

Example: Recommend an assignment group for a router issue

Learn how process analysts or business owners configure a recommended action of type field recommendation to recommend an assignment group for a router issue. This field recommendation uses a resource generator of type decision table that takes the router model and router issue as inputs and provides an assignment group as a result.

Problem scenario

QuantumLink Technologies, a newcomer to the networking equipment market, places a strong emphasis on customer satisfaction and resolving customer issues promptly. The business owners are committed to provide excellent customer service so that their business can thrive.

Alisha, one of the business owners at QuantumLink Technologies, sets up a recommended action that recommends a value for the Assignment group field based on the product model and problem specified by customers.

Rohit, a customer who recently purchased a QuantumLink router, is facing intermittent connectivity issues with his router. He creates a case on QuantumLink Technologies' customer support portal. John is frustrated by the disruptions in his internet service and is seeking a swift resolution to confirm uninterrupted connectivity for his home and work needs.

John Jason, the agent assigned to this case is recommended a field value for an assignment group so that this case can be assigned to the appropriate team and the issue can be resolved quickly.

Configuring a recommended action for recommending an assignment group for a router issue

Help Alisha configure a recommended action of type field recommendation that recommends an assignment group for a router issue.

Task	Description
Creating a decision table for recommending assignment groups	Configure a decision table that takes product and problem as inputs to provide the

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Task	Description
	assignment group as an output. You can use this decision table in a resource generator.
Configure a resource generator for providing assignment group as an outcome	Configure a resource generator that you can use while configuring a field recommendation to provide the appropriate assignment group for the router issue.
Create a field recommendation for recommending assignment group field value	Create an action of type field recommendation for recommending a field value for the assignment group.
Create a rule from the Case context record	Create a rule to show recommendations for active cases that meet the condition specified in this rule.
Create a recommendation with the field recommendation as an action type	Create a recommendation to surface the recommendation for the assignment group field value on a case record.

Creating a decision table for recommending assignment groups

Create a decision table with name **Assignment group for a router issue** that provides an assignment group as a result for a given product and problem combination.

This decision table requires two inputs:

Input	Type
Product	String
Problem	String

For the result, create the Assignment group column with Result type selected as Reference and Result table selected as Group [sys_user_group].

Configure the decision table conditions, results, and values as displayed in the following table. For more information, see Decision Tables.

Sample decision table: Assignment group for a router issue

Condition columns		Result column
Product	Problem	Assignment gro
Router M-series	Internet connectivity issue	Router-M-Tear
Router M-series	Router is heating up	Router-M-Tear
Router M-series	Network outage	Router-M-Tear
Router M-series	Security concerns	Router-M-Tear
Router N-series	Internet connectivity issue	Router-N-Tean
Router N-series	Router is heating up	Router-N-Tean
Router N-series	Network outage	Router-N-Tean
Router N-series	Security concerns	Router-N-Tean

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Configure a resource generator for providing assignment group as an outcome

Configure a resource generator of type decision table that provides an assignment group for a given router model and associated issue.

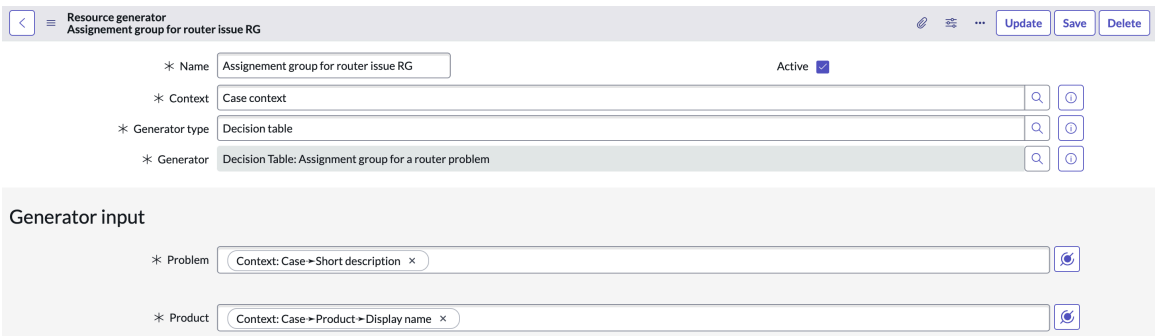
Before you begin

Role required: sn_nb_action.next_best_action_author, sn_nb_action.resource_generator_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Resource Generators**.
2. Select **New** from the Resource Generators list.
3. In the **Name** field, enter `Assignment group for router issue` RG.
4. In the **Context** field, select Case context.
5. In the **Generator type** field, select Decision table.
6. In the **Generator** field, select the Assignment group for a router issue decision table.
7. Save the record to display the generator inputs.
8. On the Generator input form, fill in the fields.
   a. Select the pill picker next to the field.
   b. In the **Product** field, select **Context: Case** > **Product** > **Display name**.
   c. In the **Problem** field, select **Context: Case** > **Short description**.
9. Select **Update**.

Result



What to do next

Create a field recommendation that you can use while creating recommended action for recommending assignment group field value.

Create a field recommendation for recommending assignment group field value

Create a field recommendation that you can select when configuring a recommended action. This field recommendation suggests an assignment group field value on a case record for a router issue.

Before you begin

Use the CSM default record page or the CSM Interaction record page to display field recommendations in CSM Configurable Workspace. For setting the CSM default record page or the CSM Interaction record page as the default page, see Set record page order.

Role required: sn_nb_action.next_best_action_author, admin

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About this task

Creating a field recommendation involves two main steps:

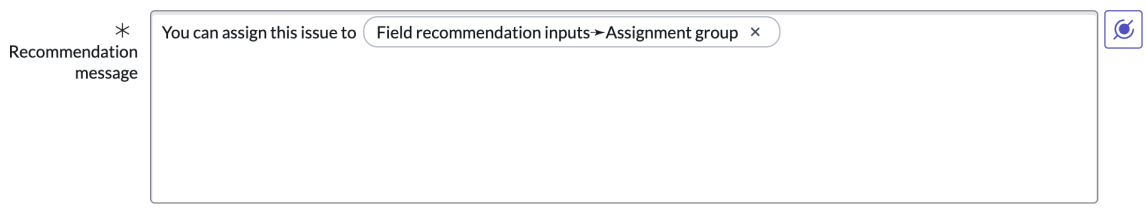
- Creating inputs for the field recommendation.
- Creating instructions about how to recommend values by configuring a definition for each field.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Field Recommendations**.
2. Select **New** on the Field Recommendations list.
3. In the **Name** field, enter `Field recommendation for assignment group`.
4. In the **Table** field, select `Case [sn_customerservice_case]` so that you can populate field recommendation for the **Assignment group** field on a case record.
5. Save the record to display the related lists.
6. In the Field Recommendation Inputs related list, select **New** to create an input.
   a. In the **Type** field, select Reference.
   b. In the **Label** field, enter `Assignment group`.
   The **Column name** field is auto-filled.
   c. In the Reference specification related list, configure the following fields.

Field	Action
Reference	Select the `Group [sys_user_group] table.`
Reference qual condition	Select the `Active | is | true` condition.

   d. Select **Update**.
7. In the Field recommendation definitions related list, select **New** to create a definition.
   a. In the **Name** field, enter `Assignment group for router issue definition`.
   b. In **Field**, select the Assignment group field.
   c. In the **Recommendation message** field, enter `You can assign this issue to` and use the pill-picker to add the recommended value **Field recommendation inputs** > **Assignment group** as part of the message.



Note:
If the resource generator returns an empty field value, the recommendation message isn't displayed.

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d. In the **Recommendation Method** list, select Recommend only.

e. Select **Submit**.

Create a recommendation with the field recommendation as an action type

Create a recommendation to select the field recommendation as an action type for recommending a value for the Assignment group field on a case record.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select Case context.
3. In the Rules related list, select Active rule.
4. In the Recommendations related list, select **New**.
5. From the New Recommendation screen, select **A field value to use**.
   A new Recommendation form is displayed with the **Rule**, **Context**, and **Action type** fields auto populated.
6. In the **Name** field, enter `Recommend assignment group for router issue`.
7. In the **Action** field, select an action.
   a. In the **Action** field, select the lookup icon.
      In the resulting pop-up window, the **Table name** field is auto-populated with the table that stores the available actions for the selected action type.
   b. In the **Document** field, select the Field recommendation for assignment group field recommendation.
   c. Select **OK**.
8. In the **Resource generator** field, select the Assignment group for router issue RG resource generator.
9. Save the record to display the Action inputs form section.
10. Define the action inputs.
    a. Select the pill picker next to the field.
    b. In the **Assignment group** field, select **Resource generator** > **Assignment group: Group**.
11. Select **Update**.

Example: Link the similar major case to the current case

Learn how process analysts or business owners configure a recommended action of type guidance to propose a major case that can be linked to the current case. This guidance uses a resource generator of type similarity with trend to recommend the similar case that has a common trend.

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Problem scenario

Isabella owns a thriving E-commerce business that specializes in selling handmade artisanal products. As the business grows, Isabella recognizes the increasing importance of providing exceptional customer service to maintain customer satisfaction and loyalty. Isabella understands that addressing customer issues effectively and promptly is crucial for the success of the business.

Daniel, a process analyst on the Isabella's team identifies the most common and critical issues that their customers report and create major cases for them. So that whenever a customer creates a case, it can be linked to the similar major case. This process helps them understand the pattern, identify the root cause, take corrective actions, and apply similar solutions.

Daniel identifies the following major issues:

- Missing items in the order
- Wrong items received
- Damaged or defective products
- Refund requests
- Billing discrepancies or errors
- Difficulty applying discount codes
- Difficulty reaching customer support

Now, Daniel configures a guidance that recommends a similar major case to the agent who is working on a new case created by a customer. The guidance provides an action to the agent to link the recommended major case to the current case.

Configuring a recommended action for linking the similar major case to the current case

Help Daniel configure a recommended action of type guidance that uses Similarity with Trend resource generator to link the major case to the current case.

Task	Description
Configuring a subflow for the guidance action automation	Configure a subflow that you can use in a guidance to link the proposed major case to the current case automatically on a click of an action button.
Configure a resource generator for providing a similar major case to the current case	Configure a resource generator of type similarity with trend that provides a similar major case to the current case.
Create a guidance for linking the similar major case to the current case	Create a guidance to link the similar major case to the current case by configuring guidance inputs, preview experience, and guidance action.
Create a rule from the Case context record	Create a rule to show recommendations for active cases that meet the condition specified in this rule.

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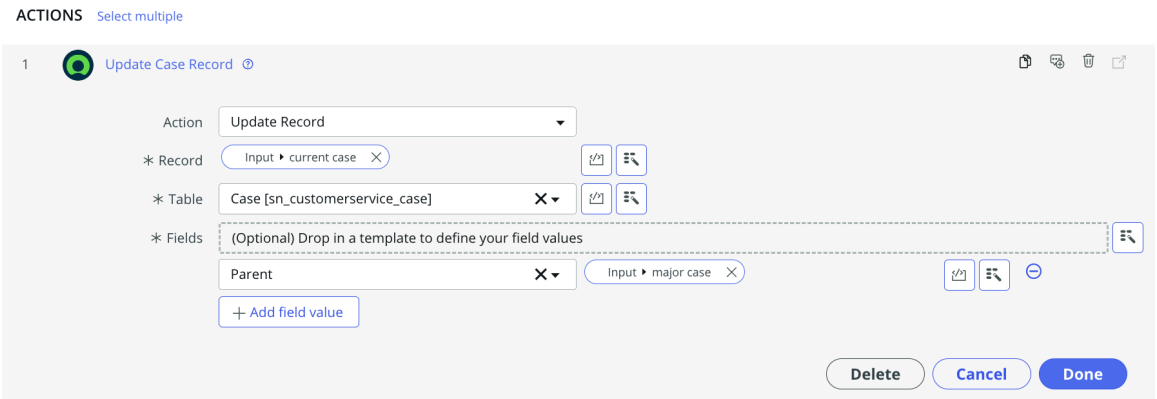
Task	Description
Create a recommendation with guidance as an action type	Create a recommendation to select the Guidance as an action type for linking a major case to the current case record.

Configuring a subflow for the guidance action automation

Configure a subflow that you can use in a guidance to automatically link the proposed major case to the current case on a click of an action button.

Configure and publish a subflow with the following inputs and action. For more information, see Create a subflow in Workflow Studio.

Field	Value	Description
Name	Link major case	-
Subflow Inputs & Outputs > **Inputs**	• Current case • Major case	Input type: Re
Actions	Update Record	Update case r case as the pa



Configure a resource generator for providing a similar major case to the current case

Configure a resource generator of type similarity with trend that provides a similar major case to the current case.

Before you begin

- Ensure Predictive Intelligence is active and set up on your instance. See Install Predictive Intelligence.
- Ensure you have a Predictive Intelligence subscription.
- Train the Major issue detector similarity solution with the existing customer cases. For more information, see Create and train a similarity solution.
- Create a trend definition with the name Major issue trends to define how many records that have something in common constitute a trend, for example, six or more records with common field values.

Role required: sn_nb_action.next_best_action_author, sn_nb_action.resource_generator_author, admin

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Procedure

1. Navigate to **All** > **Recommended Actions** > **Resource Generators**.
2. Select **New** from the Resource Generators list.
3. In the **Name** field, enter `Similar major case`.
4. In the **Context** field, select Case context.
5. In the **Generator type** field, select Similarity with Trend.
6. Save the record to display the generator inputs.
7. On the Generator input form, fill in the fields.

8. Select **Update**.

Create a guidance for linking the similar major case to the current case

Create a guidance for linking the similar major case to the current case by configuring guidance inputs, preview experience, and guidance action.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Select **New** in the Guidances list.
3. In the **Name** field, enter `Link similar major case`.
4. In the **Description** field, enter `This guidance recommends to link the identified similar major case to the current case..`
5. Create the following inputs for the guidance.
   Inputs are the variables or information that the system needs to perform the guidance. You can use inputs in multiple places such as the guidance preview experience and the guidance actions.
   a. In the Guidance Input tab, select **New**.
   b. In the **Label** field, enter `Current case`.
   c. In the **Type** field, select Reference.
   d. In the Reference Specification related list, in the **Reference** field, select the Case table.
   e. Select **Submit**.
   f. In the Guidance Input tab, select **New** again.
   g. In the **Label** field, enter `Major case`.
   h. In the **Type** field, select Reference.
   i. In the Reference Specification related list, in the **Reference** field, select the Case table.
   j. Select **Submit**.
6. Configure the preview experience.

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a. In the **Preview Title** field, enter `Link to this major case`.

b. In the **Fields to display**, select the parent case input.

c. In the **Message** field, enter `This is the similar Major case predicted that you can link to the current case.`

7. Save the guidance record to display the Guidance Actions related list.

8. Configure a guidance action.

a. In the Guidance Actions form section, select **New**.

b. In the **Action Label** field, enter `Link major case`.

c. In the **Call to Action Label** field, enter `Link major case`.

d. In the **Action Behaviour** field, select Single-click.

e. In the **Guidance Action Automation** field, select the Link major case subflow.

f. In the **Completion Message** field, enter `The suggested major case is linked!`

g. Save the record to display the flow inputs.

h. In the **Automation Flow Inputs** related list, fill in the fields.

Input	Action
current case	i. Select the pill picker next to the field. ii. Select **Guidance inputs** > **Current case**.
major case	i. Select the pill picker next to the field. ii. Select **Guidance inputs** > **Major case**.

Create a rule from the Case context record

Create a rule to show recommendations for active cases that meet the condition specified in this rule.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

About this task

New rules can only be created from context records.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select the Case context.
   The Case context is available by default.
3. In the Rules related list, select **New**.
4. In the **Name** field, enter `Active rule`.

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5. In the **Roles** field, select the Edit User Roles icon and then select Customer service agent [sn_customerservice_agent] and Consumer service agent [sn_customerservice.consumer_agent].
   The selected user roles can see recommendations for this rule.
6. Select **Done** on the Roles pop-up window.
7. In the **Condition** field, use the condition builder to add the condition "Active | is | true".
   Agents can see recommendations for the records in the context table that meet this criteria.
8. In the **Field affecting this rule** field, select Short description from the slush bucket.
9. Select **Submit**.

Create a recommendation with guidance as an action type

Create a recommendation to select the Guidance as an action type for linking a major case to the current case record.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select Case context.
3. In the Rules related list, select Active rule.
4. In the Recommendations related list, select **New**.
5. From the New Recommendation screen, select **A specific action to take or information to review**.
   A new Recommendation form is displayed with the **Rule**, **Context**, and **Action type** fields auto populated.
6. In the **Name** field, enter `Link major case to current case`.
7. In the **Action** field, select an action.

   a. In the **Action** field, select the lookup icon.
      In the resulting pop-up window, the **Table name** field is auto-populated with the table that stores the available actions for the selected action type.

   b. In the **Document** field, select the Link similar major case guidance.

   c. Select **OK**.

8. In the **Resource generator** field, select the Similar major case resource generator.
9. Save the record to display the Action inputs form section.
10. Define the action inputs.
    a. Select the pill picker next to the field.
    b. In the **Assignment group** field, select **Resource generator** > **Assignment group: Group**.
11. In the **Action Inputs** related list, fill in the fields.

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Input	Action
Current case	**a.** Select the pill picker next to the field. **b.** Select **Context: case**.
Major case	**a.** Select the pill picker next to the field. **b.** Select **Resource generator** > **Highest confidence record: case**.

12. Select **Update**.

Install the Recommended Actions application

You can install the Recommended Actions application (sn_cs_nb_action) if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Recommended Actions application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Recommended Actions:

- Store applications: Recommended Actions
- Roles
- Tables

For more information, see Components installed with Recommended Actions.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Recommended Actions application (sn_nb_action) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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

6. Select **Install**.

Components installed with Recommended Actions

Several types of components are installed with the Recommended Actions application, including tables, roles, guidances, resource generators, and scheduled jobs.

Tables

The Recommended Actions application adds the metadata tables described in the following table.

Tables installed with Recommended Actions

Table	Description
Context [sn_nb_action_rule_context]	Stores contexts for tables such as case, incident, and problem for which recommendations are generated.
Recommendation [sn_nb_action_recommended_action]	Stores recommendations, which include action type, action, and resource generator information.
Action Type Definition [sn_nb_action_type_definition]	Stores action type definitions such as guidances, guided decision trees, and field recommendations.
Field Recommendation [sn_nb_action_field_recommendation]	Stores field recommendations.
Field Recommendation Definition [sn_nb_action_field_recommendation_definition]	Stores field recommendation definitions.
Field Recommendation Input [sn_nb_action_field_recommendation_input]	Stores inputs for field recommendations.
Resource Generator [sn_nb_action_resource_generator]	Stores resource generators.
Resource Generator Type [sn_nb_action_resource_generator_type]	Stores resource generator types such as flow, decision table, scripting, similarity, similarity with trend, and classification.
Resource Generator Type Input [sn_nb_action_generator_type_input]	Stores inputs for resource generators types.
Trend Definition [sn_nb_action_trend_definition]	Stores trend definitions.

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Tables installed with Recommended Actions (continued)

Table	Description
Rule [sn_nb_action_condition_based_rule]	Stores rules, which include a condition and roles for the context.
Recommended Action Rule [sn_nb_action_rule_base]	Stores recommended action rules records.
Conditional Rule [sn_nb_action_conditional_rule]	Stores conditional rules. This table is no longer supported.
Decision Table Rule [sn_nb_action_decision_table_rule]	Stores decision table rules. This table is no longer supported.
Recommended Action Input Generator [sn_nb_action_input_generator]	Stores input generator records. This table is no longer supported.
Search result recommended action mapping [sn_nb_action_search_result_ra_mapping]	Stores mapping between search result outputs and action inputs.

Roles

The Recommended Actions application includes the roles described in the following table.

Roles installed with Recommended Actions

Role	Description	Contains roles
Recommended Actions admin [sn_nb_action.next_best_action_admin]	Grants administrator access to the Recommended Actions application.	sn_nb_action.next_best_action_author
Recommended Actions author [sn_nb_action.next_best_action_author]	Can create recommended actions.	• sn_nb_action.resource_generator_author • sn_gd_guidance.guidance_manager • sn_nb_action.next_best_action_user • sn_gd_core.decision_tree_author
Recommended Actions user [sn_nb_action.next_best_action_user]	Can use recommended actions.	sn_gd_core.decision_tree_author
Resource Generator author [sn_nb_action.resource_generator_author]	Grants access to configure resource generators.	• flow_operator • decision_table_reader • platform_ml_read

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Roles installed with Recommended Actions (continued)

Role	Description	Contains roles
		• sn_nb_action.trend_definition_author • sn_ti_admin.tia_user
Trend Definition author [sn_nb_action.trend_definition_author]	Grants access to configure trend definitions.	None

Guidances

The Recommended Actions application includes the guidances described in the following table.

Guidances installed with Recommended Actions

Guidance	Description
Apply resolution from a solved case	Enables agents to apply a resolution from a recommended solved case by clicking **Resolve case** button on a card, which copies the resolution notes and a resolution code from the solved case into the Closure Information section of the current case. The state of the current case changes to resolved.
Communicate Workaround	Enables agents to communicate a workaround from a recommended problem record by clicking a **Communicate workaround** button on a card, which opens the guidance in the side panel. The guidance shows the workaround from the problem record and provides a note field for the agent to add additional notes. The workaround and notes are added in the work notes and the problem record is linked to the current case.
Create case task	Enables agents to create a case task for the current case by clicking a **Create** button on a card, which opens the guidance in the side panel where the agent can enter a subject for a new case task and submit it.
Create Work Order	Enables agents to create a work order for a case by clicking a **Create** button on a card. Creates a work order task and opens the task in a subtab.

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Guidances installed with Recommended Actions (continued)

Guidance	Description
Link to existing defect	Enables agents to link an existing defect to the current case by clicking a **Link to defect** button on a card, which links the defect to the case and updates the work notes.
Link to existing open case	Enables agents to link the current case to an existing open case by clicking a **Link to this case** button on a card, which sets the open case as the parent of the current case.
Offer Recommendation	Enables agents to recommend upgrade of a product to provided product model.
Propose Resolution	Enables agents to enter resolution notes and a resolution code for a case by clicking a **Propose Solution** button on a card.
Read message to customer	Enables an agent to indicate that a message was read to a customer during a call by clicking the **Mark as read** button on a card, and adding the message to the work notes.
Reassign case	Enables agents to reassign the current case to a recommended assignment group by clicking the **Reassign** button on a card, which opens the guidance in a side panel where the agent can enter notes. The current case is reassigned to a different assignment group and the work notes are updated.
Review and attach article	Enables agents to review a recommended knowledge article in the contextual side panel by clicking a **Review and attach article** button on a card, which opens the article in the side panel. In the side panel, agents can do the following: • Review the article. • Attach the article to the case. • Mark the article as helpful. • Open the article in a subtab.

Resource generators

The Recommended Actions application includes the resource generators described in the following table.

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Resource generators installed with Recommended Actions

Resource generator	Description
Find most read KB Article for Product	Finds the most read KB article for the selected product. You can use this KB article to attach to a case as a recommended action.
Find Matching PRB with workaround	Finds a matching problem record that has a workaround. You can propose to share the workaround from this case as a recommended action.
Find Matching PRB without workaround	Finds a matching problem record without a workaround. You can propose to link to this problem record as a recommended action.

Configuring the Recommended Actions application

As an admin, configure the Recommended Actions application to display relevant actions to your agents based on a record context.

Recommended actions

You can configure recommended actions by following these steps.

Steps to configure Recommended actions

Step	Description
Create a context	A context enables agents to see recommendations for records from a specific table, such as the Case table.
Create a context input	A context input enables you to associate entities beyond just the context table with a context ensuring that recommendations are updated dynamically as the context evolves. **Note:** This step is not mandatory.
Create a rule for a context	A rule is a set of conditions that applies to a context and determines when a recommended action appears. When you create a rule: • Select conditions that apply to the context table. • Select the roles that have access to the recommended actions. **Note:** New rules can only be created from within a context.
Create a recommendation for a rule	A recommendation is a way to suggest an action to an agent. Create a recommendation by selecting one of the recommendation types available on the New Recommendation screen:

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Steps to configure Recommended actions (continued)

Step	Description
	• Guidance • Guided decision tree • Field recommendation **Note:** New recommendations can only be created from within a rule.

Action types

With the Recommended Actions application, you can create the following types of actions for agents to take.

Action types in the Recommended actions application

Action type	Description
Guidance	An action that an agent can take or information that they can share. For example, a guidance can recommend that an agent can view and attach a knowledge article to a case or create a work order.
Guided decision tree	A guided flow to follow. A decision tree is a multi-step process that includes a series of questions and answers and results in guidance.
Field recommendation	A recommended value to use for a field. For example, this type of action can recommend the assignment group based on the text in the case short description.

For more information, see Creating guidance and field recommendation in Recommended Actions.

Resource generators

Configure resource generators to provide information that you can use as inputs to actions such as guidances and field recommendations. Configuration of decision trees don't require resource generators. For more information, see Create a resource generator in Recommended Actions.

Arbitration parameters

Configure arbitration parameters to determine the frequency of issues or the priority order of the recommended actions so that agents get the guidance that they must help resolve customer issues. For more information, see Configure the arbitration parameters in Recommended Actions.

Create a context in Recommended Actions

Create a context for an individual table, such as the Case table. Contexts store information including the recommended actions that agents can use and the rules that determine when those actions are available.

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Before you begin
Role required: sn_nb_action.next_best_action_author, or admin

About this task
A context enables agents to see recommendations for a specific type of record when certain rules are met. These recommendations can help agents by suggesting actions to take based on the record context.

Procedure
1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select **New** on the Contexts list.
3. Fill in the fields on the form.

Context form

Field	Description
Name	Name for the context.
Table	Table for which the context applies to. If you select a table that already has a context, then a warning message is displayed.
Description	Brief description about the context.
Active (Optional)	Check box to make the context active.
Asynchronous Evaluation	When selected, enables asynchronous mode of evaluating recommendations on the contextual side panel in the CSM Workspace. That is, this mode enables agents to work on the case or incident record while the recommendations load on the contextual side panel. For more information, see Synchronous and asynchronous modes of evaluation for Recommended Actions.
Exclude fields	Fields of the context table that do not trigger the Recommendations refresh in the Configurable CSM Workspace, when these fields are updated. Add the context table fields that do not impact recommendations generation.
Parent Context Config	
Parent context	Enables you to choose which parent table's rules and recommendations must be applied to the context you are working with.

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Field	Description
	Note: ○ This field appears when the selected table has a parent table with context defined. ○ This field does not show the parent context which have context inputs configured. ○ If parent context is set, the Context inputs related list does not appear.
Inherit exclusions from parent context	When selected, includes the exclusion fields of the parent context table to prevent the trigger of the Recommendations refresh in the CSM Configurable Workspace. **Note:** This field appears only when a context is added in the Parent context field.
Contextual AI Search Config	
Search Application Configuration (Optional)	Search application configuration that specifies AI Search as the search engine and the settings to use for the search. You can configure the search result display and refinement settings in the search application configuration. For more information, see Search application configurations. The **[CSM AIS] Configurable Workspace Search Config** search application configuration is provided with the CSM Configurable Workspace store application. To access this configuration, navigate to **AI Search** > **Search Experience** > **Search Applications**. For more information about AI search configurations, see Configuring AI Search in Recommended Actions.
Default search term	Search term that appears by default. You can map the context input from the pill picker.
Grouping strategy (Optional)	Strategy for grouping recommendations. For example, you can define a grouping strategy to group recommendations that have similar criteria.

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Field	Description
	Note: You might need to configure the Context form to display the **Grouping strategy** field. This field is available by default for ITSM Workforce Optimization users.
Refresh interval (Optional)	This value determines how often recommendations are refreshed for the context. The default value for this field is 12 hours and the minimum value is 10 minutes. **Note:** You might need to configure the Context form to display the **Refresh interval** field.
Show relevancy score for results	Displays the relevancy score on the search results and recommendations in the Recommended Actions contextual side panel.
Top N results	Limits the number of search results displayed in the AI search tab of Recommended Actions to the top N results for improved precision and easier management. The number of results that appear is determined by the **Search Results Limit** value which can be updated by opening the Search Application in the Search Application Configuration.

4. Select **Save**.
   After saving the context record, the system displays the Rules and Recommendations related lists.

What to do next

- Configure context inputs. For more information, see Create a context input in Recommended Actions.
- Use the Rules related list to view or create rules for this context. For more information on how to create a rule, Create a rule in Recommended Actions.
- Use the Recommendations related list to view the recommendations related to the context rules. You can only create a recommendation from within the rule. For more information on how to create a recommendation within a rule, see Create a recommendation in Recommended Actions.
- Use the Search result mapping related list to view or create mappings between AI search outputs and guidance inputs.

Related topics

Contexts in Recommended Actions

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Create a context input in Recommended Actions

As an admin or RA author, create a context input for a context and use it in rule condition builder, resource generator input and recommendation-action mappings.

Before you begin

Role required: sn_nb_action.next_best_action_author, or admin

About this task

After creating context inputs, you must configure the RA UIB component to pass the context input values. For more information, see Configuring Recommended Actions UIB component for context inputs.

Note:

Creating context inputs is not mandatory. You can create context inputs for a context only when you want to include or map parameters other than the context table.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Open a context that you want to edit.
3. On the Context inputs related list, select **New**.

Note:
The Context inputs related list appears only when a parent context is not mapped to the context. For more information on the context input configuration limitations, see Context Input configuration limitations.

4. In the form, fill in the fields.

Field	Description
Type	Field type of the input such as Choice, Reference, String, List, Integer, etc. Depending on the field type that you select, you might need to configure additional settings in the related tabs. For example, if you select Reference as the field type, you need to select a reference table.
Application	Scoped application name. The applicable name is populated by default.
Label	Name of the context input. The **Column name** field is auto-filled.
Active	Enabling the **Active** check box makes the context input available for use in the context.

5. Provide the necessary details in the related tabs.

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The related tabs that display vary based on the field type selected in the **Type** field. For more information on the data types, see Field types reference.

6. Select **Save**.

Result

The context input appears in the appropriate fields of rules, recommendations, and resource generators.

- **Default search term** pill picker in the Contextual AI Search Config section of Context form.
- **Advanced Condition** drop-down field of the Rule form.
- Pill pickers in the Action inputs section of the Recommendation form.
- **Default search term** pill picker in the Contextual AI search configuration section of the Context form.
- Pill pickers in the Generator inputs section of the Resource generator form.

What to do next

Use the context inputs for creating the conditions in rules, and action inputs in recommendations and generator inputs in resources generators.

Create a rule in Recommended Actions

Create a rule for a context that determines when recommended actions are made available to agents.

Before you begin

Role required: sn_nb_action.next_best_action_author, or admin

About this task

New rules can be created from the context records only.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select a context.
3. In the Rules related list, click **New**.
4. Select the rule that you want to update.
5. Enter a name and a description for the rule.
6. In the **Roles** field, select the user roles that can see recommendations for this rule.
7. Click **Done** on the Roles pop-up window.
8. In the **Advanced Condition** field, use the condition builder to add one or more conditions that apply to the records for this context.
   Agents can see recommendations for the records in the context table that meet this criteria.

   If a context input is available for the context, you can build conditions on it along with the context table.
9. **Optional:** Enable the **Apply to tables extended from the context table** check box, so that the rule and its recommendations are applied to tables that are extended from the context table.
   For more information, see Apply rules to tables extended from the context table.
10. In the **Fields affecting this rule** field, add fields from the context table that must be monitored for changes.
    Changes to these fields generate recommended actions of the type field recommendation for unsaved records.

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11. Fill in the remaining fields on the form, as needed.
    For more information about these fields, see Rule form.
12. Click **Submit**.

Create a recommendation in Recommended Actions

Create a recommendation with an action type of guidance, field recommendation, or guided decision tree to suggest helpful actions to agents.

Before you begin

Role required: sn_nb_action.next_best_action_author, or admin

About this task

You select an action type and action as part of creating a recommendation. The next steps depend on the action type that you select. For example, guidances and field recommendations need action inputs as a next step, while guided decision trees don't.

For the AI search resource generator, you can select guidances only as action types in the Search result mapping related list. You must map the fields from the search source table with guidance action inputs for AI search or fields from the genius result configuration with guidance action inputs for genius results.

Then you define the action inputs, which are the parameters that enable agents to complete an action. You can select static values for inputs or use a resource generator to supply values.

Note:
New recommendations can only be created inside the rules.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select a context.
3. Select a rule in the Rules related list.
4. In the Recommendations related list, select **New**.
5. Select the type of recommendation to create from the New Recommendation screen.
   - A specific action to take or information to review (guidance)
   - A guided flow to follow (guided decision tree)
   - A field value to use (field value recommendation)

   A new Recommendation form is displayed with the **Rule**, **Context**, and **Action type** fields auto populated.
6. In the **Name** field, enter a name for the recommendation.
7. In the **Action** field, select an action.
   The available actions are determined by the selection in the **Action type** field.

   a. In the **Action** field, select the lookup icon.
      In the resulting pop-up window, the **Table name** field is auto populated with the table that stores the available actions for the selected action type.

   b. In the **Document** field, select the desired action by clicking the lookup icon.
      You can also create an action of type guidance, field recommendation, or guided decision tree. For more information, see Creating guidance and field recommendation in Recommended Actions.

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c. Select **OK**.

d. Save the record to display the Action inputs form section.
After selecting the action type and action, saving the record displays the required action inputs.

8. **Optional:** In the **Resource generator** field, select or create a resource generator and then save the record.

   (Optional) For more information, see Create a resource generator in Recommended Actions. Guidances and field value recommendations can use resource generators to find relevant resources for the action inputs.

   The **Action type**, **Action**, and **Recommendation hint** fields are not available for AI search resource generator. You can select the action type as a guidance and an action when you configure the search result mapping for AI search. For more information, see Map AI search results with guidance inputs in Recommended Actions.

9. For guidances and guided decision trees: in the **Recommendation hint** field, enter a hint text. The hint explains to agents why a recommendation is being suggested.
10. **Optional:** Select a group in the **Group** field to show relevant recommendations together.

    Note:
    You might need to configure the Recommendation form to display the **Group** field. This field is available by default for ITSM Workforce Optimization users.

11. Define the action inputs.
    Action types and actions need inputs. These parameters enable agents to complete an action. You can choose static values for action inputs or you can use a resource generator to supply values.

Option	Description
Use a static value	Enter the value in the field in the input field or use the lookup icon to select a value from the list.
Use a pill picker	**a.** Select the pill picker next to the field. ▪ The context is available in the pill picker. ▪ If you selected a **Resource generator**, the outputs from the generator are avail able in the pill picker. ▪ If an active context input is available for a context, the context input appears in the pill picker. **b.** Select the outputs from the pill picker.

12. Select **Update**.

Configure queues for recommendation process

Enable administrators to configure custom queues to handle Recommended Actions asynchronously.

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Before you begin
Role required: admin or sn_nb_action.next_best_action_admin

Procedure
1. Navigate **All** > > **System Policy** > **Queue Registry**.
2. Select an existing queue from the queue registry list.
3. On the queue registration form, fill in the fields.
   For a description of the field values, see:Queue registration form for recommendation process.
4. Select **Submit**.
5. Select the recently added queue.

   Note:
   When the new queue is submitted, the status entry is **Active**.

6. **Optional:** Update the number of jobs for this queue according to your requirement.
7. If you want to roll back a queue to its previous configurations without automated job scheduling, select the rollback related link on the queue registration form.
   The rollback related link shows up only if you are in an automated jobs scheduling configuration.
8. After the last queue registration is complete, ensure that the RA Admin [sn_nb_action.next_best_action_admin] must update the number of queues available in the value field of the *sn_nb_action.ra_processor_number_of_queues* system property.
   For example, if the number of queue is increased from 2 to 3, then the value must be updated to 3 (ra_processor_queue_3). The minimum and maximum values are 1 and 8 respectively. If the given value isn't withing this range, then 1 is considered as the default value.

Configure force refresh for recommendations

Configure the *Trigger Recommendation Refresh* data broker to refresh and update the recommendations based on the results from UI events for precise recommendations. Similarly, use the `ForceRefreshRecommendations` method for configuring an explicit refresh mechanism.

Before you begin
Role required: sn_nb_action.next_best_action_author, or admin

About this task
Prior to the Zurich family release, the recommendations often remain outdated due to refresh triggers being tied only to updates on primary context records. Starting with the Zurich family release, you can configure explicit and event-driven refreshes for various context updates beyond just the primary context table to improve recommendations relevance.

- Explicit refresh mechanism: Enables you to trigger recommendation refreshes manually, independent of internal context changes, addressing scenarios where event-driven updates are insufficient.

  Call the `ForceRefreshRecommendations` method. The `ForceRefreshRecommendations` method is shipped with the base system as part of the *NextBestActionServiceImpl* script include.

  `ForceRefreshRecommendations` method:

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```
sn_nb_action.NextBestActionService().forceRefreshRecommendation
s(input.ruleContextSysIds, input.currentRecordSysId,
 input.refreshAllUsers);
```

- Event-driven refresh: Implements automatic recommendations updates triggered by predefined system events such as attribute changes on related tables or user interactions like button clicks or tab navigation.

  Configure the *Trigger Recommendation Refresh* data broker of a UI component in the UI builder. This data broker is shipped with the base system and is available for all the UI components of the record pages. Perform the following steps to configure this data broker.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI builder**.
2. In the UI builder, open the **Workspace** experience which you want update.
3. Open the record page containing the UI component for which you want to configure the data broker.
4. In the content tree, select a UI component.
   A panel opens on the right with Configure, Style and Events tabs.
5. In the Events tab, select **Execute Data Resource - Trigger Recommendation Refresh 1**.
6. On the Configure modal, set the following properties.

Configure modal

Property	Description
Rule Context SysIds	Sysid of the rule context records that must be applied to the UI component. The recommendations of these rules are reflected in the recommendations tab when the event is triggered. This property is of String array type.
Current Record SysId	Sysid of the record to which you want to associate the UI event. This property is of String type.
Refresh All Users	Refreshes recommendations for all the active agent, when set to true. By default, the value is set to false. This property is of Boolean type.

7. **Optional:** In the **When to trigger** drop-down, select one of the following.

8. Select **Apply** in the Configure modal.

Result

When the configured component is triggered, the recommendations are refreshed and updated accordingly in the CSM/FSM Configurable Workspace.

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Creating guidance and field recommendation in Recommended Actions

Create guidances and field recommendations that you can use to configure recommended actions.

Configuring guidances

When you create a guidance, you configure several different aspects of that guidance:

Guidance configuration steps

Feature	Description
Configure inputs and outputs for a guidance.	• Inputs: The variables or information that the system must perform the guidance. • Outputs: the result of the guidance.
Configure a preview experience for a guidance.	A preview on the card that is displayed to the agent can include: • A hint that briefly tells the agent what the guidance is about • A preview message that describes the guidance in more detail • The action that the agent can take
Configure a detail experience for a guidance.	A detailed message that is displayed for guidances that open in the contextual side panel or in a subtab.
Configure a primary call to action for a guidance.	A guidance can have multiple actions, with one identified as the primary action and optional secondary actions.
Configure the behavior of a guidance.	Determines how the system executes a primary action after the agent selects the action button on the card. • **Single click**: Initiates and completes the action and moves the card to the History tab in the Recommended Actions panel. This behavior is useful for simple actions such as escalating a case. • **Open in the contextual side panel**: Expands the action and displays information about that action in the Recommended Actions panel. This behavior is useful for actions such as reviewing the content in an article before attaching it to a case. • **Open in a sub tab**: Opens the action in a subtab under the case tab. This behavior is

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Guidance configuration steps (continued)

Feature	Description
	useful for guidances that require the agent to select and submit additional information, such as filling out the fields on a form.
Customize the preview experience and the detail experience of a guidance	Options to customize the following items in the UI Builder: • **Preview experience**: The preview of the recommendation card includes a hint, an icon, a message, and an action button. The preview of the card shows up in the contextual side panel. • **Detail experience**: The detail experience of the guidance includes the drill down actions. It opens in the contextual side panel or in a subtab.

Configuring field recommendations

Field recommendation suggests a value for a field in the record form. Creating a field recommendation involves two main steps:

- Selecting the inputs for the recommendation.
- Creating the instructions about how to use those inputs.

Create a field recommendation in Recommended Actions

Create a field recommendation that you can select when configuring a recommended action. Field recommendations auto-fill a value or suggest a value for a field. For example, this type of action can recommend the assignment group based on the text in the case short description.

Before you begin

Use the CSM default record page or the CSM Interaction record page to display field recommendations in CSM Configurable Workspace. For setting the CSM default record page or the CSM Interaction record page as default page, see Set record page order.

Role required: sn_nb_action.next_best_action_author, admin

About this task

Creating a field recommendation involves two main steps:

- Creating inputs for the field recommendation.
- Creating instructions about how to recommend values by configuring a definition for each field.

Depending on the configuration, the recommended field values are auto-filled or shown as messages underneath the fields for the new records. The recommended field values are shown as messages only underneath the fields for the existing records. For an example implementation of field recommendation setup, see Create a field recommendation for recommending assignment group field value.

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Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Field Recommendations**.
2. Click **New** on the Field Recommendations list.
3. In the **Name** field, enter a name for the field recommendation.
4. In the **Table** field, select a table.
   This table includes the field for which you're configuring a recommended value.
5. Save the record to display the related lists.
6. In the Field Recommendation Inputs related list, select **New** to create an input.

   a. In the **Type** field, select the field type for the input.

   b. In the **Label** field, enter a label for the input.

   c. In the **Column name** field, enter a column name.
   This name should use lower case letters and underscores. For example, `confidence_score`.

   d. Configure the settings for the input in the related lists.
   These settings and related lists are determined by the selection in the **Type** field. For example, if you select Reference as the input type, you must configure:
   - The table and any conditions for the reference field.
   - The type of list to use.
   - A default value.

   e. Click **Submit**.

7. In the Field recommendation definitions related list, select **New** to create a definition.

   a. In the **Name** field, enter a name for the definition.

   b. Select the **Field** to be recommended and save the record to see additional details.

   c. In the **Recommendation message** field, add the message that is recommended underneath the field on the form.
   You can include the recommended value as part of the message by using the pill-picker.

   > **Note:**
   > If the resource generator returns an empty field value, the recommendation message is not displayed.

   d. In the **Recommended value** field, use the pill-picker to select a value.

   e. In the **Recommendation Method** list, select one of the options that auto-fills the value or recommends the value as a message.

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Recommendation Method list fields and descriptions

Field	Description
Recommend only	Displays a recommendation message for the field.
Autofill as per the confidence threshold	▪ **Confidence**: Field that provides the confidence score. Enter a static value or use the pill-picker to select an input that you configured in the Field recommendation inputs related list. ▪ **Confidence threshold for direct assignment**: Confidence threshold for the recommendation. If the confidence score is more than the threshold value, the recommended value is auto-filled. Otherwise, a message is displayed.
Autofill as per the resource generator preference	**Recommendation Preference**: Field that has "true" or "false" value for preference. If this value is true, the recommended value for the field is auto-filled. Otherwise, a message is displayed. Enter a static value or use the pill-picker to select an input that you configured in the Field recommendation inputs related list.

f. Click **Submit**.

Create a guidance in Recommended Actions

Create a guidance that you can select when creating a recommendation in Recommended Actions.

Before you begin

Role required: sn_nb_action.next_best_action_author, or admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Create a guidance.

   a. Select **New** in the Guidances list.

   b. In the **Name** field, enter a name for the guidance.

   c. In the **Description** field, enter a brief description of the guidance.

   d. Optional: Make the guidance available to multiple agents working on the case by selecting the **Action available to multiple users** check box.

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When this option isn't selected, only one agent can work on any guidance. When the first agent works on the guidance and the state is in-progress, completed, or error, the other agents can't see this guidance.

e. **Optional:** Select **Allow users to re-run the guidance** to enable agents to go back to the previous node or edit the previous nodes in the runtime experience of a decision tree. This field is only displayed when the Guided Decisions Experience plugin (sn_ga_exp) is installed.

f. **Optional:** Select **Hide completed guidance** to hide the guidance recommended for a case resolution.
In other words, the completed guidance in the View my response section of a Decision Tree is not displayed for the agent.

> **Note:**
> This field is visible only when the Guided Decision Experience plugin is installed. You may need to configure the form to add this field.

g. Select **Submit**.

3. Open the guidance that you want to update.
4. Create one or more inputs for the guidance.
Inputs are the variables or information that the system needs to perform the guidance. You can use inputs in multiple places such as the guidance preview experience and the guidance actions.

   a. In the Guidance Input tab, select **New**.

   b. In the **Label** field, enter a name for the input.

   c. In the **Type** field, select the field type of the input.
   Depending on the field type that you select, you might need to configure additional settings. For example, if you select Reference as the field type, you need to select a reference table.

   d. If the guidance input requires an action by the agent, such as adding information to a field, select the **Is form field** check box.

   e. **Optional:** Enter a **Default value**.

   f. Select **Submit**.

5. **Optional:** Create one or more outputs for the guidance.
Outputs are the desired result of the guidance action. For example, if a guidance action creates a case task, the output of that action can return a reference to the case task that was created.

   a. In the Guidance Output tab, select **New**.

   b. In the **Label** field, enter a name for the output.

   c. In the **Type** field, select the field type of the output.
   Depending on the field type that you select, you might need to configure additional settings. For example, if you select Reference as the field type, you need to select a reference table.

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d. **Optional:** Enter a **Default value**.

e. Select **Submit**.

6. Configure the detail experience for the guidance in the Detail Experience tab.
   The detail experience is a message that is displayed for guidances that opens in the contextual side panel or in a subtab.
   a. In the **Title** field, add a title for the guidance in the detailed view.
   b. In the **Guidance Message** field, provide a message for the detail view.
7. Select **Submit**.

Configure guidance actions in Recommended Actions

Configure the actions that an agent can perform for a Recommended Actions guidance.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Select a guidance from the Guidances list.
3. In the Guidance Actions form section, click **New**.
4. On the Guidance Action form, fill in the fields.

Field names on the Guidance Action form

Field	Description
Guidance	The guidance that this action is associated with. This field is read only.
Action label	A name for this guidance action.
Call to Action Label	The label for the action button that appears on the recommendation card in the contextual side panel. For example, **Review and attach article** or **Propose Solution**.
Action Behavior	The selected behavior for the guidance action: ○ **Single click**: The action is initiated and completed with one click and the card moves to the **History** tab in the side panel. Useful for simple actions such as escalating a case. ○ **Open in Contextual Side Panel**: The action opens in a detailed view within the side panel. The agent can review the details in the side panel, such as reviewing the content of a knowledge base article. ○ **Open in Sub Tab**: The action opens in a separate tab.

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Field	Description
	Note: Actions that open in the contextual side panel or in the subtab don't move to the in-progress state. The action moves to the in-progress or completed state only when the agent clicks the action button in the detail view.
Primary	Denotes the guidance action as a primary action. This field is enabled by default. A primary action highlights the action that the agent should take and makes that action available as a button on the recommendation card. **Note:** A guidance can have only one primary guidance action. If this field is not selected, the guidance action is a secondary action available through the more actions menu on the recommendation card.
Application	The application that this guidance action is associated with. This field is read only.
Guidance Action Automation	The flow associated with this guidance action.
Order	The order of the action.
Completion Message	The message that appears at the top of the recommendation card when the guidance action is complete. For example, **KB article was shared**.

5. Depending on the selected flow in the **Guidance Action Automation** field, you can configure flow inputs and guidance outputs.
   - Configure flow inputs in the **Automation Flow Inputs** tab.
   - Configure outputs in the **Guidance Outputs** tab.

     These fields can contain static text, dynamic content (field values from guidance inputs), or a combination of static text and dynamic content. To use dynamic content, select the pill picker icon next to the field and select a guidance input from the list.
6. Click **Submit**.

Configure a guidance preview experience

Configure a preview experience that conveys relevant information about the guidance action to the agent before a recommendation is triggered. This information appears on the Recommended Actions card in the contextual side panel.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

About this task

A guidance preview includes the following elements:

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- A title
- Fields to display
- A message made up of text and HTML content, including images, videos, and links

You must configure at least one of these elements to save the guidance preview. This action prevents the guidance from appearing empty in the contextual side panel.

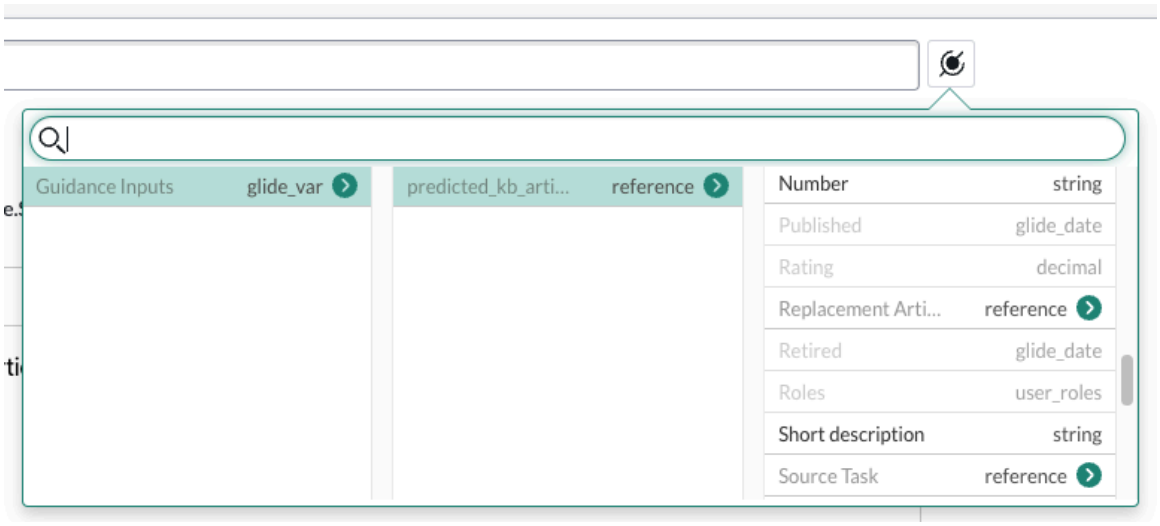
Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Select a guidance from the **Guidances** list.
3. Select the **Preview Experience** tab.
4. In the **Preview Title** field, add a title for the guidance preview.

   This field can contain static text, dynamic content (field values from guidance inputs), or a combination of static text and dynamic content. To select dynamic content as a field value:

   a. Select the pill picker icon next to the **Preview Title** field.

   b. Select a guidance input from the list. You can drill down to another level to find the input you want.



5. Select fields to display in the guidance preview.

   a. In the **Fields To Display** field, click the lock icon to unlock the field.

   b. Move the required fields from the **Available** column to the **Selected** column.
   You can select up to four fields.

   c. Use the up and down arrows to arrange the selected fields.

   d. Click the lock icon again to lock the field.

6. In the **Message** field, create a message for the guidance preview.
   You can use the tools available in the rich text editor to create and format the message. This field can include text and HTML content like images, videos, and links.
7. Click **Submit**.

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Customize a guidance preview experience in the UI Builder

Customize a preview of a Recommended Actions card that displays in the contextual side panel using UI Builder. The preview experience includes a hint, an icon, a message, and an action button.

Before you begin

Role required: sn_nb_action.next_best_action_author and ui_builder_admin, admin

About this task

You begin by creating a UI page variant of a guidance preview experience. When you create a UI page variant from a page template, you start with a base structure that you can customize. By using the component properties, you can change how your recommendation card preview looks.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Select a guidance from the Guidances list.
3. Select **Create preview UI** to create a UI page variant of a guidance preview experience.

   This page includes an empty `customExpProps` container with the properties listed in the following table during run-time. The Recommended Actions framework passes the `customExpProps` object as a property to the custom experience.

Preview experience properties

Property	Description
sysId	ID of the recommendation.
name	Title of the preview experience.
description	Message for the preview experience.
recommendationHint	Text that tells the agent why a recommendation is being suggested.
callToActions	Settings for the guidance action.
actionTypeLabel	Label for the recommended action type.
icon	Icon for the recommendation card.
actionStateLabel	External name of the action state.
actionStateValue	Internal name of the action state.
previewFields	The fields to display in the guidance preview experience.
errorMessage	Error message to display when the recommendation fails to display.
ariaHidden	On the Recommended Actions grouped list, the sn-carousel component passes this property to each card to determine if the content is hidden within the carousel. If the card is hidden, you can use this value to set aria-hidden or disable any actionable component to true and avoid accessibility issues.
useCase	Search/RA tab where the guidance is getting rendered.
actionInputs	Guidance Inputs.

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Property	Description
actionTypeSysId	Sys Id of the recommendation type.
actionId	Sys Id of the recommendation.
table	Recommended Actions Context table.
tableSysId	Recommended Actions Context table record sys_id.
renderer	Component responsible to render the detailed experience
secondaryCallToAction	Secondary actions to be shown on card.
isGenius	Is genius result card, used in Search tab genius result.
contextSysId	Recommended Actions context sysId.
actionConfigurations	Recommended Actions actionConfigurations property value. The Value field is empty by default.
isFullSearchView	If search displayed in full search view of side panel view, the value is true.
contextInputs	Recommended Actions contextInput property value. To get the predefined syntax, navigate to **All >** > **Recommended Actions** > **Context** > **Context Inputs** and copy the JSON format of the context inputs.

The following example shows properties and sample values for the preview experience.

```
"customExpProps": {
        "sysId": "e8421a2a436f0210f81d92621ab8f2da",
        "name": "Attach and share article",
        "description": null,
        "recommendationHint": "Knowledge",
        "callToActions": [
            {
                "label": "",
                "name": "",
                "id": "1e8392aa436f0210f81d92621ab8f291",
                "actionBehavior": "contextual_side_panel",
                "primary": "true",
                "order": "100",
                "completionMessage": "Knowledge article
 successfully attached."
            }
        ],
        "recommendationAction": "",
        "actionTypeLabel": "Guidance",
        "icon": "magnifying-glass-sparkle-outline",
        "actionStateLabel": "New",
        "actionStateValue": "new",
        "previewFields": null,
        "attributes": "",
        "errorMessage": "",
        "ariaHidden": false,
        "useCase": "search",
        "actionInputs": {},
        "actionTypeSysId": "",
        "actionId": "",
```

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```
        "table": "sn_customerservice_case",
        "tableSysId": "",
        "renderer": "sn-guidance-experience-connected",
        "secondaryCallToAction": {},
        "isGenius": false,
        "contextSysId": "",
        "actionConfigurations": {},
        "isFullSearchView": false
    }
```

4. Select **Edit preview in UI Builder**.
   The UI page variant opens in UI Builder, where you can add and configure components to customize the look and feel of the preview experience. For more information, see Working with components in the UI Builder.
5. Bind the preview experience properties to your preview UI.
   Data bindings are in the **Config** tab of the configuration panel in UI Builder. For more information, see Data resources in UI Builder.
6. Add and bind scripts to components in your preview UI to dispatch events by using an event handler to execute or skip a recommendation with a corresponding payload.

   The following table shows the list of events that are emitted with respect to the actions perform by an agent:

Preview experience events

Events handled	Description
ON_SINGLE_CLICK_ACTION_INITIATE	Initiates and completes the action when an agent selects the action button. This event passes the following parameters in the payload: `api.emit('ON_SINGLE_CLICK_ACTION_INITIATE', { sysId: api.context.props.customExpProps.sysId, name: api.context.props.customExpProps.name, actionStateValue: api.context.props.customExpProps.actionStateValue, actionMetadata: api.context.props.customExpProps.callToActions[0] , table: api.context.props.customExpProps.table, tableSysId: api.context.props.customExpProps.tableSysId,`

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Events handled	Description
	<pre>contextSysId: api.context.props.customExpProps.contextSysId, actionType: api.context.props.customExpProps.actionTypeSysId, actionInputs: api.context.props.customExpProps.actionInputs, formFieldInputs: { <actionInputs key>: <actionInputs value> }, actionId: api.context.props.customExpProps.actionId, name: api.context.props.customExpProps.name, actionMetadata: api.context.props.customExpProps.callToActions[0], actionStateValue: api.context.props.customExpProps.actionStateValue, })</pre> The `formFieldInputs` contains the `actionInputs`, which must be updated when the event is emitted.
ON_DRILL_DOWN_ACTION_INITIATE	Expands the action and displays more actions or information after an agent selects the primary action button. This event passes the following parameters in the payload: <pre>api.emit('ON_DRILL_DOWN_ACTION_INITIATE ', { table: api.context.props.customExpProps.table, tableSysId: api.context.props.customExpProps.tableSysId, actionType: <sys_id for "Guidance" action type/ e38f55b9b72120107d472397ee11a9be>, actionInputs: api.context.props.customExpProps.actionInputs, formFieldInputs: {"<actionInputs Key>":"<new</pre>

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Events handled	Description
	value which needs to be set>"}, actionId: api.context.props.customExpProps.actionId, sysId: api.context.props.customExpProps.sysId, name: api.context.props.customExpProps.name, actionStateValue: api.context.props.customExpProps.actionStateValue, actionMetadata: api.context.props.customExpProps.callToActions[0], renderer: api.context.props.customExpProps.renderer, contextSysId: api.context.props.customExpProps.contextSysId, sysId: api.context.props.customExpProps.sysId, name: api.context.props.customExpProps.name })
DISMISS_ACTION_CLICK	Cancels the action. api.emit(‘DISMISS_ACTION_CLICK‘, { sysId: api.context.props.customExpProps.sysId })
ACTION_TRIGGERED_PROPAGATION	Enables user to add UI-specific behavior for guidance actions. This event propagates the payload details to the parent where this event can be handled. api.emit(‘SN_NEXT_BEST_ACTION_LIST_CONNECTED#ACTION_TRIGGERED_PROPAGATION' ‘, { "actionSysId": api.context.props.customExpProps.actionId

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Events handled	Description
	<pre>"actionName": api.context.props.customExpProps.actionConfigurations[api.context.props.customExpProps.actionId][“actionName”] "actionType": "guidance", "eventName": "<eventName>", "payload": { } }</pre>
LOG_SEARCH_RESULT_EVENT	Adds the search result logs to the Queued Signal Events [sys_signal_event_queue] table. <pre>api.emit(LOG_SEARCH_RESULT_EVENT, {actionData: {actionName: actionId}})</pre>

For more information, see Define and bind client scripts to components.

Customize a guidance detail experience in the UI Builder

Customize how your detail experience looks in the contextual side panel or in a subtab of the Recommended Actions card using UI Builder. The detail experience can include things such as user inputs and drill down actions.

Before you begin

Role required: sn_nb_action.next_best_action_author and ui_builder_admin, admin

About this task

You begin by creating a UI page variant of a guidance detail experience. When you create a UI page variant from a page template, you start with a base structure that you can customize. By configuring the components and using the component properties, you can change how your detail experience looks in the contextual side panel or in a subtab.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Select a guidance from the Guidances list.
3. Select **Create detail UI** to create a UI page variant of a guidance detail experience.
   This page includes an empty container with the properties listed in the following table.

Detail experience properties

Property	Description
guidanceInputs	The inputs required to perform the guidance.
guidanceOutputs	The outputs of the guidance.
status	The status of the guidance.
guidanceMessage	The message for the detail experience.
guidanceActions	The guidance actions in the detail view.

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Property	Description
errorMessages	The error message to display when the recommendation fails to display.

The following example shows properties and their sample values for the detail experience.

```
{
    "guidanceInputs": {},
    "guidanceOutputs": {
        "meta": []
    },
    "status": "waiting",
    "guidanceMessage": "",
    "guidanceActions": [
        {
            "label": "Attach",
            "action_sys_id":
 "1e8392aa436f0210f81d92621ab8f291",
            "variant": "primary",
            "isExecuted": false,
            "completionMessage": "Knowledge article
 successfully attached.",
            "action_behaviour": "contextual_side_panel",
            "primary": true
        }
    ],
    "errorMessage": "",
    "actionConfigurations": {},
    "guidanceId": "",
    "tableName": "sn_customerservice_case",
    "bare": true,
    "scrollable": "none"
}
```

4. Select **Edit detail in UI Builder**.
   The UI page variant opens in UI Builder, where you can add and configure components to customize the look and feel of the detail experience. For more information, see Working with components in the UI Builder.
5. Bind the preview experience properties to your custom detail UI.
   Data bindings are located in the **Config** tab of the configuration panel in UI Builder. For more information, see Data resources in UI Builder.
6. Add and bind scripts to components in your custom detail UI to dispatch events by using an event handler to execute, skip, or mark complete a recommendation with a corresponding payload.

Detail experience events

Events handled	Description
GUIDANCE_ACTION_CLICKED	The action that is selected. This event passes the action selected to the payload. `api.emit( 'GUIDANCE_ACTION_CLICKED',{ model: {`

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Events handled	Description
	<pre>fields: [{'name': 'input', 'value': '100'}] }, action: api.context.props.guidanceActions.find(action => action.label == "guidance action label"); });</pre> **Note:** In the `guidanceActions[n]` property in the response, provide the index number of the action that you want to apply.
SKIP_GUIDANCE	Skips the guidance. <pre>api.emit('SKIP_GUIDANCE');</pre>
GUIDANCE_MESSAGE_PUBLISHED	Passes data to an upstream application. <pre>api.emit('SN_GUIDANCE_EXPERIENCE_CONNECTED#GUIDANCE_MESSAGE_PUBLISHED', { name:'decision-tree-payload' jsonPayload: jsonObject });</pre>
GUIDANCE_MARK_COMPLETE	Marks a custom guidance as completed. <pre>api.emit('GUIDANCE_MARK_COMPLETE');</pre>
GO_BACK_GUIDANCE	Goes back to the previous node in a decision tree. <pre>api.emit('GO_BACK_GUIDANCE');</pre>
ACTION_TRIGGERED_PROPAGATION	Enables you to add UI specific behavior for guidance actions. This event propagates the payload details to the parent where this event can be handled. <pre>api.emit('SN_NEXT_BEST_ACTION_LIST_CONNECTED#ACTION_TRIGGERED', {</pre>

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Events handled	Description

	<pre>"actionSysId":api.context.props.guidanceId,
	"actionName":
	api.context.props.actionConfigurations[api.context.props.guidanceId][“actionName”]
	"actionType": "guidance",
	"eventName": "<eventName>",
	"payload": {}</pre>

For more information, see Define and bind client scripts to components.

Create a resource generator in Recommended Actions

Create resource generators that you can use to provide resources for recommendations from Recommended Actions.

Before you begin

The Task Intelligence Admin Console (com.sn_ti_admin) plugin must be installed for selecting the Task Intelligence Classification resource generator type.

Role required: sn_nb_action.next_best_action_author, sn_nb_action.resource_generator_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Resource Generators**.
2. Select **New** from the Resource Generators list.
3. In the **Name** field, enter a name for the resource generator.
4. In the **Context** field, select a context.
5. In the **Generator type** field, select a generator type.
   Different types of generators are available that you can use. Some of the generator types require an additional selection in the **Generator** field.

   For example, if you choose flow as the generator type, you must also select the specific flow to use. Selecting the lookup icon opens a pop-up window that you can use to select the required flow.

   For more information, see Resource generator types.
6. If applicable, in the **Generator** field, select a generator.
7. Save the record.
8. On the Generator input form, fill in the fields.
   For a description of the field values, see Resource generator inputs form.

   The fields that appear in this form section are determined by the selections in the **Generator type** and **Generator** fields.
9. Select **Update**.

Resource generator inputs form

The form provides information about the generator type and generator inputs.

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Resource Generators form fields

The Task Intelligence Admin Console (com.sn_ti_admin) plugin must be installed for selecting the Task Intelligence Classification resource generator type.

Note:

- You can enter static values for the generator input fields. If the **Generator type** is Flow or Decision table, you can use the pill picker to select dynamic values. The context record is available for selection in the pill picker.
- If the context inputs are defined for a context, they appear in the pill picker for selection. The context inputs are supported for Flow and Decision table generator types only.

Generator input form

Generator type	Generator inputs	Description
Flow	Generator	The subflow for the resource generator.
	Inputs for flow	Inputs for the selected subflow.
Decision table	Generator	The decision table for the resource generator.
	Inputs for decision table	Inputs for the selected decision table.
Similarity	Similarity definitions	The similarity solution definition to find records that are relevant to the context record.
	Top N Results	The number of records to return from the most relevant records found by the similarity solution definition.
Scripting	Script include	The script include record, which is an implementation of the ScriptingGeneratorFactory template.
AI search	Search field	The context field on which the AI search is performed.
	Top N Results	The number of records to return from the AI search.
Similarity with Trend	Similarity definitions	The similarity solution definition to find records that are relevant to the context record.
	Trend definitions	The trend definition you want to associate with this solution definition.
Classification	Classification definition	The classification definition with a classification solution to return the predicted values or record references for a field on a table.
	Top N Results	The number of values or records to return from the values or records predicted by the classification definition.
Task Intelligence Classification	Solution	The solution record that contains configuration for recommended input

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Generator input form (continued)

Generator type	Generator inputs	Description
		fields and recommended output fields for prediction. The solution also contains preferences whether the fields are auto-filled or recommendation messages are displayed.
	Top N Results	The number of values or records to return from the relevant records predicted by the solution definition.

Configure the arbitration parameters in Recommended Actions

Configure the recommended actions by the frequency of issues or by the order of priority so that your agents get the guidance that they must help resolve customer issues.

Before you begin

Role required: sn_nb_action.next_best_action_author

About this task

A mathematical formula determines the priority of the recommended actions that are displayed to the agents. For most cases, you should use the default values to ensure that the relevant recommended actions are available for a given context. If you want to alter the frequencies, you can modify the values.

The recommended actions in the New state appear by ranking. For example, the score for these actions is calculated by the order of frequency and the priority order of the rule.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Arbitration Configuration**.
2. On the Arbitration Configuration form, fill in the fields.

Arbitration Configuration form

Field	Description
Rule Order Weight (sn_nb_action.rule_order_weight)	Weight given to an action based on the priority of the rule that recommends it. The default value is 0.9.
Recommendation Order Weight (sn_nb_action.recommendation_order_weight)	Weight given to an action based on the priority of the rule that recommends it. The default value is 0.9.
Frequency Weight (sn_nb_action.frequency_weight)	Weight applied based on the number of times an action is recommended across rules. The default value is 1.5.

3. Select **Save**.

Configuring AI search in Recommended Actions

As an admin, configure AI search in Recommended Actions to enable agents to perform an AI search to find relevant resources.

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You can configure AI search in Recommended Actions by performing these procedures.

Steps to configure AI search

Step	Action
Enable the AI search tab in UI builder	Deselect the **Hide Search** button in UI Builder to display the AI search tab in the contextual side panel of your workspace.
Create a context and select a search application configuration	• Create a context so that agents can see recommendations for records from a specific table, such as the Case table. • Select a search application configuration to specify AI search as the search engine. This configuration includes search sources and genius result configurations.
Map AI search results with guidance inputs in Recommended Actions	Map AI search results with guidance inputs to enable the AI search results to be displayed with appropriate actions.
Automatically map AI search results with guidance inputs	Automatically create AI search results for a search configuration application in Recommended Actions.

Configuring genius results

In the search profile of your selected search application configuration, link the following Genius Result configurations to display actionable top results. For more information, see Link a Genius Result configuration to a search profile.

Genius Result configuration	Description
Catalog item	Displays top search results from the Catalog Item [sc_cat_item] table. Each answer card shows a single CI record.
People	Displays top search results from the User [sys_user] table. Each answer card shows a single user record.
Q&A	Displays top search results extracted from HTML fields of records on the Knowledge [kb_knowledge] table and tables that extend it. Each answer card shows a topic snippet and an answer snippet extracted from a single knowledge article.
Now Assist Q&A	Displays the top search results extracted from the HTML fields of the records on the Knowledge [kb_knowledge] table and the tables that extend it. Each answer card shows an answer snippet extracted by Now LLM from a knowledge article. For reference, the answer card also includes a link the user can select to view the source knowledge article.

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Genius Result configuration	Description
	Note: Now Assist in the AI Search application (com.ais_assist) is required to link the Now Assist Q&A Genius Result configuration to your search profile. For more information, see Now Assist in AI Search.

Customizing Recommended Actions UIB component for AI search

Customize the Recommended Actions UIB component to align with your organization's requirements:

- Modify titles for the main heading, Recommended Actions tab, and Search tab.
- Modify the order of the **Recommended Actions** and **Search** tabs.
- Hide or show Recommended Actions and Search tabs.

For more information, see Recommended Actions UIB setup.

Explore advanced customization options, such as adjusting the number of results to view on a page, identifying genius results to add to the search profile, and configuring search sources. For more information, see Configuring AI Search.

Map AI search results with guidance inputs in Recommended Actions

Create mappings between AI search results and guidance inputs to recommend relevant actions to agents using AI search or enable agents to use AI search to search for the relevant resources.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select a context for the AI search.
   If a message appears about the application scope, select **here** to be able to edit the record.
3. In the **Search Application Configuration** field, select the Lookup using list icon and select either the base system CSM Configurable Workspace Search Config or a custom configuration that specifies AI search as the search engine and contains your desired search settings.
   You can configure the search result display and refinement settings in the search application configuration. For more information, see Search application configurations.

   The **[CSM AIS] Configurable Workspace Search Config** search application configuration is provided with the CSM Configurable Workspace store application. To access this configuration, navigate to **AI Search** > **Search Experience** > **Search Applications**.
4. In the Search result mapping related list, select **New**.
5. In the **Action type** field, select Guidance as an action type.
6. In the **Action** field, select an action to associate with the guidance.
   The available actions are determined by the selection in the **Action type** field.

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a. In the **Action** field, select the Lookup using list icon ( ).
In the resulting pop-up window, the **Table name** field is auto-populated with the table that stores the available actions for the selected action type.

b. In the **Document** field, select the Lookup documents using list icon ( ) and then select the action.

c. Select **OK**.

d. Save the record.
Saving the record displays the required action inputs.

7. Configure the AI search result type.

8. Save the record.
The AI search parameters display in the pill picker.
9. Map the action inputs.
Action types and actions need inputs. These parameters enable agents to complete an action. You can choose static values for action inputs or you can use the pill picker to supply dynamic values.

10. Select **Update**.

Automatically map AI search results with guidance inputs in Recommended Actions

Automatically create AI search results for a search configuration application in Recommended Actions.

Search application configuration records specify the search engine and settings to use for search in Recommended Actions. When you choose AI search as an application's search engine, you can configure the search results and map them to specific actions.

Starting with the Yokohama release, the Recommended Actions application automatically creates the mapping between search results and actions.

When an admin creates or updates the search application configuration for a context record, the system automatically creates search result mapping records for each of the search sources in that configuration.

- If a search source does not have an existing mapping to an action, the system maps the search source to the Default guidance for search results guidance.
- If a search source has an existing mapping to a specific action, the system keeps that mapping and does not overwrite it with the default guidance.

Mapping records are stored in the Search result recommended action mapping table (sn_nb_action_search_result_ra_mapping) and are displayed in the Search result mapping related list on the context record.

When a context record is saved or updated and search result mappings are created, the system displays a message: "Based on the selected Search Application Configuration the Search Result Mapping list has been updated. Please review!"

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Adding new search sources

Admins can add search sources to the search profile of a search application configuration. If a new search source is added to the configuration selected for a context record, the system does the following:

- Creates a new record in the Search result to recommended action mapping table (sn_nb_action_search_result_ra_mapping) for the added search source.
- Maps the search source to the Default guidance for search results.

When a search source is deleted from the search profile, the system removes the corresponding record from the Search result to recommended action mapping table (sn_nb_action_search_result_ra_mapping).

Refreshing the Search result mapping related list

The system stores search result mapping records in the Search result to recommended action mapping table and displays them in the Search Result Mapping related list on the context record.

The Search Result Mapping related list includes a **Refresh** button that admins can use to create search result mapping records for the search sources within a selected search application configuration in a context record. Selecting **Refresh** generates mapping records for any missing search result mappings in the search application configuration and associates them with the Default guidance for search results guidance.

Note:
Refreshing the Search Result Mapping list does not override existing customer-defined mappings.

Newly created mapping records are active by default. Admins can control which search sources are displayed to agents by enabling or disabling the **Active** field on the mapping records.

Search result recommended action mapping table

The Search result recommended action mapping table (sn_nb_action_search_result_ra_mapping) stores the mapping between search sources and actions. Records in this table include an **Active** field which the admin can use to manage the activation state of search result mappings. When a new record is created in this table, the **Active** field is set to true by default.

When an agent performs a search in the Recommended Actions search component in CSM Configurable Workspace, the system displays the search sources that are marked as active in the search result mapping configuration. Inactive search sources are excluded from the search results.

Changes in the search result mapping, such as activating or deactivating a search source, are automatically reflected in the search results.

When the **Active** field is disabled for a search source, an admin can create a new mapping for that source. A search source can have multiple search result mapping records, but only one can be active at a time.

Conditional UI display for search result mapping

The Recommended Actions context record includes the **Search application configuration** field. When an admin selects a configuration in this field, the search result mapping records for the configuration are displayed in the Search result mapping related list. If the **Search application**

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configuration field is empty, the Search result mapping related list does not appear on the context record.

Enable AI search in Recommended Actions

As an admin, you can enable the Recommended Actions - AI search on the Front-line case page, CSM default record page, and CSM Interaction page (for chat, video, walk-up, and email channels) by setting the **hideAgentAssistShowRA** UX page property to true.

Before you begin

Role required: admin

About this task

The Recommended Actions - AI search is available for the following pages:

- CSM default record page
- Front-line case page
- CSM Interaction record page for chat, video, email, and walk-up channels

The following table shows how you can avail Recommended Actions - AI search feature:

Recommended Actions AI search - version compatibility

Version	Feature availability
New customers starting with Yokohama release	Recommended Actions - AI Search is an integral part of the Contextual Side Panel by default. No additional manual configuration is required.
Customers who on-boarded before Yokohama release	Agent Assist is enabled by default with the option to manually migrate to Recommended Actions - AI search. To migrate from Agent Assist to Recommended Actions - AI Search create and set the *hideAgentAssistShowRA* UX page property to `True`. **Note:** If you already created this property for enabling Recommended Actions in the chat interaction record, you need not create it again.

Procedure

1. Navigate to **All**.
2. Search for `sys_ux_page_property.LIST` and press Enter.

   Note: If the *hideAgentAssistShowRA* UX page property already exists, you need not create it again.

3. Select **New**.
4. Fill in the fields on the form.

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UX page property form

Field	Description
Page	Page for which the property is applicable. Select `CSM/FSM Configurable Workspace`.
Name	Name of the page property. Give the name as `hideAgentAssistShowRA`.
Type	True or False
Value	Enables or disables the property. Set the value to `true` to enable the property.
Application	Application scope in which the property is being created.
Description	Brief description of the UX page property that you are creating.

5. Select **Save**.

Recommended Actions for Customer Service

Use Recommended Actions for Customer Service to display relevant actions to agents based on the context of a record.

The Recommended Actions for Customer Service application displays recommendations for case records in CSM Configurable Workspace. Agents can take the actions provided by the recommendations to help customers and resolve their issues. Agents can also use this application to perform an AI search to find relevant resources.

The Recommended Actions for Customer Service application provides predefined guidances and recommendation context records tailored for Customer Service Management. It also provides workspace configurations that automatically display recommended actions and search results in the contextual side panel.

For more information about recommended actions and AI search results, see Recommended Actions.

Context records

The Recommended Actions for Customer Service application provides context records for the Case and Interaction tables. A context enables agents to see recommendations for records from a specific table when certain rules are met.

- Case Context record
- Interaction Context record

Guidances

The Recommended Actions for Customer Service application includes custom guidances for the following tables:

- Knowledge
- Case

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- Incident
- Problem
- Change Request

These guidances enable search results from the corresponding search source tables for the Case Context record. Customer service agents can see these results in the Recommended Actions tab in the contextual side panel.

Plugin

The Recommended Actions for Customer Service application (app-cs-recommended action) is available from the ServiceNow Store.

This application has a dependency on the Recommended Actions application.

Request apps from the ServiceNow Store

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

Contexts in Recommended Actions for Customer Service

A context enables agents to see recommendations for records from a table when certain rules are met. These recommendations can help agents by suggesting actions to take based on the record context.

The Recommended Actions for Customer Service application provides context records for the Case and Interaction tables.

Case Context record

The Recommended Actions for Customer Service application provides the Case Context record for the Case table.

Context records include rules and recommendations. The Case Context record also includes search result mapping records for the search source tables. The following tables are mapped to specific guidance actions:

- Knowledge
- Case
- Incident
- Problem
- Change Request

The remaining tables are mapped to the Default guidance for search results guidance action.

Interaction Context record

The Recommended Actions for Customer Service application includes a context record and search mapping record that automatically displays search results from the Knowledge table for chat interaction records.

The Interaction Context record enables search based on the short description of the interaction record and displays relevant articles. The search mapping record maps knowledge results to the

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Share KB in chat interactions guidance. During chat interactions, the system accurately displays knowledge results in the Search tab in the contextual side panel.

The Recommended Actions for Customer Service application also includes a search mapping record that maps all search source tables, with the exception of the Knowledge table, to the Default guidance for search results guidance action. During chat interactions, the system accurately displays results for the search source tables in the Search tab.

Follow these steps to enable recommendations in the contextual side panel for chat interactions:

1. Navigate to **All** > **Recommended Actions** > **Contexts** > **CSM Interaction context**.
2. Enable the **Active** check box.
3. Select **Update**.

Fix script

The Recommended Actions for Customer Service application includes a fix script that checks for existing context records associated with the same table as the Interaction Context record.

- If one or more records for the same table are found, the Interaction Context record is deactivated.
- If no existing context records for the same table are found, the Interaction Context record remains active.

This avoids duplicate or conflicting context records.

Activating or deactivating context records

When activating or deactivating context records, the system displays alert messages so that contexts can be managed effectively without causing conflicts.

If multiple contexts are activated for the same table, the system alerts the admin to specify the correct **contextSysID** property in the Recommended Actions component on record pages for the referenced table.

If an admin activates multiple contexts for the same table, the system displays a message advising the admin to specify the correct **contextSysID** property on the Recommended Actions component for all record pages that reference this table.

The message includes information about how to configure the **contextSysID** property on the Recommended Actions component and what happens if the correct context is not specified.

The system logs all context activation and deactivation events along with the displayed alerts.

Guidances in Recommended Actions for Customer Service

A guidance is an action that an agent can take or information that an agent can share as they work to resolve tasks, such as customer service cases. Guidances appear as cards in the contextual side panel in a workspace.

The Recommended Actions for Customer Service application includes custom guidances for the following tables:

- Knowledge
- Case
- Incident

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- Problem
- Change Request

These guidances enable search results from the corresponding search source tables for the Case Context record. Customer service agents can see these results in the Recommended Actions tab in the contextual side panel.

Knowledge guidance

The Case Context record includes a search result mapping record for the Knowledge table that maps search results to the Attach and share article guidance. When an agent is viewing a case record, preview cards for Knowledge search results in the Recommended Actions tab include the **Attach and share article** action.

Case guidance

The Case Context record includes a search result mapping record for the Case table. This record maps search results from the Case table to the **Case resolution guidance**.

The Case resolution guidance is configured with dynamic actions that are determined by the state of the case returned by the search. These actions include:

- **Link as parent case**: This action links the recommended case as a parent to the current case. (The current case is a non-major case and the recommended case is major/non-major).
- **Link as child case**: This action links the recommended case as a child to the current case. (The current case is a major case and the recommended case is a non-major case.)
- **Copy resolution**: This action copies the resolution code and resolution notes from the recommended case to the current case. This action is available when the recommended case is in the Closed or Resolved state.

Note:
If the current case and the recommended case are both major cases, no action is included on the preview card.

The preview card for the case resolution guidance includes the case title and number, the current state and priority, the case description, and the dynamic action.

Interaction guidance

The Case Context record includes a search result mapping record for the Incident table. This record maps search results from the Incident table to the **Link incident to current case** guidance.

Agents can link the recommended incident by selecting the **Link incident** action on the preview card in the Recommended Actions tab. This action does the following:

- Updates the **Incident** field on the case record with the incident number.
- Adds an entry to the work notes.
- Displays a message when the incident is successfully linked. A message is also displayed if the linking fails.

The preview card for the **Link incident to current case** guidance includes the incident title and number, the current state and priority, and a brief description of the incident.

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Problem guidance

The Case Context record includes a search result mapping record for the Problem table. This record maps search results from the Problem table to the **Link problem to current case** guidance.

Agents can link the recommended problem by selecting the **Link problem** action on the preview card in the Recommended Actions tab. This action does the following:

- Updates the **Problem** field on the case record with the problem number.
- Adds an entry to the work notes.
- Displays a message when the problem is successfully linked. A message is also displayed if the linking fails.

The preview card for the **Link problem to current case** guidance includes the problem title and number, the current state, the number of related incidents, and a brief description of the problem.

Change request guidance

The Case Context record includes a search result mapping record for the Change Request table. This record maps search results from the Change Request table to the **Link change request to current case** action.

Agents can link the recommended change request by selecting the **Link change request** action on the preview card in the Recommended Actions tab. This action does the following:

- Updates the **Change Request** field on the case record with the change request number.
- Adds an entry to the work notes.
- Displays a message when the change request is successfully linked. A message is also displayed if the linking fails.

The preview card for the **Link change request to current case** guidance includes the change request title and number, the current state, the risk level and type of change, and a brief description of the change request.

Recommended Actions in the chat interaction record

The Recommended Actions feature is available by default in the contextual side panel for chat interaction records.

This feature appears as the first tab in the contextual side panel and is available for interactions of type chat.

The Recommended Actions feature is enabled by default for new (zboot) customers. This feature replaces Agent Assist, which is disabled from the contextual side panel.

The Recommended Actions feature includes two tabs:

- Recommendations: displays relevant actions based on the context of the chat interaction record.
- Search: displays relevant search results based on the short description of the chat interaction record.

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hideAgentAssistShowRA UX page property

Enabling Recommended Actions for chat interaction records is controlled by the **hideAgentAssistShowRA** UX page property, which is only available for new customers.

Existing customers that want to disable Agent Assist in the contextual side panel and enable Recommended Actions can create this UX page property.

1. Navigate to **All** > **Now Experience Framework** > **Experiences**.
2. Select CSM/FSM Configurable Workspace.
3. Select **New** in the UX Page Properties related list.
4. Create the property with the following values:
   a. Name: hideAgentAssistShowRA
   b. Type: true | false
5. Set the property to true.
6. Select **Save**.

Recommended Actions component contextSysId property

The Recommended Actions (RA) component includes the contextSysId property, which determines the rules and data sources that are evaluated to provide recommendations and search results. This property is automatically set to the default context for case records and displays accurate recommendations and search results on the Front-line case page.

This change to the contextSysId property only applies to new customer instances where the Recommended Actions component is added to the Front-line case page. Existing customers are not impacted.

Machine learning solutions for Customer Service Management

Machine learning in Customer Service Management helps with case creation, assignment, and resolution.

Task Intelligence for Customer Service	Use the following AI capabilities to automate several routine tasks across the case life cycle and enable agents to focus on complex case resolution. • Record categorization • Sentiment analysis • Language detection • Document intelligence
Predictive Intelligence for CSM solution definitions	Use predictive intelligence solution definitions to assist agents with a variety of tasks. Solution definitions predict one or more output fields based on a configured input field.
Trending case topics	Identify clusters of cases with similar issues and pinpoint factors that drive up case

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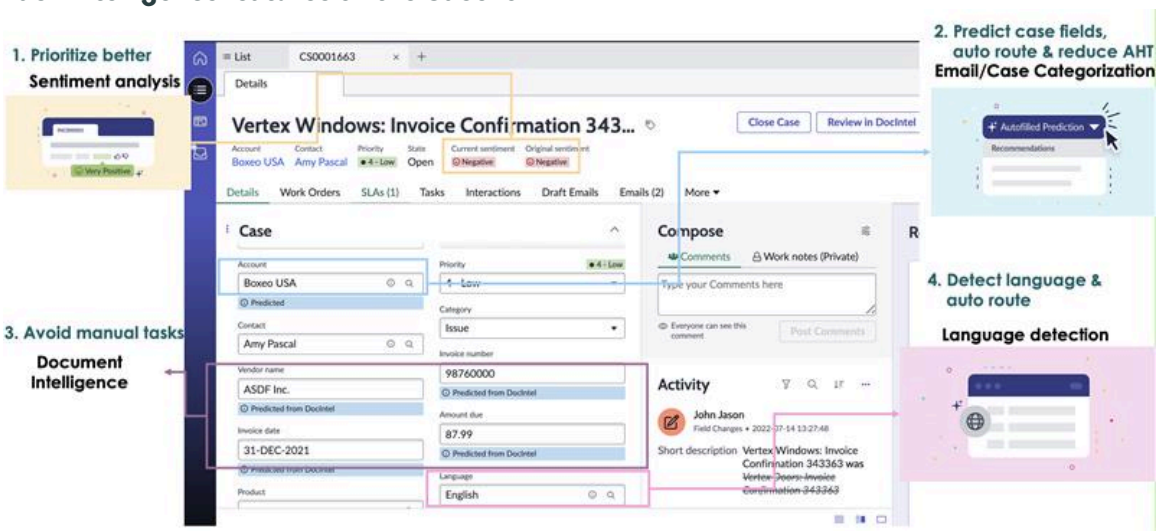
	volume. Each cluster of cases represents a trending case topic.
Similar case recommendations	Enable customer service agents to easily find similar cases that can provide helpful information about cases they are currently working on.
Estimated time to resolve a case	Predict the estimated time to resolve a case based on attributes such as the case short description, category, priority, and assignment group.
Predictive Intelligence for case management	Predict values for a case, such as the category, priority, and assignment group, based on information entered in the short description.
Auto-responder notifications	Use auto-responder notifications to share relevant content in email notifications that can help deflect cases.

Task Intelligence for Customer Service

Task Intelligence for Customer Service offers several AI capabilities such as language detection, record categorization, Sentiment Analysis, and Document Intelligence. These capabilities automate several routine tasks across the case lifecycle and enable agents to focus on complex case resolution.

Task Intelligence features on the Case form



Task Intelligence for Customer Service features

Feature	Description
Record categorization	Task Intelligence for Customer Service provides the following types of categorization: • **Multi-lingual record categorization**: Use a machine learning model that understands English, French, German, and Spanish to evaluate text in emails and records created in different languages and to predict and automatically

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Task Intelligence for Customer Service features (continued)

Feature	Description
	populate fields on records in the Case table, tables that extend the Case table, and the Interaction table. This feature uses one machine learning model to support multiple languages so you no longer need one model per language. The model can also support additional languages on demand. • **Attachment-based record categorization**: Use a machine learning model to parse email or record text and attachments and automatically populate fields on case and interaction records based on signals contained in the text. This feature evaluates text in the email subject and body, the record short description and description, and the attachments and uses all of this information to predict field values. As a result, you can integrate predictions with any routing engine and automatically route records to the appropriate service desk based on these values.
Sentiment Analysis	Detect and display the initial and ongoing sentiment of customer service cases by evaluating the following text: • Email subject and body • Case short description and description Help agents gauge customer emotions and better prioritize their work while enabling them to provide more empathetic and compassionate customer experiences. Sentiment Analysis is currently available in English.
Language detection	Identify the language used to create a customer service case and add the language to the **Language** field for the case record. This feature can identify up to 20 different languages. Add the identified language to the case as a skill, which is stored in the Task Skills table. This table can be configured as a related list on the Case form. Use the identified language to route cases to assignment groups and agents with the necessary language skills.
Document Intelligence	Document intelligence reduces the time needed to resolve the case by automating some of the routine case tasks, which enables agents to focus on more complex case resolution. Extract relevant information from PDF and image files, such as credit card numbers, vendor names, or customer addresses, and add that information to fields on the case.

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Task Intelligence for Customer Service features (continued)

Feature	Description
Task Intelligence Admin Console	The Admin Console provides a business friendly interface that you can use to create, train, and deploy machine learning models to predict field values for records, extract sentiment, and detect language. The models provide flexible options to either auto-fill values on the records or to provide recommendations only, depending on the sensitivity of those fields. An option is also available to run the model in the background only for monitoring purposes.
DocIntel Admin experience	The Document Intelligence application includes the DocIntel Admin experience, which provides an easy-to-use interface that you can use to do the following: • Create and configure document processing use cases • Monitor the performance of Document Intelligence use cases For more information, see Create a Document Intelligence use case.
Similar case recommendations	Use the Similar Case Recommendation feature to quickly locate similar cases that offer valuable insights into the current issue. Also, use this feature to suggest cases that might be related to major problems, helping you provide more informed and efficient support.

Request apps on the Store

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

Task Intelligence for Customer Service application

The Task Intelligence for Customer Service application (com.snc.csm_ml_task) is available from the ServiceNow Store. This application has the following plugin dependencies:

- Predictive Intelligence for Customer Service Management (com.snc.csm_ml)
- Customer Service (com.sn_customerservice)
- Skills Management (com.snc.skills_management)
- Dynamic Translation (com.glide.dynamic_translation)
- ServiceNow Language Detection Service Spoke (com.glide.language_detection_spoke)
- Predictive Intelligence - Task Intelligence (com.glide.platform_ml_task)
- Admin Center for Task Intelligence (com.sn_ti_admin)

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Configuring Task Intelligence for Customer Service

After installing the Task Intelligence for Customer Service application, you can configure the different features and use the Task Intelligence Admin Console to create models. For more information, see:

- Install and configure Task Intelligence features
- Set up and deploy Task Intelligence models

Using Task Intelligence for Customer Service

Use the Task Intelligence features to complete the following tasks:

- Create field prediction and sentiment models for case and interaction records
- Review and submit values extracted by Document Intelligence
- Review Task Intelligence analytics and prediction history

For more information about these tasks, see Use Task Intelligence for Customer Service.

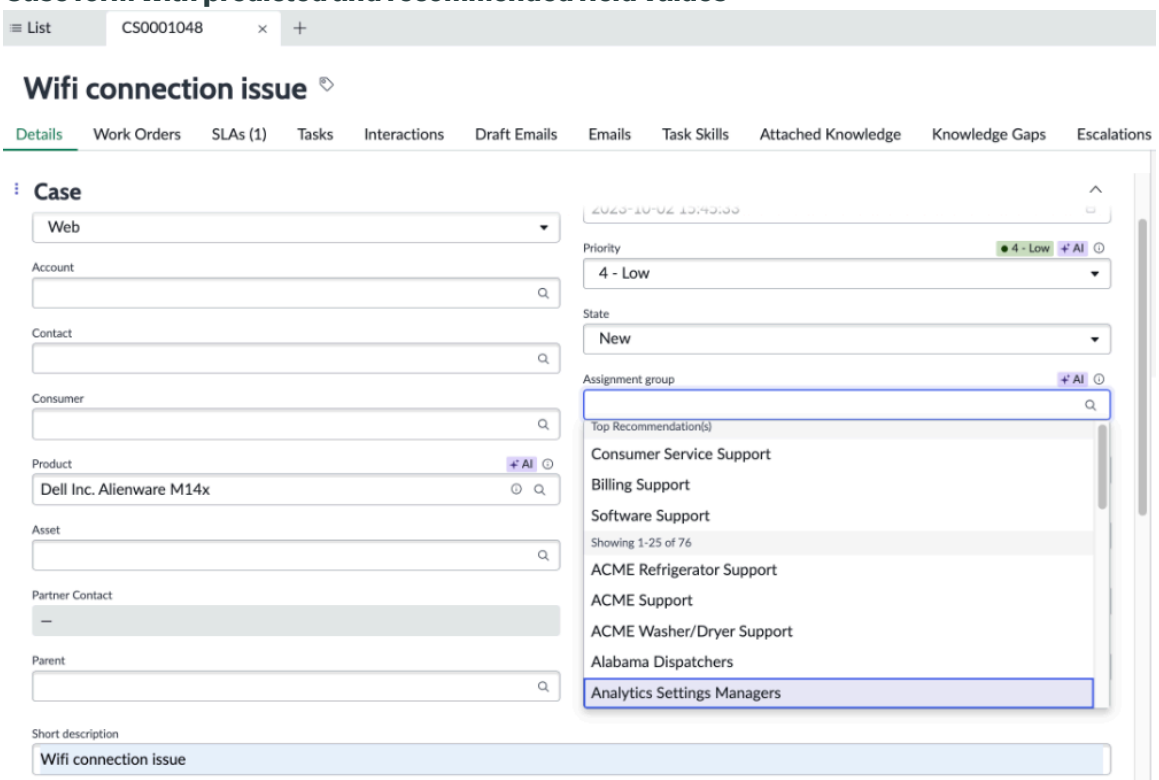
Record categorization

The record categorization feature included with Task Intelligence for Customer Service uses machine learning models to evaluate text, predict field values, and automatically populate fields on case and interaction records.

Record categorization supports multiple languages and can scan attachments in addition to evaluating text from emails and records. Use this feature to categorize cases, case types, and interactions from multiple channels including email, web, and chat.

You can use the results of the categorization to automatically route records to the right service desk, which avoid the need for multiple email inboxes and RPA bots. Auto- routing also frees up your employees to work on other tasks.

Case form with predicted and recommended field values



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Predicted field values

On case and interaction records, the fields that contain predicted values are identified with an AI icon and label (AI). These fields also include an information icon that displays a message with additional context about the predicted values.

Note:
in CSM Configurable Workspace, the AI icon is persistent over the life-cycle of the record. In Core UI, the AI icon is removed when the agent changes the field value.

In CSM Configurable Workspace and Core UI, the fields on the record that contain predicted values are identified with the *Predicted* or **Recommended** messages.

Recommended field values

Fields that are predicted by AI include recommended values. When an agent selects a predicted field, the system displays a drop-down list that includes the top three recommendations at the top of the list followed by all other values. This feature is available for the following types of fields:

- Choice lists
- Single lookup
- Multi lookup
- Single and multi text fields

If the top three recommendations aren't available, the system displays a message in the Top Recommendations section of the dropdown list that no predictions are available. The other values follow this message.

The agent can select any value from the dropdown list, either one of the top three recommended values or one of the other values. The agent can also type in the field and filter the results in the dropdown list, except the top three recommendations which are always displayed.

Note:
The top three recommendations remain in the dropdown list through the case life cycle regardless of the selected field value.

Filtering inactive field values from predictions

Enable the *sn_csm_ml_task.case.categorization.enable_inactive_filter* to remove inactive field values from predictions. The default setting for this property is false.

AI prediction banner

When a case record includes a categorization prediction, the system displays a banner at the top of the record. The banner is displayed when there is atleast one field with auto-fill predictions in categorization models. The banner is displayed for records in the Case table and extensions of the Case table.

Note:
The banner is displayed in CSM Configurable Workspace and in the Core UI.

The system displays the banner when there is at least one field with an auto-fill prediction in categorization models or when one of the extracted fields hasn't been reviewed by the agent. The banner is displayed for records in the Case table.

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Note:
If the agent changes the predicted value, the banner is removed. If all predicted fields are recommended, the banner isn't displayed.

The banner can be enabled or disabled by the *sn_csm_ml_task.ui.banner.enabled* system property.

Prediction feedback

The system stores feedback on prediction results in the Predictor Result [ml_predictor_results] table. ml_admin role can access the table and view the results.

- Autofill: A value is considered to be predicted correctly (set to true) if the predicted value and the final value are the same.
- Recommendation: A value is considered to be predicted correctly if any one of the predicted values matches the final value.

The Predictor Result table also stores information about skipped and failed predictions. For more information about this table, see Components installed with Task Intelligence for Customer Service.

Multi-lingual record categorization

Use a machine learning model that understands the following languages to evaluate text in emails and records created in different languages and to predict and automatically populate fields on cases, case types, and interactions.

- English
- French
- German
- Spanish

Multi-lingual record categorization uses one machine learning model that is trained to understand multiple languages. This model can:

- Understand the text in emails and records.
- Evaluate the text and predict field values.
- Add the predicted values to fields on cases, case types, and interactions.

Multi-lingual record categorization can support the following additional languages on demand:

- Arabic
- Chinese (PRC)
- Chinese (Taiwan)
- Dutch
- Italian
- Japanese
- Korean
- Polish
- Portuguese
- Russian

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- Thai
- Turkish

Note:
If you must evaluate emails or cases in these additional languages, reach out to the product team for support.

Attachment-based record categorization

Attachments can include valuable signals that help support desks to categorize and route records automatically. To take advantage of attachment information, you can use a machine learning model to parse email and record text and attachments and automatically populate fields on cases, case types, and interactions based on signals contained in the text.

The model can predict information about a case based on:

- Text in the subject line and body of a customer email.
- Text in the short description and description of a case or interaction.
- Text in email and record attachments.

Note:
The model can be configured to use different fields for prediction.

Attachment-based categorization uses all of this information to predict field values. As a result, you can automatically route records to the appropriate service desk based on these values.

Related topics

Configure record categorization

Task Intelligence Admin Console

Create a model to predict record fields

Sentiment Analysis

Sentiment Analysis can help you gauge customer emotions, enabling you to provide more empathetic and compassionate customer experiences.

Use the sentiment analysis feature included with Task Intelligence for Customer Service to:

- Evaluate email and case text.
- Identify the current sentiment of new cases.
- Identify the ongoing sentiment of updated cases.
- Display this information to agents and managers.

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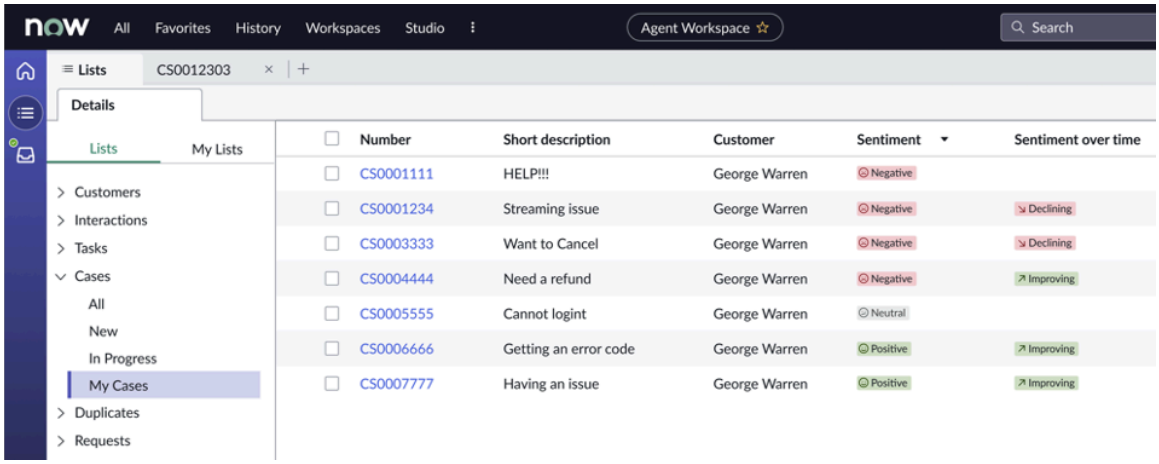
Case list with sentiment fields



Agents can use current case sentiment to prioritize their work and ongoing sentiment as it trends over time to see if cases are moving in the right direction.

Managers can use sentiment to route cases to agents with the right empathy skills, monitor cases and reassign as needed, and avoid escalations. Manager can also identify coaching opportunities by looking at cases that ended on a negative sentiment.

Note:
In the Yokohama release, the sentiment analysis feature can predict sentiment for cases created in English.

Sentiment analysis machine learning models

Sentiment analysis uses a pre-trained machine learning model to evaluate email and case text and predict sentiment. This analysis takes place when a case is created and when it is updated by the customer.

Sentiment analysis for cases

Cases scenario	Description

When a case is created	The sentiment analysis model evaluates the following text to make a prediction:
	• Text in the subject line and body of emails.
	• Text in the short description and description of cases.
	
	If the model can make a prediction, it returns the following information:
	• A sentiment label and corresponding sentiment level.
	  ○ Positive (1.0)
	  ○ Neutral (0.5)
	  ○ Negative (0.0)
	• A confidence level for the prediction.
	
	If the model can make a prediction, the sentiment is added to the **Original sentiment** field.

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Sentiment analysis for cases (continued)

Cases scenario	Description
	If the model can't make a prediction, the **Original sentiment** is not set. This system stores the sentiment prediction information in the Predictor Results for Task table.

When a case is updated	The sentiment analysis model evaluates the following text to make a prediction:
	• The text from the body of a reply email.
	• Comments that a customer adds to the case.
	
	If the model can make a prediction, it returns the following information:
	• An updated sentiment label and corresponding sentiment level.
	• A confidence level for the prediction.
	
	The system:
	• Updates the **Current sentiment** field with the current sentiment.
	• Compares the updated current sentiment to the original current sentiment, calculates the change in sentiment, and updates the **Sentiment over time** field.
	  ○ If there is an increase in the score, the **Sentiment over time** field shows Improving.
	  ○ If there is a decrease in the score, the **Sentiment over time** field shows Declining.
	  ○ If there is no change in the score, the **Sentiment over time** field continues to display the previous value.
	
	Note: If the **Original sentiment** is Neutral and the **Current sentiment** is Neutral, then the **Sentiment over time** is Neutral.
	
	If the model can't make a prediction, no information gets recorded and the value in the **Current sentiment** field remains the same.

For more information about the pre-trained machine learning model, see Create a model to predict case sentiment.

Prediction feedback

The system stores feedback on prediction results in the Predictor Result [ml_predictor_results] table. Users with the ml_admin role can access the table and view the results. For sentiment analysis:

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- The default value in the **Predicted correctly** field for each sentiment prediction is set to true.
- The **Final input value** and **Final output value** fields remain empty because sentiment analysis predictions do not collect feedback from agents.

The Predictor Result table also stores information about skipped and failed predictions. For more information about this table, see Components installed with Task Intelligence for Customer Service.

Related topics

Configure Sentiment Analysis

Configure Sentiment Analysis

Create a model to predict case sentiment

Language detection

The language detection feature uses a pre-trained model to detect the language used to create customer service cases. You can configure the model to add the language to the **Language** field on the case record and/or add the language as a skill for the case.

All 30

Last refreshed 3m ago.

Number	Short description	Name	Contact	Account
CS0001045	Wifi Connection is poor	English	Alex Linde	Advanced Routing Components
CS0001054	Dit is zo'n zonnige dag en ik hou ervan	Dutch	(empty)	Avid Corporation
CS0001053	Tohle je tak slunečný den a miluju ho	Czech	(empty)	Advanced Super Routing
CS0001052	problema de conexion wifi -es	Spanish	(empty)	(empty)
CS0001051	problema de conexion wifi -es.	Spanish	(empty)	(empty)
CS0001031	Das ist eine gute Arbeit zu wissen. Ich bin immer für Sie da	German	(empty)	Spark Technologies
CS0001032	C'est un bon travail à savoir. Je suis toujours là pour toi	French	(empty)	(empty)
CS0001029	これは知っておくと良い仕事です	Japanese	(empty)	Advanced Super Routing
CS0001030	To je dobrá práce vědět. Jsem tu vždy pro tebe	Czech	(empty)	Advanced Super Routing

Agents can save time by not having to manually select the language for each case or rely on a manual process for case routing. You can use the language skill stored in the Task Skills table to route cases to the assignment groups and agents with the necessary language skills.

- Cases can be routed automatically with Advanced Work Assignment (AWA).
- Cases can be assigned to agents based on language skills using the assignment workbench.
- Cases can be assigned based on the value in the **Language** field.

Note:
Routing based on detected language must be configured separately.

The language detection feature supports 20 different languages. For details, see Languages supported by Task Intelligence.

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Language detection flow

Detecting the language used to create a case is based on a flow, **Task Intelligence Case Language Detected**, which is available with the Task Intelligence for Customer Service application. This flow is triggered at case creation with the condition that at least one of these case fields is not empty:

- Short description
- Description

When a case is created, the system calls the Detect Language action in the Dynamic Translation spoke which evaluates the text and returns the detected language.

If the returned language confidence is above the defined confidence threshold, the system performs a check to see if the language exists in the Languages [sys_language] table. It performs this check by matching the language code to the value in the ID field.

If the language exists in the Languages table, the system does the following, depending on the language detection model configuration:

- Adds the language to the **Language** field in the Case table.
- Stores the prediction results in the Predictor Results for Task table [ml_predictor_results_task].
- Stores the language skill in the Task Skills table [task_m2m_skill].

For more information, see Create a model to detect case language.

Prediction results

The system stores feedback on prediction results in the Predictor Result [ml_predictor_results] table. Users with the ml_admin role can access the table and view the results.

For language detection, the Predictor Result table stores the prediction results from the Language Detection Service spoke. The **Detected Language** field stores the language returned by the Language Detection Services spoke.

The Predictor Result table also stores information about skipped and failed predictions. For more information about this table, see Components installed with Task Intelligence for Customer Service.

Related topics

Configure language detection

Task Intelligence Admin Console

Create a model to detect case language

Document Intelligence for Customer Service

Use the Document Intelligence for Customer Service feature to extract relevant information from email and case attachments, such as credit card numbers or customer addresses, and add that information to cases.

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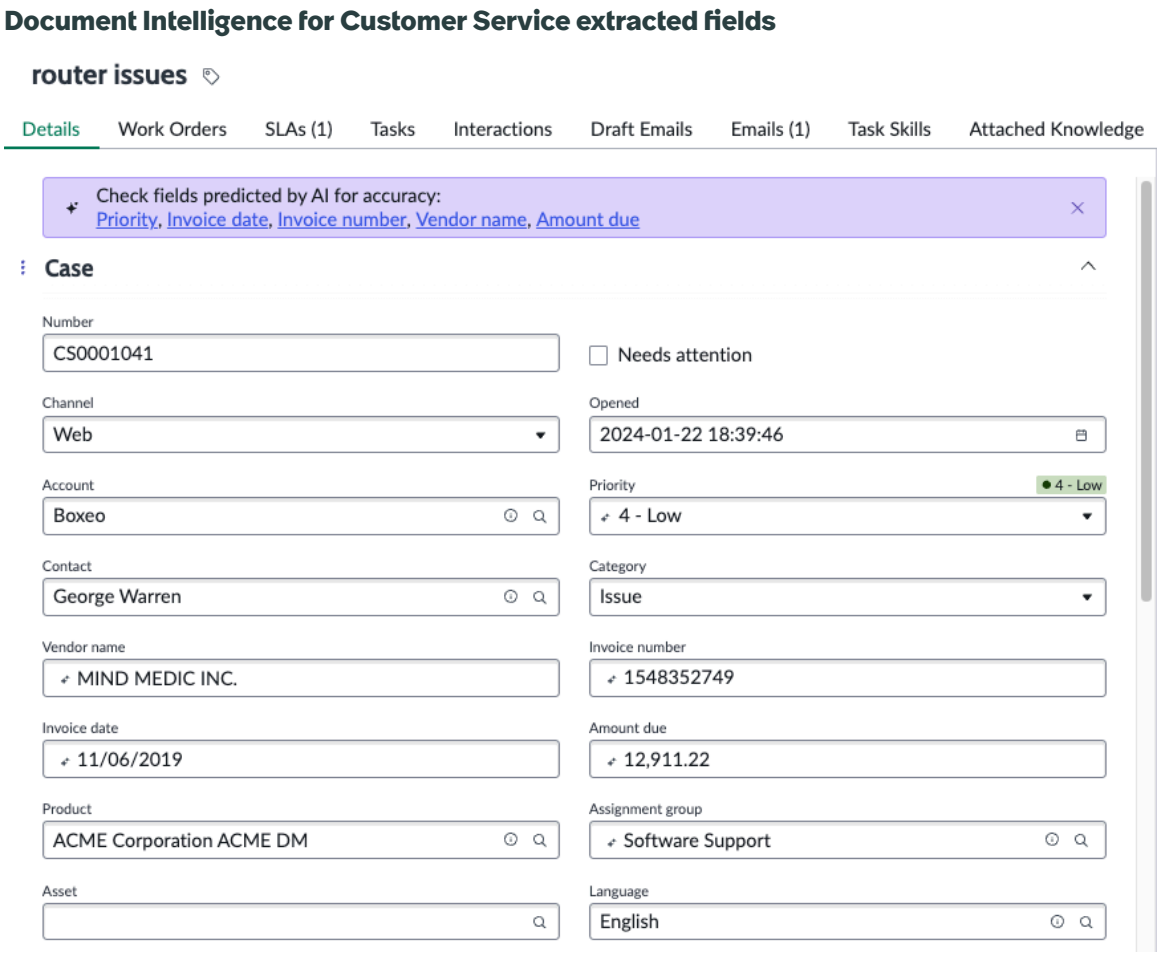

Agents can review values for extracted fields and make corrections as needed by accessing the Document Intelligence interface directly from the case. From this interface, agents can confirm correct values, fix incorrect values, and continue to train the model. This HITL/Human In the Loop interaction of verifying the recommended values enables agents to refine the model and continually improve performance.

Predicted field values

In CSM Configurable Workspace and Core UI, the fields on the Case form that contain Document Intelligence predicted values are identified with an AI icon (✨) and label. These fields also include an information icon that displays a message with additional context about the predicted values.

Note:
The system displays the AI icon automatically. The agent doesn't need to refresh the record page.

In CSM Configurable Workspace and Core UI, the fields on the Case form that contain Document Intelligence predicted values are identified with the message `Predicted from DocIntel`.

Prediction banner

The system displays a banner at the top of a case record that contains one or more Document Intelligence field predictions. The banner is displayed:

- When there is at least one field with an auto-filled prediction from a categorization model.
- When one or more of the extracted fields haven't been reviewed by the agent.

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- When the fields are being updated.
- When the fields can't be generated or predicted.

Once an agent reviews the field, the banner is removed.

The banner is displayed for records in the Case table, extensions of the Case table, and interaction records. The banner is displayed in the Core UI and CSM Configurable Workspace.

The banner can be enabled or disabled by the *sn_csm_ml_task.ui.banner.enabled* system property.

DocIntel Admin experience

The DocIntel Admin experience provides an easy-to-use interface that you can use to do the following:

- Create and configure document processing use cases
- Monitor the performance of Document Intelligence solutions

The DocIntel Admin experience is available with the Document Intelligence Admin (com.snc.docintel_admin) store app. This app automatically activates the flows and properties required by Document Intelligence for Customer Service.

Access the DocIntel Admin experience through the Task Intelligence Admin Console:

1. Navigate to **Task Intelligence for Customer Service** > **Setup**.
2. In the Explore related applications section of the console, select **Open DocIntel** in the Document Intelligence card.

Note:
If Document Intelligence Admin isn't installed, the home page displays a link that you can use to download and activate the application.

For more information, see the following topics:

- Create a Document Intelligence use case
- Monitor Document Intelligence performance

.

Use Cases list

From the DocIntel Admin experience, select **Use Cases** in the header to display a list of the use cases. The Use Cases list uses a default filter with an OR condition to show use cases for:

- Application = Task Intelligence for Customer service -or-
- MLUC ID = MLUC CSM-00003

Note:
The user can't modify these filter conditions from the advanced view.

Each use case has an MLUC ID number that is automatically assigned when the use case is created. This ID number is used for machine learning usage tracking. The Task Intelligence for Customer Service application manages the MLUC ID for Document Intelligence for Customer Service use cases.

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Document classification

With the system administrator role, you can create document classification use cases and define the classes or categories for the AI to detect and apply to documents. This process is useful in situations where there are multiple types of documents that must be evaluated.

Set up a document classification use case in the following steps.

1. Create a document classification use case.

   Define the name and properties for the use case.

2. Create a document class.

   Define the classes or categories that the AI learns to detect and apply to documents.

3. Create a document task for document classification and upload sample documents for each class.
4. Train a use case.

   Initiate a training job to provide user inputs from completed document tasks to the AI for continuous improvement.

Related topics

Document Intelligence

Configure Document Intelligence for Customer Service

Review and submit values predicted by Document Intelligence

How Document Intelligence for Customer Service works

Document Intelligence for Customer Service performs a series of steps to extract relevant information from email and case attachments and add that information to fields on the case record.

Use cases

A use case, previously known as a task definition, is a template that is used to define the structure of a type of document you want to process. A use case is made up of the use case record and its related fields, field groups, integrations, flows, and all the related machine learning (ML) models. For more information, see Set up document extraction use cases.

Document Intelligence use case components

Component	Description
Fields	Identifies a field that you want to extract a value for. A use case includes the list of fields to extract from case and email attachments and a mapping of the extracted values to fields in the Case table.
Field groups	Field groups help Document Intelligence extract data from documents with tables, check box lists, and other logical groupings of fields.
Document tasks	A document task includes one or more attached documents that are used to train the use case to identify and extract

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Document Intelligence use case components (continued)

Component	Description
	the correct information. Document tasks are stored in the Document Tasks related list on the Use Case form. The Document Intelligence feature creates these tasks for each case with valid attachments. Each task trains the model. In CSM Configurable Workspace, agents can view these tasks, confirm or correct extracted values, and continue to train the model.
Integrations	Select conditions that tell the Document Intelligence feature when to extract values. The system creates tasks for those cases that meet the specified conditions. For example, you can add a condition on the **Category** field where **[Category] [is] [Credit Card]**. At run time, the system evaluates the active use cases and identifies the use case to use for the case based on the integration. The first active use case that matches the integration for the case or case type is selected. If there are use cases for the case or case type but none that match the integrations, then no use case is selected. You can create one integration for a use case. If a use case has more than one integration, the system uses the latest one. **Note:** When creating an integration, make sure that the **Create Flow** check box remains unchecked.

Users with the ti_admin role or the ti_analyst role can create use cases for cases and for case types. At run time, the system identifies the correct use case based on the case or case type when a case is created and has a valid attachment. If there is no use case for a specific case type, the system goes up in the hierarchy chain until it finds a use case to use.

Use cases are stored in the Use Case (di_task_definition) table.

Extraction modes

A use case includes an extraction mode that determines how the data is extracted in the document task and how the task is processed. The mode changes the behavior of the fields in the Document Intelligence workspace.

DocIntel uses the following extraction modes

Document Intelligence use case extraction modes

Extraction mode	Definition
Recommendation	Provides recommendations for the extracted fields in the Document Intelligence workspace. Agents can choose the recommended value

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Document Intelligence use case extraction modes (continued)

Extraction mode	Definition
	for a field or manually enter a value. All fields must be reviewed. Recommendations are ordered based on how confident the AI is in the prediction. As Document Intelligence continues processing your documents, recommendations can improve over time.
Auto-fill	Adds values for the extracted fields in the Document Intelligence workspace. All fields must be reviewed. Auto-fill works only if the AI has enough confidence to make the prediction. You can change the confidence threshold by updating the **Auto-fill threshold** field in the use case.
Fully automated (Straight through processing)	DocIntel extracts the data for all fields and processes the document task if the confidence scores for all required fields are above the defined confidence threshold. DocIntel becomes more confident over time, as it processes more and more documents. Choose Fully automated mode for frequently processed documents or if you're confident in the system.

Extraction labels

In CSM Configurable Workspace, the fields on the Case form that contain Document Intelligence predicted values are identified with an AI icon (✦) and label. These fields also include an information icon that displays a message with additional context about the predicted values.

In Core UI, the fields on the Case form that contain Document Intelligence predicted values are identified with the message `Predicted from DocIntel`.

- For Fully automated mode, the message appears below each extracted field returned by the task. The values and messages for each field are added to the case before the agent views the case record.
- For the other extraction modes, the message appears below the extracted fields after the agent reviews the extracted values in the Document Intelligence interface, confirms or corrects values, and submits those values.

Predicted field values

In CSM Configurable Workspace, the fields on the Case form that contain Document Intelligence predicted values are identified with an AI icon (✦) and label. These fields also include an information icon that displays a message with additional context about the predicted values.

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In Core UI, the fields on the Case form that contain Document Intelligence predicted values are identified with the message `Predicted from DocIntel`.

Performance

The Document Intelligence for Customer Service feature needs time to identify cases with attachments, scan the attachments, and make recommendations for case fields. The response time also depends on factors such as case with attachment volume and data center location.

The system displays notifications to the user for the following scenarios:

- If the extraction fails.
- If the extraction is too slow.
- If there are no attachments.
- If there are unexpected attachments.

How it works

When a case is created, Document Intelligence for Customer Service checks to see:

- If the case has one or more attachments.
- If the attachment types are specified in the *sn_csm_ml_task.case.docintel.parsing_supported_types* system property.

If yes, the feature:

- Identifies the right use case to use based on the case or case type and the use case integrations.
- Creates a task using the use case, the sys_id of each attachment, and the case reference.
- Sends the task, attachment sys_ids, and case reference as inputs to the prediction model.
- Uses optical character recognition (OCR) solutions to extract data from the documents.
- Sets the status of the task to Done once the solution has completed.
- If the extraction mode in the use case is set to Fully automated, the extracted values are added to the case.
- If the extraction mode is set to Autofill or Recommendation, the agent can validate the extracted values in the Document Intelligence workspace.

The agent can open a case and review the predicted fields or review the prediction task by selecting **Review in DocIntel** and opening the Document Intelligence workspace interface in a separate tab. From this interface, agents can:

- Review each predicted field.
- Confirm correctly predicted values.
- Update incorrect or missing values.
- Submit the changes.

Similar case recommendation

The Similar Case Recommendation feature enables customer service agents to quickly locate similar cases that offer valuable insights into the current issue.

This feature also suggests cases that might be related to major problems, helping agents provide more informed and efficient support.

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With the Similar Case Recommendation feature, agents can:

- Identify similar cases.
- Copy resolution notes from resolved cases.
- Link the current case to a similar one.
- View and submit the current case as a major case candidate. The system displays three similar open and resolved cases.
- View similar major cases first and link the current case as a child to a major case.

When using similarity models in the workspace, the agent can:

1. Open a case record.
2. Select the Recommendations tab in the contextual side panel.
3. Choose the Suggested Actions sub-tab to see:
   - A card to propose a major case and a card for similar major cases (if enabled).
   - Up to three similar open case cards (customer-configurable).
   - Up to three similar resolved case cards (customer-configurable).

For more info, see View similar case recommendations

Task Intelligence Admin Console

Use the Task Intelligence Admin Console to create, train, and deploy machine learning models that predict different types of information for case and interaction records.

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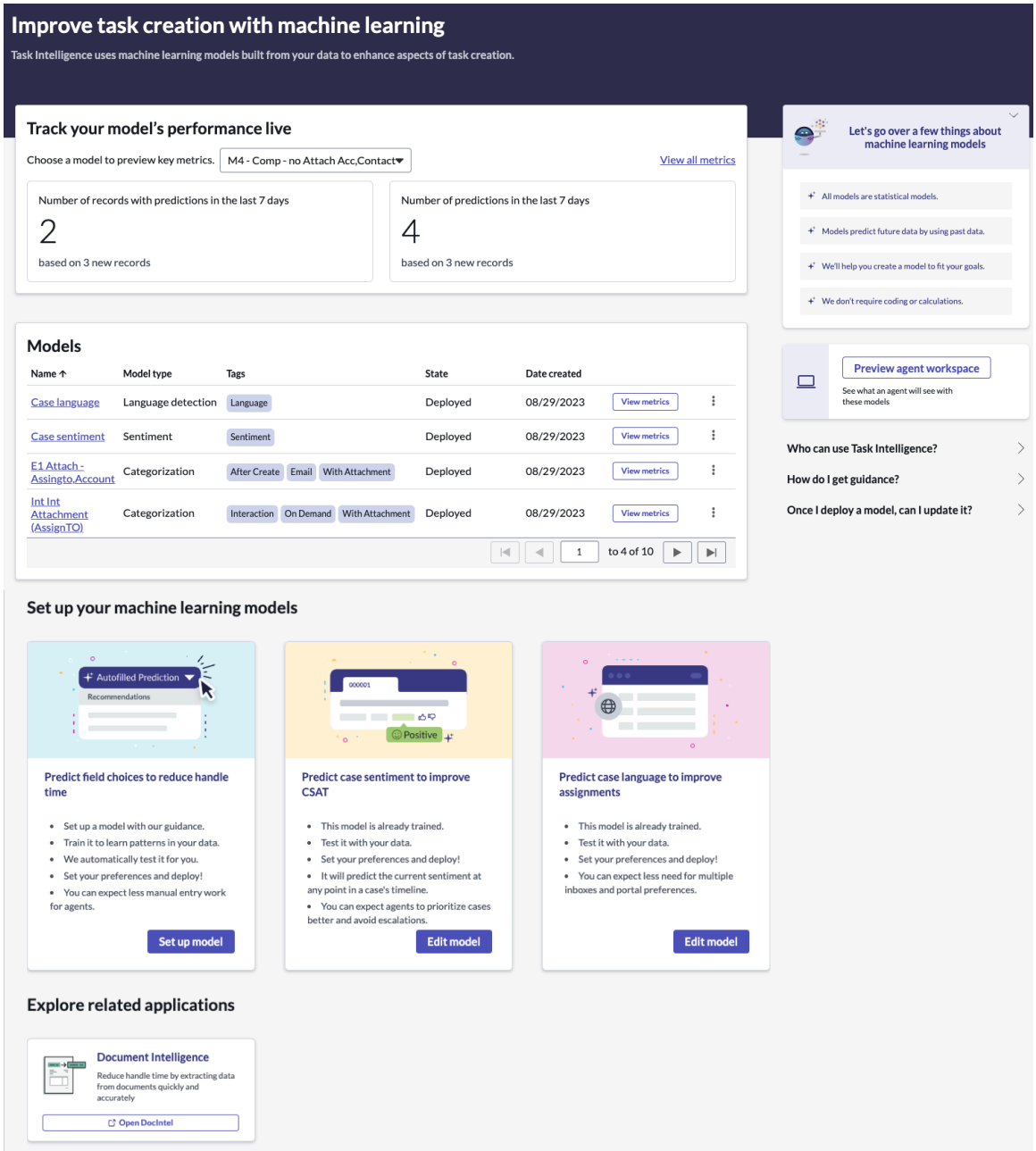

From the Admin Console, you can set up predictive models, preview the agent's experience, view when the models are active, and track model performance.

The Admin Console provides tools that you can use to create and implement machine learning models in just a few steps. Each model follows a six-step process.

Steps to create and implement machine learning models

1. Select a model to use as a starting point.	Select the model based on what you want the model to do. For example:

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Steps to create and implement machine learning models (continued)

	• Use the field prediction model to make field value predictions that you can use to categorize cases and interactions. • Use the case sentiment model to predict sentiment at any point from case creation to case resolution.
2. Define the purpose of the model.	Tell the model when you want it to make predictions and what you want it to predict. For example, predict the category and priority when a new case is created.
3. Select the data used to train the model.	Train the model using selected data, such as the text in the case short description and description, so it can learn patterns in the data. Then test the model to see how well it works.
4. Assess the model's results.	View test results to see how your well the model performed. These results indicate how a model will perform after being deployed.
5. Select preferences for prediction results.	Add predictions directly to record fields, show predictions as recommendations, or monitor predictions in the background.
6. Deploy the model.	Review your selections and start using the model.

You can also use the Task Intelligence Admin Console to access related applications. For more information about using the console, see the following topics:

- Create a model to predict record fields
- Create a model to predict case sentiment
- Create a model to detect case language
- Create a Document Intelligence use case

Machine learning model setup and behavior

Set up models to predict field values and sentiment for customer service cases.

Training a model

Training a machine learning model is when the model learns patterns in past data to make predictions for new data. Models are trained using a lot of data so that they can learn patterns and the large data set makes the learned patterns statistically significant.

Setting up a field prediction model

Users with the ml_admin role can create and train a machine learning model to predict field values from the Task Intelligence Admin Console.

Using the field prediction model as a starting point, you can choose the training data set that the model learns from. The model can be trained using data from the following tables:

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- Email [sys_email] table
- Case [sn_customerservice_case] table
- Tables that extend the Case table
- Interaction [interaction] table

Models can also be trained using data from email or case attachments.

You then direct the model to learn a pattern between two types of fields from that data:

- **Output fields** are the fields that you want your model to predict. For example, the Category and Priority fields for cases.
- **Input fields** are the fields that the model uses as a basis for predictions. For example, text in the subject and body of an email.

You can use the recommended input fields or you can modify these fields and add your own preferences.

If the model is configured to use text from attachments, the system performs the following steps when a case or interaction is created:

- The system checks the record for attachments with supported content types and file extensions. It ignores the attachments that have unsupported file extensions.
- If the record has attachments in a supported format, the system parses the text and sends it as an input to the categorization model, along with text from the input fields.
- If the record does not have attachments, or no attachments in a supported format, the system sends text from the input fields to the categorization model.

Supported content types and file extensions are stored in the *sn_csm_ml_task.categorization.allowed_content_types* system property. For more information, see Components installed with Task Intelligence for Customer Service.

Supporting multiple languages

Categorization supports multiple languages including attachments, if the models are configured to include attachments. The categorization model returns the predicted language and stores it in the **Detected Language** field in the Predictor Result [ml_predictor_results] table.

Setting up a case sentiment model

The case sentiment model is pre-trained with a large data set to learn communication patterns. This data comes from customer emails and case descriptions and comments and reflects typical communication between agents and customers.

- **Email**: The model uses the text in the subject and body of the initial email to predict sentiment when the case is created. Text from the body of subsequent emails is used to update the prediction.
- **Cases**: The model uses the text in the case short description and description to predict sentiment when the case is created. Comments added to the case are used to update the prediction.

The case sentiment model supports case types. When setting up a sentiment model, you select the table on which to run sentiment analysis. You can select:

- The Case table
- Tables that extend the Case table

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Note:
The sentiment analysis feature supports one level of custom extension from the Case table.

Install the Task Intelligence for Customer Service application

You can install the Task Intelligence for Customer Service application (com.snc.csm_ml_task) if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Task Intelligence for Customer Service application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- The minimum version of the workspace required to support Task Intelligence for Customer Service application is CSM and FSM Configurable Workspace Foundation (sn_cwf_wrkspc): 24.2.1.
- To enhance ML functionality, we need to set up three Access Control Lists (ACLs) within the Customer Service application. These ACLs are essential for granting the platform_ml_read role the necessary read access to the sn_customerservice_case table and its associated fields. For more information, see KB1705485

Role required: ti_admin

About this task

The following items are installed with Task Intelligence for Customer Service:

- Store applications: Task Intelligence for Customer Service
- Roles
- Tables
- Properties
- Flows
- Scheduled jobs

For more information, see Components installed with Task Intelligence for Customer Service.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Task Intelligence for Customer Service application (com.snc.csm_ml_task) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

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4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Components installed with Task Intelligence for Customer Service

Several types of components are installed with the Task Intelligence for Customer Service application, including tables, roles, properties, flows, and scheduled jobs.

Tables

The Task Intelligence for Customer Service application uses the following tables.

Tables installed with the Task Intelligence for Customer Service application

Table	Description
ML Solution [ml_solution]	The ML Solution table stores trained machine learning solutions. Activating the Task Intelligence for Customer Service application (com.snc.csm_ml_task) creates a record in this table for the pre-trained sentiment analysis machine learning solution: *ml_x_snc_global_global_sentiment*.
ML Sentiment [ml_sentiment]	This table stores machine learning sentiment information and includes the following fields: • **Original sentiment**: The sentiment that is predicted when the case is created. • **Current sentiment**: The sentiment that is predicted when the case is updated. • **Sentiment over time**: Displays the sentiment trend prediction as an agent works to resolve the case. To be able to calculate a value for this field, there must be a minimum of two sentiment predictions. The system uses the following formula used to determine the sentiment trend: `(currentSentiment - originalSentiment) > 0 ?'improving' :'declining';`
Predictor Result [ml_predictor_results]	This table stores prediction results and feedback for record categorization, sentiment analysis, and language detection. This includes skipped and failed predictions that result from prediction requests.

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Tables installed with the Task Intelligence for Customer Service application (continued)

Table	Description
	For case categorization: • The **Default confidence** and **Predicted confidence** fields store confidence values returned by the categorization machine learning models. • For cases created from email, the **Source ID** field includes a reference to the sys_email record and the **Predicted Table** field includes a reference to the sys_email table. For sentiment analysis: • The default value in the **Predicted correctly** field for each sentiment prediction is set to true. • The **Final input value** and **Final output value** fields remain empty because sentiment analysis predictions do not collect feedback from agents. For language detection: • The Predictor Result table stores the prediction results from the Language Detection Service spoke. • The **Detected Language** field stores the language returned by the Language Detection Services spoke. The Predictor Result table includes the **Skipped** field, which is a true|false field. • **True**: The prediction was skipped. • **False**: The prediction was not skipped. For more details about skipped predictions, see Logic for Skipped field values below. **Note:** The Predictor Result list includes a filter on the **Capability** field, which displays results where the capability is Classification. Remove this filter to display all of the prediction results.
Case [sn_customerservice_case]	The Case table stores customer service case records. This table is the recipient for case categorization predictions. The **Language** field has been added to the Case table. This field is a reference to the Language [sys_language] table. This field is populated with the prediction made by the language detection spoke and stores the language that was used to create the email or case. The Case table is added with the Customer Service (com.sn_customerservice) plugin.

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Tables installed with the Task Intelligence for Customer Service application (continued)

Table	Description
Task [task]	The Task table is one of the core tables provided with the ServiceNow base system. The sentiment analysis feature adds the **Sentiment** column to the Task table. This column is a reference to the Task ML Sentiment [task_ml_sentiment] table.
Task ML Sentiment [task_ml_sentiment]	This table stores sentiment predictions. The reference to the prediction record is stored in the **Sentiment** field in the Task table. This table is an extension of the ML Sentiment [ml_sentiment] table. The **Task** column in the Task Sentiment table is a reference to the Task [task] table and is used for domain separation.
Task Skills [task_m2m_skill]	The Task Skills table stores skills for the Customer Service Management application. The language detection feature links language skills to new customer service cases by saving the detected language in the Task Skills table. The Task Skills table lists customer service cases and the language skill detected and assigned to each case.

Logic for Skipped field values

Prediction preference	Top 1 prediction	Top 3 (at least 1 prediction)	Skipped
Autofill	Yes	Yes	False
	Empty	Yes	True
Recommendations	Yes	Yes	False
	Empty	Yes	False
	Empty	Empty	True
Monitor only	Yes	Yes	False
	Empty	Yes	False
	Empty	Empty	True
Prediction unsuccessful	N/A	N/A	True
Prediction error	N/A	N/A	True

Tables installed with Document Intelligence for Customer Service

The Document Intelligence for Customer Service application uses the following tables:

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Tables installed with the Document Intelligence for Customer Service application

Table	Description
DocIntel Use Case [di_task_definition]	Stores Document Intelligence use cases for the Case table (sn_customerservice_case) or case type tables that extend the Case table.
DocIntel Task [di_task]	Stores Document Intelligence tasks. The **is_stp** field controls straight through processing. When this field is set to true, straight through processing is enabled for the task. The **agent_input** field is set to true if an agent makes changes to predicted values in the DocIntel tab. **Note:** You can track tasks from the ML Solutions table (ml_solution.list).
Integration Setup [di_integration_setup]	Stores use case filters that are applied to cases. The **Target Table** field stores the target for the predicted fields, either the Case table (sn_customerservice_case) or a case type table.
Field [di_key]	Stores the keys to be extracted by Document Intelligence.
Field Value [di_extracted_value]	Stores the extracted values for the keys in a use case task.

Roles

The Task Intelligence for Customer Service application includes the following roles.

Roles installed with Task Intelligence for Customer Service

Role	Description	Contains roles
Task Intelligence admin [sn_csm_ml_task.ti_admin]	Can create, train, and retrain machine learning models. This role can also deploy and delete models.	• sn_docintel.admin • sn_ti_admin.tia_admin • sn_customerservice.case_viewer
Task Intelligence analyst [sn_csm_ml_task.ti_analyst]	Can create, train, and retrain machine learning models.	• sn_customerservice.case_viewer • sn_ti_admin.tia_analyst • sn_docintel.manager

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Roles installed with Task Intelligence for Customer Service (continued)

Role	Description	Contains roles
[sn_ti_admin.tia_admin]		• ml_admin • platform_ml_read
[sn_ti_admin.tia_analyst]		ml_admin
[sn_ti_admin.tia_user]		ml_report_user
Task sentiment viewer [task_ml_sentiment_viewer]	Provides read access to records in the Task Sentiment [task_ml_sentiment] table if the user has read access to the associated task records. This role is added to the following roles: • sn_customerservice_agent • sn_customerservice.consumer_agent	

Note:
The sn_docintel.extraction_agent role is added to the customer service agent role (sn_customerservice_agent) and the consumer service agent role (sn_customerservice_consumer_agent).

Properties

The Task Intelligence for Customer Service application includes the following properties.

Properties installed with Task Intelligence for Customer Service

Property	Description
sn_csm_ml_task.logging.verbosity	The log verbosity for the Task Intelligence for Customer Service application. This property has the following values: • **error**: Show only critical errors which may prevent the search from completing. • **warn**: Show warning which indicates possible unexpected changes in behavior while searching. Also shows errors. • **info**: Show progress messages as the Code Search application searches for results. Also shows errors and warnings.

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Properties installed with Task Intelligence for Customer Service (continued)

Property	Description
	• **debug**: Show information that may be useful while debugging the application. Also shows errors, warnings, and info messages. • **off**: Do not generate logs. The default setting is info.
Categorization properties	
sn_csm_ml_case.case.categorization.enabled	Enables categorization predictions for customer service cases. The default setting is false.
sn_csm_ml_task.categorization.attachment.max_size	Determines the maximum size of an attachment that can be parsed by categorization machine learning models. The maximum supported size is 500kb. The default setting is 450kb.
sn_csm_ml_task.categorization.allowed_content_types	Controls the content types and file extensions that are supported by the ML predictor for categorization with attachment. By default, the following attachment types can be used with attachment-based case categorization predictions: pdf, xls, xlsx, docx, and csv. To configure content types: • Leave the property empty to enable all of the supported file extensions. This is the default setting. • Create a subset of the default values by entering a comma-separate list of content types and file extensions. For example, `application/pdf,text/csv`.
sn_csm_ml_task.categorization.flow_start_time.threshold	Sets the max waiting threshold for categorization predictions that include attachments. The default value is 10 minutes. If the call to the API does not return a prediction before the maximum waiting threshold is reached, predictions are made without the attachment text. These predictions are based on text from the subject and body of the email or the case short description and description.

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Properties installed with Task Intelligence for Customer Service (continued)

Property	Description
sn_csm_ml_task.categorization.case.delay	Adds a delay before fetching valid attachments for Task Intelligence when cases are created from email.
sn_csm_ml_task.case.categorization.enable_prediction	Enables the property to remove inactive field choices from predictions. The default setting is false.
Sentiment analysis properties	
sn_csm_ml_task.case.sentiment.mlpredictor.enabled	Enables sentiment predictions for customer service cases. The default setting is false. To enable sentiment predictions, set this property to true. **Note:** This property is automatically set to true when a sentiment model is trained and deployed from the Task Intelligence Admin Console.
Language detection properties	
sn_csm_ml_task.case.language.mlpredictor.enabled	Enables language detection for customer service cases. The default setting is false. To enable language detection, set this property to true. **Note:** This property is automatically set to true when a language detection module is tested and deployed from the Task Intelligence Admin Console.
sn_csm_customerservice.case.ml.language.detection.threshold	Controls the threshold for language prediction. The default value for this property is 0.70. Predictions with a confidence level greater than the threshold are saved in the Predictor Results (ml_predictor_results_task) table and the Task Skills (task_m2m_skill) table. Predictions with a confidence level less than the threshold are only saved in the Predictor Results (ml_predictor_results_task) table.
sn_csm_ml_task.case.languagedetection.confidence_level	Stores the confidence level threshold for the language detection feature. The default value is 0.7.
Document Intelligence properties	
sn_csm_ml_task.case.docintel.mlpredictor.enabled	Enables Document Intelligence for Customer Service Management.

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Properties installed with Task Intelligence for Customer Service (continued)

Property	Description
	Note: This property is activated automatically when the user creates a use case.
sn_csm_ml_task.case.docintel.parsing_supported_types	Contains a list of the supported attachment types: *image/png,image/jpeg,application/pdf*
sn_csm_ml_task.straight_through_processing_max_waiting_threshold	Defines the maximum waiting time for a straight through processing task to finish. The default time is 5 minutes. If a use case is configured to use the straight through processing prediction mode, the agent can see the relevant fields on the Case form automatically populated within 5 minutes of case arrival. If this threshold is exceeded, the values are skipped. However, the agent can still view the task in the DocIntel tab and manually extract the values.
sn_csm_ml_task.case.delay_attachments_for_seve	Waits for several milliseconds before fetching valid attachments for Task Intelligence for Customer Service when a case is created from email. **Note:** This property is inactive by default. If you notice that attachments are being missed for cases created from email, enable this property.

Flows

The Task Intelligence for Customer Service application includes the following flows.

Flows installed with Task Intelligence for Customer Service

Flow	Description
Task Intelligence Sentiment [new_task_intelligence]	This flow is inactive out of box and is activated after setting up models on the Task Intelligence Admin Console.

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Flows installed with Task Intelligence for Customer Service (continued)

Flow	Description
Task Intelligence Sentiment Case Update [task_intelligence_case_update_flow]	This flow is inactive out of box and is activated after setting up models on the Task Intelligence Admin Console.
Task Intelligence Inbound Email Reply [task_intelligence_inbound_email_reply]	This flow is inactive out of box and is activated after setting up models on the Task Intelligence Admin Console.
Task Intelligence Case Language Detection [task_intelligence_case_language_detection]	Language detection determines the language used to create a case. Depending on configuration, the system can add this value to the **Language** field on the Case form. This field is a reference to the Language [sys_language] table. It can also add the language as a skill to the Task Skills related list on the Case form. This flow is automatically activated when a language detection module is trained and deployed from the Task Intelligence Admin Console.
Task intelligence - DocIntel at case creation	This flow is inactive out of box.
Task Intelligence - DocIntel Process Extracted Values	This flow is inactive out of box.

Machine learning models

The sentiment analysis feature uses the *ml_x_snc_global_global_sentiment* machine learning model. This model is provided with the Task Intelligence for Customer Service application.

Scheduled job for categorization solution training

The system administrator can run the *Categorization solution training* scheduled job on demand.

Note:
It is recommended that you import a training data set to the Case table [sn_customerservice_case] to support the initial training of the Categorization machine learning model. The training data set should be tailored to the Case fields that you want to predict and include additional case records that have the correct labels (i.e., the expected field values) for the specific fields being predicted. By creating this data set, you leverage your own data to train the algorithm to predict on the fields you select.

The system administrator can set the following parameters before running the scheduled job.

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Parameters for Scheduled jobs

Parameter	Description
trainNewSolution	Set to true to train a new solution. Set to false to retrain a solution and add the name of the solution in the *existingSolutionName* parameter.
inputFields	The fields that are used to train the model. For example: `["short_description","description"];`
outputFields	The fields to be predicted. For example: `["priority","category"];`
encodedQuery	The query that is applied to the data used for training.
existingSolutionName	The name of an existing solution. Add a name to this parameter if retraining a solution.

To determine when a solution is ready to be used for categorization predictions, the system administrator can check the status of the scheduled job. Once the state is Solution Complete, the solution can be used for predictions.

Scheduled job for publishing previously deployed models

The system administrator can run the *Deploying Task Intelligence for Customer Service Management* after upgrading the Task Intelligence for Customer service plugin.

This scheduled job verifies if there are previously deployed models for record categorization, sentiment analysis, language detection, and Document Intelligence and publishes these models.

Configure Task Intelligence for Customer Service

Install the Task Intelligence for Customer Service application and configure the different features: record categorization, language detection, Sentiment Analysis, and Document Intelligence for Customer Service.

Install and configure Task Intelligence features

Complete the following tasks to install Task Intelligence for Customer Service and configure the features.

Task Intelligence feature configuration

Task	Description
Install the Task Intelligence for Customer Service application	You can install the Task Intelligence for Customer Service application (com.snc.csm_ml_task) if you have the admin role.
Configure record categorization	Activate the required plugins and import training data. Then you can create and train a model to predict field values.

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Task Intelligence feature configuration (continued)

Task	Description
Configure Sentiment Analysis	Activate the required plugins, enable the sentiment analysis property, and assign roles. Then you can train a model to predict case sentiment.
Configure language detection	Activate the required plugins and the ServiceNow translator to use the language detection feature. Then you can set up a model to detect the case language.
Configure Document Intelligence for Customer Service	Enable Document Intelligence for Customer Service and create use cases to extract data.

Set up and deploy Task Intelligence models

Once you have completed the configuration tasks, you can use the Task Intelligence Admin Console to set up and deploy models for record categorization, sentiment analysis, and language detection. You can also use the Task Intelligence Admin Console to access the Document Intelligence Admin interface, which you can use to create document processing use cases.

Model deployment in Task intelligence

Task	Description
Create a model to predict record fields	Create and train a model to predict fields for cases and interactions.
Create a model to predict case sentiment	Edit and test the pre-trained sentiment model to predict sentiment for customer service cases.
Create a model to detect case language	Edit and test the pre-trained model to detect the language used to create customer service cases.
Create a Document Intelligence use case	Create a use case to identify the information to extract from email and case attachments.
Create a model to predict similar cases	Test and edit the pre-trained similar cases model for predicting similarity in customer service cases and create a new model for custom cases.
Edit a model	Edit the case models that have already been trained and deployed. Change the model configurations, view the updated training results, and redeploy the model.
Export a model	Export a Task Intelligence model to another instance.
Create a custom similar case model	Set up a training model to help it recognize similarities between two types of tables by comparing their fields. The model looks at the prediction fields of a prediction table and the training fields of a training table. It uses the similarities in these fields to predict similar records.

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Related topics

Task Intelligence for Customer Service

Use Task Intelligence for Customer Service

Configure record categorization

Activate the required plugins, import training data, and create and train a model to predict field values for case and interaction records.

Steps to configure record categorization

Step	Description
Ensure that your instance is set up for Predictive Intelligence (PI).	Predictive Intelligence is a ServiceNow platform feature that provides a layer of artificial intelligence, which serves as a framework for machine learning models. For more information, see Predictive Intelligence.
Activate the Task Intelligence for Customer Service application (com.snc.csm_ml_task).	The Task Intelligence for Customer Service application enables customers to create and train categorization machine learning models. This application automatically activates the following plugins: • Predictive Intelligence for Customer Service Management (com.snc.csm_ml) • Customer Service (com.sn_customerservice) • Skills Management (com.snc.skills_management) • Dynamic Translation (com.glide.dynamic_translation) • ServiceNow Language Detection Service Spoke (com.glide.language_detection_spoke) • Predictive Intelligence - Task Intelligence (com.glide.platform_ml_task) • Admin Center for Task Intelligence (com.sn_ti_admin)
Import a training data set.	You can use the record categorization feature with the Case table [sn_customerservice_case], tables that extend the Case table, and the Interaction table [interaction]. It is recommended that you import a training data set into the desired table to support the initial training of a categorization model.

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Steps to configure record categorization (continued)

Step	Description
	Note: This data should include case types if you have tables that extend the Case table. The training data set should be tailored to the fields that you want to predict. It should also include additional records that have the correct labels (for example, the expected field values) for the fields being predicted. Creating a training data set enables you to leverage your own data to train the algorithm to predict on the fields you select. 1. Identify the table and the fields that you want your model to predict. 2. Select the table and records for training the model. 3. Identify the fields in the selected table as the input values to be used for training the model.
Set up and deploy at least one categorization model.	For details, see Create a model to predict record fields.

Related topics

Record categorization

Configure Sentiment Analysis

Activate the required plugin, enable the sentiment analysis property, and assign roles to use the sentiment analysis feature.

Follow the steps in the table below to configure the sentiment analysis property for cases.

Sentiment analysis configuration steps

Step	Description
Ensure that your instance is set up for Predictive Intelligence (PI).	Predictive Intelligence is a ServiceNow platform feature that provides a layer of artificial intelligence, which serves as a framework for machine learning models. For more information, see Predictive Intelligence.
Activate the Task Intelligence for Customer Service application (com.snc.csm_ml_task).	The Task Intelligence for Customer Service application enables customers to leverage machine learning algorithms in Customer Service Management. The sentiment analysis feature is included with this application.

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Sentiment analysis configuration steps (continued)

Step	Description
	This application automatically activates the following plugins: • Predictive Intelligence for Customer Service Management (com.snc.csm_ml) • Customer Service (com.sn_customerservice) • Skills Management (com.snc.skills_management) • Dynamic Translation (com.glide.dynamic_translation) • ServiceNow Language Detection Service Spoke (com.glide.language_detection_spoke) • Predictive Intelligence - Task Intelligence (com.glide.platform_ml_task) • Admin Center for Task Intelligence (com.sn_ti_admin)
Configure the Case list and Case form to display the sentiment analysis fields.	The sentiment analysis feature adds the following fields: • **Original sentiment** • **Current sentiment** • **Sentiment over time** Configure these fields for each of the following interfaces as needed: • CSM Configurable Workspace • CSM Agent Workspace • Core UI Platform interface
Use the Task Intelligence Admin Console to create and deploy a sentiment model.	See Create a model to predict case sentiment.

Configure sentiment analysis fields

The sentiment analysis feature uses the following fields to display sentiment prediction information on Cases list and Case form:

- Original sentiment
- Current sentiment
- Sentiment over time

Add the sentiment fields to Case list views and to the Case form for CSM Configurable Workspace, CSM Agent Workspace, and Core UI.

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- In CSM Configurable Workspace, these fields appear as secondary values in the configurable form header. You can configure secondary values to display either below the primary value at the top of the form or in the Record Information tab in the contextual side panel. (For more information, see Display the form ribbon and form header secondary values in the Contextual side panel.)
- In CSM Agent Workspace, these fields appear in the Case form header.
- In Core UI, these fields appear on the Case form.

Sentiment analysis fields

Field	Description
Original sentiment	The sentiment that is predicted when a case is created. The values for this field include: • Positive • Neutral • Negative
Current sentiment	The most recent sentiment prediction for the case. This prediction is assessed when a case is created and updated. The values for this field include: • Positive • Neutral • Negative When a case is created, the **Original sentiment** and **Current sentiment** are assigned the same value. When a case is updated, the **Original sentiment** remains the same and the **Current sentiment** is updated with the most recent prediction.
Sentiment over time	A trend indicator that reflects the change in sentiment as a case is updated. The values for this field include: • Improving • Neutral • Declining This field requires a minimum of two sentiment predictions in order to calculate a value.

Configure sentiment fields for CSM Agent Workspace

To add the sentiment fields to the Case list:

1. Enter **sys_aw_list.list** in the application navigator and press **Enter**.
2. Click **All** from the Case [sn_customerservice_case] table.
3. Click the lock icon next to the **Columns** field.

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4. Select and move the sentiment fields from the **Available** column to the **Selected** column.
5. Click the lock icon again.
6. Click **Update**.

To add the sentiment fields to the Case form header:

1. Select **CSM Workspace** as the application scope.
2. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Form Header**.
3. In the Table column of the Form Headers list, select **sn_customerservice_case**.

   If adding sentiment fields for a case type, select the case type table that extends the Case table.

4. Click **New** in the Secondary Values related list.
5. Select the desired sentiment field in **Field** field and click **Submit**.
6. Repeat step 5 for the remaining sentiment fields.
7. Click **Update** on the Form Header form.

Configure sentiment fields for CSM Configurable Workspace

To add the sentiment fields to the Case list:

1. Enter **sys_ux_list.list** in the application navigator and press **Enter**.
2. Click **All** from the Case [sn_customerservice_case] table.
3. Click the lock icon next to the **Columns** field.

   If adding sentiment fields for a case type, select the case type table that extends the Case table.

4. Select and move the sentiment fields from the **Available** column to the **Selected** column.
5. Click the lock icon again.
6. Click **Update**.

To add the sentiment fields to the Case form header:

1. Select **CSM Workspace** as the application scope.
2. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Form Header**.
3. In the Table column of the Form Headers list, select **sn_customerservice_case**.
4. Click **New** in the Secondary Values related list.
5. Select the desired sentiment field in **Field** field and click **Submit**.
6. Repeat step 5 for the remaining sentiment fields.
7. In the UX header Configurations list, click **Edit**.
8. In the **Collection** field, add **CSM/FSM Configurable Workspace Header Config**.
9. Click **Update** on the Form Header form.

Configure sentiment fields for Core UI

To add the sentiment fields to the Case list:

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1. Navigate to **Customer Service** > **Cases** > **All**.
2. Right-click the list header and select the desired list view.
3. Right-click any column heading and select **Configure** > **List Layout**.
4. Select and move the fields from the **Available** column to the **Selected** column.
5. Click **Save**.

To add the sentiment fields to the Case form:

1. Navigate to **Customer Service** > **Cases** > **All**.
2. Open a case.
3. Right-click the form header and select **Configure** > **Form Layout**.
4. Select and move the fields from the **Available** column to the **Selected** column.
5. Click **Save**.

Related topics

Sentiment Analysis

Configure language detection

Activate the required plugins and flows to use the language detection feature.

For more information about the languages supported by language detection, see this topic: Languages supported by Task Intelligence.

Follow the steps in the table below to configure the language detection feature for cases.

Language detection configuration steps

Step	Description
Ensure that your instance is set up for Predictive Intelligence (PI).	Predictive Intelligence is a ServiceNow platform feature that provides a layer of artificial intelligence, which serves as a framework for machine learning models. For more information, see: • Predictive Intelligence • Machine learning solutions for Customer Service Management
Activate the Task Intelligence for Customer Service application (com.snc.csm_ml_task).	The Task Intelligence for Customer Service application enables customers to leverage machine learning algorithms in Customer Service Management. The sentiment analysis feature is included with this application. This application automatically activates the following plugins: • Predictive Intelligence for Customer Service Management (com.snc.csm_ml) • Customer Service (com.sn_customerservice)

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Language detection configuration steps (continued)

Step	Description
	• Skills Management (com.snc.skills_management) • Dynamic Translation (com.glide.dynamic_translation) • ServiceNow Language Detection Service Spoke (com.glide.language_detection_spoke) • Predictive Intelligence - Task Intelligence (com.glide.platform_ml_task) • Admin Center for Task Intelligence (com.sn_ti_admin)
Activate the ServiceNow translator.	To activate the translator: 1. Navigate to **Dynamic Translation** > **Translator Configurations**. 2. Select ServiceNow in the list of configurations. 3. Enable the **Active** check box and click **Update**.

Related topics

Language detection

Configure Document Intelligence for Customer Service

Enable Document Intelligence for Customer Service and create use cases to extract data.

Document Intelligence for Customer Service configuration steps

Step	Description
Ensure that your instance is set up for Predictive Intelligence (PI).	Predictive Intelligence is a ServiceNow platform feature that provides a layer of artificial intelligence, which serves as a framework for machine learning models. For more information, see Predictive Intelligence.
Activate the Task Intelligence for Customer Service application (com.snc.csm_ml_task).	The Task Intelligence for Customer Service application enables customers to create use cases for Document Intelligence and extract relevant information from PDF and image files. This application automatically activates the following plugins:

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Document Intelligence for Customer Service configuration steps (continued)

Step	Description
	• Predictive Intelligence for Customer Service Management (com.snc.csm_ml) • Customer Service (com.sn_customerservice) • Skills Management (com.snc.skills_management) • Dynamic Translation (com.glide.dynamic_translation) • ServiceNow Language Detection Service Spoke (com.glide.language_detection_spoke) • Predictive Intelligence - Task Intelligence (com.glide.platform_ml_task) • Admin Center for Task Intelligence (com.sn_ti_admin)
Activate the Document Intelligence Admin application (com.snc.docintel_admin)	The Document Intelligence Admin application enables customers to create and configure use cases for extracting data. Activating this application automatically activates the properties and flows used by Document Intelligence for Customer Service.
(Optional) Configure the sn_csm_ml_task.case.docintel.parsing_supported_types system property.	Supported attachment types for Document Intelligence include: • image/png • image/jpeg • application/pdf You can configure the property to use a subset of these attachment types.
Use the DocIntel Admin experience to create one or more use cases.	• Create a use case that identifies the information to extract from email and case attachments. • Define the fields to be extracted. • Select conditions for a use case that tell the Document Intelligence feature when to run. For more information, see Create a Document Intelligence use case.

Document Intelligence for case types

When you create a case type that extends the Case [sn_customerservice_case] table, you need to configure the **Review in DocIntel** UI action for the case type table.

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Related topics

Document Intelligence for Customer Service

Review and submit values predicted by Document Intelligence

Document Intelligence

Create a model to predict record fields

Create and train a model to predict fields for case and interaction records.

Before you begin

Role required: ml_admin, ti_admin

About this task

The field prediction model is a guide that includes some recommended settings. You can use these settings, such as the recommended input fields, or add your own preferences.

You can create and train multiple field prediction models for cases, case types, and interactions.

Set up your model

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup** to access the Task Intelligence Admin Console.
2. Select **Set up model** on this model: **Predict field choices to reduce handle time**.

This opens the model and displays the first of five pages. Each page in the model asks you questions and helps you select the information you need to build an effective model.

Define the purpose

Select the table and the trigger for the model's predictions.

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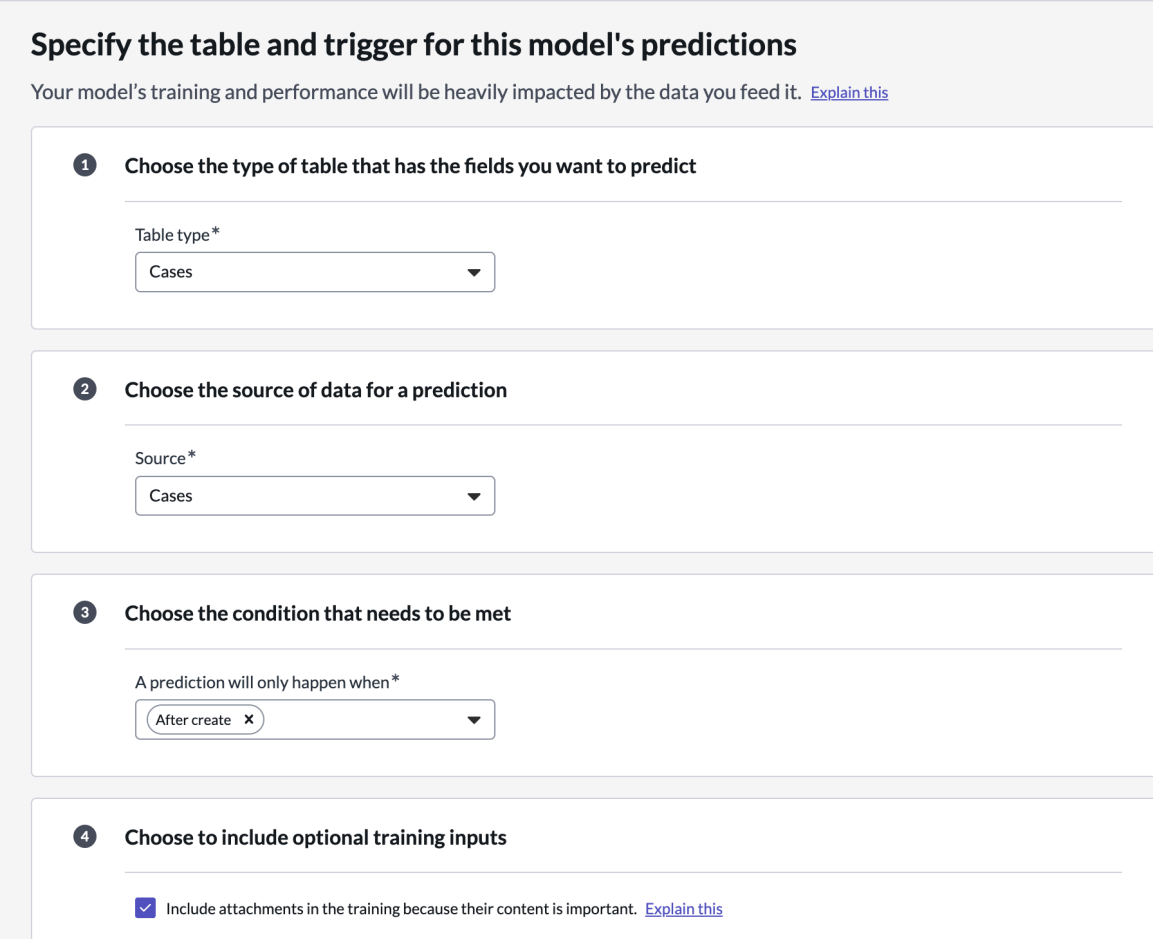

You can have the model predict case or interaction fields when a new customer email arrives or when an interaction is created. Base your decision on the data that your model should use to make the predictions.

Select the table and trigger	
Choose the type of table that has the fields you want to predict	Select the table type: • Cases • Interactions The model uses data from the selected table to make predictions.
Choose the moment or channel that should trigger a prediction	Select the trigger for the prediction: • Cases • Emails • Interactions
Choose to include optional training inputs	Enable the check box to include attachments when training the model.

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Select the table and trigger (continued)

	Email and record attachments can have information that is useful for routing records correctly.

1. Choose a table type for the model.
2. Choose the prediction trigger.
3. If desired, enable the check box to include attachment data.

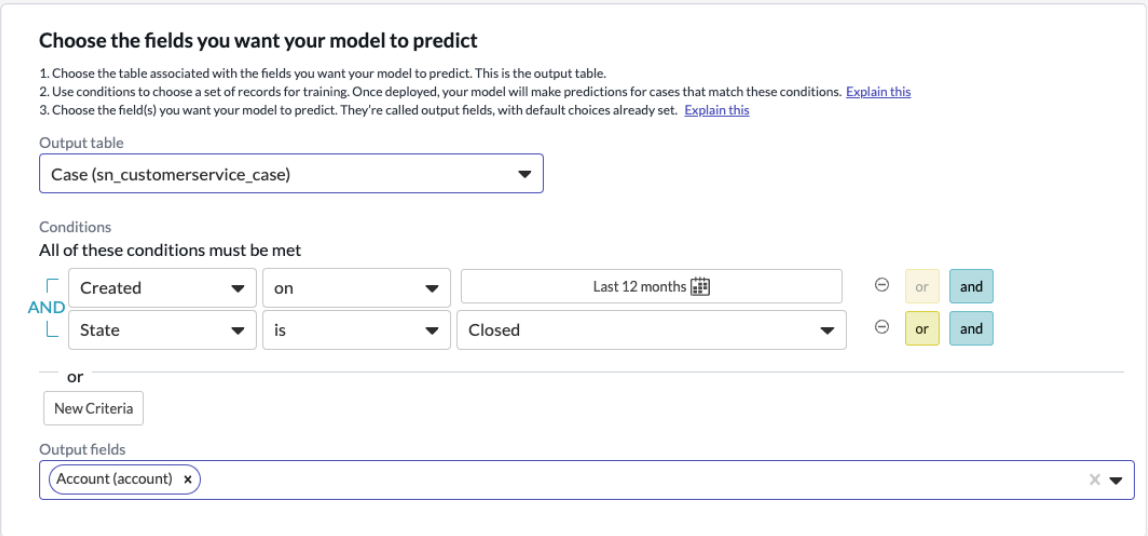
   Include text from email or record attachments if this information is useful for making predictions. The model can evaluate attachment data, along with email or record text, to make predictions.
4. Select **Save & continue**.

Train your model

Select the input fields and output fields so your model can learn patterns. Output fields are the fields that you want the model to predict. Input fields are the fields that the model uses to make predictions.

Selecting this information tells the model what to look for during training.

Note:
You can use the recommended settings or select different ones.



1. Provide a name for the model.
2. Choose the output table and the output fields for the model to predict.
3. Select conditions to choose a set of records for training.

   The selected conditions determine both how the model is trained and act as a filter for the conditions that a record has to meet in order for predictions to be made.

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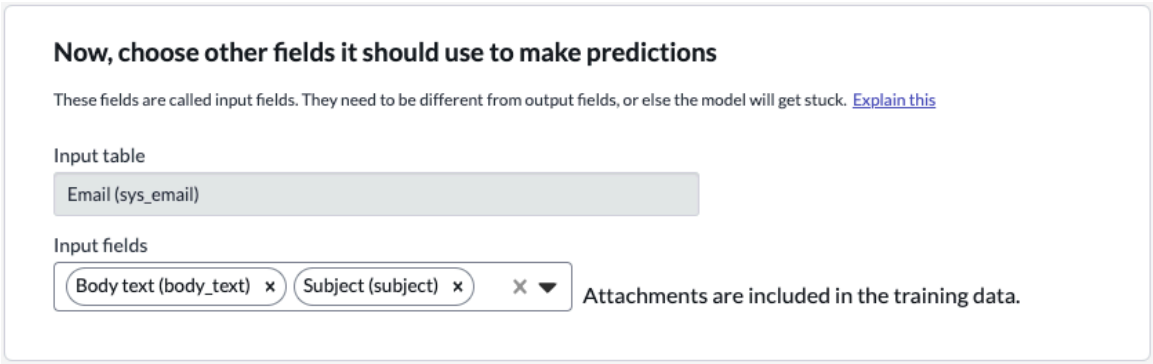
4. Select the fields in the training data that the model should use to make the predictions (input fields).



5. Choose the input fields.
6. Review the resulting number of cases in the training data based on the selected conditions.

   The model needs a minimum of 500 records for effective training. If this minimum number isn't available, try selecting different conditions.

7. Select **Launch training**.

   Training can take some time, particularly if you are training the model on a large amount of data. You can request that the system send you an email when the training is done.

Assess your model

Assess the results from the training and view sample results for the predicted fields. Reviewing the results gives you a preview of how your model will perform after being deployed.

Select the prediction preference for each field. The model provides flexible options to autofill field values, provide recommendations for field values, monitor only, or turn off predictions depending on the sensitivity of those fields.

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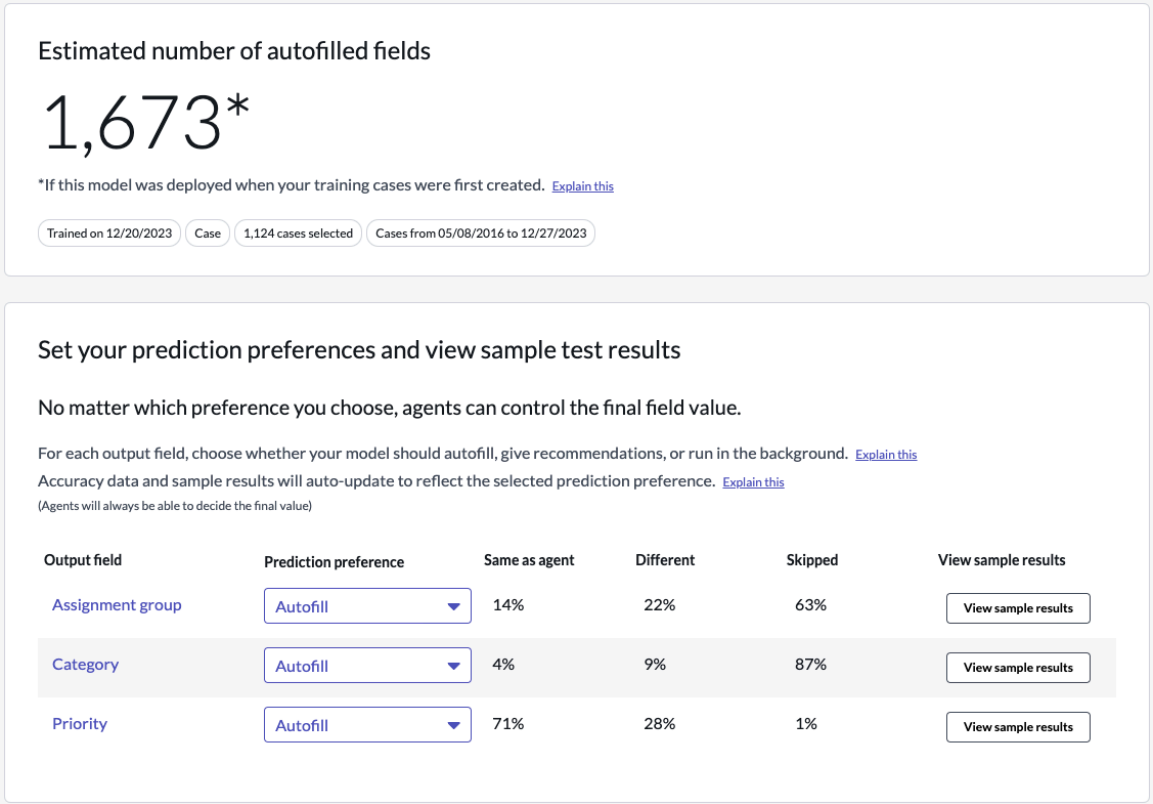

1. Select a **Prediction preference** for each enabled field.

Autofill	Adds the best predicted value to the field on the record.
Recommendations	Shows the recommended value in a message below the field.
Monitor only	The system makes the field predictions and stores the information in the Predictions History but does not add any information to the case records.
Turn off predictions	Turns off predictions for the field.

2. Select **View sample results** to see sample results for each predicted field.
3. Select **Save & continue**.

Deploy your model

Review your choices from the previous pages and information about how the model was trained. Then you can select **Deploy** to deploy the model.

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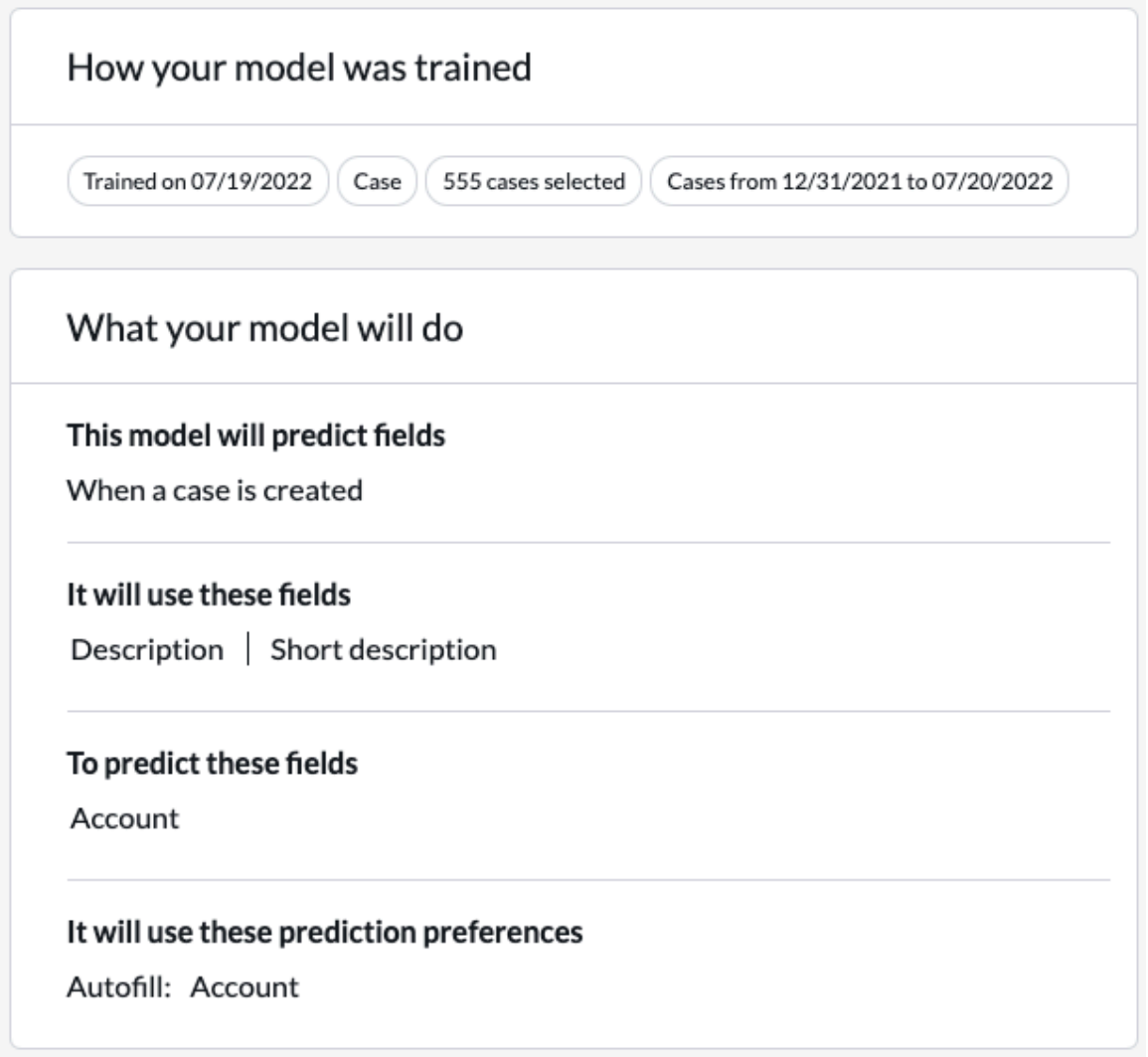

Create a model to predict case sentiment

Edit and test the pre-trained sentiment model to predict sentiment for customer service cases.

Before you begin

Role required: ml_admin, ti_admin

About this task

The case sentiment model is pre-trained with a large data set to learn communication patterns. You select a set of records to test the model and then view the results before deploying.

Set up your model

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup** to access the Task Intelligence Admin Console.
2. Select **Edit model** on this model: **Predict case sentiment to improve CSAT**.

   This opens the model and displays the first of five pages. Each page in the model asks you questions and helps you select the information you need to build an effective model.

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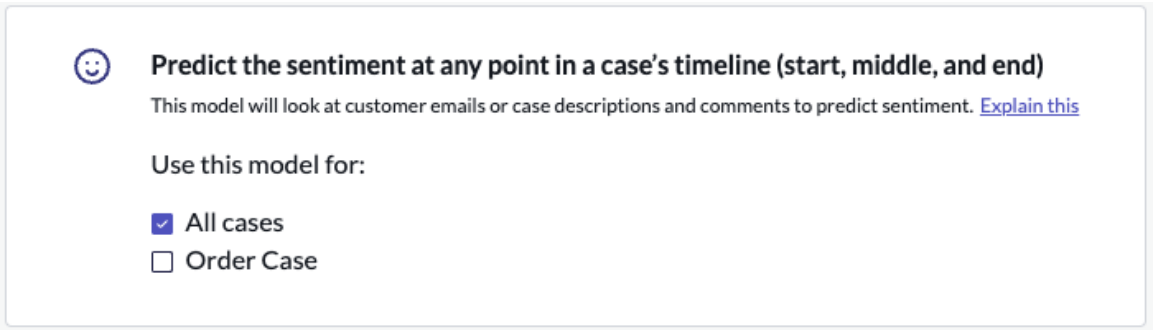
Define the purpose

Tell the model when you want it to make predictions.



The sentiment model is pre-trained with a large data set to understand communication patterns. This data comes from customer emails and from case descriptions and comments.

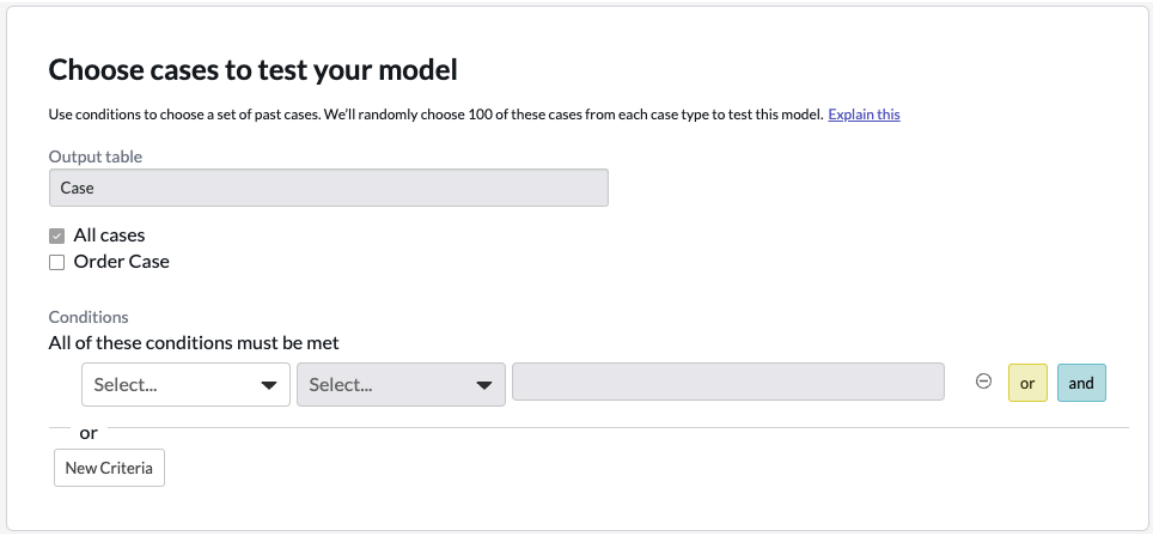
1. Select the table that contains the records to be tested.

   Select **All cases** to test records in the Case table or select a case type table.

2. Select **Save & continue**.

Test your model

Choose the cases to use to test the model.



Selecting this information tells the model what type of records to use for testing. When the model is deployed, it predicts sentiment on all records in the table that match the selected conditions.

1. Use conditions to choose a set of records for testing.
2. Select **Launch testing**.

Assess your model

Assess the results from the testing and view sample results for past cases.

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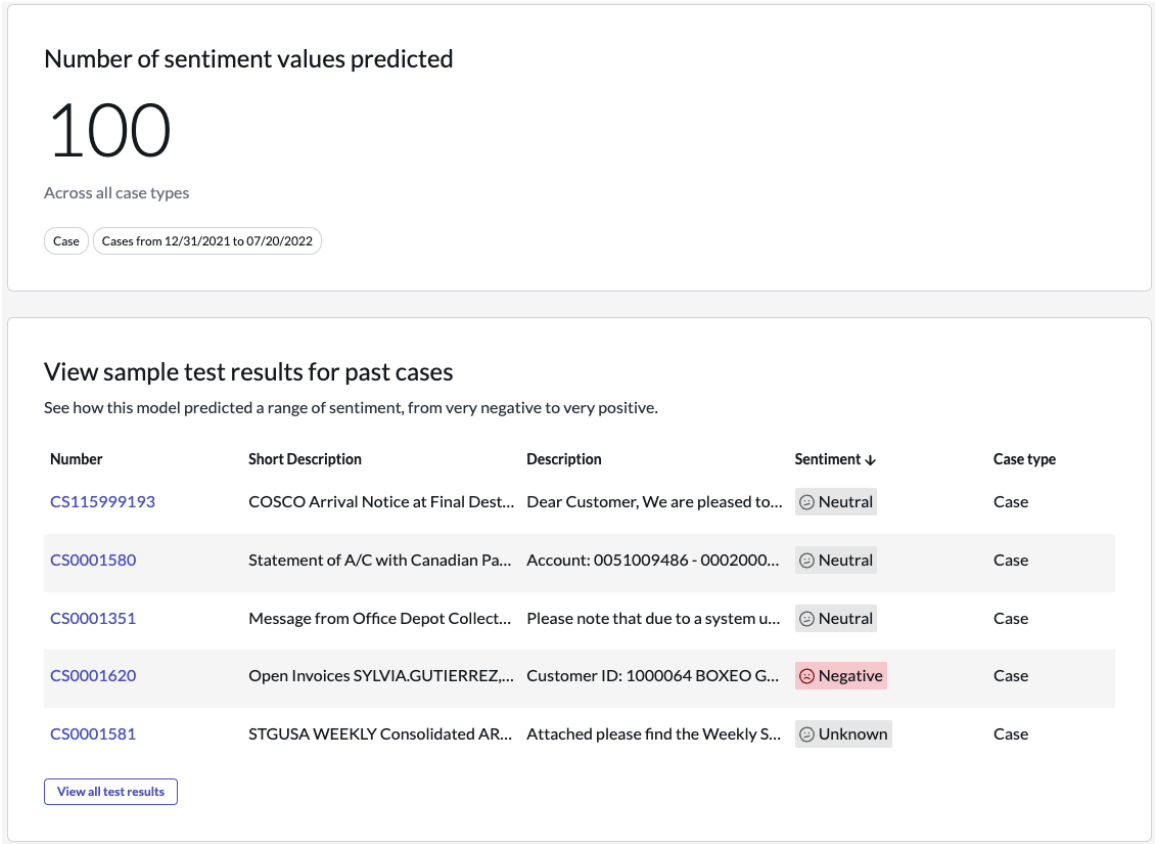
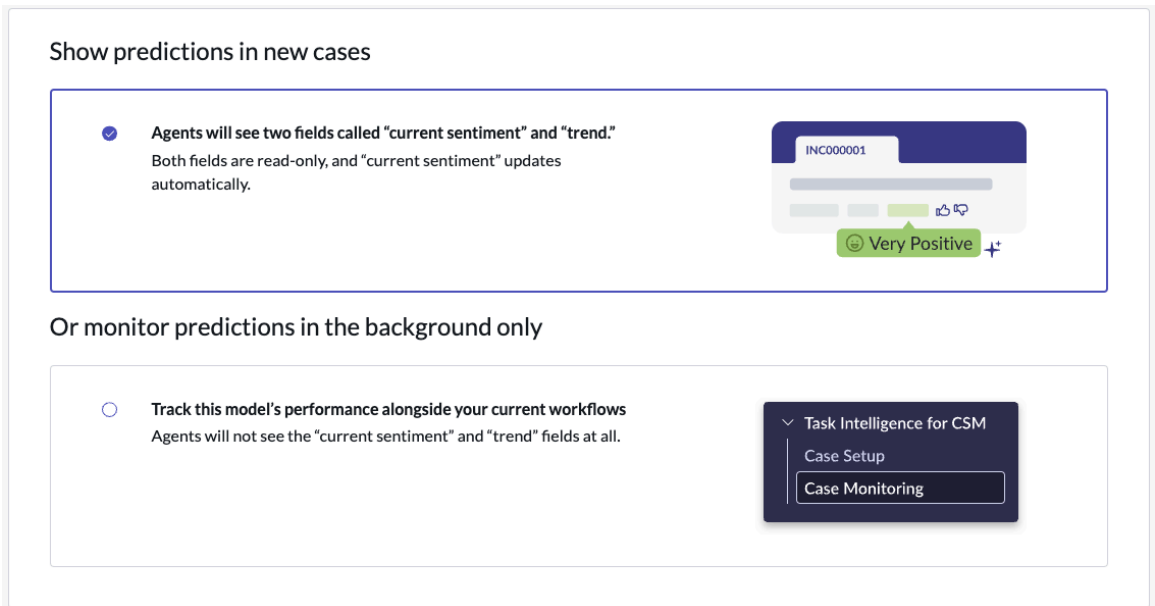


Reviewing the results gives you a preview of how your model will perform after being deployed.

1. Select **View all test results** to see a list of results.
2. Select **Save & continue**.

Set your preferences

Tell the model how you want to use the sentiment predictions.



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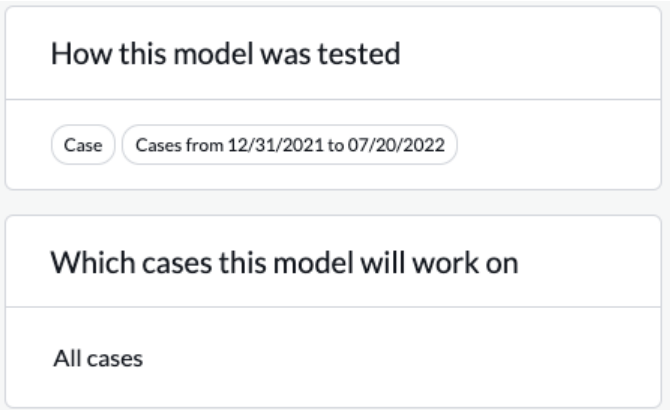
1. Display predictions in the **Current sentiment** and **Sentiment over time** fields.
2. If desired, you can run the model in the background only.

   With this option, the system makes the predictions and stores the information in the Predictions History but does not add any information to the case records.
3. Select **Save & continue**.

Deploy your model

Review your choices from the previous pages. Then you can select **Deploy** to deploy the model.



Create a model to detect case language

Edit and test the pre-trained model to detect the language used to create customer service cases.

Before you begin

Role required: ti_admin

About this task

The language detection model is a pre-trained model. You select a set of records to test the model and then view the results before deploying.

Using the language detection model automatically enables the Task Intelligence Case Language Detection flow and the *sn_csm_ml_task.case.language.mlpredictor.enabled* property.

Prerequisite

- Activate the I18N: Internationalization plugin
- Enable the ServiceNow translator.

For more information, see Configure language detection.

Set up your model

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup** to access the Task Intelligence Admin Console.
2. Select **Edit model** on this model: **Predict case language to improve assignments**.

   This opens the model and displays the first of four pages. Each page in the model asks you questions and helps you select the information you need to build an effective model.

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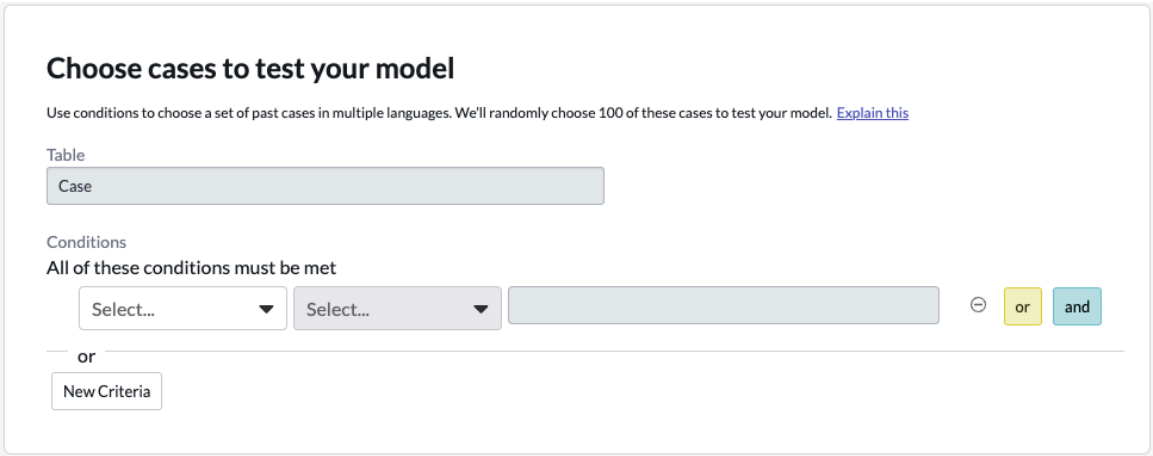
Test your model

Choose the cases to use to test the model.

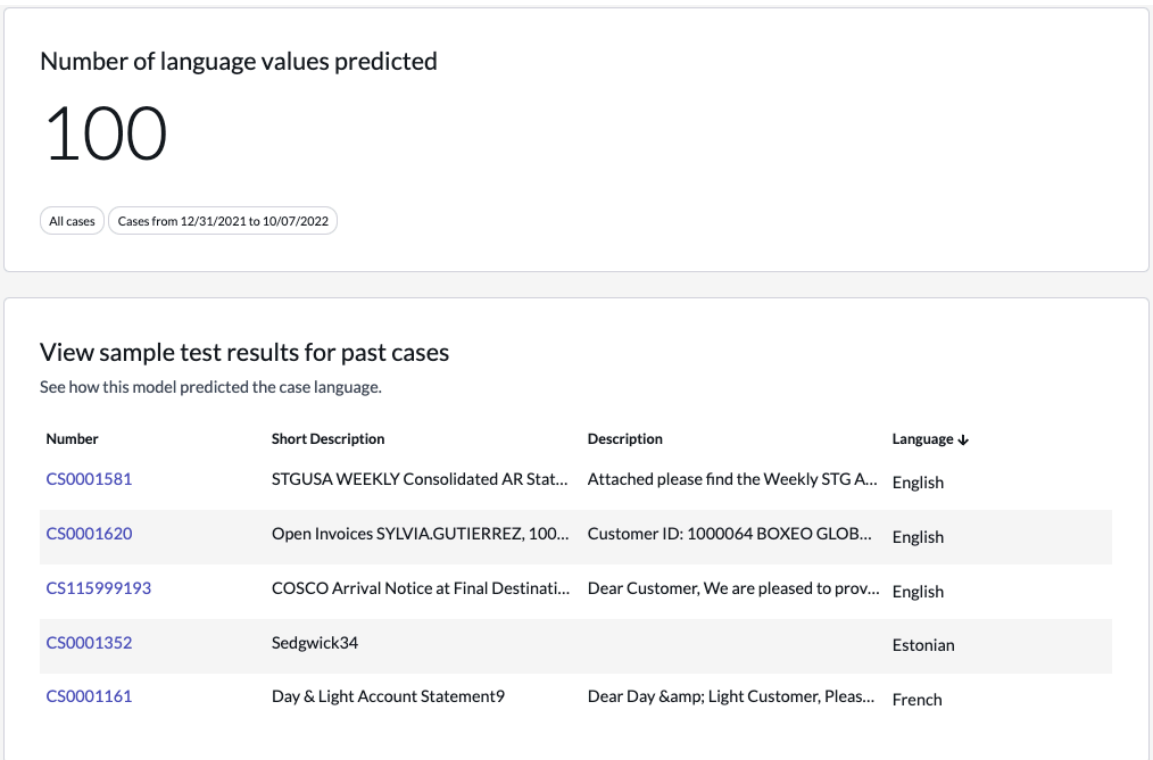


Selecting this information tells the model which records to use for testing. When the model is deployed, it predicts the language on all records in the table that match the selected conditions.

1. Use conditions to choose a set of records for testing.
2. Select **Launch testing**.

Assess your model

Assess the results from the testing and view sample results for past cases.



Reviewing the results gives you a preview of how your model will perform after being deployed.

1. Select **View all test results** to see a list of results.
2. Select **Save & continue**.

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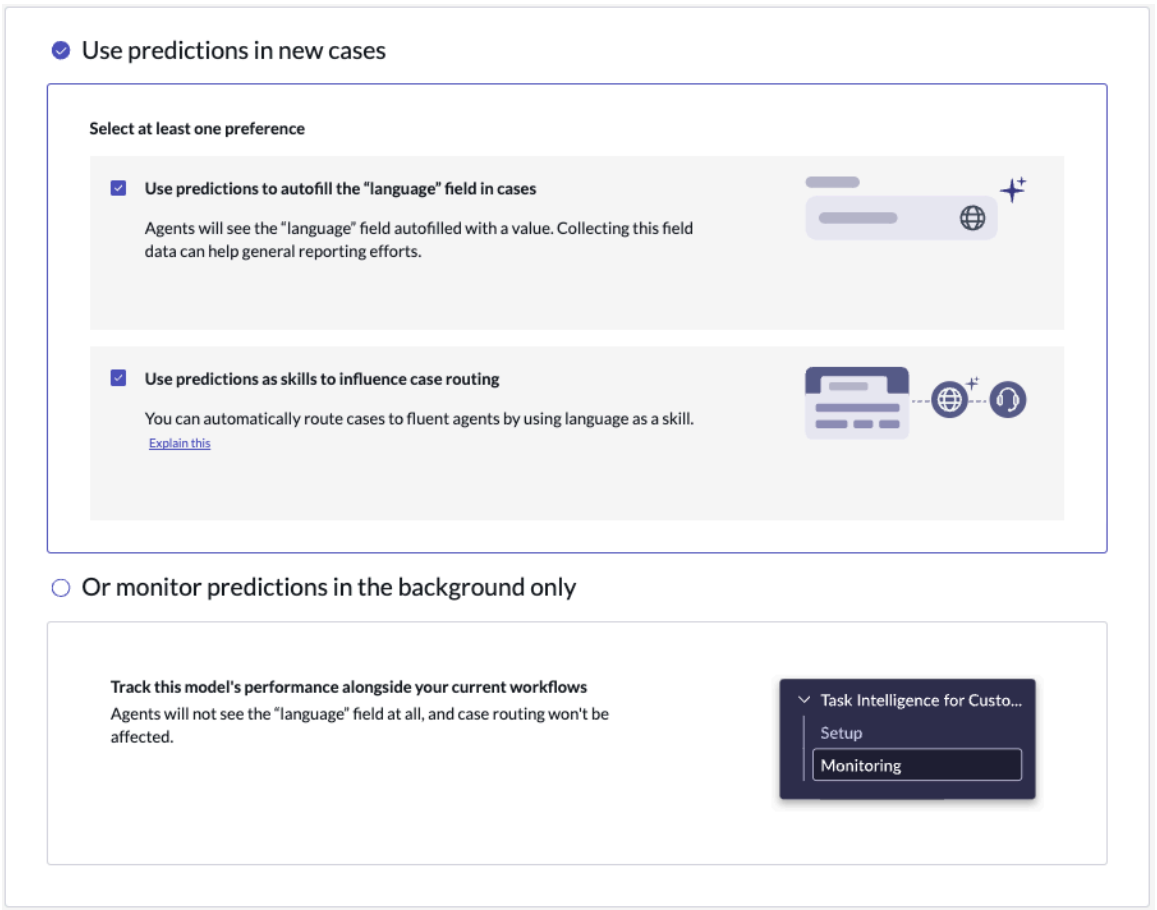
Set your preferences

Tell the model how you want to use the language predictions.



1. Use predictions in new cases.
   a. Add the predicted language in the **Language** field in cases.
   b. Use the language prediction as a skill to assist with case routing (add the language skill to the Task Skills table for the case record).
2. If desired, you can run the model in the background only.

   With this option, the system makes the language predictions and stores the information in the Predictions History but does not add any information to the case records.
3. Select **Save & continue**.

Deploy your model

Review your selections from the previous pages. Then you can select **Deploy** to deploy the model.

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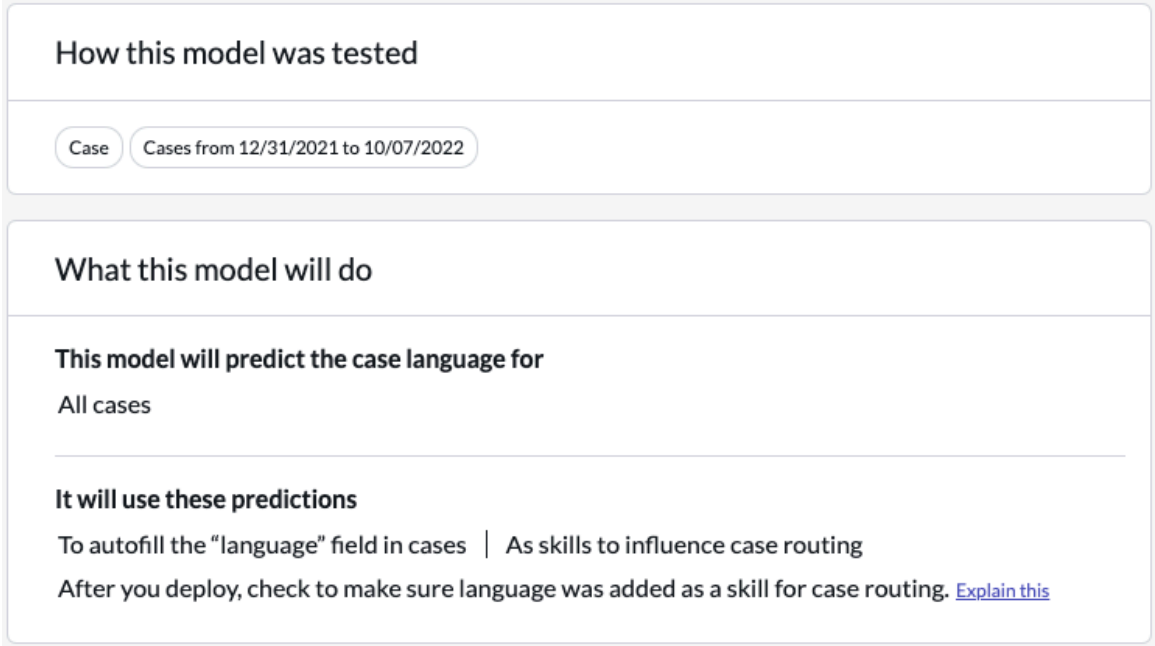

Create a Document Intelligence use case

Create a use case that identifies the information to extract from email and case attachments and determines how users with CSM agent roles interact with the extracted values in the Document Intelligence workspace.

Before you begin

Role required: sn_csm_ml_task.ti_analyst, sn_csm_ml_task.ti_admin, ti_admin

About this task

A use case contains the list of fields to extract from attachments and a mapping of those fields to fields in the Case table or a case type table. It also contains an extraction mode that controls how the values for the extracted fields are added to the case.

Use cases include the following information.

Use case form fields and descriptions

Use case information	Description
Fields	Configure the list of fields to predict for a use case. A field is a single piece of information to extract from a document. For example, the date on a document.
Document tasks	Create a document task and include attachments that are used to train the Document Intelligence model to identify the correct information.
Integrations	Select conditions for a use case that tell the Document Intelligence feature when to run.

Prerequisite

- Activate Task Intelligence for Customer Service (com.snc.csm_ml_task).
- Activate Document Intelligence Admin (com.snc.docintel_admin).

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For more information, see Configure Document Intelligence for Customer Service.

Access the DocIntel Admin experience

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup** to open the Task Intelligence Admin Console.
2. In the Explore related applications section of the console, select **Open DocIntel** in the Document Intelligence card to open the DocIntel Admin experience.

Create a use case

Create a use case to identify a document or set of documents to be processed together in Document Intelligence. With Document Intelligence for Customer Service, the Use Cases list in the DocIntel Admin experience uses a default filter with an OR condition to show use cases for:

- Application = Task Intelligence for Customer service -or-
- MLUC ID = MLUC CSM-00003

To create a use case:

1. Select **Use Cases** in the DocIntel Admin header.
2. Select **New use case** in the Use Cases list.
3. In the Define a new use case pop-up window, enter the following information.

Define a new use case pop-up window

Field	Definition
Name	The name of the use case.
Location for the extracted data	The table that contains the records to be automatically populated with data extracted from attachments. Set this field to the case or case type that is relevant to your use case.
Extraction mode set by default	The extraction mode determines how the results are displayed to agents in the Document Intelligence workspace. The DocIntel Admin starts by showing the results for each use case as recommendations.

4. Select **Save** to add the use case to the Use Cases list.

Define the fields to extract

After creating a use case, select the fields that you want to extract. You can select one or more fields for a use case. These fields can be of the text or Boolean type.

Note:
The fields to be extracted should already exist in the use case target table. If the fields do not exist in the target table, add them to the table and then complete this step.

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1. Select a use case in the Use Cases list.
2. Select the Fields tab.

   This tab lists the fields that have been selected for extraction for the use case.
3. Select **Define your fields**.

   If you have already defined one or more fields and you want to add another field, select **New field**.
4. Fill in the fields in the Define a new field pop-up window.

Define a new field pop-up window

Field	Definition
Use case	[Read only] The use case associated with this field record.
Field Name	The display name of the field to extract as it appears in the Document Intelligence workspace.
Field Type	The type of field (for example, a text field or a check box option). Field type is read-only if you add this field to a field group. The field type is whatever is designated for the group. Some field types convert the extracted value into a standard format. See Data normalization.
Is field required	[Text and number fields only] Required fields can't be left empty or unreviewed.
Add field	Select the field group that you want to add the field to.
Target Table	[Read only] The table that stores the document processing results for this use case.
Target Field	Field on the target table you want to align this field with. Used for integration. **Note:** You must select a use case with a target table.
Define multiple fields	If you're adding more than one field to the use case, enable this check box to keep the pop-up window displayed on the screen.

5. Select **Add field**.

   The system adds the field definition to the Fields list.

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Create a document task

Document tasks include attached documents that are used to train the model to identify and extract the correct information.

1. Select a use case in the Use Cases list.
2. Select the Document tasks tab.

   This tab lists the tasks that have been created for the use case.
3. Select **Create a document task**.

   If you have already created one or more tasks and you want to add another task, select **New document task**.
4. In the Create the document task pop-up window, enter a **Document task name**.
5. Select **+Add File** to add one or more attachments.
6. Select the file and then select **Open**.
7. In the Upload a file pop-up window, select **Upload**.
8. In the Create the document task pop-up window, select **Add Extraction**.

   The system adds the task to the Document Tasks list and Document Intelligence begins the data extraction process, which can take a short time to complete.
   - When the extraction process is complete, the **Is Processed** field is set to true.
   - When the values have been extracted from the document, the **Status** field is set to Done.
9. Open the task and select **Open in Document Intelligence** to view the task in the Document Intelligence Workspace.
10. Train the extracted fields to identify the correct values.
    a. If a field value is correct: put your cursor in the field and press Return to confirm the value.
    b. If a field value is missing: select the value from the list and press Return to confirm the value.
    c. If a field value is incorrect: delete the incorrect value and enter the first few characters of the correct value. When the correct value appears in the list, select it and then press Return.
    d. If a field value is incorrect and the correct value does not appear on the image, select *Missing in the document* from the list.
    e. Select **Submit**.

Create an integration

Select conditions for a use case that tell the Document Intelligence feature when to run.

You can create one or more integrations for a use case. If a use case has more than one Integration, the system uses the latest one at run time.

> **Note:**
> When creating an integration, make sure that the **Create Flow** check box remains unchecked.

1. Select a use case in the Use Cases list.
2. Select the Integrations tab.

   This tab lists the integrations that have been created for the use case.

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3. Select **Set up your first integration**.

   If you have already created one or more integrations, select **Add integration**.

4. In the Create Integration pop-up window, enter a name for the integration.
5. Use the condition builder to select conditions that tell the Document Intelligence feature when to predict values.

   At run time, the system identifies the right task definition based on these filters. The first active task definition that matches the filters for the case or case type is selected.

6. Select **Save**.

Set general Document Intelligence features

General settings determine how the Document Intelligence feature displays information to agents. General settings apply to all use cases.

1. Select **Settings** in the DocIntel Admin header.
2. Enable or disable the **Exact match option**. When enabled, Document Intelligence displays only the candidate values that exactly match what the agent types.
3. Enable or disable the **Candidate score** to display confidence scores for each recommendation.
4. Select a layout for the **Side panels**.
5. Set the **Default width of the extraction panel**.
6. Set the **Default width of the thumbnail panel**.
7. Select the **Default document fit for the image panel**.

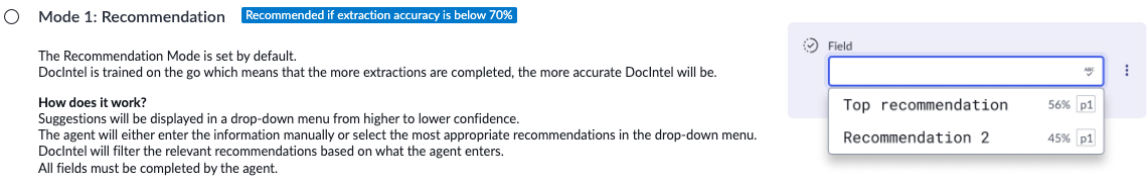
For more information about the general settings, see Configure Document Intelligence.

Configure the data extraction mode

The extraction mode determines how the Document Intelligence workspace handles the extracted values. Two extraction modes are available: Recommendation and Autofill.

- Recommendation mode provides recommendations for the extracted fields in the Document Intelligence workspace. Agents can choose the recommended value for a field or manually enter a value.
- Autofill mode adds values to the fields in the Document Intelligence workspace if the extraction confidence is higher than the **Autofill Threshold** value.

1. Select **Settings** in the DocIntel Admin header.
2. In the left column of the Settings page, expand the Use Cases list and select a use case.
3. Select **Extraction Mode**.
4. To use the Recommendation mode, enable **Mode 1: Recommendation**.



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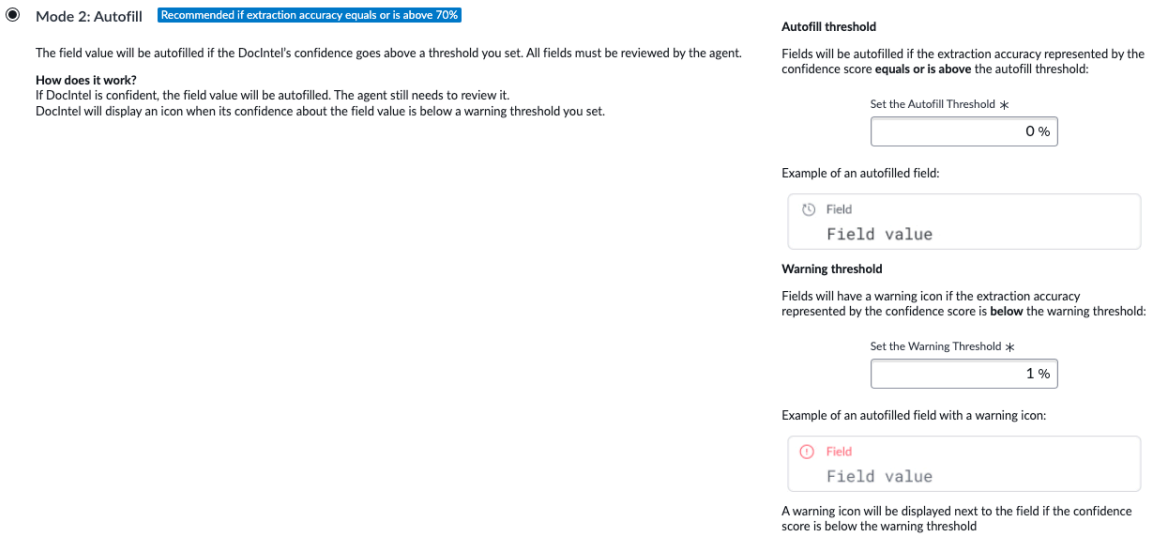
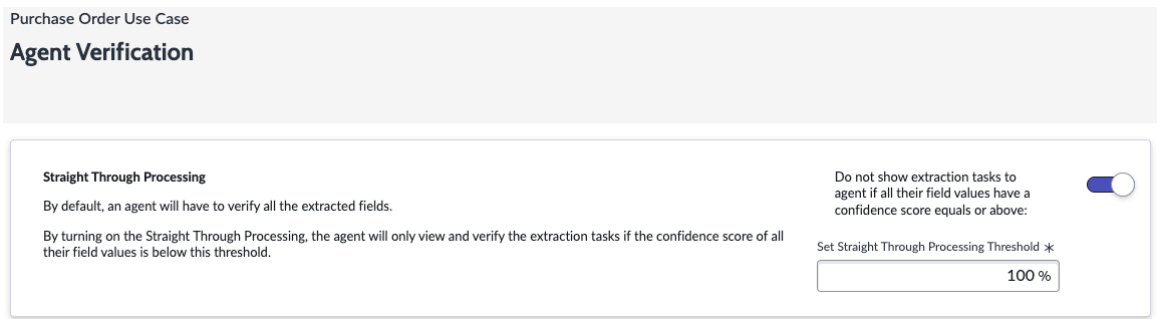
5. To use the Autofill mode, enable **Mode 2: Autofill**.
   a. Enter a percentage value in the **Set the Autofill Threshold** field.
   b. Enter a percentage value in the **Set the Warning Threshold** field.



Configure the agent verification setting

By default, agents review and verify the fields with values that are extracted from attached documents. You can enable Straight Through Processing to automatically populate these fields with extracted values. When enabled, agents only review and verify the extraction tasks if the confidence score of all field values is below the set threshold.

1. In the left column of the Settings page, expand the Use Cases list and select a use case.
2. Select **Agent Verification**.



3. If desired, enable **Straight Through Processing**.
4. Enter a percentage value in the **Set Straight Through Processing Threshold** field.

Create a model to predict similar cases

Test and edit the pre-trained similar cases model for predicting similarity in customer service cases and create a model for custom cases.

Pre-requisites

Role required: ml_admin, ti_admin

About this task

Base system models: Task Intelligence for Customer Service includes three base system models for predicting similar records for cases:

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- Major Case identifier
- Similar Open Cases
- Similar Resolved Cases

To get recommendations for a major case identifier that includes propose major cases and similar major cases, install the Major Issue Management plugin plugin and activate the feature as needed to get recommendations. When you install the Task Intelligence for CSM plugin in your production instance, the plugin automatically installs and trains the similar open cases, similar resolved cases, and major case identifier models using your data. These models are then auto-deployed. The similar open case and similar resolved case models show predictions on recommended actions on case form. However, recommendations aren't enabled for the major case identifier model in the base system.

Steps to activate Major Case identifier recommendation

1. Navigate to **All** > **Recommended Actions** > **Recommendations.**.
2. Select **Propose major issue** under the Application scope **Task Intelligence for Customer Service**.
3. Check the **Active** check box.
4. Select **Update**.

   Repeat the steps for **Similar major cases**.

Note:

Propose major issue and similar major cases are inactive in the base system.

Enable Suggested Actions on the front line case page record

Before you begin

Role required: workspace_admin, ui_builder_admin, ti_admin, next_best_action_author

Recommended Actions component should be added to the specific record page. (Front line or CSM default record page)

About this task

To enable **Suggested Actions** tab, the admin should activate the **Recommended actions** feature on two specific pages: **Front line case page** and **CSM default record page**. Once activated, agents can view the recommendations on these pages.

Note:
For CSM default record page, first wire Recommended actions on this CSM default record page first, and then enable the **Suggested Actions** tab in UIB via the component property.

To enable **Suggested Actions** feature in the Recommended Actions component, follow the following steps:

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1. Navigate to **All**> **Now Experience Framework** >**Experiences**.
2. Select the UX application **CSM/FSM Configurable Workspace**.
3. Select **Open in UI Builder**.
4. Navigate to **Record** under **Pages and variants**.
5. Select **Front-line Case page**.

> **Note:**
> Verify that you are in the accurate scope to be able to edit.

6. Select **Recommended Actions 1** under the Tabs.
7. In the Configure tab, turn off the toggle for **Hide recommended actions**.
8. Select **Save**.

By following these steps, you successfully activate the Recommended Actions feature, enabling agents to view suggestions under Recommendations in the CSM/FSM Configurable Workspace. When you open a case, you find the recommendations section with two tabs: **Search** and **Suggested Actions**. The recommendations are displayed under **Suggested Actions**.

Enable Recommended actions in the CSM default record page

1. Navigate to **All**.
2. In the search box, enter sys_ux_screen_condition.list and press enter.
3. Select the filter icon, enter **[Screen] [contains] [Recommeded Actions default]** and **[Application] [is] [Recommeded Actions]**, and select **Run**.
4. Select the **true** link under **Active**.
5. On the **UX Screen Condition** page in the Script, replace the return value with **true**.
6. Select **Update**.

Result: On opening a case, the recommendations section with two tabs: Search and Suggested Actions is displayed. The recommendations are displayed under Suggested Actions.

Find out how to Create a custom similar case model, Edit a model, and Export a model

Edit a model

Edit the case models that have already been trained and deployed. Change the model configurations, view the updated training results, and redeploy the model.

Before you begin

Role required: ti_admin

A prediction model must already be created, trained, and deployed.

About this task

You have two options for editing your model: view the current training results or retrain the model. The first time you edit a model, a pop-up appears to ask you which option you would like to take. Resetting your prediction preferences enables you to change how visible the predictions are for agents. Retraining your model enables you to select new data for training, which changes the prediction capabilities of the model. While you can retest your prediction model, it doesn't change the prediction skills.

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Procedure

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup**.
2. From the **Models** list, select the menu icon of the model you want to edit, and then select **Edit Model**.
3. Modify the fields to get the required predictions.
4. Select **Launch training**.
   A warning message appears asking if you want to update and train the model.
5. Select **Retrain**.
   The new training results page loads.
6. Select the **Compare models results** button to show both the previous results and the new results.
7. Select **Save & continue**.
8. Set your preferences for displaying the predictions or running them in the background.
9. Select **Save & continue**.
   The **Deploy your model** screen loads and shows the changes that you made indicated in yellow. If you don't want to deploy the changes, select **Discard changes**.
10. Review the model and select **Redeploy**.
    Your updated model is deployed.

What to do next

See how to Export a model

Export a model

Export a Task Intelligence model to another instance.

Before you begin

Role required: ti_admin or tia_admin

Procedure

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup**, depending on which application and context you want to export for.
2. In the **Models** list, select the more options menu of the model you want to export.
3. Select **Export model**.
   A new tab opens with authentication steps.
4. Select **Allow**.
   Your browser screen goes blank. To check that the download was successful, look at the bottom left of your browser and also check your download location to see if you have the exported model on your computer. Repeat this process for any other Task Intelligence models that you want to move to the target instance.

Result

The browser downloads the XML file to your system.

What to do next

You can use the XML file to transfer the model to another instance using update sets. To learn more, see System update sets. Find out How to move your trained Task Intelligence Models to a different instance.

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Create a custom similar case model

Set up a training model to help it recognize similarities between two types of tables by comparing their fields.

The model looks at the prediction fields of a prediction table and the training fields of a training table. It uses the similarities in these fields to predict similar records.

Before you begin

Role required: ml_admin, ti_admin

About this task

The case similarity model is pre-trained with a large data set to learn communication patterns. You select a set of records to test the model and then view the results before deploying.

Set up similar cases prediction model

Use Task Intelligence for CSM to set up similar case prediction model and train it with your data to make predictions. Access your model's performance results, set the prediction preferences and behavior, and deploy your model.

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup** to access the Task Intelligence Admin Console.
2. On the **Suggest similar case to reduce resolution time** card, select **Set up model**.

This action opens the model and displays the introductory pages. Each page in the model asks you questions and helps you select the information needed to build an effective model.

Train the similarity model

Train your similar case model with training data to predict the similar records by recognizing similarities between fields of Case table and training tables. When you train a machine learning model, the model looks at the prediction fields of a prediction table and the training fields of a training table. It uses the similarities in these fields to predict similar records.

You can select the table and fields that you want to predict, such as the Prediction table and Predictions fields. Also, you can select the tables and fields that you want the model to use to predict the similar records, such as the Training table and Training fields. Select this information to tell the model what to look for during training.

Note:
You can either use the recommended settings or customize the settings to fit your needs.

1. Enter a name for the model.
2. Select the **Prediction table** you want the model to predict.
3. Select **Conditions** to choose a set of records to use for training.

   Note:
   These conditions provide the requirements that a record must meet to make the predictions. However, this functionality is currently not supported.

4. Select the **Prediction fields** which will be used to predict similar records.
5. Select the **Training table** in the training data that you want the model to use to make predictions.

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6. Select **Conditions** to choose a set of records to use for training.
7. Select the **Training fields** that you want the model to use to make predictions.
8. Select the **Language** in which training takes place.
9. Select the **Update Frequency** to decide how frequently the training should occur.
10. Review the resulting **Number of records** in the training data based on the selected conditions.

    The records that are counted include the number of fields, parameters, and data that the model uses to train. Based on the provided information and the set conditions, the number or records gets updated automatically. The model needs a minimum of 10,000 records for effective training. If this minimum number hasn't been reached, try selecting different conditions. You can also click the refresh icon to refresh the number.

11. Select to retain a model manually or set it to auto retrain.
12. Select **Launch training**.

Assess the similarity model

Assess the results from the model training and view sample results to see the similar records predicted for cases. Reviewing the results gives you a preview of how your model will perform after being deployed. Based on the sample results, select the prediction preference. The model has flexible options. Based on the sensitivity and requirements of each case record, you can do the following actions:

- Recommend similar records for the cases.
- Monitor and run the prediction model for the cases in the background only. Admin can track the predictions made by model by going to **All** > **Task Intelligence for Customer Service** > **History**.
- Turn off the predictions for the cases.

Steps in Assess the similarity model:

1. View the number value in the **Estimated number of records used for training** section.
2. Select **View sample results** to see the similar records predicted for each case.
3. Choose one of the following options from the **Prediction preference** drop-down list for each field.

Options	Description
Recommendations	Shows the top recommendations based on the similarity patterns. Agents can choose to accept or reject the recommendation. You can configure the number of recommended values using Advanced Recommended actions for CSM. For more information, see Configuring the Recommended Actions application.
Turn off predictions	Stops the model from performing any predictions.

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Options	Description
Monitor only	Monitors and runs the model in the background only without making any predictions on the case form.

4. Select **Save & continue**.

Deploy the similarity model

Deploy the Similar cases model to predict the similar records for the cases.

1. Review your choices from the previous pages and information about how the model was trained.
2. Select **Deploy** to deploy the model.

A pop-up appears confirming that your model was deployed.

Predictive Intelligence for CSM solution definitions

Use your instance records to build Customer Service Management specific solutions.

Solution definitions

These solution definitions are available as templates on instances where both Predictive Intelligence and Customer Service Management are active. Create your own solution definition records to customize the behavior.

Solution Definitions for Customer Service Management

Solution Definition	Solution Type	Description
CSM Case Assignment	Classification	Predicts the **Assignment group** field from the **Short description**.
CSM Case Categorization	Classification	Predicts the **Category** field from the **Short description**.
CSM Case Prioritization	Classification	Predicts the **Priority** field from the **Short description**.
Grouping of Cases into Topics	Clustering	Clusters similar cases into topics based on the **Short description**.
All Similar Cases	Similarity	Recommends similar cases based on the **Short description** that can help customer service agents with case investigation and resolution processes.
Recommended Open Cases	Similarity	Recommends similar open cases based on the **Short description**.

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Solution Definitions for Customer Service Management (continued)

Solution Definition	Solution Type	Description
Recommended Resolved Cases	Similarity	Recommends similar resolved cases based on the **Short description**.
Major Issue Detector	Similarity	Provides recommendations for major issues based on the **Short description**. • Recommends one or more major cases, if available. • Otherwise, recommends similar cases that are not linked as child cases to a major case.
Similar Knowledge Articles	Similarity	Recommends similar knowledge articles by comparing the **Text**, **Short description**, and **Description** fields of knowledge articles to the **Short description** of the customer service case.
Similar Knowledge Articles All	Similarity	Recommends similar knowledge articles by comparing fields in the Knowledge View database view [sn_customerservice_knowledge_view] with the **Short description** of the customer service case. **Note:** This solution definition is used in the Auto-Responder feature. For more information, see Train the similarity solution for finding Auto-Responder notification content.

Business rules for classification solutions

These business rules apply only to the CSM Case Assignment, CSM Case Categorization, and CSM Case Prioritization solution definitions. The rules are available only on instances where both Predictive Intelligence and Customer Service Management are active. Create your own business rules on the Case [sn_customerservice_case] table to customize prediction and reporting behaviors.

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Business rules for Customer Service Management

Business rule	Table	Description
Default Case Based Prediction	Case [sn_customerservice_case]	Generates prediction results from the active Customer Service Management solutions. Runs when a case record is inserted.
Update Prediction Results	Case [sn_customerservice_case]	Updates the solution precision and coverage statistics. Runs when a case record is closed.

Upgrade Information

If your instance is running on the Kingston release and you are upgrading to the Yokohama release:

- Use the Default Case Based Prediction business rule template to create a new business rule. This rule includes a Solution variable that gets all active solutions retrieved by the findActiveSolution(solutionName) method.
- In a global domain environment, use the solutionNames array variable which requires that you explicitly provide the solutions that are called by the business rule.
- In a domain-separated environment, such as an MSP environment, refer to the commented code in the business rule template for easy customization.
- The business rule template calls the applyPredictionForSolution() method to predict regardless of any changes to the default value.

Maintaining prediction accuracy

You can manage prediction drift by retraining, modifying, or creating solutions to reflect changes in your business conditions. Test and modify your business rule over time to verify it works as desired across multiple consumption points and user personas.

Related topics

Similar case/recommendation

Trending case topics

Resolve cases more efficiently and proactively using Predictive Intelligence to identify clusters of cases with similar issues and pinpoint factors that drive up case volume. Each cluster of cases represents a trending case topic.

Using trending case topics has the following benefits:

- Increase manager productivity: Quickly identify clusters of cases that point to similar underlying issues and act to resolve them.
- Improve customer experience: Proactively resolve issues by analyzing patterns in customer service data.
- Enhance operational excellence: Reduce the backlog of open cases by resolving similar cases at once.

System administrators train solution definitions to cluster similar cases and identify similar major cases for the clustering.

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Major issue managers use trending case topic lists to analyze the backlog of cases. Using the lists, they can quickly identify any existing major cases that the backlog could be linked to or create a new major case.

Activation information

The trending case topics feature requires the Predictive Intelligence for CSM (com.snc.csm_ml) plugin and the Major Issue Management (com.sn_majorissue_mgt) plugin.

Related topics

- Configure trending case topics
- View trending case topics
- Add trending case topics to existing major cases
- Create major cases for trending case topics

Configure trending case topics

Train solution definitions to identify clusters of cases that point to similar underlying issues and find any related major cases for the clusters.

Before you begin

Role required: admin

About this task

Access the menus and use the modules to train the solution definitions to identify trending case topics. For more details, see Trending case topics.

Procedure

1. Navigate to **Predictive Intelligence** and then either **All** > **Similarity** > **Solution Definitions** or **Clustering** > **Solution Definitions**.
2. Complete the following tasks to train the solution definitions for trending case topics.

Solution definitions field description

Task	Description
Train the clustering solution definition to automatically group similar cases into topics	Configure a clustering solution definition to cluster similar cases into groups.
Train the similarity solution definition to find similar existing major cases	Configure a similarity solution definition to find similar major cases for the clusters.

Train the clustering solution definition to automatically group similar cases into topics

To enable clustering of similar cases into topics, you must first update and train the clustering solution definition.

Before you begin

Role required: admin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml).

About this task

By default, a clustering solution definition for clustering groups of cases into topics is already available. A clustering solution definition groups similar records into clusters so you can address them collectively or identify patterns.

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You can modify the fields, filters, update frequency, and training frequency.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Clustering** > **Solution Definitions**.
2. In the Clustering Definitions list, search for and select the Grouping of Cases into Topics solution definition (ml_sn_sn_csm_ml_global_grouping_of_cases_into_topics).
3. On the Clustering Definition form, verify the default field values.
4. Change the fields and filters, as required.
5. To change the frequency with which the model for clustering solution definition must be rebuilt, edit the **Update Frequency** field.
6. To change the frequency with which to include new records in the model for the clustering solution definition, edit the **Training Frequency** field.
7. In the Training Request Schedule related list, view the schedule for training the Grouping of Cases into Topics solution definition.
8. Click **Update & Retrain**.
9. Open the Grouping of Cases into Topics solution definition.
10. In the ML Solutions related list, view the training solution progress in the **Progress** column.

> **Note:**
> Alternatively, you can click the link for the solution in the **Active** column. On the ML Solution form, click the **Show training progress** related link to check the training solution progress.

11. Click the **Cluster Visualization** tab.
    The clusters that were formed for the given solution are displayed in a tree map in descending order of size from top left to bottom right. Each node is colored from red to green depending on the cluster quality.

Train the similarity solution definition to find similar existing major cases

To enable finding related major cases in a cluster, you must first update and train the similarity solution definition.

Before you begin

Role required: admin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml).

About this task

By default, a similarity solution definition for finding similar existing major cases in a cluster is already available. A similarity solution definition collects and compares your existing records to new similar records.

You can modify the fields, filters, update frequency, and training frequency.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions list, search for and select the Major Issue Detector solution definition (ml_sn_global_major_issue_detector).
3. On the Similarity Definition form, verify the default field values.

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For more information about the Similarity Definition form fields, see Create and train a similarity solution.

4. Change the fields and filters, as required.
5. To change the frequency with which the model for similarity solution definition must be rebuilt, edit the **Update Frequency** field.
6. To change the frequency with which to include new records in the model for the similarity solution definition, edit the **Training Frequency** field.
7. In the Training Request Schedule related list, view the schedule for training the Major Issue Detector solution definition.
8. Click **Update & Retrain**.
9. Open the Major Issue Detector solution definition.
10. In the ML Solutions related list, view the training solution progress in the **Progress** column.

> **Note:**
> Alternatively, you can click the link for the solution in the **Active** column. On the ML Solution form, click the **Show training progress** related link to check the training solution progress.

Similar case recommendations

The similar case recommendation feature enables customer service agents to easily find similar cases that can provide helpful information about a current case. This feature can also provide recommendations about cases that may be related to major issues.

The similar case recommendation feature uses the following components:

Additional search resources for contextual search

Additional search resources are provided for contextual search. These additional resources enable customer service agents to search open or resolved cases for information related to the current case.

Predictive Intelligence similarity solution definitions

Several of the additional search resources have an associated Machine Learning (ML) similarity solution definition. These additional resources perform a contextual search based on the case short description and return a list of similar records.

Predictive Intelligence in Agent Workspace

Predictive Intelligence can provide agents with a list of cases that are similar to the current case. These similar cases may provide helpful details or resolution information for the current case. Predictive Intelligence can also provide recommendations about potential major issues and major cases.

With the similar case/recommendation feature, customer service agents can:

- Find cases that are similar to the current case.
- Copy resolution notes and codes from resolved cases to the current case.
- Link the current case to a similar case.
- View a list of open cases similar to the current case and submit the current case as a major case candidate.
- View one or more similar major cases and link the current case as a child to a major case.

Major issue managers can search for cases that are similar to a major case and add them as child cases.

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Using the feature in Agent Workspace and in the platform interface

With Agent Workspace, agents can:

- Perform a search in Predictive Intelligence using the additional search resources.
- Create a link from the current case to a selected case in the search results.
- Copy resolution information from a selected case to the current case. This includes the resolution code and the resolution notes (the agent must then save the case).
- View a list of similar cases that do not include major cases. This is a way to see that the current case might be a major case candidate.
- View a list of similar cases that include one or more major cases. The major cases are displayed first in the list of results. Agents can use an available action to add the current case as a child of a major case.

With the platform interface, agents can:

- Perform a search in the Related Search Results section on the Case form using the additional search resources. Agents can select these additional resources from a list by the **Related Search** field.
- Create a link from the current case to a selected case in the search results.

Plugins

The configuration for the similar case/recommendation feature is included with the Customer Service plugin (com.sn_customerservice).

The similar case/recommendation feature has a dependency on the Contextual Search plugin (com.snc.contextual_search). Activate the Contextual Search plugin to use contextual search and the additional search resources.

To use similar case/recommendation with the following features, activate the associated plugins:

- Major Issue Management – activate the Major Issue Management plugin (com.sn_majorissue_mgt)
- Predictive Intelligence – activate the Predictive Intelligence plugin (com.glide.platform_ml)
- Problem Management – activate the Problem Management Best Practice – Madrid – State Model (com.snc.best_practice.problem.madrid.state_model)

Related topics

Machine learning solutions for Customer Service Management

Additional search resources

The similar case recommendation feature uses additional search resources, which are configured using the Contextual Search application.

Navigate to **Contextual Search** > **Additional Resources** to view the Search Resources (Additional Resources view) list. Two types of additional search resources are available: Table and Predictive Intelligence Similarity.

Table resources

Additional search resources of the type **Table** are based on a selected table and have specific conditions that must be met for a record to be included in the search results.

The following **Table** additional search resources are included with the Customer Service plugin:

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- Resolved Cases
- Open Major Issues

The following **Table** additional search resources are included with the Problem Management Best Practice - Madrid - State Model plugin:

- Open Problems
- Resolved Problems

Table type additional search resources

Additional Resource	Table	Description
Resolved Cases	Case	Returns a list of cases created in the last six months that have a state of resolved or closed and the resolution code is one of the following: • Solved - Fixed by support/Guidance provided • Fixed by closing related PRB • Workaround provided based on open PRB Actions available: • **Link to Case**: the current case becomes a child of the case selected from the search results. • **Copy Resolution Information**: copies the resolution notes and resolution code from the selected case to the current case.
Open Major Issues	Case	Returns a list of open major cases. Actions available: **Link to Case**: the current case becomes a child of the case selected from the search results.
Open Problems	Problem	Returns a list of open problems. Actions available: **Link to Case**: adds the selected record as the Problem reference on the current case.
Resolved Problems	Problem	Returns a list of problems that have a state of Resolved or Closed. Actions available: **Link to Case**: adds the selected record as the Problem reference on the current case.

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Predictive Intelligence Similarity resources

Additional search resources of the type Predictive Intelligence Similarity are associated with a Machine Learning (ML) similarity solution definition. Search resources of this type require the Predictive Intelligence plugin (com.glide.platform_ml). The resources listed in the following table are included with the Predictive Intelligence plugin.

In addition to the associated similarity solution definition, Predictive Intelligence Similarity resources can have configured properties. These properties identify conditions that must be met for cases to be included in the search results.

Predictive Intelligence Similarity type additional search resources

Additional Resource	Table	Description
Recommended Resolved Cases	Case	Returns a list of resolved similar cases created in the last six months. Associated with the Recommended Resolved Cases similarity solution definition.
Recommended Open Cases	Case	Returns a list of open similar cases created in the last six months. Associated with the Recommended Open Cases similarity solution definition.
All Similar Cases	Case	Returns a list of all similar cases created in the last six months. Associated with the All Similar Cases similarity solution definition.

Major case agent assist recommendations

The Major Case agent assist recommendations is used for recommending major cases.

The agent assist provides a recommendation for each of the two major case scenarios:

- Major case found: returns a list with one or more major cases created in the time-frame indicated in the solution definition that are similar to the current case. Cases are listed by similarity score. The default time-frame is set to the start of yesterday.
- No major case found: returns a recommendation based on the number of cases created in the time-frame indicated in the solution definition that is similar to the current case (does not include any major cases). The default time-frame is set to the start of yesterday.

To configure the time-frame for the solution definition threshold, see Update your similarity score threshold.

If the Major Case agent assist recommendations find one or more major cases similar to the current case, the Predictive Intelligence tab displays these cases ranked by similarity score. The

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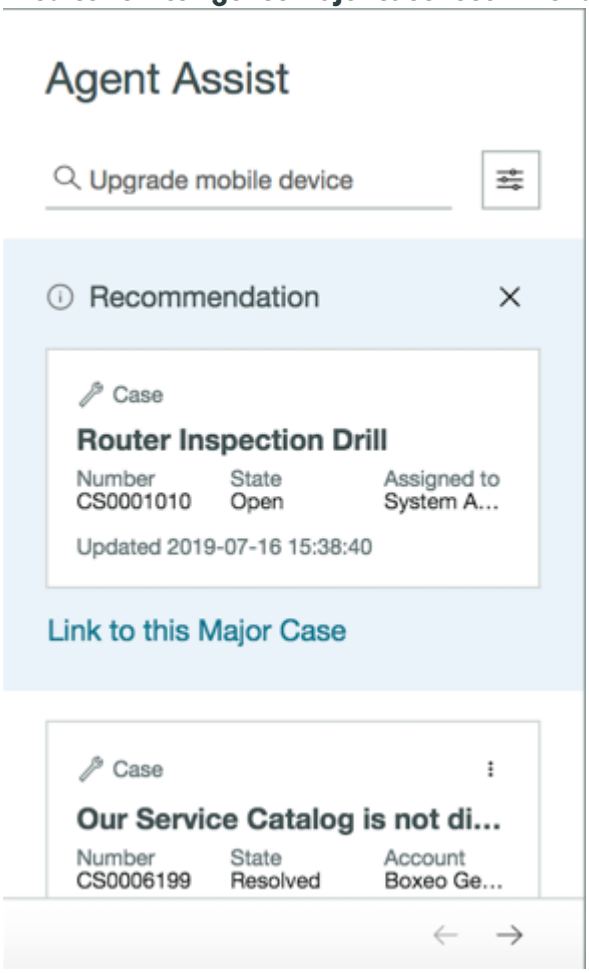
case with the highest score is highlighted with a white box and the title **Major Case** and includes a user action to link the current case to the major case.

Predictive Intelligence major case recommendation



If the Major Case agent assist recommendations find cases similar to the current case, but no major cases, the Predictive Intelligence tab displays a recommendation highlighted with a blue box. It includes the option to propose the current case as a major case candidate.

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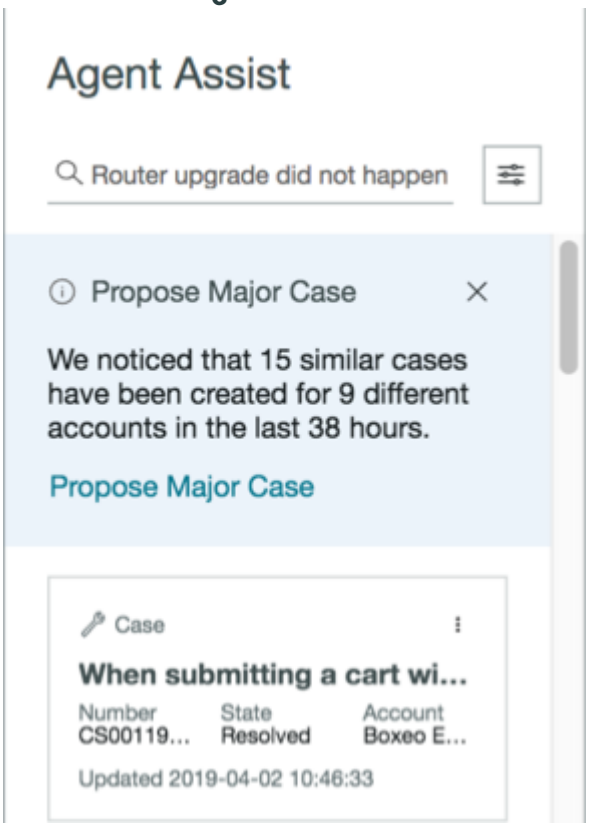
Predictive Intelligence tab similar case recommendation



The Major Case agent assist recommendations:

- Uses the Major Case agent assist recommendations ML solution definition.
- Includes some properties that provide customers with customization options, such as the recommendation title and message that appears in the Predictive Intelligence tab.
- Includes the **Potential Major Case** trend definition.

  This definition sets the threshold for:

  - Finding the number of distinct accounts that cases must belong to for a major issue recommendation. The default value is 3.
  - The number of similar cases that must be returned by the solution definition for a major issue recommendation using a script. The default value is 10.

Similarity solution definitions

The similar case recommendation feature uses several Predictive Intelligence solution definitions for similarity models.

Navigate to **Predictive Intelligence** > **Similarity** > **Solution Definitions**. The following solution definitions are provided with the similar case/recommendation feature.

- All Similar Cases (ml_sn_global_all_similar_cases)
- Recommended Resolved Cases (ml_sn_global_recommended_resolved_cases)
- Recommended Open Cases (ml_sn_global_recommended_open_cases)
- Major Issue Detector (ml_sn_global_major_issue_detector)

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Several of the additional contextual search resources used by the similar case/recommendation feature are associated with these solution definitions. Agents can select these search resources and access the cases returned by these similarity solution definitions.

Related topics

Create and train a similarity solution

Similar case user actions

Customer service agents and major issue managers can use the similar case recommendation feature to link cases, copy resolution information, propose major case candidates, and add cases to existing major cases.

User actions and results

User Action	Description	UI Action	Result
Customer service agent can link the current case to a similar case	• **Agent Workspace**: The Predictive Intelligence tab shows a list of similar cases ordered by the similarity score. • **Platform**: The Related Search Results section of the case form shows a list of similar cases ordered by the similarity score.	• Agent Workspace: Select the More UI actions menu and select **Link to Case**. • Platform: Select the desired case in the search results list, then select **Link to Case**.	The current case is linked as a child of the similar case.
Customer service agent can copy resolution information from a resolved case to the current case	**Agent Workspace**: The Predictive Intelligence tab shows a list of resolved similar cases ordered by the similarity score.	Agent Workspace: Select the More UI Actions menu and select **Copy Resolution**.	Copies the resolution code and resolution notes from the similar case to the current case. **Note:** Be sure to save the current case record.
Customer service agent can propose a major case candidate	**Agent Workspace**: The Predictive Intelligence tab shows a major issue	Agent Workspace: Select the **Propose Major Case** link.	The current case is proposed as a major issue.

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User actions and results (continued)

User Action	Description	UI Action	Result
Note: The Major Issue Detector similarity solution definition must be active.	recommendation with the following message: "We noticed that (x) similar cases have been created for (y) different accounts in the last (z) hours. Propose this as a major issue?"		
Major issue manager can associate the current case to a major case **Note:** The Major Issue Detector similarity solution definition must be active.	**Agent Workspace**: the Predictive Intelligence tab lists one or more major cases similar to the current case, ranked by similarity score.	Agent Workspace: Select the More UI Actions menu and select **Link to this major issue**.	The current case is added as a child to the major case.

Related topics

Similarity solutions

Estimated time to resolve a case

Machine learning in Customer Service Management helps with case resolution by predicting the estimated time to resolve a case.

Machine learning predicts the estimated time to resolve a case (ETTR) based on attributes of a case such as its short description, category, priority, and assignment group. For more information about configuring the machine learning regression definition for ETTR, see Configure the default estimated time to resolve a case regression definition.

Activation

This feature is available with activation of the Predictive Intelligence for Customer Service Management plugin (com.sn_csm_ml). For more information, see Install Predictive Intelligence.

Agents must activate the **Time to resolve** ribbon component, which displays the ETTR, to view it in the CSM Agent Workspace or in the CSM Configurable Workspace. For more information, see Display the time to resolve ribbon component and Estimated time to resolve.

Configure settings for estimated time to resolve values

After upgrading, configure some settings to view the **Time to Resolve Numeric Value** column in the case report for older cases and determine the information that is displayed.

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Before you begin

You must have a trained default estimated time to resolve a case regression solution. For more information, see Configure the default estimated time to resolve a case regression definition.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Fix Script**.
2. Select the **Populate Numeric TTR values** fix script.
3. **Optional:** Modify the default parameter values.
   - *LookBackPeriodInMonths*: The number of past months of cases to examine. The default value is 15 months.
   - *report.setLimit*: The maximum number of records to examine. The default value is 150,000.
4. Click **Run Fix Script** to populate the estimated time values taken to resolve older cases.
5. Either run the script on screen or run it in the background.
   - To display the script running on the screen, click **Proceed**.
   - To run the script in the background, click **Proceed in Background**.

Configure the default estimated time to resolve a case regression definition

The Estimated Time to Resolve a Case regression definition is available by default. You can modify the default values of case fields, the case timeline, and the training frequency.

Before you begin

Role required: admin, ml_admin

About this task

The Estimated Time to Resolve a Case definition is available by default. You can train this available definition to complete a solution and make predictions. You can change some of the default settings such as the fields, a filter, and the training frequency. For more information on creating and training a solution, see the following.

Create and train a regression solution.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Regression** > **Solution Definitions**.
2. Click **Estimated Time to Resolve a Case**.
   In the Regression Definition screen, the **Table** field is autopopulated with the Case Report [sn_customerservice_case_report] table. The **Output Field** field is autopopulated with the time taken to resolve a case in seconds.

   Note:
   If you have upgraded, you have to run a fix script in order to show the **Time to Resolve Numeric Value** column to display values for older cases. For more information, see Configure settings for estimated time to resolve values.

3. To edit, add, or delete case attributes, modify the default values in the **Fields** field.
   The default case attributes are Short Description, Category, Assignment group, Assigned to, Priority, Product, Channel, Account, Service, Contact, Contract, and Description. These details are taken from the case record.
4. Edit the **Filter** field if you want to modify the number of past months of cases to examine.

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The default value is 15 months.

5. Edit the **Training Frequency** field if you want to modify the frequency of training. The default value is every 30 days.
6. Either update the changes you made or update and retrain the solution.
   - To update the changes you made, click **Update**.
   - To update and retrain the solution, click **Update and Retrain**.

Display the time to resolve ribbon component

Activate the **ETTR Experience Card** so that you can display the time to resolve ribbon component in your CSM workspaces.

Before you begin

Role required: admin

About this task

The Time to resolve ribbon component is available by default and can be displayed in both CSM Agent Workspace and CSM Configurable Workspace. You must activate the component in CSM Agent Workspace before you activate it in CSM Configurable Workspace.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Forms** > **Workspace Ribbon Settings**.
2. Select any record that has the table value **Case [sn_customerservice_case]**.
3. Increase or decrease the values in the width column to make the total combined width of all the components to 12 or less.

   Note:
   If the total is already exceeding 12, decrease the values for the other components before modifying the value of **ETTR Experience Card**.

4. Select **ETTR Experience Card**.
5. Select **Active**.
6. In the **Ribbon Component Attributes** form section, modify components such as the **Card title** and **Info message** as required.

   Note:
   - You can see that the Solution name is pre-filled with the default name.
   - The same procedure applies to activate the **ETTR Experience Card** in the CSM Configurable Workspace. You must activate the **ETTR Experience Card** in the CSM Agent Workspace before activating it in the CSM Configurable Workspace. Navigate to **User Experience Framework** > **Ribbon Configuration Settings** and activate. The **Ribbon Component Attributes** section is not available for modifying.

Predictive Intelligence for case management

Assist agents with case creation by requiring a minimum of information, such as the short description, and predicting values for the category, priority, and assignment group.

From either Agent Workspace or the platform interface, agents can use this feature when creating cases by providing the short description. Based on the information entered in the **Short description** field, the Predictive Intelligence feature predicts the category, priority, and assignment group, and routes the case to the correct queue.

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Plugin

The Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml) provides Predictive Intelligence capabilities for Customer Service Management. This plugin enables customers to leverage machine learning algorithms for searching related cases in CSM. This plugin requires:

- Customer Service (com.sn_customerservice)
- Predictive Intelligence for Contextual Search (com.snc.contextual_search_ml)

The Predictive Intelligence for Customer Service Management plugin is activated automatically for new Orlando customers. Existing customers upgrading to the Orlando release must manually activate this plugin.

Solution definitions

Predictive Intelligence includes the following solution definitions for case management:

- CSM Case Categorization
- CSM Case Assignment
- CSM Case Prioritization

A solution definition predicts one or more output fields based on a configured input field. At least one solution definition must be active to use Predictive Intelligence with Customer Service Management.

For more information, see Predictive Intelligence for CSM solution definitions.

Business rules

Predictive Intelligence also includes business rules for Customer Service Management:

- Default Case Based Prediction
- Update Prediction Results

For more information, see Predictive Intelligence for CSM solution definitions.

Extension points

The Predictive Intelligence feature for Customer Service Management includes the **CSMPredictionService** extension point. This extension point contains a method that returns the following information:

- The list of solution definitions that are used to predict field values during case creation.
- The treatment of the predicted fields based on the values of the input fields.

The system administrator can use this extension point to customize the solution definitions.

Configure Predictive Intelligence for case management

Activate the Predictive Intelligence plugin and enable the related system property and client script to use Predictive Intelligence with Customer Service Management.

Before you begin
Role required: admin

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Procedure

1. Activate the Predictive Intelligence plugin (com.glide.platform_ml).
2. Enable the **Enable/Disable the prediction for case** property (*sn_customerservice.case.mlpredictor.enable*).
   a. Navigate to **Customer Service** > **Administration** > **Properties.**
   b. Enable the **Enable/Disable the prediction for case** check box.
   c. Click **Save**.
3. Enable the **Predict Case Values** client script.
   a. Navigate to **System Definition** > **Client Scripts**.
   b. Click **Predict Case Values** in the Client Scripts list.
   c. Enable the **Active** check box.
   d. Click **Update**.

Use Predictive Intelligence for case management

Agents can use Predictive Intelligence to predict values for configured fields when creating a customer service case.

Before you begin
Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task
When you create a case, the Predictive Intelligence feature predicts values for the configured fields based on the short description.

Note:
If you update the case, the values for these fields are not predicted again.

Procedure

1. Create a case.
2. Enter information in the **Short description** field and then tab to the next field.

   Based on this information, the system predicts the values for the **Priority**, **Assignment group**, and **Category** fields.

   Note:
   If the system can't predict values based on the short description, these fields remain empty.

3. **Optional:** Change the values in the predicted fields if needed or enter values for fields where Predictive Intelligence has skipped the prediction.
   The system doesn't overwrite user-entered values for the predicted fields.

Update cases with missing field predictions

View the list of open cases for which the prediction of category, priority, or assignment group was skipped by the Predictive Intelligence feature.

Before you begin
Role required: sn_customerservice_agent, sn_customerservice_manager or admin

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About this task

In the event that Predictive Intelligence cannot predict one or more case attributes for a case, customer service agents and administrators can update this information after a case is created. For example, the short description might not include enough detail to make a prediction.

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** > **Cases Skipped by Predictive Intelligence**.
2. Select a case from the list.
3. Provide the missing information and click **Update**.

Configure Auto-Responder notifications

Configure the Auto-Responder feature for sharing relevant content in email notifications for deflecting cases.

Before you begin

Role required: admin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.

About this task

When you install and activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml), the following related plugins are also activated:

- Customer Service plugin (com.sn_customerservice)
- Predictive Intelligence for Contextual Search plugin (com.snc.contextual_search_ml)
- Email Notification Script for Contextual Search Results plugin (com.snc.adv_cxs_results_email_script)

You can also configure the Auto-Responder feature for tasks other than customer service cases. For more information, see Configure Auto-Responder for tasks other than cases.

Procedure

1. Follow the steps in this link: Enable Auto-Responder.
2. Follow the steps in this link: Train the similarity solution for finding Auto-Responder notification content.
3. **Optional:** Follow the steps in this link: Configure the search context for Auto-Responder.
4. **Optional:** Follow the steps in this link: Limit the number of articles in Auto-Responder notifications for cases.
5. **Optional:** Follow the steps in this link: Include advanced contextual search results in Auto-Responder notifications.

   Note:
   By default, any knowledge articles viewed in the last 30 days by the user are not included in the email notification. You can use the `getViewedContent` extension point to modify the filter out by the duration of the last viewed content.

6. **Optional:** Follow the steps in this link: Enable text search recommendations in Auto-Responder notifications.

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7. **Optional:** Follow the steps in this link: Include cases logged using specified communication channels in Auto-Responder notifications.
8. **Optional:** Follow the steps in this link: Include knowledge articles from custom portals in Auto-Responder notifications.

> **Note:**
> When you configure the Auto-Responder feature to use a custom portal, the default configuration for the customer service portal and consumer service portal are not used. Ensure that you use this configuration when you have your own custom portal and don't want to use the customer service portal or consumer service portal.

Related topics

Using Auto-Responder for case deflections

Enable Auto-Responder

Enable the Auto-Responder feature to include content suggested for deflecting cases in email notifications.

Before you begin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Properties**.
2. In the Auto-Responder Recommendations section, select the check box for the **Enable auto-responder recommendations** property (*sn_customerservice.case.autoresponder.enable*).
3. Click **Save**.

Train the similarity solution for finding Auto-Responder notification content

Update and train a similarity solution definition to enable the Auto-Responder feature to suggest content by comparing the short description of a customer service case with those of existing knowledge articles.

Before you begin

Role required: admin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.

About this task

A similarity solution definition collects and compares your existing records to new similar records. The Similar Knowledge Articles All similarity solution selects knowledge articles for customer service cases from the predefined knowledge bases in the consumer service portal and customer service portal. To select knowledge articles from any custom knowledge base in a portal or from a knowledge base in any custom portal, you must modify this similarity solution.

For a similarity solution to work correctly, the Knowledge [kb_knowledge] table in the Knowledge View [sn_customerservice_knowledge_view] database view must have at least the required

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number of records set in the configuration of your ServiceNow instance. The default minimum number required is 10,000.

If the Knowledge Management Advanced plugin (com.snc.knowledge_advanced) is activated, the tables for knowledge article templates (such as FAQ, How to, What Is, KCS Article) are also added to the Knowledge View [sn_customerservice_knowledge_view] database view. For a similarity solution to show results from each template type, each of the tables for the template type must have at least the required number of records. If a table doesn't have the required number of records, you might not see the results from that table. For more information, see Database View support for Predictive Intelligence.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions list, search for and select the Similar Knowledge Articles All solution definition (ml_sn_sn_customerservice_global_similar_knowledge_view_articles).
3. On the Similarity Definition form, verify the default field values for knowledge articles.

Note:
If the application scope isn't set to Customer Service application, you cannot edit the form and a warning message appears. To make the form editable, click the word **here** at the end of the message.

Similarity Definition form

Field	Description
Label	Unique name for your similarity solution.
Word Corpus	Defines which knowledge articles and cases are selected. By default, the **All Articles and Cases** word corpus is available to search for knowledge articles similar to a customer service case short description. **Note:** Modify the word corpus to use the knowledge base defined for your portal. If you have defined custom tables for knowledge articles and article templates, you must include their fields in the word corpus content. For more information about the word corpus and word corpus content, see Create a word corpus.
Table	Table or database view that contains the knowledge article records. Set the value to the Knowledge View [sn_customerservice_knowledge_view] database view unless you use a different table or database view for storing knowledge articles. This database view joins the Knowledge [kb_knowledge], What Is [kb_template_what_is], How To [kb_template_how_to], FAQ [kb_template_faq], and KCS Article [kb_template_kcs] tables for viewing all fields in a knowledge article. After you assign a table value, the number of records that match the filter conditions is displayed as a link. **Note:** The What Is [kb_template_what_is], How To [kb_template_how_to], FAQ [kb_template_faq], and KCS Article [kb_template_kcs] tables are available only if the Knowledge Management Advanced plugin is activated. For more information, see Activate the Knowledge Management Advanced plugin.

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Field	Description
Fields	Fields from the Knowledge View [sn_customerservice_knowledge_view] database view selected for similarity comparison with the case short description. The fields must be the same as the fields you define for the Word corpus content.
Filter	Filter conditions applied on the database view to filter knowledge article records for Auto-Responder recommendations. Click **Add Filter Condition** to apply conditions to the Field records you're using as a base to retrieve your similarity results. For example, for the customer service portal, you would set a **[Workflow] [is] [Published] AND [Knowledge base] is [Customer Service]** filter condition. For a custom portal, you select the knowledge base of the custom portal in the **[Knowledge base]** condition.
Test Table	Table that contains the case records that you want to compare with knowledge article records. Set the value to the Case [sn_customerservice_case] table unless you use a different table for storing case records.
Test Fields	Fields from the case selected for similarity matching with knowledge article fields. By default, the short description field of a customer service case is used for the similarity match with knowledge article fields.
Processing Language	Dominant language of the dataset you're training on the solution definition. By default, English processing is applied to all datasets. For example, if you select Italian, the system processes the data in both English and Italian. **Note:** The term "processing" indicates some of the language-specific steps used as part of training a solution. These steps might include tokenizing words, removing stop words, and stemming.
Stopwords	Common terms in the processing language that are excluded from the search, for example, prepositions. When you select your processing language, the system automatically adds a Stopwords list that uses the same language. For example, if your processing language is Italian, the **Default Italian Stopwords** list appears. The **Default English Stopwords** list appears by default.
Training Frequency	Frequency with which the model for the similarity solution definition must be retrained.
Update Frequency	Frequency with which to include new records in the model for the similarity solution definition.

For more information, see Create and train a similarity solution.

4. **Optional:** In the Training Request Schedule related list, update the schedule for training the Similar Knowledge Articles All solution definition.
   By default, the training request schedule is **Periodically** and runs after every 30 days.
5. Click **Update & Retrain**.

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6. Open the Similar Knowledge Articles All solution definition (ml_sn_sn_customerservice_global_similar_knowledge_view_articles) and in the ML Solutions related list, view the training solution progress in the **Progress** column.
   When **Progress** is 100%, in the ML Solutions related list, you can include more useful content in the Auto-Responder notification by reviewing the similarity examples based on the similarity score and updating the similarity score threshold value.
7. **Optional:** Update the similarity score threshold.

   a. In the **Active** column, click the link for the solution.

   b. Review the similarity examples by clicking the **Similarity Examples** related link on the ML Solution form.
   For more information, see Review solution similarity examples.

   c. In the Solution Statistics related list on the ML Solution form, enter the required value in the **Similarity Score Threshold** field, right-click the ML Solution form, and then click **Save**.
   For more information, see Update your similarity score threshold.

Result

When the solution is complete, the knowledge articles similar to the fields selected for a customer service case are sent as Auto-Responder recommendations.

Related topics

Knowledge article templates

Configuring the search context for Auto-Responder

You can configure the predefined search context for customer service cases to include relevant search resources in Auto-Responder email notifications.

The Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml) includes the predefined **Case Email Autoresponder KB search** search context for customer service cases configured for use in the Auto-Responder feature. This search context uses the predefined Search Knowledge Articles searcher that provides knowledge articles as search results.

By default, the **Case Email Autoresponder KB search** search context includes contextual search results based on Predictive Intelligence. You can edit this search context to include any additional resources. For more information, see Define a search context.

Note:
To provide other relevant recommendations to resolve a customer service case when Predictive Intelligence results are insufficient or unavailable, you can also enable the text search recommendations in the Auto-Responder email notification. For more information, see Enable text search recommendations in Auto-Responder notifications.

Limit the number of articles in Auto-Responder notifications for cases

Send the most relevant knowledge articles in Auto-Responder notifications for customer service cases by limiting the number of knowledge articles that are included.

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Before you begin

- Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.
- Set the application scope to Customer Service using the application picker. For more information, see Application picker.

Role required: admin

Procedure

1. Navigate to **All** > **Contextual Search** > **Table Configuration**.
2. Search for `Case [sn_customerservice_case]`.
3. Click the **Case [sn_customerservice_case]** link in the **Name** column corresponding to the row containing the **Case Email Autoresponder KB Search** search context.
4. In the Email Configurations related list, double-click the value in the Limit column for the **Case auto-responder recommendations** row.
5. Enter the maximum number of knowledge articles you want to include in the Auto-Responder email notifications for customer service cases and click the save icon ( ).
   The maximum allowed limit value is 20. If you enter a limit value of more than 20, the Auto-Responder email notification includes up to 20 articles only.
6. On the Table Configuration form, click **Update**.

Include advanced contextual search results in Auto-Responder notifications

Use scripted extension points to include the advanced contextual search results in email notifications for content suggested by the Auto-Responder feature.

Before you begin

Role required: admin

- Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.
- Set the application scope to Email Notification Script for Contextual Search Results. For more information, see Application picker.

About this task

The Email Notification Script for Contextual Search Results plugin (com.snc.adv_cxs_results_email_script) installs the *`csm_AdvancedEmailSearchResults`* script, *`CSMAdvancedEmailSearchResults`* script include and *`CSMAdvancedEmailSearchResultsExtensionPoint`* extension points.

The *`csm_AdvancedEmailSearchResults`* script is preconfigured for the customer service portal and consumer service portal.

Using extension points makes it easier to integrate customizations without actually altering the base code. You can extend standard base functionality using customized scripts. For more information, see Using extension points to extend application functionality.

An implementation is available in the base system for scripted extension points. You can modify the data and add additional fields.

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Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** column, search for and click **sn_adv_emailscript.CSMAdvancedEmailSearchResultsExtensionPoint**.
3. On the Extension Point form, select a script include to use the `CSMAdvancedEmailSearchResultsExtensionPoint` extension points.
   - Modify the existing script by going to the Implementations related list and clicking **CaseAutoresponder**.
   - Create and register a custom script include.

     For more information, see Registering custom script includes against the scripted extension points.
4. Modify the script to use the extension points available through the `CSMAdvancedEmailSearchResults` script include.

   You can create multiple implementations for each extension point and provide an order number for each implementation. The implementation that has the lowest order number is executed first.

   Configuration for different extension points implementation

Configuration	Implementation
Include a custom portal and search for knowledge articles from the knowledge base associated with the custom portal. **Note:** Applies only to tasks other than customer service cases.	Modify the `updateSearchRequestConfig` extension point to include the custom portal for your tasks other than customer service cases.
Filter out the content by the duration of the last viewed content.	Modify the `getViewedContent` extension point by entering the last viewed content duration in days. **Note:** By default, any knowledge articles viewed in the last 30 days by the user are not included in the email notification.
Define the layout of the email notifications.	Modify the `printSearchResults` extension point to specify a custom layout for the Auto-Responder email notifications.

5. On the Extension Point form, click **Update**.

Registering custom script includes against the scripted extension points

Register custom script includes against a selected scripted extension point in the application code.

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By registering the custom script, you create an extension instance record that links the scripted extension point definition to its implementation in the custom script include.

Enable text search recommendations in Auto-Responder notifications

Configure the Auto-Responder feature to send recommendations that match a text search of a case short description to resolve a customer service case when Predictive Intelligence results are insufficient or unavailable.

Before you begin

- Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.
- Set the application scope to Email Notification Script for Contextual Search Results using the application picker. For more information, see Application picker.

Role required: admin

About this task

By default, the Auto-Responder feature is configured to send contextual search results based on Predictive Intelligence. Knowledge articles that have significant text similarity with the short description of a case are sent as Auto-Responder recommendations.

You can configure the Auto-Responder feature to send knowledge article recommendations that match a text search of the case short description when the recommendations sent through the Predictive Intelligence feature aren't sufficient or the feature is disabled.

Procedure

1. In the navigation filter, enter `sys_properties.list`.
2. Search for the *`sn_adv_emailscript.textsearch.enable`* property.
3. In the **Value** field, enter `true`.
4. Click **Update**.

Include cases logged using specified communication channels in Auto-Responder notifications

Send Auto-Responder email notifications for customer service cases logged using a communication channel.

Before you begin

Role required: admin

Perform the following tasks.

- Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.
- Set the application scope to Customer Service using the application picker. For more information, see Application picker.
- Ensure that the required channel is already set up for use. For more information, see Configure communication channels.

About this task

By default, the Case auto-responder recommendations notification is configured to send Auto-Responder email notifications for customer service cases logged using emails. You can configure

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it to include other communication channels such as web, phone, chat, social, community, alert, and virtual agent.

Procedure

1. Navigate to **All** > **System Notification** > **Notifications**.
2. Search for `Case auto-responder recommendations`.
3. In the **Name** column, click the **Case auto-responder recommendations** link.
4. In the **Conditions** field, click **Add Filter Condition** or **Add "Or" Clause** to set the filter condition for a communication channel.

   Note:
   The default filter condition is **[Channel] [is] [Email] AND [Active] [is] [true]**.

   For example, to send Auto-Responder notifications for customer service cases logged using a mobile phone in addition to email, you would click **Add Filter Condition** and create the condition **[Channel] [is] [Phone] AND [Active] [is] [true]**.

Include knowledge articles from custom portals in Auto-Responder notifications

Configure the Auto-Responder feature to suggest knowledge articles from a custom portal.

Before you begin
Role required: admin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.

About this task
By default, the Auto-Responder feature is configured to suggest knowledge articles from customer service portal and consumer service portal. Use this procedure only when you have your own custom portal and don't want to use the default customer service portal or consumer service portal.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Properties**.
2. In the text box for the **Custom portal URL containing the knowledge article parameter** property (*sn_customerservice.case.autoresponder.customportal*), enter your custom portal URL containing a knowledge article parameter such as sys_kb_id or kb_number.
   Example format: `https://<instance-name>.service-now.com/csm?id=kb_article_view&sys_kb_id=<sys_kb_id>`
3. Click **Save**.

What to do next
After you configure the *sn_customerservice.case.autoresponder.customportal* property, you must configure the Similar Knowledge Articles All similarity solution definition to use the knowledge base of the custom portal. For more information, see Train the similarity solution for finding Auto-Responder notification content.

Configure Auto-Responder for tasks other than cases

Configure the Auto-Responder feature to send helpful resources for tasks other than customer service cases.

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Before you begin

Role required: admin

Perform the following tasks.

- Activate the Email Notification Script for Contextual Search Results plugin (com.snc.adv_cxs_results_email_script). For more information, see Activate a plugin.
- Set the application scope to the scope of your task table using the application picker. For more information, see Application picker.
- Verify that you have defined a search context for your task to include recommended resources in the Auto-Responder email notifications. For more information, see Define a search context.
- Verify that you have configured a table for the search context associated with your task. For more information, see Configure table for a contextual search.

Procedure

1. Configure the Notification [sysevent_email_action] table for your task to use the `csm_AdvancedEmailSearchResults` script.

   a. Navigate to **System Notification** > **Notifications**.

   b. Select the Notification [sysevent_email_action] table for your task.

   c. In the What will it contain related list, enter `${mail_script:csm_AdvancedEmailSearchResults}` in the **Message HTML** field.

   d. **Optional:** Verify that notifications aren't sent if there are no search results by entering the `hasResults()` function in the **Advanced condition** field of the When to send related list. The `hasResults()` function checks whether search results exist. You can use the return value of the function to avoid the system from sending an email notification if there are no search results. For more information, see Advanced conditions for email notifications.

   Tip:
   Refer to the Case auto-responder recommendations notification that uses the `hasResults()` function for returning the search results value. To view a notification, navigate to **System Notification** > **Notifications**.

   e. Select **Update**.

2. Map your task table configuration with the email notification for your task.

   a. Navigate to **Contextual Search** > **Table Configuration**.

   b. Select the task table configuration link in the **Name** column corresponding to the row containing the search context for your task.

   For the table that you're configuring, be sure to do the following:

   - Train the similarity solution for the table. For more information, see Train the similarity solution for finding Auto-Responder notification content.
   - Add the similarity solution in the Additional Resource Configurations tab on the Search Context form.

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c. In the Email Configurations related list, link your task table configuration with the Notification [sysevent_email_action] table.
   - To create another email configuration for a user field, select **New**.
   - To edit an existing email configuration, select the preview email configuration for email notification icon (), and then in the Email Configuration window, select **Open Record**.

d. On the Email Configuration form, verify the default field values for your task, or fill in the values for a custom configuration.

Email Configuration form

Field	Description
Email notification	Select the email notification for your task.
User field	Reference field that helps narrow down the search results sent as recommended resources in Auto-Responder email notifications. For example, if you select **Caller** for the Incident [incident] table, the resources associated only with callers are added to the Auto-Responder email notifications. **Note:** This is a mandatory field for Auto-Responder. This field must be a reference field of the User table (sys_user) or tables that extend the User table.
Limit	Maximum number of resources you want to include in the Auto-Responder email notifications for your task. The maximum allowed limit value is 20. If you enter a value more than 20, the Auto-Responder email notification includes up to 20 resources only.

e. Update or submit the Email Configuration form.
   - For a new configuration, select **Submit**.
   - For an existing configuration, select **Update**.

3. **Optional:** Enable contextual search results based on text searches in addition to search results based on Predictive Intelligence to be included in Auto-Responder notifications.
   For more information, see Enable text search recommendations in Auto-Responder notifications.
4. **Optional:** Configure a custom portal and include advanced contextual search results in email notifications.
   For more information, see Include advanced contextual search results in Auto-Responder notifications.

Set up self-service

Creating a self-service portal helps customers resolve issues independently. You can integrate features like knowledge bases, chatbots, and appointment booking for easy access to information.

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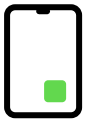
Customer and Consumer Service Portals

Set up the Customer and Consumer Service Portals to provide information and support to your customers.

Walk-up Experience

Set up Walk-up Experience to configure a contact channel to support both online check-in and onsite check-in to a service center.

Conversational Appointment Booking



Set up Conversational Appointment Booking to enable customers to book, reschedule, and cancel appointments from Virtual Agent conversations.

Communities

Use Communities to interact, learn, share knowledge, troubleshoot issues, and stay informed about the latest developments and innovations within the Customer Service Management ecosystem.

Knowledge Management

Create and share knowledge bases containing articles that provide users with information such as self-help, troubleshooting, and task resolution.

Service catalog

Create service catalogs to provide your customers with self-service opportunities to request items such as service and product offerings.

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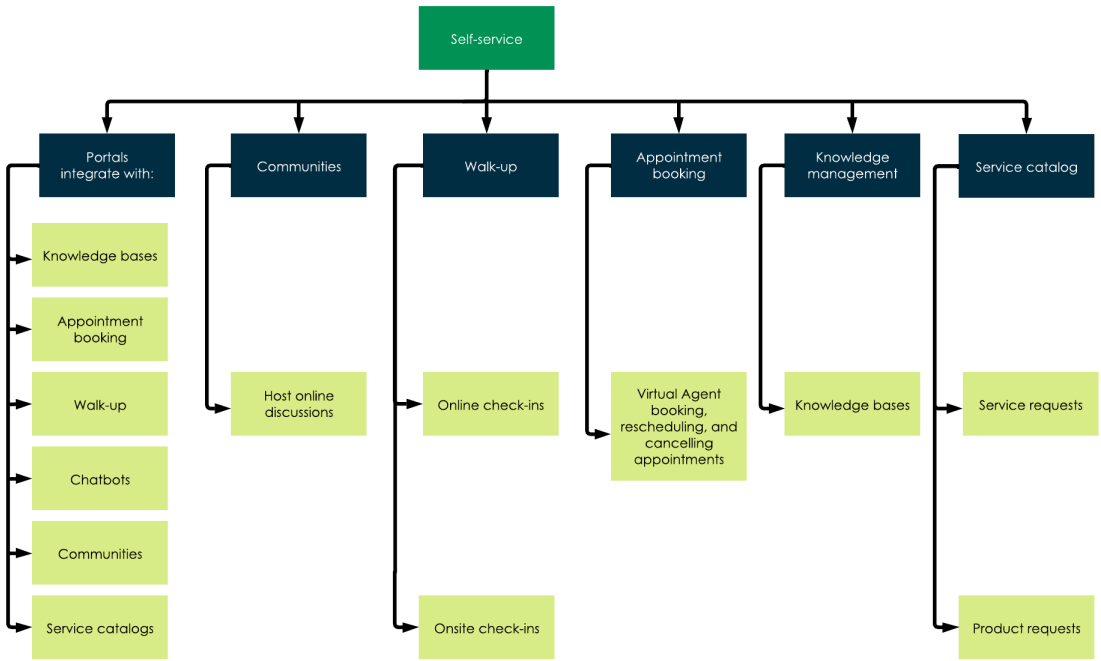
Self-service overview



Customer and Consumer Service Portals

Create and enable self-service portals for your customers to support their needs efficiently. Integrate these portals with knowledge bases, communities, service catalogs, and chatbots. Additionally, provide features like walk-up experiences and appointment booking to enhance their self-service options.

Walk-up Experience

Set up Walk-up Experience to support both online and onsite check-ins at your service center. Configure the experience to fit the needs of your organization.

Conversational Appointment Booking

Install and set up the Conversational Appointment Booking application to enable customers to book, reschedule, or cancel appointments through Virtual Agent conversations.

Communities

With the Communities application, you can engage with your employees, customers, partners, and prospects. Share knowledge and troubleshoot issues, and stay informed about the latest developments in the Customer Service Management ecosystem. Get quick responses by posting questions, reviewing blogs or videos, and searching previous discussions.

Knowledge Management

Create and share knowledge bases using the Knowledge Management application. Use the knowledge base to share articles that provide your users with information such as self-help, problem-solving, and task resolution.

Service Catalog

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Use the Service Catalog application to create and customize service catalogs so that your customers can request items such as services and product offerings. Additionally, you can standardize request fulfillment to maintain the accuracy and availability of the items in the catalogs.

Configure the Customer and Consumer Service Portals

Configure the Customer and Consumer Service Portals to provide information and support for your customers.

Before you begin

Role required: admin

About this task

The Customer and Consumer Service Portals are self-service web portals based on the ServiceNow Service Portal application.

The Customer Service Portal supports your business-to-business (B2B) customers and the Consumer Service Portal supports your business-to-consumer (B2C) customers.

Use the portals to provide information and support for your customers. The portals provide a basic format that customers can use to search for information or request assistance from a customer service agent. They include the following features:

- A header with links for different customer activities.
- A search feature that customers can use to search for information from several repositories.
- Links to information sources such as the knowledge base, the user community, and customer support.

Note:
The Customer Service Portal is automatically installed when you activate the Customer Service plugin.

To activate the Consumer Service Portal, activate the Consumer Service plugin.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Customer Service Portal (B2B) or the Consumer Service Portal (B2C) category, view the list of tasks to configure the feature.

Customer and Consumer Service Portal configuration tasks

Task	Description
Customize the Customer Service Portal	Customize the Customer Service Portal to meet your needs.
Activate the Consumer Service Portal	Activate the Consumer Service Portal plugin.
Customize the Consumer Service Portal	Customize the Customer Service Portal to meet your needs.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

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Related topics

Service Portal

Activate the Consumer and Customer Service Portals

Activate the portal plugins to use the Consumer and Customer Service Portals.

Before you begin
Role required: admin

Procedure

1. Navigate to the ServiceNow store application or **All** > **System Definitions** > **Plugins** in the CSM application.
2. Install any one of the following plugins.

3. Select **Activate**.

Setup the Customer and Consumer Service Portals

Customize the Customer and Consumer Service Portals to meet your needs.

Before you begin
Role required: admin

Procedure

Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
Some of the components that you can customize include:

- Branding: Configure the portal branding to give your Customer Service Portal its own look and feel. The default theme for Customer and Consumer Service portals is the Coral theme.
- Menus: Configure the portal header menu to set up the main menu, one of the main navigation controls for your users.
- Homepage: Assign a homepage to the portal.
- Widgets: Use Service Portal widgets to define the content in your portal.
- Roles: Configure page security by role to either set up pages to be public (no login required) or to filter them by user role.

Configure AI Search for the Customer and Consumer Service Portals

You must configure the Customer and Consumer Service Portals to use AI Search.

Before you begin
You must install a CSM or CSP portal and AI Search integration for CSM and CSP Portals.

Role required: admin, sp_admin

About this task
AI Search is inactive by default and you must enable it by updating the portal record.

Procedure

1. Navigate to **All** > **Service Portal** > **Portals** and open a portal record.
2. Configure AI search

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a. Select **Customer Support** for csm portal or select **Customer Service** for CSP portal.

b. Select the **Enable AI Search** check box.

c. In the **Search Application** field, search and select **CSM Portal Default Search Application** for customer service portal or **CSP Portal Default Search Application** for consumer service portal.
A search application configuration defines search experience settings, such as the search engine, search results limit, and suggestions limit. A search application configuration is selected by default, but you can select a different configuration if needed.

Note:
You might have to configure the form layout to add **Search Application** field on the form. For more information about adding fields to a form, see Configuring the form layout.

d. In the **Search Results Configuration** field, search and select **CSM Portal Search** for customer service portal or **CSP Portal Search** for consumer service portal.
A search result configuration defines how search results are displayed. A search result configuration is selected by default, but you can select a different configuration if needed.

Note:
You might have to configure the form layout to add **Search Results Configuration** field on the form. For more information about adding fields to a form, see Configuring the form layout.

e. Select **Update**.

3. Enable page route map
   a. Navigate to **All** > **Service Portal** > **Page Route Maps**.
   b. Search and Select **CSM AI Search Home Page** for customer service portal or **CSP AI Search Home Page** for consumer service portal.
   c. Select **Active** check box.
   d. Select **Update**.

Enable AI search in the Customer and Consumer Service Portals for unauthenticated users

An administrator activates the AI search widgets so that guest users logging in to the Customer and Consumer Service Portals can use the AI search feature.

Before you begin

Role required: admin
You must configure AI Search for the Customer and Consumer Service Portals. For more information, see Enable and configure AI Search in Service Portal.

Procedure

1. Navigate to **All** > **Service Portal** > **Widgets**.
2. Search for **Typeahead Search**.
3. Click **Typeahead Search**.
4. Select the **Public** check box.

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5. Click **Update**.
6. Repeat the steps for the **AI Search Assist** widget.

AI Search Assist for authenticated external users

Enable AI Search Assist in the Customer and Consumer Service Portals for authenticated external users with the snc_external role.

Configure AI Search Assist Actions for authenticated external users

Enable the AI Search Assist Actions to search knowledge articles in the Customer and Consumer Service Portals. It applies for authenticated external users with the snc_external role.

Before you begin

Activate Customer Service Management

You must configure AI Search for the Customer and Consumer Service Portals. For more information, see Enable and configure AI Search in Service Portal.

You must enable the Typeahead Search and AI Search Assist for the authenticated external users to use the AI search feature. For more information on the widgets, see Typeahead Search widget and AI Search Assist widget.

Role required: admin

Procedure

1. Navigate to **All** > **System Web Services** > **Scripted Web Services** > **Scripted REST APIs**.
2. On the Scripted REST APIs page, search and select **AI Search Assist Action (Internal API)**.
3. On the AI Search Assist Actions (Internal API) page, in the Resources related list, select **Order [sc_cat_item]**.
4. On the Order [sc_cat_item] page, in the **Security** tab, do the following:
   a. Select the **Requires authentication** to turn on the authentication.
   b. Clear the **Requires SNC Internal** checkbox to turn off the feature.
   c. Select **Update**.
5. On the AI Search Assist Actions (Internal API) page, in the Resources related list, select **Resolves my issue**.
6. On the Resolves my issue page, do the following:
   a. Select the **Requires authentication** to turn on the authentication to access resource.
   b. Clear the **Requires SNC Internal** check box.
   c. Select **Update**.
7. Select **Update**.

Configure AI Search Assist in the Customer and Consumer Service Portals for authenticated external users

Enable the AI Search Assist to search knowledge articles in the Customer and Consumer Service Portals. It applies for authenticated external users with snc_external role.

Before you begin

Activate Customer Service Management

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You must configure AI Search for the Customer and Consumer Service Portals. For more information, see Enable and configure AI Search in Service Portal.

You must enable the Typeahead Search and AI Search Assist for the authenticated external users to use the AI Search feature. For more information on the widgets, see Typeahead Search widget and AI Search Assist widget.

Role required: admin

Procedure

1. Navigate to **All** > **System Web Services** > **Scripted Web Services** > **Scripted REST APIs**.
2. On the Scripted REST APIs page, search and select **AI Search Assist (Internal API).**
3. On the AI Search Assist (Internal API) page, in the Resources related list, select **search**.
4. On the search page, in the **Security** tab, do the following:
   - Select the **Requires authentication** to turn on the authentication to access resource.
   - Clear the **Requires SNC Internal** check box.
   - Select **Update**.
5. Select **Update**.

Enabling guest users to submit a catalog item on the Customer Service Portal

Configure customer service portal to enable guest users to access and submit catalog item.

Guest users or logged out users can't access catalog items by default. You must change the accesses for the catalog items and its related services to make a catalog item available for guest users.

Changes required to enable guest user access

Make the following items public to enable logged out users to request catalog items:

Items that must be made public for guest user access

Item	Required changes
Portal pages and widgets	Enable public access for those portal pages and widgets that are used to display the following: • list of catalog items • catalog item form • Home page or browse catalog page to which the users are redirected to after submitting the catalog item For details, see Enable public access on a service portal page and Enable public access on widgets.
Catalog categories	Enable public access for those catalog categories that enables the guest users to browse the list of items on the widget.

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Items that must be made public for guest user access (continued)

Item	Required changes
	For details, see Enable public access for categories for the catalog items. It is optional to make these items public
Catalog items	Enable public access for the catalog items and their forms that must be displayed to the guest users. For details, see Enable public access for a catalog item. **Note:** Configure the catalog item script to display post submission confirmation message and redirection to an appropriate page. For details, see Configure catalog item script to display confirmation message and redirect the guest user.
Catalog item variables and variable sets	Enable public access for the catalog item variables and variable sets that should be displayed on the submit form for guests. For details, see Enable public access for a catalog item variable and variable set.
Catalog item APIs	Enable public access for the catalog item APIs to allow submitting the form. For details, see Enable public access on REST APIs. **Note:** Introduce rate limits on the public REST APIs to avoid excessive use or abuse of publicly available catalog items. For details, see Apply a rate limit on REST APIs.

Enable public access on a service portal page

Configure service portal pages used to display the catalog item to enable public access.

Before you begin

Role required: admin, catalog_admin

About this task

Enable public access to the pages that are used to display the following:

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- list of catalog items
- catalog item form
- redirect page displayed after users submit the catalog item

Procedure

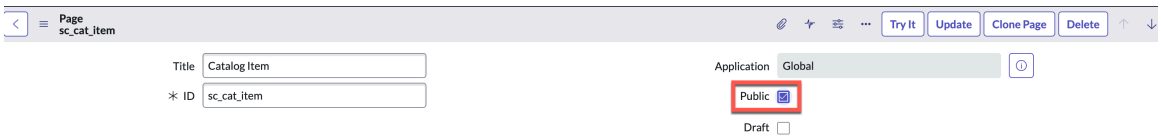
1. Navigate to **All** > **Service Portal** > **Pages**.
2. Search and select the pages used to display catalog items on the portal.
   For example, you can search for the following out-of-the-box pages:

   For portals:

   - csm_sc_category (browse page)
   - sc_category (browse page)
   - sc_cat_item (form page)
   - csm_sc_cat_item (form page)

   For Engagement Messenger:

   - cwf_sc_category (browse page)
   - sc_cat_item (form page)
   - sc_cat_item (form page)
3. Select the **Public** check box.



4. Select **Update**.

Result
The pages used to display the catalog items are made public.

Enable public access on widgets

Configure service portal widgets to enable public access.

Before you begin
Role required: admin, catalog_admin

About this task
Enable public access to the widgets that are used to display the following:

- list of catalog items
- catalog item form

Procedure

1. Navigate to **All** > **Service Portal** > **Widgets**.
2. Search and select the widgets used to display catalog items on the portal.
   For example, you can search for the following out-of-the-box widgets:
   - SC Catalog Item
   - SC Order Guide

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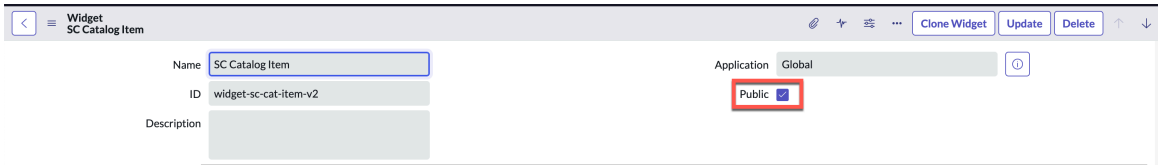
- Catalog Checkout Widget (if two-step checkout is enabled)
- SC Order Status

3. Select the **Public** check box.



4. Select **Update**.

Result
The widgets used to display the catalog items are made public.

Enable public access for categories for the catalog items

Configure categories of a catalog item to enable access for guest user. This is only when you want to provide browsing experience to the guest users.

Before you begin
Role required: admin, catalog_admin

About this task
Enable public access for categories that should be made available for guest users to browse the list of items on the widget.

Procedure

1. Find the catalog items.
   a. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Categories**.
   b. Search and select the required category.
2. Make the categories available for guest user.
   a. Select the **Categories** related list.
   b. Select the available Catalog Category item.
   c. Select the **Available for** related list.
   d. Select **Edit**.
   e. Search and move **Guest user** from Collection to Available for List.

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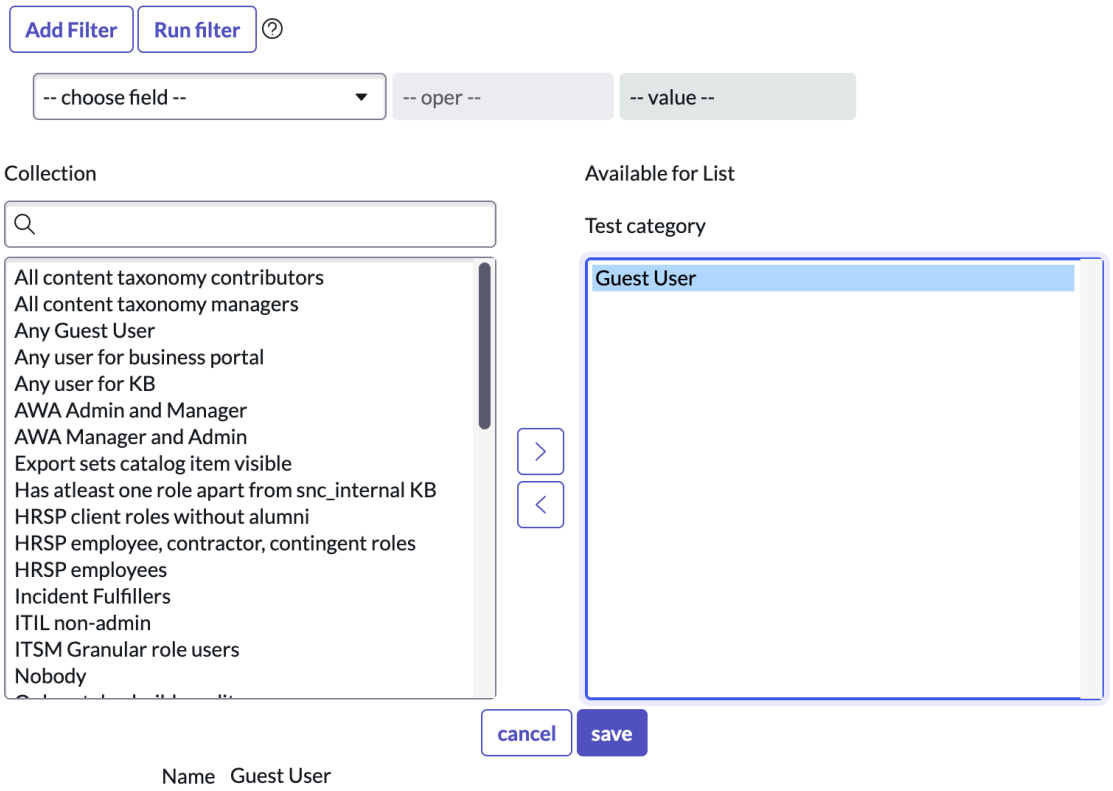

f. Select **Save**.

g. Select **Update**.

3. Select **Update**.

Result
The required categories are made public. Guest users can now view items under these categories.

Enable public access for a catalog item

Configure a catalog item to enable access for guest users.

Before you begin
Role required: admin, catalog_admin

About this task
By default, the catalog items aren't available for guest users. To make the catalog item available, edit the Available for and Not Available for user criteria.

Procedure
1. Find the catalog items.

a. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Items**.

b. Search and select the required item.

2. Make the item available for the guest user.

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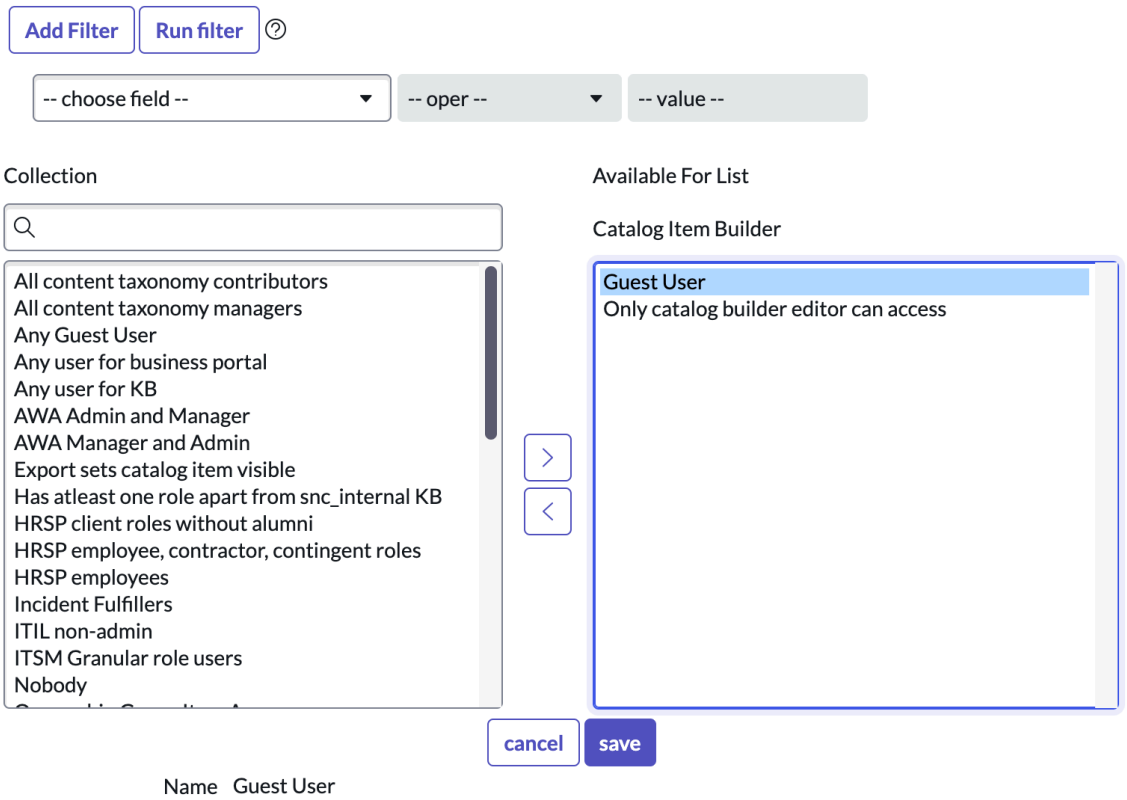
a. Select the **Available for** related list.

b. Select **Edit**.

c. Search and move **Guest User** from Collection to Service Category Request.



3. Edit the **Not Available For** tab.
   a. Select the **Not Available For** related list.
   b. Select **Edit**.
   c. Move **SNC External** (if available) from Not Available For to Collection.
   d. Select **Save**.
4. Select **Update**.

Result

The catalog item is made public. The guest users can now view it.

Configure catalog item script to display confirmation message and redirect the guest user

Configure the catalog item script to display a confirmation message and redirect the guest user to homepage or browse catalog page.

Before you begin

Role required: admin, catalog_admin

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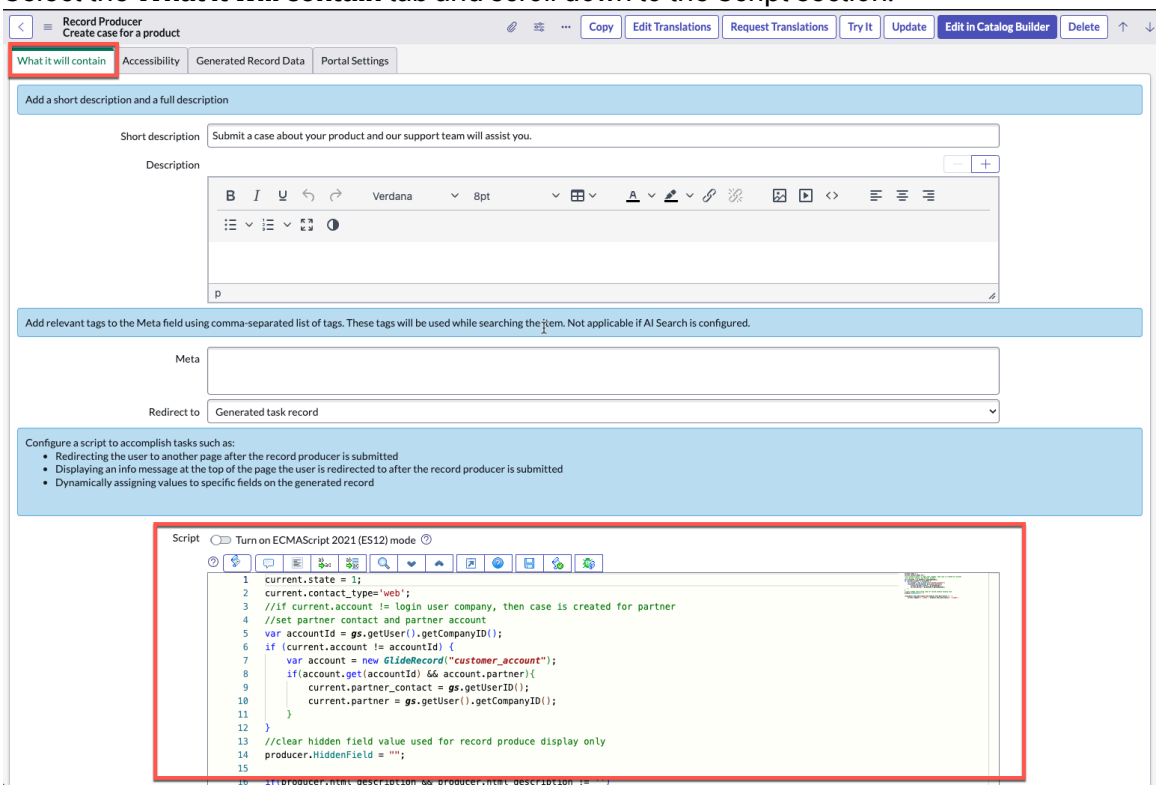
Procedure

1. Find the catalog items.
   a. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Items**.
   b. Search and select the required item.
2. Make changes to the script.
   a. Select the **What it will contain** tab and scroll down to the Script section.



   b. Paste the following code and update it as per your requirement

```
gs.addInfoMessage("Your case has been submitted"); // Info
 message to be displayed
producer.portal_redirect =
 "csm?id=csm_sc_category&catalog_id=-1"; // portal page to
 redirect to
```

3. Select **Update**.

Result

The catalog item script is configured to display a confirmation message and redirect guest users.

Enable public access for a catalog item variable and variable set

Configure input variables and variable sets to be displayed on the submit form. Enable guest users to access these items.

Before you begin

Role required: admin, catalog_admin

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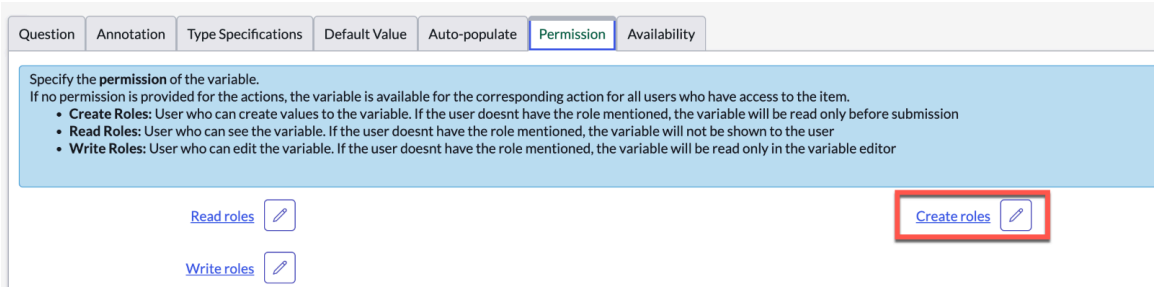
About this task

The following video demonstrates the process of enabling public access for a catalog item variable and variable set.

https://player.vimeo.com/video/1132209911?h=7138aa4c44&badge=0&autopause=0&%85

Procedure

1. Find the catalog items.
   a. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Items**.
   b. Search and select the required item.
2. Make all available catalog item variables public.
   a. Select the **Variable** related list.
   b. Open a variable.
   c. Select **Permission**.
   d. Select the pencil icon ( ) for **Create roles**.



   e. In the Create Roles pop-up window, search and move **public** from Available to Selected.
   f. Select **Done**.
   g. Select **Update**.

   A single catalog item variable is public. Repeat these steps to make other catalog item variables public.
3. Make catalog item variable sets public.
   a. Select the **Variable Sets** related list.
   For more information about variable sets, see Service catalog variable sets.
   b. Open a variable set.
   The Variable Set page opens.
   c. From the **Variables** tab, open a variable.
   d. Select **Permissions**.
   e. Select the pencil icon ( ) for **Create roles**.

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f. In the Create Roles pop-up window, search and move **public** from Available to Selected.

g. Select **Done**.

h. Select **Update**.

A single catalog item variable set is public. Repeat these steps to make other catalog item variable sets public.

4. Select **Update**.

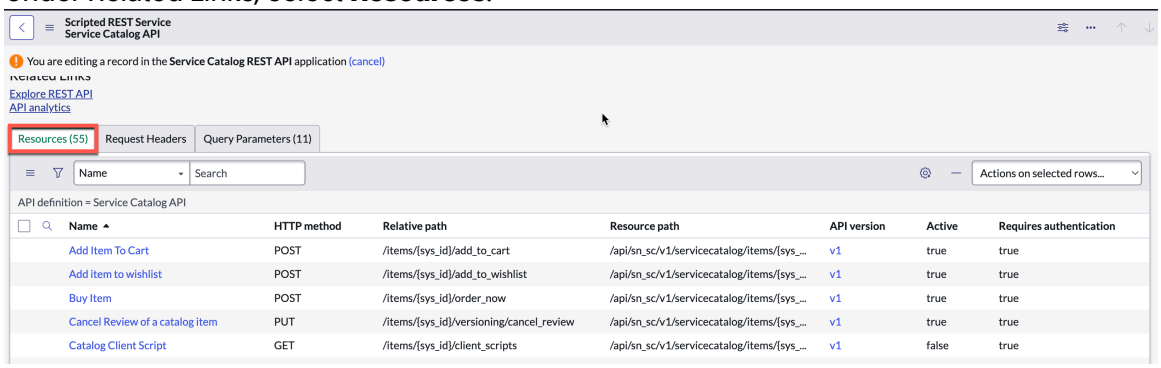
Result
The variables and variable sets used to display catalog item fields are made public.

Enable public access on REST APIs

Enable public access for the API resources to allow guest users to submit form.

Before you begin
Role required: admin, catalog_admin, web_service_admin

Procedure
1. Navigate to **All** > **System Web Services** > **Scripted Web Services** > **Scripted REST APIs**.
2. Search and select `Service Catalog` API in the name field.
3. Under Related Links, select **Resources**.



4. Search and select the required items in Resources.
   You can search for the following types of REST APIs:
   - Buy Item
   - Submit a Record Producer
   - Validate Variable Regex (If the item consists of a variable which requires Regex Validation)
   - Checkout Order Guide
   - Variable display value
   - Check requested for delegation on item
5. Scroll down and clear the **Requires authentication** check box under Security.

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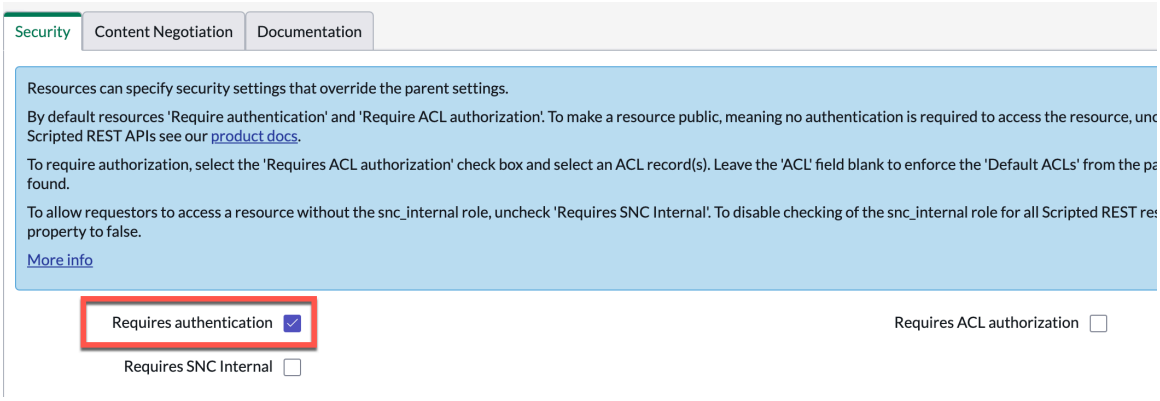


6. Select **Update**.

Result
The REST APIs used to allow form submission for the guest users are made public.

Apply a rate limit on REST APIs

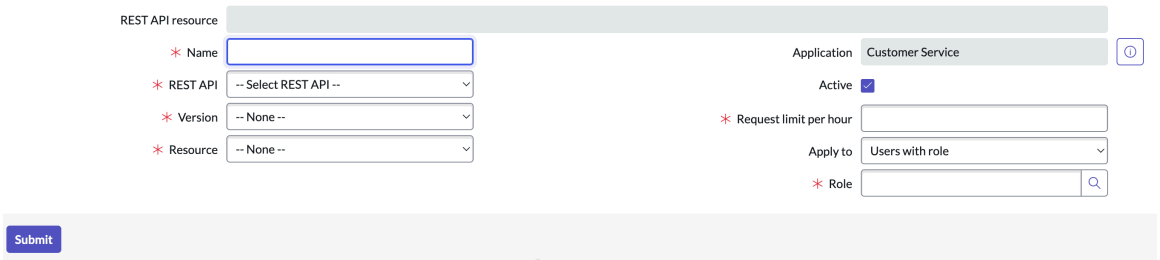
Apply a rate limit to REST APIs to avoid excessive use or abuse of publicly available catalog items.

Before you begin
Role required: admin, catalog_admin, web_service_admin

About this task
A rate limit restricts the uncontrolled creation of publicly available catalog items, mitigating the risks associated with malicious actors and automated bots.

Procedure

1. Navigate to **All** > **System Web Services** > **Rate Limit Rules**.
2. Select **New**.



3. On the REST API Rate Limit Rule form, fill in the fields.

   For a description of the field values, see Rate limit rule form for guest user access to catalog items.

4. Select **Submit**.

Result
A rate limit is applied to the publicly available APIs.

Related topics

Create an inbound REST API rate limit

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Activate the standard ticket page for upgrade customers

If you have upgraded your instance, redirect the ticket page to the standard_ticket page in the Service Portal and view requests on the standard ticket page.

Before you begin
Role required: admin or sp_admin

About this task
For new customers, the standard ticket page is enabled by default. For upgrade customers, you must enable it.

Procedure

1. Navigate to **All** > **Service Portal** > **Page Route Maps**.
2. Search for Customer Service Management ticket route maps.
3. Set the value to **true** in the **Active** column.
4. Click the name of the page route map.
5. Click **here** to edit the record.
6. Select the **Active** check-box.
7. Click **Update**.

Related topics

Standard ticket page

Configure the standard ticket page for cases

You can configure the standard ticket page for customer service cases from where users can view the details of a case in the Service Portal.

Before you begin
Role required: admin

or sp_admin

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
2. Click sn_customerservice_case, csm_order case, sn_customerservice_task, or customer_project_task which is available by default.

   Note:
   You can add your own case types and add new configurations for the required tables. For more information, see Configure the standard ticket page.

3. Click **here** to edit the record.
4. Edit the fields on the Ticket Configuration form as required.
   For example, you can add tabs to the existing **Activity** and **Attachments** tabs in the **Info fields** field under the Info Region tab.
5. Click **Update**.

Related topics

Configure the standard ticket page

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Consumer Service Portal properties

Properties that the system administrator can set to limit the number of registered products per consumer, the number of open cases per consumer, and the number of attachments per consumer record.

Consumer Service Portal properties

Property	Description
consumer_max_attachments_per_record	Maximum consumer attachable items per record. • **Type**: integer • **Default value**: 5 • **Location**: **Customer Service** > **Administration** > **Properties**
consumer_max_new_cases_daily	Maximum new cases that a consumer can create per day. • **Type**: integer • **Default value**: 10 • **Location**: **Customer Service** > **Administration** > **Properties**
consumer_max_comments_per_case_daily	Maximum comments that a consumer can post per day on a case. • **Type**: integer • **Default value**: 25 • **Location**: **Customer Service** > **Administration** > **Properties**
consumer_max_products	Maximum registered products per consumer. • **Type**: integer • **Default value**: 25 • **Location**: **Customer Service** > **Administration** > **Properties**
create_case.description.enable_html_editor	Enable the flag to add description using the HTML editor on the Create Case form page. • **Type**: boolean • **Default value**: True for new customers and False for upgrade customers. • **Location**: **Customer Service** > **Administration** > **Properties**

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Activate the sitemap configuration and definition records for the Consumer Service Portal

Include knowledge articles and catalogs in your sitemap by activating the sitemap configuration and definition records.

Before you begin

- Activate Sitemap Generator
- Verify that an unauthenticated user can access the knowledge base article and catalogs by accessing it as a guest user.
- Verify that the Public option is selected on the Knowledge Article form or Service Catalog page form.

Role required: admin

About this task

Beginning with the Yokohama release, the Sitemap Generator configuration is available with the base system and is inactive by default.

Procedure

1. Navigate to **All** > **Sitemap Generator** > **Sitemap Configuration**.
2. In the UX Sitemap Configurations [sys_ux_seo_sitemap_config] table, select the sitemap_config_CSP record.
3. Enable the generation of sitemaps.
   a. On the form, select the **Active** check box.
   b. In the Sitemap Config Definition related list, double-click the **Type** field and select the **true** option from the list.
   c. Select the Save icon ( ).
4. Select **Update**.

Result

All active sitemaps regenerate once in a day and include content from any of their active sitemap definitions.

Portal usage calculation

Portal usage enables you to track how your customers and employees are using the portal. The Customer Portal Usage dashboard provides information about portal visits resulting in session counts.

To view the Customer Portal Usage dashboard, navigate to **All** > **Customer Service** > **Administration** > **Portal Usage**.

Note:
You can ignore the bot session usage that is captured as part of this dashboard.

Note:
This definition tracks usage for customer service portals based on the user roles and ignores usage for non CSM portals or roles. Sessions are tracked for the following roles:

- External roles: sn_esm_user, sn_customerservice.requester, sn_communities.community_user
- Internal roles: sn_customerservice.self_contributor

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A user session is a period of activity on the Customer or Consumer Service Portal by any of the following session types:

- Guest session: Session where the user isn't logged in
- Bot session: Separate count of sessions generated due to bots and crawlers
- External session: Session where the user is an external user, typically a customer, or consumer who is logged in

The aggregate session count is based on the following

calculations:

A user session times out after a specific period of inactivity.

User access to the self-service portals is tracked as follows: per session, per day, and per portal. If the same user logs in from multiple browsers or devices, each login is counted as a separate visit. Each first call of a portal page starts a session and, the usage metrics are calculated for the 24 hours window.

The default session timeout is 30 minutes. This setting can be adjusted using a system property. For more information about modifying the session timeout setting, see Manage user sessions.

Site visit calculation examples

A user logs in, logs out, and then logs in again.

Example of a site visit calculation for a user who logs in, logs out, and then logs in again

Step	User activity	Billable count incremented
1	User visits the portal as an anonymous or guest user	Yes
2	User logs in	No
3	User logs out	No
4	User logs in immediately after logging out	Yes

A user logs in and continues the session past midnight:

Example of a site visit calculation for a user who logs in and continues the session past midnight

Step	User activity	Billable count incremented
1	User visits the portal as an anonymous or guest user	Yes
2	User logs in	No
3	User session continues past midnight	**Yes**

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Example of a site visit calculation for a user who logs in and continues the session past midnight (continued)

Step	User activity	Billable count incremented
4	User logs out	No

Customer Service Portal user roles

Several different roles allow customers to create and edit cases and manage users from the customer portal.

Customer Service Portal user roles

User role	What this user can do on the Customer Service Portal
Customer [sn_customerservice.customer]	• Create a case for this user's account. • View a list of cases created by this user. • Edit cases created by this user. • View a list of assets belonging to this user's account. • Search for information.
Customer case manager [sn_customerservice.customer_case_manager]	• Create a case for this user's account and for child accounts. • View a list of cases created by this user and view cases for child accounts. • Edit cases created by this user and edit cases for child accounts. • View a list of assets belonging to this user's account and to child accounts. • Search for information. • Create a case on behalf of another contact in this account. • View a list of cases belonging to this account. • Edit cases belonging to the account. **Note:** The customer case manager role is not automatically added to the **sn_customerservice.contact_role_assignment** system property. To expose this role to customer and partner administrators, navigate to **Customer Service** > **Administration** > **Properties** and add it to this property.
Customer administrator [sn_customerservice.customer_admin]	• Create a case for this user's account. • Create a case on behalf of another contact for this account. • View a list of cases belonging to this account.

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Customer Service Portal user roles (continued)

User role	What this user can do on the Customer Service Portal
	• Edit cases belonging to this account. • View a list of assets belong to this user's account. • Search for information. • Manage users for this account.
Partner [sn_customerservice.partner]	• Create a case for this user's account. • Create a case on behalf of customer accounts. • View a list of cases belonging to this user. • Edit cases belonging to this user. • View a list of assets belong to this user's account. • Search for information.
Partner administrator [sn_customerservice.partner_admin]	• Create a case for this user's account. • Create a case on behalf of customer accounts. • View a list of cases belonging to this account and to customer accounts. • View a list of assets belong to this account and to customer accounts. • Edit cases belonging to this account and to customer accounts. • Manage users for this account and for customer accounts.

Limit access to product model data on the Customer Service Portal

Use a system property to limit customer access to data in the Product Models table.

From the Customer Service Portal, product model data can be accessed by external users with the sn_esm_user role. System administrators can use the *csm_cmdb_model.customer_visible_flag* system property and the **Customer Visible** field on the Product Models table (cmdb_model) and child tables to limit this access.

The *csm_cmdb_model.customer_visible_flag* system property enables the **Customer Visible** field for the tables listed below. By default, this property is set to false. When set to true, the system uses the setting in the **Customer Visible** field to determine access to product model data on the Customer Service Portal.

- Product Models table (cmdb_model)
- Software Models table (cmdb_software_product_model)
- Application Models table (cmdb_application_product_model)
- Consumable Models table (cmdb_consumable_product_model)

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- Facility Models table (cmdb_facility_product_model)
- Hardware Models table (cmdb_hardware_product_model)

The Model Categories table (cmdb_model_category) doesn't have a **Customer Visible** field. Access to model categories data is restricted by using the **Customer Visible** field on the Product Model table. Only the categories for the products which are visible in the Product Model table would be visible in the Model Categories table.

For upgrades from Jakarta to Madrid, the **Customer Visible** field is added to each record in the Product Models table and set to false.

To limit access:

1. Set the *csm_cmdb_model.customer_visible_flag* system property to true.
2. Customize the Product Models table (cmdb_model) and add the **Customer Visible** column.
3. Set the value of the **Customer Visible** field to true for the product models that should be visible to external customers.

If the products are linked to a customer account, the external users can see these products using the product models.

View the number of portal bot-based sessions

Ensure customers are not incorrectly billed by viewing the number of bot-based sessions. CSM portal usage sessions are billable to customers but sometimes customers are unnecessarily charged for sessions generated due to bots, crawlers, and DDOS attacks.

Before you begin

Role required: admin, usage_admin

About this task

For all new portals you create, bot sessions are captured in the Service Portal Bot Sessions [ua_sp_bot_session] table and all session types are captured in the Service Portal Usage [ua_sp_usage] table.

Procedure

1. Navigate to **All** > **Reports** > **View/Run**.
2. Enter `customer portal usage` in the **Search** field.
3. Select the **Customer Portal Usage** report from the drop-down list.
   The report shows the session count for all sessions and a separate count of sessions generated due to bots, crawlers, and DDoS attacks.

Multi-factor authentication for Customer and Consumer Service Portals

Multi-factor authentication, also known as two-step verification, is a security requirement that asserts a user enter more than one set of credentials.

Enable multi-factor authentication for Customer and Consumer Service Portal users so that access to the self-service web portals is more secure from potential vulnerabilities. For more information, see Multifactor authentication (MFA).

Multi-factor authentication properties

Use properties to enable role-based multi-factor authentication criteria and configure the behavior.

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Properties for multi-factor authentication

Property	Description
Enable Multi-factor authentication [glide.authenticate.multifactor]	Select this check box to enable users and administrators to use this feature. • Type: enabled | disabled • Default value: enabled • Location: **Multi-factor Authentication** > **Properties**
Number of times a user can bypass setting up multi-factor authentication [glide.authenticate.multifactor.setup.bypass.count]	Enter a number that represents how many times a user can skip the additional passcode requirement, allowing them to log in even without their mobile device. If you disable this feature and then re-enable it, the counter starts over again. • Type: string • Default value: 3 • Location: **Multi-factor Authentication** > **Properties**
The time in minutes, the one-time code sent to user's email address is valid for [glide.multifactor.onetime.code.validity]	Enter a number in minutes that specifies how long the reset code is valid. See Log on with multi-factor authentication. • Type: string • Default value: 10 • Location: **Multi-factor Authentication** > **Properties**
Additional time in seconds for which the code will be valid to accommodate for the clock skew. Max value is 60 seconds. [glide.authenticate.multifactor.clock_skew]	Enter a number in seconds with a maximum of 60. By default, the instance validates the code entered by you against the single app-generated code generated at whatever the `current time` is. You can skew the time window with this property and allow one or more codes generated during a time window to be considered valid. The property's value is used in the following calculation: `current time - x/2` and `current time + x/2`, where 'x' is the value of this property. If you use the value of 10, for example, the instance considers any codes generated by the app between the time range `[the current time - 5 seconds]` and `[current time + 5 seconds]` to be valid.

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Properties for multi-factor authentication (continued)

Property	Description
	Use this property to help prevent log in issues where you're unable to enter the correct code in the default time allotted.

Configure roles for multi-factor authentication

Add the following external roles to the multi-factor roles:

- sn_customerservice.customer
- sn_customerservice.consumer

Users with these roles are required to use multi-factor authentication. For more information, see Configure user-based multi-factor criteria.

Sitemap Generator for the Consumer Service Portal

The ServiceNow® Sitemap Generator application enables you to efficiently define and automatically generate XML sitemaps.

Sitemap Generator configuration requirements for the Consumer Service Portal

The sitemap is generated from a script or static XML. Validating sitemaps isn't handled automatically, so verify when creating a sitemap that its contents meet the following requirements:

- Includes only the knowledge base and catalogs configured for the Consumer Service Portal
- Includes only Consumer Service Portal pages with unauthenticated user access
- Excludes Consumer Service Portal URLs that aren't publicly accessible
- Excludes pages that respond with a 301 redirect
- Excluded retired and expired knowledge base articles
- Includes hreflang support for knowledge articles

For information about sitemap requirements for search engine optimization (SEO), see Build and submit a sitemap in the Google documentation.

Configure Business Portal

Configure the business portal to provide information and support for your customers.

Before you begin

Role required: admin

About this task

The Business Portal is a self-service web portals based on the Service Portal application.

The Business Portal supports your business-to-business (B2B) customers.

Use the portals to provide information and support for your customers. The portals provides ready to use features that require minimal setup. These include:

- Header and footer with links for different customer activities.
- Home page provides a summary of essential items to the logged-in user.

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- Hierarchical menu to systematically navigate to different portal pages.
- Unified browse experience for knowledge and catalog through taxonomy topics.
- List pages to browse, search, and filter through records of cases, products, orders, and others.
- Record view pages to view key information, related actions, related lists, and quick links of a record.

You can add additional self-service capabilities such as order management by installing the respective plugin.

Note:
The Business Portal Store app is automatically installed when you install the Customer Service Portal store app. For details, see Activate the Consumer and Customer Service Portals.

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. On the Service Portals page, in the Title column, enter `*business portal`.
3. Select **Business Portal**.
   A page opens in your instance where you can configure the Business Portal.
4. Clear **Inactive** check box.

   Note:
   The business portal is inactive by default.

5. Select **Update**.
   You can access the business portal using the URL, <servicenow instance URL>/business_portal.

Related topics

Service Portal

Setup the Business Portal

Customize the business portal to meet your needs.

Before you begin

Role required: admin

Procedure

Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
Some of the components that you can customize include:

- Branding: Configure the portal branding to give your business portal its own look and feel. The Coral theme is the default theme for the business portal.
- Menus: Update the base system menu or add a new one. For details, see Configure the portal header menu.
- Home page: Update the default home page by updating the widget configuration or assign a custom home page. For details, see Assign a homepage to the portal.
- Widgets: Use configurable portal widgets to define the content in your portal. For details, see Configurable Portal widget library.

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- Header: Update the header configuration according to your need. For details, see Configure the Portal Polaris Header widget for your portal
- Footer: Customize information at the bottom of the page. For details, see Configure the Portal Polaris Footer widget.
- Taxonomy: Configure a taxonomy on Business Portal to define topics relevant to your users.
- List pages: Browse, search & filter through records of cases, products, orders, and others. For details, see Add and configure the Portal Data List widget
- Roles: Configure page security by role to either set up pages to be public (no login required) or to filter them by user role.
- Search sources: Configure a search source for the portal to describe the behavior and source of searchable data. For details, see Define a search source.
- Knowledge base: Configure a knowledge base for the portal to view the associated knowledge articles. For details, see Configure knowledge bases for a portal.
- Catalog: Configure a catalog for business portal. For details, see Configure a catalog in Service Portal.

Setup the theme for Business Portal

Customize the theme of the business portal to add font and theme style sheets.

Before you begin

Role required: admin

About this task

The default theme for the business portal is the Coral Theme. You can use your own theme according to your branding.

You must customize your theme to add font or theme size-related style sheets.

Procedure

1. Navigate to **All** > **Service Portal** > **Themes**.
2. Search and select the required theme.
3. Add font and theme style sheets.

   a. On the theme record, select the **CSS Includes** in the related list.

   b. Select **Edit**.

   c. Add the following style sheets from the Collection list to the CSS Includes list:

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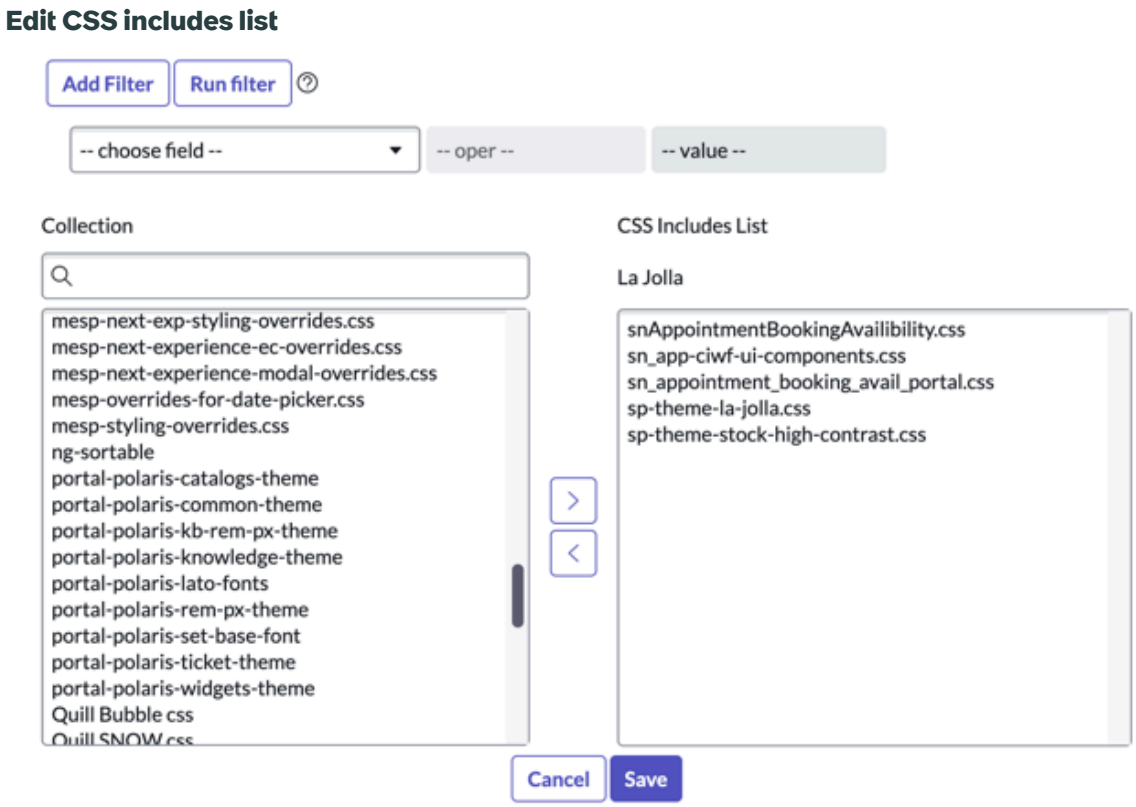

- portal-polaris-set-base-font
- portal-polaris-rem-px-theme
- portal-polaris-kb-rem-px-theme

d. Select **Save**.

4. Hover over the style sheet and select the preview icon (ⓘ) then select **Open Record** to set the order of added style sheets.
   a. Set the order of portal-polaris-set-base-font as the lowest.
   b. Set the order of portal-polaris-rem-px-theme as second highest.
   c. Set the order of portal-polaris-kb-rem-px-theme as the highest.

   Note:
   Convert any font or theme size from REMs to pixels in the CSS with a conversion factor of 10. For example, 10 REMs should be changed to 100 pixels.

5. Select **Update**.

Configure a taxonomy on Business Portal to define topics relevant to your users

Configure and manage the taxonomy on the Business portal to meet your needs.

Before you begin

Role required: admin or sp_admin

About this task

Add or edit taxonomy and child topics to the business portal. Taxonomy enables you to define topics which are relevant to your users.

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For example, topics relevant to an e-commerce site can be orders, returns, payments, and others. Your users can find the relevant topic and then use available articles and catalog items of that topic.

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. Search and select `*business portal` in the Title column on the Service Portals page.
3. Select **Business Portal**.
   If a message appears about the application scope, select **here** to be able to edit the record.
4. In Related Lists, select **Taxonomy**.
5. Select **Edit**.
6. On the Edit Members page, move the required taxonomy from **Collection** to the **Taxonomy List**.
   You can also create a taxonomy. For more information, see Create taxonomy.

   Note:
   Only one taxonomy can be associated with a portal.

7. Select **Save**.

What to do next

Create and associate topics to the new taxonomy and associate catalog items and knowledge articles to the topics created. For details, see Associate connected content to a topic.

Related topics

Create and associate topics

Business Portal user roles

Different roles allow customers to create and edit cases and manage users from the Business portal.

Business Portal user roles

User role	What this user can do on the Business Portal
Customer [sn_customerservice.customer]	• Create a case for this user's account. • View a list of cases created by this user. • Edit cases created by this user. • Search for information.
Customer case manager [sn_customerservice.customer_case_manager]	• Create a case for this user's account and for child accounts. • View a list of cases created by this user and view cases for child accounts. • Edit cases created by this user and edit cases for child accounts. • Search for information.

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Business Portal user roles (continued)

User role	What this user can do on the Business Portal
	• Create a case on behalf of another contact in this account. • View a list of cases belonging to this account. • Edit cases belonging to the account. **Note:** The customer case manager role is not automatically added to the **sn_customerservice.contact_role_assignment** system property. To expose this role to customer and partner administrators, navigate to **Customer Service** > **Administration** > **Properties** and add it to this property.
Customer administrator [sn_customerservice.customer_admin]	• Create a case for this user's account. • Create a case on behalf of another contact for this account. • View a list of cases belonging to this account. • Edit cases belonging to this account. • Search for information. • Manage users for this account.
Partner [sn_customerservice.partner]	• Create a case for this user's account. • Create a case on behalf of customer accounts. • View a list of cases belonging to this user. • Edit cases belonging to this user. • Search for information.
Partner administrator [sn_customerservice.partner_admin]	• Create a case for this user's account. • Create a case on behalf of customer accounts. • View a list of cases belonging to this account and to customer accounts. • Edit cases belonging to this account and to customer accounts. • Manage users for this account and for customer accounts.

Configure AI Search for Business Portal

Configure Business Portal to use AI Search.

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Before you begin
Role required: admin, sp_admin

About this task
AI Search is disabled by default. You can enable it by updating the portal record.

Procedure
1. Navigate to **All** > **Service Portal** > **Portals** and open a portal record.
2. Select **Business Portal**.
3. Select the **Enable AI Search** check box.
4. In the **Search Application** field, search and select the required search application.
   A search application configuration defines search experience settings, such as the search engine, search results limit, and suggestions limit. A search application configuration is selected by default, but you can select a different configuration if needed.

   You can modify existing search application configurations such as CSM Portal Default Search Application, or create and configure your own search application configurations with AI Search specified as the search engine.

   Note:
   You may need to configure the form layout to add **Search Application** field on the form. For more information about adding fields to a form, see Configuring the form layout.
5. In the **Search Results Configuration** field, search and select the required search results configuration.
   A search result configuration defines how search results are displayed. A search result configuration is selected by default, but you can select a different configuration if needed.

   You can modify existing search results configuration record such as CSM Search or create and configure your own search results configuration.

   Note:
   You may need to configure the form layout to add **Search Results Configuration** field on the form. For more information about adding fields to a form, see Configuring the form layout.
6. Select **Update**.

Enable AI search in the Business Portals for unauthenticated users

Activate the AI search widgets to allow guest users logging in to the Business portal to use the AI search feature.

Before you begin
Role required: admin
You must configure AI Search for the business portal. For more information, see Enable and configure AI Search in Service Portal.

Procedure
1. Navigate to **All** > **Service Portal** > **Widgets**.
2. Search for **Typeahead Search**.
3. Select **Typeahead Search**.
4. Select the **Public** check box.

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5. Select **Update**.
6. Repeat the steps for the **AI Search Assist** widget.

AI Search Assist for authenticated external users

Enable AI Search Assist in the business portal for authenticated external users with the snc_external role.

Configure AI Search Assist Actions for authenticated external users in Business Portal

Enable the AI Search Assist Actions to search knowledge articles in the business portal. It applies for authenticated external users with the snc_external role.

Before you begin

You must configure AI Search for the business portal. For more information, see Enable and configure AI Search in Service Portal.

You must enable the Typeahead Search and AI Search Assist for the authenticated external users to use the AI search feature. For more information on the widgets, see Typeahead Search widget and AI Search Assist widget.

Role required: admin

Procedure

1. Navigate to **All** > **System Web Services** > **Scripted Web Services** > **Scripted REST APIs**.
2. On the Scripted REST APIs page, search and select **AI Search Assist Action (Internal API)**.
3. On the AI Search Assist Actions (Internal API) page, in the Resources related list, select **Order [sc_cat_item]**.
4. On the Order [sc_cat_item] page, in the **Security** tab, do the following:
   a. Select the **Requires authentication** to turn on the authentication.
   b. Clear the **Requires SNC Internal** checkbox to turn off the feature.
   c. Select **Update**.
5. On the AI Search Assist Actions (Internal API) page, in the Resources related list, select **Resolves my issue**.
6. On the Resolves my issue page, do the following:
   a. Select the **Requires authentication** to turn on the authentication to access resource.
   b. Clear the **Requires SNC Internal** check box.
   c. Select **Update**.
7. Select **Update**.

Configure AI Search Assist for authenticated external users in the Business Portal

Enable the AI Search Assist to search knowledge articles in the Business Portal.

Before you begin

Role required: Authenticated external users with snc_external role

Activate Customer Service Management

You must configure AI Search for the Business Portal. For more information, see Enable and configure AI Search in Service Portal.

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You must enable the Typeahead Search and AI Search Assist for the authenticated external users to use the AI Search feature. For more information on the widgets, see Typeahead Search widget and AI Search Assist widget.

Role required: admin

Procedure

1. Navigate to **All** > **System Web Services** > **Scripted Web Services** > **Scripted REST APIs**.
2. On the Scripted REST APIs page, search and select **AI Search Assist (Internal API).**
3. On the AI Search Assist (Internal API) page, in the Resources related list, select **search**.
4. On the search page, in the **Security** tab, do the following:
   - Select the **Requires authentication** to turn on the authentication to access resource.
   - Clear the **Requires SNC Internal** check box.
   - Select **Update**.
5. Select **Update**.

Business portal usage calculation

Track how your customers and employees are using the portal. The Customer Portal Usage dashboard provides information about portal visits resulting in session counts.

To view the Customer Portal Usage dashboard, navigate to **Customer Service** > **Administration** > **Portal Usage**.

Note:
You can ignore the bot session usage that is captured as part of this dashboard.

A user session is a period of activity on the Customer service portal, Consumer Service Portal, or Business portal by any of the following session types:

- Guest session: Session where the user isn't logged in
- Bot session: Separate count of sessions generated due to bots and crawlers
- External session: Session where the user is an external user, typically a customer, or consumer who is logged in

The aggregate session count is based on the following

calculations:

A user session times out after a specific period of inactivity.

User access to the self-service portals is tracked as follows: per session, per day, and per portal. If the same user logs in from multiple browsers or devices, each login is counted as a separate visit. Each first call of a portal page starts a session and, the usage metrics are calculated for the 24 hours window.

The default session timeout is 30 minutes. This setting can be adjusted using a system property. For more information about modifying the session timeout setting, see Manage user sessions.

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Site visit calculation examples

A user logs in, logs out, and then logs in again.

Example of a site visit calculation for a user who logs in, logs out, and then logs in again

Step	User activity	Billable count incremented
1	User visits the portal as an anonymous or guest user	Yes
2	User logs in	No
3	User logs out	No
4	User logs in immediately after logging out	Yes

A user logs in and continues the session past midnight:

Example of a site visit calculation for a user who logs in and continues the session past midnight

Step	User activity	Billable count incremented
1	User visits the portal as an anonymous or guest user	Yes
2	User logs in	No
3	User session continues past midnight	**Yes**
4	User logs out	No

Limit access to product model data on the Business Portal

Use a system property to limit customer access to data in the Product Models table.

External users can access the product model data from the Business Portal with the sn_esm_user role. System administrators can use the *csm_cmdb_model.customer_visible_flag* system property and the **Customer Visible** field on the Product Models table (cmdb_model) and child tables to limit this access.

The *csm_cmdb_model.customer_visible_flag* system property enables the **Customer Visible** field for the tables listed below. By default, this property is set to false. When set to true, the system uses the setting in the **Customer Visible** field to determine access to product model data on the Business Portal.

- Product Models table (cmdb_model)
- Software Models table (cmdb_software_product_model)
- Application Models table (cmdb_application_product_model)
- Consumable Models table (cmdb_consumable_product_model)
- Facility Models table (cmdb_facility_product_model)
- Hardware Models table (cmdb_hardware_product_model)

The Model Categories table (cmdb_model_category) does not have a **Customer Visible** field. Access to model categories data is restricted by using the **Customer Visible** field on the Product

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Model table. Only the categories for the products which are visible in the Product Model table will be visible in the Model Categories table.

For upgrades from Jakarta to Madrid, the **Customer Visible** field is added to each record in the Product Models table and set to false.

To limit access:

1. Set the *csm_cmdb_model.customer_visible_flag* system property to true.
2. Customize the Product Models table (cmdb_model) and add the **Customer Visible** column.
3. Set the value of the **Customer Visible** field to true for the product models that should be visible to external customers.

External users can see these product using these product models if the products are linked to the customer account.

Multi-factor authentication for Business Portal

Enable multi-factor authentication for business portal users so that access to the self-service web portals is more secure from potential vulnerabilities.

Multi-factor authentication, also known as two-step verification, is a security requirement that asserts a user enter more than one set of credentials. For more information, see Multi-factor authentication.

Multi-factor authentication properties

Use properties to enable role-based multi-factor authentication criteria and configure the behavior.

Properties for multi-factor authentication

Property	Description
Enable Multi-factor authentication [glide.authenticate.multifactor]	Select this check box to allow users and administrators to use this feature. • Type: enabled | disabled • Default value: enabled • Location: **Multi-factor Authentication** > **Properties**
Number of times a user can bypass setting up multi-factor authentication [glide.authenticate.multifactor.setup.bypass.count]	Enter a number that represents how many times a user can choose to skip the additional passcode requirement. This gives your users the ability to still log in the instance if they do not have their mobile device with them. If you disable this feature and then re-enable it, the counter starts over again. • Type: string • Default value: 3 • Location: **Multi-factor Authentication** > **Properties**

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Properties for multi-factor authentication (continued)

Property	Description
The time in minutes, the one time code sent to user's email address is valid for [glide.multifactor.onetime.code.validity]	Enter a number in minutes that specifies how long the reset code is valid. See Log on with multi-factor authentication. • Type: string • Default value: 10 • Location: **Multi-factor Authentication** > **Properties**
Additional time in seconds for which the code will be valid to accommodate for the clock skew. Max value is 60 seconds. [glide.authenticate.multifactor.clock_skew]	Enter a number in seconds with a maximum of 60. By default, the instance validates the code entered by the user against the single app-generated code generated at whatever the `current time` is. You can skew the time window with this property and allow one or more codes generated during a time window to be considered valid. The property's value is used in the following calculation: `current time - x/2` and `current time + x/2`, where 'x' is the value of this property. If you use the value of 10, for example, the instance considers any codes generated by the app between the time range `[the current time - 5 seconds]` and `[current time + 5 seconds]` to be valid. Use this property to prevent log in issues where the user is unable to enter the correct code in the default time allotted.

Configure roles for multi-factor authentication

Add the external role sn_customerservice.customer to the multi-factor roles.

Users with this role is required to use multi-factor authentication. For more information, see Configure user-based multi-factor criteria.

Configure Walk-up Experience for Customer Service Management

Configure various aspects of Walk-up Experience based on the specific requirements of your organization. Walk-up Experience users with the sn_csm_walkup.walkup_admin role and administrators can activate and configure the application to meet specific requirements.

Before you begin

Role required: admin

About this task

There is a sequence of tasks that enable you to configure CSM Walk-up Experience. Perform these tasks based on the plugin you activated.

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You can configure appointments, decide when to send notifications to users, establish and configure physical queue locations and operating schedules, integrate with CSAT surveys, and associate stockrooms with queue locations. You can also customize your Walk-up Experience portal with a unique logo and branding.

To configure CSM Walk-up Experience, use the configuration tasks listed in the table below which takes you through the entire configuration process.

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Administration**.
2. Complete the following tasks to configure the CSM Walk-up Experience feature.

CSM Walk-up Experience configuration tasks

Task	Description
Activate CSM Walk-up Experience.	Activate the Walk-up for CSM plugin (com.snc.walkup_for_csm). **Note:** This plugin includes demo data.
Click **Walk-up Locations** for configuring locations.	Create walk-up location queues with custom schedules, assignment groups, average wait time, and more. For more information about configuring locations, see Configure Walk-up Experience locations.
Click **Schedules**.	View, create, or modify walk-up venue schedules, such as 8-5 weekdays, and associate them to the walk-up location queues. For more information about configuring schedules, see Configure Walk-up Experience schedules.
Click **Appointment Configurations** for configuring appointments.	Create service configurations for individual walk-up queue locations. You can configure schedules, number of appointments allowed per day, how far in the future users can book appointments, and more. For more information about configuring appointments, see Configure appointment booking.
Click **Portal Configurations** for configuring a portal.	Create and modify custom Walk-up Experience online and on-site service portals. For more information about configuring the portal, see Configure the Walk-up Experience portal.
Click **Notifications** for configuring notifications.	Access and configure alerts that keep users and fulfillers informed of events that concern them. For more information about configuring notifications, see Configure Walk-up Experience notifications.
Surveys	Access customer satisfaction surveys and enable public access to the surveys, set

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Task	Description
	survey trigger conditions, and view user responses. For more information about configuring schedules, see CSM Walk-up Experience customer satisfaction surveys.

Walk-up Experience for Customer Service Management

The ServiceNow® Walk-up Experience for Customer Service Management application enables you to set up a contact channel to support both online check-in and onsite check-in to a pre-established walk-up service center.

Walk-up Experience aims to support users and significantly improve their satisfaction through a fast in-person support. Employees and business guests can get real-time, in-person help with their issues.

User personas and roles are defined as follows:

Requesters

Users access the Walk-up Experience application in several ways.

- Online:
  - Quickly check in online to the nearest available walk-up venue using the **Walk-up Check In** option on the Service Portal using your computer.

    Note:
    Walk-up Experience application automatically routes you to the nearest walk-up queue using the IP address of your computer. You can change the location, if desired.

  - Join the queue and view your queue position.
  - Schedule appointments for support and receive appointment reminders, as well as cancel or reschedule appointments from links in the reminder or from the online check-in interface.
  - Schedule only one appointment per walk-up location queue at a time.

    Note:
    Even with a scheduled appointment, you can still check into a walk-up location queue online or in person onsite.

  - Receive email notifications when your request is assigned to a technician when your position in the queue is close to being served and when your walk-up request has been closed or abandoned, should you decide not to attend the queue.
- Onsite at the Walk-up Experience location:
  - Check into a queue at the physical walk-up location by manually entering your name, email, and contact details.
  - Observe queue activities on a large monitor that displays both walk-in requesters and those with appointments.
  - View the monitor displaying how many people are currently in the queue, guest positions in the queue, who is being served, and estimated wait times.
  - Answer an available single-question survey which captures your user sentiment after a visit.

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Technicians or Agents

Customer support uses the Walk-up Experience application to meet the demand of urgent issues or requests from the requesters.

- Walk-up Experience technicians manage daily operations at the walk-up queue locations. They resolve customer service issues.
- Technicians can accept and close Walk-up Experience interactions through the Agent Workspace interface. Agent Workspace contains a personal inbox where walk-up interactions, if configured in Advanced Work Assignment, are automatically pushed for assignment.
- Agents can manage all aspects of Walk-up Experience fulfillment using Agent Workspace. Based on their capacity, and if records are on-hold, they can work on multiple transactions at the same time and promote interactions to cases.
- Technicians can view and accept scheduled appointments in their Agent Workspace personal inbox. Appointments are routed to the inbox according to agent availability. Alternatively, agents can pick and choose appointments manually.
- If necessary, technicians can work with anyone in the queue at any time. Technicians can manually assign themselves to a walk-up interaction, by accepting the interaction from a list of unassigned interactions in Agent Workspace.

Managers

Managers supervise the walk-up location technicians and oversee daily operations.

- Walk-up managers can observe and capture operational and performance data by monitoring the walk-up dashboard.
- Walk-up managers can use the application to increase customer satisfaction, provide customer service in a timely manner, and report performance data to upper management.

Administrators

Configure and maintain walk-up related systems, such as the walk-up location branding and text, queue locations and schedules, appointments, advanced work assignments, and notifications, and CSAT surveys.

Walk-up Experience User Roles

Role Name	Role	Description
sn_walkup.walkup_login	Store representative	A user with this role helps requesters check in at the walk-up location.
sn_csm_walkup.walkup_technician	CSM walk-up technician	A user with this role fulfills user demands at the CSM walk-up location.
sn_csm_walkup.walkup_manager	CSM walk-up manager	A user with this role manages the team at the walk-up location.

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Walk-up Experience User Roles (continued)

Role Name	Role	Description
sn_csm_walkup.walkup_admin	CSM walk-up administrator	A user with this role administers walk-up interactions, location queues, and walk-up reasons.

Configuring Walk-up Experience for Customer Service Management

To get started with Walk-up Experience for Customer Service Management, see Configure Walk-up Experience for Customer Service Management.

Walk-up Experience for guest users

The Walk-up Experience application can enable guest users to manage walk-up appointments online from the Consumer Service Portal or Customer Service Portal home page.

Request apps on the Store

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

Requirements to use Walk-up Experience for guest users

Note the following requirements for guest users to be able to use Walk-up Experience:

- The Guest Walk-up Experience for Customer Service store app must be installed. For more information on installing the store application, see Install a ServiceNow Store application.
- The com.snc.walkup_for_csm plugin must be activated. For more information on activating a plugin, see Activate a plugin.
- The Walk-up Check-in widget must be configured. For more information, see Add a Walk-up Experience online check-in link on the Service Portal home page.

Domain separation and the CSM Walk-up Experience application

This section is an overview of domain separation as it pertains to the CSM Walk-up Experience application and how it relates to Service Portal pages, interaction queues, and configurations. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

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

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

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For more information on support levels, see Application support for domain separation.

Overview

Domain separation in the CSM Walk-up Experience application is supported at the **Basic** level. However, the application depends on the Service Portal, which is not supported for domain separation. Domain separation pertains to the CSM Walk-up Experience application in the following ways:

- Walk-up location queues support domain separation to define which end users can access each location queue.
- The Interaction table supports standard domain separation for data security. Interaction tickets are opened for a specific domain.
- Walk-up location queues and interactions support domain separation. Therefore, fulfillers also work within a domain-separated environment when addressing interaction tickets associated with a location queue.
- Management and administration configurations reside in the walk-up location queue records. Therefore, those configurations are available to the respective domain managers and admins.
- While the Service Portal pages are not domain separated, the CSM Walk-up Experience application's portal pages retrieve data within the user's specific domain. Therefore, those pages can be reused across different service portals designed and configured for separate domains. The admins must build each portal themselves.
- The **Domain** field is available on the wu_location_queue table. Setting domain here ensures users only see queues that are part of their domains during online check-in.
- For Advanced Work Assignment routing to operate, each wu_location_queue must include a work item routing condition. This condition explicitly adds a reference to the domain the queue is part of.

> **Note:**
> The appointment booking feature is not domain separated. Since Appointment [itil_appointment] table data is not domain separated, list views could reveal data across domains.

How domain separation works in the CSM Walk-up Experience application

For this application to be the most effective, walk-up administrators should configure walk-up locations accordingly. Configure the `wu_location_queue` record to meet a user need, which affects the requester experience. Each domain configured to the location queue record has its own set of rules. The same applies to other tables within the Walk-up application as well.

> **Note:**
> Elements of the Service Portal platform such as settings, portals, and widgets cannot be domain separated. However, the data within the widgets displays based on how the domain is configured. The recommended approach is to set up separate portals for each MSP customer.

Elements of the Service Portal that are used as part of the walk-up experience are as follows:

- Portal (Walk-up)
- Pages (`walkup_online_checkin, walkup_queue_on_site, walkup_home, walkup_survey, walkup_check_in`)

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- Theme (Walk-up theme)
- Widgets (Online check-in experience, walk-up queue on site, walk-up check-in, walk-up exit survey, walk-up home, walk-up schedule)

To learn more, see Domain separation and Service Portal.

For data separation, the CSM Walk-up Experience application uses the walk-up user (Requester/ Walkup login user) domain to determine in which domain the requester data should be placed.

- Requesters can check in only in locations for which they have visibility.
- Requesters are able to select the Reasons that belong only to their own domain.
- Interaction records are created in the Requester's domain.

For the Fulfiller side, the application uses the domain of the walk-up user (walk-up technician/ manager/ admin) to determine which records are visible.

- By domain separation rules, Fulfillers can work only on interactions that are visible to them.
- Fulfillers are able to configure only walk-up location records that belong to their domain, are in the global domain, or have the parent-child hierarchy.
- The same visibility rules apply for the Many to Many `[wu_m2m_location_queue_reason]` tables that control the mapping between a location and reason.
- The walk-up context records also have domain separation support. This support ensures technicians to view detailed requester information only for the records that are visible by domain separation rules.

Domain-separated tables

As part of the CSM Walk-up Experience, records in the following tables can be domain separated.

- Walk-up location queues `[wu_location_queue]`
- Walk-up reasons for visit `[wu_reason]`
- Walk-up reasons `[wu_m2m_location_queue_reason]`
- Walk-up contexts `[wu_context]`
- Interactions `[interaction]`

CSM Walk-up Experience portal security and access

Security is built into the application to help prevent end-user facing devices at the Walk-up Experience onsite portal from offering elevated role privileges to users. The Walk-up Experience onsite portal is accessed by an account containing only the sn_walkup.walkup_login role. The sn_walkup.walkup_login role contains the snc_external role.

Understanding Walk-up Experience portal security

Accessing the onsite Walk-up Experience portal requires the singularly assigned sn_walkup.walkup_login role. The user record with this role cannot contain any other roles. Because most user records contain multiple roles, the sn_walkup.walkup_login role is assigned to a user record account, not a human user. The security feature helps prevent the onsite portal

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check-in device from permitting users who might try accessing the portal with an elevated privilege role.

The sn_walkup.walkup_login role is granted to a user record for an account used to log in to the check-in device. Typically, the device at the onsite Walk-up Experience portal is a tablet. It is not an actual human being with an assigned role, but an account with a role. For example, a technician opening the onsite Walk-up portal for business logs in to the check-in device using the user record that contains the sn_walkup.walkup_login role. Again, the portal can only be accessed by a user record that contains this role only. A user cannot access the portal with the admin role or if the user record contains roles other than the sn_walkup.walkup_login role.

Access to Walk-up Experience

Technicians opening up the onsite Walk-up location for business, or joining the support team during operation hours, access the user record account. Technicians with sn_walkup.walkup_login role can log in to the Walk-up Experience portal. Internal and external users can access the onsite Walk-up Experience portal via a check-in device, typically a tablet, to enter a queue. Internal, authenticated users can also access an online queue check-in via desktop.

Configure the Walk-up Experience portal

Create engaging walk-up center service portals featuring your logo, portal theme, desired catalog, links to a knowledge base and social community, and more.

Before you begin

Role required: admin or sn_walkup.walkup_admin

Walk-up Experience includes a complete base-system **Walk-up Portal** with theme. The **Walk-up Portal** pages are meant to be used as built. You can create custom portal pages to meet your needs by copying the portal pages and associated widgets and making changes to the copies. You can configure both an online check-in portal and a physical check-in portal for your walk-up locations.

There are several ways to configure the Walk-up service portal:

- **Service Portal** application: Modular user interface framework for quick and easy building and customization of application portals.
- Service Portal Walk-up form: Requires CSS and HTML experience.

Procedure

1. To configure the Walk-up service portal using the **Service Portal** application, navigate to **Service Portal** > **Service Portal Configuration**.
   The Service Portal configuration page opens.
2. To customize the base-system walk-up portal with your unique branding, title, logo, theme colors, layout, properties, widgets, and more, or to create a new walk-up portal, refer to Service Portal for detailed information.
3. Alternatively, to configure the Walk-up service portal using the Service Portal Walk-up form, navigate to **CSM Walk-up Experience** > **Administration** > **Portal Configurations**.
   The Service Portals list opens.
4. In the Service Portals list, click Walk-up or search for it in the list header search box.
5. Click the Form menu icon and select **Configure** > **Form Design**.
   The form designer opens.
6. In the form designer header drop-down list select or search for any of the configurable walk-up forms to customize your portal appearance.

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Option	Description
Walk-up context [wu_context]	Configure an online check-in channel for users to join a walk-up queue before physical ly arriving at the walk-up location. Identifies a walk-up user and the description of the asso ciated interaction.
Walk-up Location Queue [wu_location_ queue]	Configure the physical walk-up location in teraction queue to manage and administer the service center. You can establish walk-up locations, set hours of operation, enable on line check-in, determine assignment groups, associate stockrooms, as well as design the queue time display and position notification system.
Walk-up Reason [wu_m2m_location_ queue_reason]	Define various common reasons why a user needs walk-up support.
Walk-up Reason for Visit [wu_reason]	Specify the order in which reasons for a visit should be prioritized at a walk-up location.

To modify form content to meet your portal requirements, refer to Form configuration for detailed information.

Configure Walk-up Experience service channel

Configure the Walk-up Experience service channel to meet the needs of your walk-up agents. You can configure the way the tasks are assigned and manage interactions in the Agent Workspace.

Before you begin

Role required: admin or sn_csm_walkup.walkup_admin

About this task

The Walk-up Experience service channel is viewed and configured through Advanced Work Assignment. You can modify default values and conditions as required.

Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Service Channels**.
   The Service Channels list displays.
2. Select **Walk-up** to open the Walk-up Experience service channel.
3. Refer to Create or configure a service channel for detailed information regarding the Service Channel Walk-up form values and conditions.
   For more information regarding Advanced Work Assignment service channels configuring capacity and utilization, inbox layout, and overriding agent capacity for selected agents, see Service channels.

Configure Walk-up Experience notifications

As an administrator, you can create and use notifications to notify requesters about events that impact them while they're getting their issue addressed through a walk-up experience. Requesters are notified of online appointments that they've taken or when their issue is assigned to a store representative by email.

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Before you begin
Role required: admin or sn_csm_walkup.walkup_admin

About this task
Walk-up Experience includes several base system notifications that you can use or customize to notify walk-up visitors about specific information and interactions.

Walk-up Experience notifications

Notification	Description
Walk-up Abandoned	Notifies when a walk-up interaction is closed.
Walk-up Threshold Notification	Notifies visitors when they're close to being next in line for support.
Walk-up Assigned	Notifies when an interaction is assigned to a technician.
Walk-up Closed	Notifies when an interaction is closed.

Procedure
1. Navigate to **All** > **CSM Walk-up Experience** > **Administration** > **Notifications**.
2. Select an available walk-up notification to view basic properties, as well as information about when to send it, who receives it, and what the notification contains.
3. To modify a walk-up notification, edit any of the form fields.
4. To create a walk-up email or push notification, select **New**.
   For more information, refer to the following topics:
   - Create an email notification
   - Create a push message

   For complete information regarding using the System Notification application, refer to Notifications.

Configure Walk-up Experience schedules

Once you know the hours of operation for your Walk-up Experience location, you can either access the base system default schedules or create schedules to associate with your walk-up location.

Before you begin
Role required: admin or sn_csm_walkup.walkup_admin

Procedure
1. Navigate to **All** > **CSM Walk-up Experience** > **Administration** > **Schedules**.
   The Schedules list opens. You can view all available base-system default schedules, such as **8-5 weekdays excluding holidays**.
2. To modify an existing base system schedule, select the schedule name, otherwise select New to create a schedule if none of the default schedules apply for your walk-up location.
3. Complete the Schedule New record form or modify fields on an existing form.

   To complete this process and for detailed information on creating, modifying, and using schedules in the system, including a definition of all form fields, refer to Schedules.

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Walk-up Experience appointment booking

With the CSM Walk-up Experience appointment booking feature, walk-up users can view available appointment windows. The users can also select and book an appointment for a walk-up location using the online **Walk-up Check-in** feature.

Create time windows for walk-up queue locations enabling requesters to book service appointments.

The Appointment Booking plugin (com.snc.appointment_booking) must be activated to use the application. Appointment booking adds the Appointment Booking menu to the application navigator and the following modules:

- **Appointment Booking Configuration**: Use this module to create an appointment booking. Configure an application and then configure each service within that application.
- **Appointment Bookings**: Use this module to view a list of appointments that have been booked for services. This list includes the work orders associated with each appointment.

Appointment booking requires configuration at both the application level, in this case, Walk-up Experience, and at the walk-up queue service level, represented by the actual location of the walk-up queue.

The Walk-up Experience application configuration contains settings that apply to all the service locations within the application that support appointment booking.

A service configuration is required for each of the walk-up queue locations within the application that offer scheduled appointments. A service configuration includes settings that apply only to that specific walk-up queue service location.

Note:
Both the application configuration and the service configuration must be active to book appointments.

For detailed information about the **Appointment Booking** application, see Manage appointments.

Configure appointment booking

Create or modify appointment booking configurations for Walk-up Experience services. A service is defined as the actual physical location of a walk-up queue. The information stored in the Walk-up Experience application configuration applies to all services or queue locations within the application.

Before you begin

Role required: admin or sn_csm_walkup.walkup_admin

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Administration** > **Appointment Configurations**.
2. Select **New** to create a service configuration.
   Alternatively, you can select an existing service configuration to modify data.
3. In the Appointment Booking Service Configuration form, fill in the following fields as needed.

Appointment Booking Service Configuration form

Field	Description
Name	The name of the service configuration.

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Field	Description
Active	Activates appointment booking for the service. **Note:** If deactivated, customers cannot schedule appointments for the service but can still create work orders.
General Information	
Configuration	The name of the appointment booking configuration to which this service belongs.
Availability table	The table calculates appointment availability. For Walk-up Experience, choose Walk-up Appointment [wu_appointment].
Holiday Schedule	The holiday schedule to use when determining availability. Appointment booking evaluates the holiday schedule when determining the number of available appointments and excludes any day in the schedule that is set to **Exclude**. Select the lookup icon and select a schedule from the Schedules list. **Note:** Holiday schedules are useful when you set the assignment method for tasks to **manually**, which does not consider agent schedules.
Catalog Information	
Catalog item	The service in the service catalog for which you are creating this appointment booking configuration. Select the lookup icon and select the associated service from the Record Producers list. You must create a record producer for each walk-up service location. **Note:** The catalog item must exist in the service catalog. If you are using appointment booking with work orders, create a work order template before you configure appointment booking.
Location	The field on the record provider that determines the appointment location.

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Field	Description
	Note: Verify the **Location** field on both this form and the Walk-up Location Queue (wu_location_queue) form are configured in alignment. Walk-up Experience contains the *location* reference variable, which is a Location (cmn_location) record. Selecting **Location** from the search list icon confirms you are aligning with the same time zone as the walk-up location you are configuring for. When you select **Location**, the online appointment scheduling calendar displays in the user time zone. If you leave this field empty or if you have not configured the user preference for the instance to have an associated time zone, the appointment scheduling calendar defaults to display in the user time zone. If a user in Europe has User preferences for **Time zone** configured for **Europe/Brussels** and the Appointment Booking Configuration for the **Location** field is set to a cmn_location with the time zone **US/Pacific**, then the appointment scheduling calendar displays in the US/Pacific time zone. When a user creates an appointment, the system defaults to use the schedule associated with the Walk-up Location Queue (wu_location_queue), regardless of the **Location** field value of this record producer.
Appointment is mandatory	Enable this check box if it is required for a customer to create an appointment when requesting this service. ○ If enabled, the **Appointment** field appears on the record producer and the user must select an available appointment before submitting the service request. ○ If inactive, the user can submit the service request without selecting an appointment.
User contact	The field on the record producer that determines for whom the appointment was created. Set this field to **Contact**. This is a reference field that looks for a sys_user variable on the record producer.
Booking	
Appointments per window	The number of available appointments for each configured appointment time slot. This number determines the number of available appointments displayed on the Select Appointment window. Enter a number in this field if the assignment method for tasks is set to **manually**. If set to either **using auto-assignment** or **using dynamic scheduling**, this setting does not apply, unless a location is not provided. Then the configuration defaults to the number of appointments per window.
Lead time	The number of hours or days from the current time after which you have booked an appointment for this service. Define the lead time in hours or days. The default is 4 hours.
Future bookable max days	The number of days after the current day for which an appointment can be booked for this service. The default is 14 days.

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Field	Description
Reschedule / Cancel by time	The number of hours or days prior to an appointment start time that are required for canceling an appointment or rescheduled. If a user attempts to cancel or reschedule an appointment within this number of hours, the **Cancel** button is not available. Define the time in hours or days. The default is 4 hours.
Appointments	
Appointment window	The length or duration of the appointment window. **Note:** Ensure enough time to start and complete the work within this window.
Work duration	The amount of time required to complete all tasks created by the record producer. You set the duration for a task when it is created which is used to determine availability. The default is 1 hour.
Travel duration (round trip)	An estimated value of the average travel time required (round trip) for the agent performing the task. Set the value to 0 since the work is performed onsite and travel time is not needed.
Daily Schedule	
Bookable days	The days of the week for which appointments can be booked. The default is Monday through Friday. Bookable days should reflect the appointment schedule. **Note:** Appointment schedules are separate from the walk-up queue location schedule but should be the same days and hours as the walk-up queue location schedule.
Daily start time	The start of the work day and the earliest start time for an appointment window. The default is 9:00.
Daily end time	The end of the work day and the latest end time for an appointment window. The default is 18:00 PM.
Include daily break	Enable this check box to schedule a break for each bookable day, then select the break start and end times. Can define one break which applies to all days.
Appointment booking preview	Provides a preview of the appointment windows and times based on the selected start and end times, break time, and appointment window.

4. Select **Submit**.

Walk-up Experience appointment booking administration

Create or modify and enable the CSM Walk-up Experience application configuration and the individual service location configurations for the **Appointment Booking** feature.

Administrators can create, modify, and enable the Walk-up Experience application configuration. Appointment booking administrators (appointment_booking_admin) can create, modify, and enable configurations for service locations within the Walk-up Experience application.

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Walk-up Experience is an application level configuration provided with the base system appointment booking feature. You can include as many service level configurations as needed. The service level configurations apply to the individual walk-up queue locations that exist. Administrators can modify these configurations as needed or use them as examples to create new configurations.

For detailed information on appointment booking administration, refer to Configure appointment booking.

Enable Walk-up Experience appointment-booking

Enable or disable the appointment booking feature for Walk-up Experience as well as for the individual walk-up service locations available to customers.

Before you begin

Role required: admin or sn_csm_walkup.walkup_admin

About this task

The Appointment Booking plugin (com.snc.appointment_booking) must be activated to use the application.

When you enable appointment booking, the **Schedule an appointment** tab appears on the online check-in page. Users choose a reason for the appointment and select a date a time from the available appointments.

Procedure

1. Navigate to **All** > **Appointment Booking** > **Appointment Booking Configuration**.
2. Click **Walk-up Experience**.
   The **Walk-up Experience** configuration is provided with the base system **Appointment Booking** feature.
3. Click **Active** to enable appointment booking for the Walk-up Experience application.
   Alternatively, if the feature is active you can deactivate it by clicking **Active**.
4. In the Appointment Booking Service Configuration related list, click the name of a service.
   For Walk-up Experience, the physical location of a walk-up queue defines a service. Every walk-up queue associated with your application is a service that you must configure for appointment booking.
   The Appointment Booking Service Configuration form for the selected service opens.
5. Click **Active** to set the field to true.
6. Click **Update**.

Walk-up Experience appointment booking configuration

Create or modify appointment booking configurations for the Walk-up Experience. You can view or modify the Walk-up Experience application appointment booking configuration and create or modify related service appointment configurations.

The base system Walk-up Experience application includes a default appointment booking configuration that can be modified. By default, the information stored in the Walk-up Experience application appointment booking configuration applies to all services within that application. Services within the Walk-up Experience application are defined as the actual walk-up queue locations. You can create new appointment booking service configurations for the Walk-up Experience application or modify existing configurations.

For example, you may want to configure one walk-up queue to accept appointment booking every day from Monday to Friday, but for another queue, you only want appointment booking

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available on Monday, Wednesday, and Friday. By configuring appointment booking at the service level, you can achieve this goal.

Specific Walk-up Experience set-up criteria for appointment booking include the following configurations:

- Define different appointment schedules and time windows per queue location.
- Define the time window in which you want to support appointments. For example, 15 minutes v. 30 minutes.
- Define the time window capacity. For example, the maximum number of appointments per time window.

View or modify a Walk-up Experience appointment booking configuration

View the base system default appointment booking configuration to determine if the criteria meets your walk-up appointment booking requirement. You can modify the configuration to manage appointment booking. The information stored in the Walk-up Experience appointment booking configuration applies to all the services within the application.

Before you begin

Role required: admin or sn_csm_walkup.walkup_admin

About this task

The **Walk-up Experience** configuration is provided with the **Appointment Booking** feature.

Procedure

1. Navigate to **All** > **Appointment Booking** > **Appointment Configurations**.
2. To view the **Walk-up Experience** configuration, click the configuration name.
3. In the Appointment Booking Configuration form, view or modify the following fields as needed.

Appointment booking application configuration fields

Field	Description
Name	The name of the application configuration.
Task Table	Appointments are created for the tasks in the selected table. The Walk-up Appointment [wu_appointment] table is the default table for the **Walk-up Experience** configuration.
Availability Method	Use one of two methods to determine appointment availability. ○ **Number of appointments per slot**: Define a specific number of appointments per time slot. Use this method if the task assignment is set to **manually** which is the default setting. ○ **Scripted**: Use this configuration setting to determine availability if the task assignment method is set to **using auto assignment** or **dynamic scheduling**.
Active	Activates the application configuration and enables appointment booking.
Auto acceptance	If the application configuration setting for **Process lifecycle** is set to **task-driven**, an agent must accept or reject an assigned task. Enable the **Auto acceptance** check box to override this configuration setting for appointment booking.

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Field	Description
Portal View	Display available appointments for a single day or for a week on the online **Self Service Walk-up Check-in** portal or from the **Service Portal**.

4. Click **Submit**.

Create or modify a Walk-up Experience appointment booking service configuration

Create or modify appointment booking configurations for Walk-up Experience services. A service is defined as the actual physical location of a walk-up queue. The information stored in the Walk-up Experience application configuration applies to all services,or queue locations, within the application.

Before you begin

Role required: admin or sn_apptmnt_booking.appointment_booking_admin

About this task

To use the appointment booking feature, administrators must create a configuration for each service, or queue location, that is available to walk-up customers. Service configurations are created within the **Walk-up Experience** application configuration, as part of the **Appointment Booking** application.

Procedure

1. Navigate to **All** > **Appointment Booking** > **Appointment Booking Configuration**.
2. Click **Walk-up Experience**.
3. In the Appointment Booking Service Configuration related list, click **New** to create a new service configuration.
   Alternatively, you can click an existing service configuration to modify data.
4. In the Appointment Booking Service Configuration form, fill in the following fields as needed.

Appointment booking service configuration fields

Field	Description
Active	Activates appointment booking for the service. **Note:** If deactivated, customers cannot schedule appointments for the service but can still create work orders.
General Information	
Name	The name of the service configuration.
Configuration	The name of the appointment booking configuration to which this service belongs.
Availability table	The table that is used to calculate appointment availability. For Walk-up Experience, choose Walk-up Appointment [wu_appointment].
Holiday Schedule	The holiday schedule to use when determining availability. Appointment booking evaluates the holiday schedule when determining the number of available appointments and excludes any day in the schedule that is set to **Exclude**. Click the lookup icon and select a schedule from the Schedules list.

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Field	Description
	Note: Holiday schedules are useful when the assignment method for tasks is set to **manually**, which does not consider agent schedules.
Catalog Information	
Catalog Item	The service in the service catalog for which this appointment booking configuration is being created. Click the lookup icon and select a service from the Record Producers list. **Note:** The catalog item must exist in the service catalog. If you are using appointment booking with work orders, create a work order template before you configure appointment booking.
Location	The field on the record provider that determines the appointment location.
Appointment is mandatory	Enable this check box if it is mandatory that a customer create an appointment when requesting this service. ○ If enabled, the **Appointment** field appears on the record producer and the user must select an available appointment on the Select Appointment window before submitting the service request. ○ If disabled, the user can submit the service request without selecting an appointment.
User contact	The field on the record provider that determines who the appointment is being created for. This is a reference field that looks for a sys_user variable on the record producer, for example, **Contact**.
Timezone	The appointment window based on the **Timezone** field specified in the user contact record or the location where the appointment for the task is scheduled.
Booking	
Appointments per window	The number of available appointments for each configured appointment time slot. This number determines the number of available appointments that are displayed on the Select Appointment window. Enter a number in this field if the assignment method for tasks is set to **manually**. If set to either **using auto-assignment** or **using dynamic scheduling**, this setting does not apply, unless a location is not provided. Then the configuration defaults to the number of appointments per window.
Lead time	The number of hours or days from the current time after which an appointment can be booked for this service. Define the lead time in hours or days. The default is 4 hours.
Future bookable max days	The number of days in advance of the current day for which an appointment can be booked for this service. The default is 14 days.
Reschedule / Cancel by time	The number of hours or days prior to an appointment start time that are required for an appointment to be canceled or rescheduled. If a user attempts to cancel or reschedule an appointment within this number of

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Field	Description
	hours, the **Cancel** button is not available. Define the time in hours or days. The default is 4 hours.
Appointments	
Appointment window	The length or duration of the appointment window. **Note:** Allow enough time for the work to be started and completed within this window.
Work duration	The amount of time required to complete all tasks created by the record producer. This duration is set for a task when it is created. Used to determine availability. The default is 1 hour.
Travel duration (round trip)	An estimated value of the average travel time required (round trip) for the agent performing the task. Set the value to 0 since the work is performed onsite and travel time is not needed.
Daily Schedule	
Bookable days	The days of the week for which appointments can be booked. The default is Monday through Friday. Bookable days should reflect the appointment schedule. **Note:** Appointment schedules are separate from the walk-up queue location schedule but should be the same days and hours as the walk-up queue location schedule.
Daily start time	The start of the work day and the earliest start time for an appointment window. The default is 9:00.
Daily end time	The end of the work day and the latest end time for an appointment window. The default is 18:00 PM.
Include daily break	Enable this check box to schedule a break for each bookable day, then select the break start and end times. Can define one break which applies to all days.
Appointment booking preview	Provides a preview of the appointment windows and times based on the selected start and end times, break time, and appointment window.

5. Click **Submit**.

Configure daily schedules for Walk-up Experience service appointment booking

Specify different daily hours of operation for your Walk-up Experience location appointment booking.

Before you begin

Role required: admin or sn_apptmnt_booking.appointment_booking_admin

About this task

Create a unique appointment booking schedule for each day of the week or for specific days of the week. For example, you can set the appointment booking availability schedule to run all day, from 9:00am to 5:00pm, Monday, Wednesday, and Friday. Tuesday and Thursday appointment

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availability schedule can run from 9:00am to 12:00pm. You can completely remove appointment booking for a specific day of the week, for example, Friday.

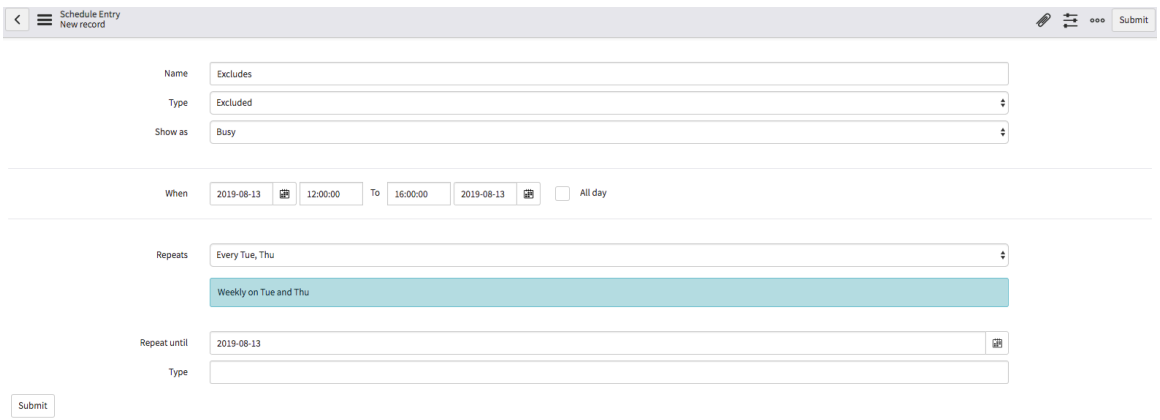
Note:
To specify unique daily booking schedules, while using your associated appointment booking configuration, create new Schedule Entries to exclude the hours appointment booking is not available.

Procedure

1. To configure, for example, Tuesday and Thursday appointment availability schedule from 9:00am to 12:00pm, navigate to **Walk-up Experience** > **Schedules**.
2. Select the schedule you use, for example, the **8-5 weekdays excluding holidays** schedule.
3. In the Schedule Entries related list, click **New** to display the Schedule Entry New record form.
4. Name the new record **Excludes** and fill in the form to create a unique daily booking schedule for Tuesday and Thursday appointments.

Schedule Entry Excludes configuration fields

Field	Description
Name	Name the record. For example, name the record **Excludes** to indicate the hours excluded from appointment booking.
Type	Choose **Excluded** as the type.
Show as	Choose **Busy** as the reason for the exclusion.
When	Indicate the date to begin using this booking availability schedule. Also indicate the time to exclude booking availability for this date. For example, the hours of 12:00pm through 5:00pm.
Repeats	Indicate the recurrence for this availability schedule. For example, **Weekly on Tue and Thu**.
Repeat until	Specify how long you want this availability schedule to run by selecting an end date.



5. Click **Submit**.
6. To verify that Tuesday and Thursday appointment booking is only available from 9:00am to 12:00am, navigate to your online Walk-up Check-in application.
   If configured for view, You can access the online Walk-up Check-in application from the **Service Portal Home** page or under **Self-Service** in the left navigation bar.

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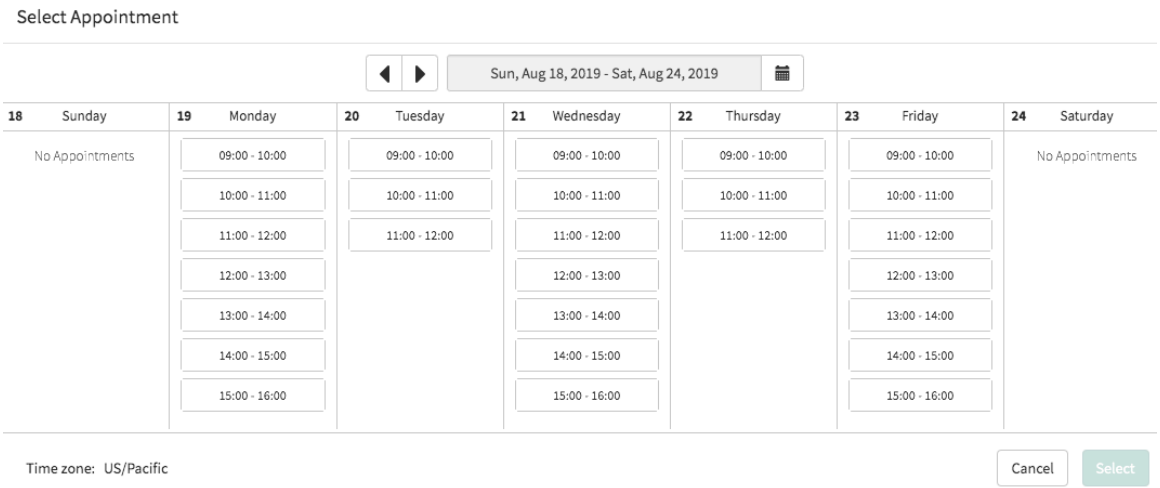
7. Select the walk-up location for which you are verifying the schedule.
8. Click **Schedule an appointment** and select a reason for the visit.
9. Select a date for the appointment.
   The **Select Appointment** window displays the first available appointment, by week and day.
10. Determine that appointments are only available on Tuesdays and Thursdays from 9:00am to 12:00pm.



Activate and configure appointment booking reminders for Walk-up Experience

Configure scheduled appointment reminders for Walk-up Experience users. Reminders ensure that users attend appointments in a timely manner, and if they can't attend then reschedule or cancel an appointment.

Before you begin

Role required: admin or sn_csm_walkup.walkup_admin

About this task

For using appointment booking reminders, you must activate the **Appointment Booking Reminders** Scheduled Job, which is not active by default. In addition, the **Appointment reminder** field doesn't appear on the **Appointment Booking Service Configuration** form by default. You must add it to the form and configure reminders. Reminders are inactive unless a configuration is set.

Procedure

1. To activate the **Appointment Booking Reminders** Scheduled Job, navigate to **System Definition** > **Scheduled Jobs**.
2. Search for **Appointment Booking Reminders** by name and click to open.
3. Click the **Active** field to activate the scheduled job.
4. Click **Update**.
5. To add the **Appointment reminder** field to the **Appointment Booking Service Configuration** form, navigate to **Walk-up Experience** > **Administration** > **Appointment Configurations**.
6. Select a Walk-up Experience service configuration from the list.
   The system opens an **Appointment Booking Service Configuration** form.
7. Click the menu button ( ) and scroll to **Configure** > **Form Layout**.

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8. Select **Appointment reminder** from the **Available** list and move it to the **Selected** list using the add button.
9. Click **Save**.
   The **Appointment Booking Service Configuration** form displays with the **Appointment reminder** field.
10. To configure an appointment reminder, choose an amount of time, in hours, from the **Appointment reminder** field drop-down list.
    The hour/hours you choose represents the amount of time before a scheduled appointment that you want to send a reminder for. For example, two hours before a scheduled appointment.
11. Click **Update** to add the appointment reminder configuration.

Configure Walk-up Experience locations

Administrators define walk-up locations while setting up the walk-up experience for an organization. Requesters see this information when they schedule appointments or check in at a service location.

Before you begin

Role required: admin or sn_csm_walkup.walkup_admin

About this task

Administrators can configure the following for locations:

- Create or modify walk-up location queues or mark locations as inactive.
- Allocate schedules for appointments, AWA conditions.
- Set conditions to automatically route work items.
- Location unavailable temporarily.
- Location address and picture.
- Specify reasons-for-visit options.
- Configure how interactions display for each walk-up location.

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Administration** > **Walk-up Locations**.
2. Select **New**.
3. Complete the form.
4. Select the **Management** tab to complete the Management form section.
5. Select the **Administration** tab to complete the administration section of the form.
6. Right-click in the form header and select **Save**.
   Several tabs appear.
   - **Interactions**
   - **Walk-up Appointments**
   - **Reasons for Visit**

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- **Assignment Eligibility**
- **Work Item Sort Order**

7. Click the **Interactions** tab to view interactions or configure how the walk-up Interactions list should display.

   You can use the filter icon ( ) and the personalize list icon ( ) to modify.

8. Click the **Walk-up Appointments** tab to view appointments or configure how the Walk-up Appointments list should display.

   You can use the filter icon ( ) and the personalize list icon ( ) to modify.

9. Click the **Reasons for Visit** tab to view, modify, or create a reason for visit option.
   The base system includes three active reasons:
   - **I need something**
   - **Something is not working**
   - **Laptop refresh**
   - **Other**
10. Click the **Assignment Eligibility** tab to view, modify, or create an assignment rule for your walk-up queue locations.
    Assignment rules are configured in the Advanced Work Assignment product.
11. Click the **Work Item Sort Order** tab to view, modify, or create a Work Item Sort Orders for your walk-up queue locations.
12. Click **Update** to save the new or modified location queue.

Configure Walk-up Experience locations for guest users

Configure walk-up locations for guest-users so they can select a location while making appointments.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Administration** > **Appointment Configurations**.
2. Select a location that the guest user needs access to.
3. Click the Preview this record icon ( ) next to the **Catalog item** field.
4. In the Record Producer window, click **Open Record**.
5. Under Related Links, click the Available For tab.
6. Click **Edit**.
7. Move **Any Guest User** from the **Collection** list to the **Available For** list and click **Save**.
8. Under **Related Links**, click the Variable Sets tab.
9. Select *sn_appointment_variable_set* and set permissions for each of its variables.

   a. In the notice at the top of the form about the current application, click **here** to access the CSM Walkup Experience application record.

   b. Select the **sn_appointment** variable.

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c. Click the Permission tab.

d. For the **Read roles** and **Write roles**, move the public, snc_internal, and snc_external roles from the **Available** list to the **Selected** list.

> **Note:**
> **Create roles** is also required for the correct auto-population of the information in the guest records.

e. Click **Done**.

f. Repeat these actions for the **sn_appointment_macro** variable.

10. Repeat step 9 to set permissions for the *sn_walkup_variable_set* variable set.

Result
The configured walk-up locations are now available for guest users.

Remove a Walk-up Experience location

If you permanently close down a physical Walk-up Experience location, you can also remove the location from the Walk-up Location Queues table.

Before you begin
Role required: admin or sn_csm_walkup.walkup_admin

Procedure
1. Navigate to **All** > **CSM Walk-up Experience** > > **Administration** > **Walk-up Locations**.
2. Click the name of the walk-up location you want to remove to open the location queue record.
3. Click **Delete** in the form header.
   A confirmation pop-up appears ensuring you want to delete the record.
4. Click **Delete**.
   The Walk-up Experience location queue is removed from the application.

CSM Walk-up Experience customer satisfaction surveys

With Walk-up Experience surveys, you can rate your satisfaction with walk-up location interactions, providing management with feedback to improve the walk-up experience.

The Walk-up Experience application includes two base-system predefined surveys.

Walk-up CSAT survey

This survey is an onsite, one-click sentiment analysis survey where you can quickly rate service based on a 1–3 scale, where 1 is a negative experience and 3 is a positive experience. The survey uses an image scale of three faces with different sentiments: sad, neutral, and smiling.

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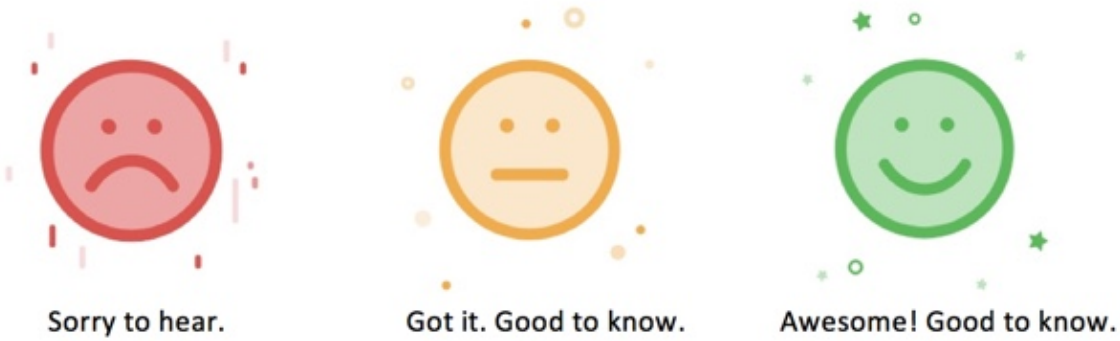
Walk-up sentiment analysis survey



Walk-up experience satisfaction survey

You can access this survey from a link enclosed in an email. The link is sent when walk-up interactions are closed. This survey uses sentiment analysis for the overall experience, wait-time experience, technician experience, technician professionalism, and additional comments. This survey is based on a 1–5 numeric rating scale, where 1 is very unsatisfied and 5 is very satisfied.

Walk-up administrators and managers can modify these surveys and the associated trigger conditions. Managers and administrators can review responses by question and see a scorecard for each survey on the **Walk-up Experience Dashboard** module. User comments provide feedback that is used to improve the performance of walk-up interactions.

For more detailed information about working with surveys, sentiment analysis, trigger conditions, and survey questions, see Assessments and Surveys.

Configure Walk-up Experience surveys

Define surveys so that requesters can provide feedback on their satisfaction with the service quality received at a location.

Before you begin

Role required: admin or sn_csm_walkup.walkup_admin

About this task

Creating a customer satisfaction survey requires that you first define a new survey and then use the Survey Designer to design, configure, and make it available to users.

Procedure

1. To view and use a base system predefined survey in the Walk-up Experience application, navigate to **CSM Walk-up Experience** > **Administration** > **Surveys**.
   The Assessment Metric Types list opens displaying the available walk-up surveys.
2. To modify an existing walk-up survey, select the survey name, otherwise navigate to **Survey** > **View Surveys** and select **New** to define a new survey if none of the base system surveys are optimal for your walk-up location.
3. To modify or complete the form, refer to modify a survey definition.

System properties for configuring Walk-up Experience for guest users

System properties enable you to configure the Walk-up Experience for guest users to access the Walk-up Check-in widget from the Service Portal home page and schedule appointments online.

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Properties to configure Walk-up Experience application

As an admin, in your instance, enter `sys_properties.list` in the filter navigator and add the following properties. The default values are listed in the following table.

Walk-up Experience properties

Property	Default Value	Description
sn_guest_walkup_cs.guest_user.walkup_enabled (true/false)	true	Enables or disables Walk-up Experience for guest user.
sn_guest_walkup_cs.captcha.enabled (true/false)	true	Enables or disables the CAPTCHA validation from the welcome page.
sn_guest_walkup_cs.max_confirmations_validity_in_minutes (integer)	15 minutes	The time to confirm the appointment booking.
sn_guest_walkup_cs.max_otp_validity_in_minutes (integer)	5 minutes	The time that the one-time password the user receives to modify or cancel the appointment is valid.
sn_guest_walkup_cs.max_guest_appointments_per_location	0	The number of appointments the guest user can book per location.
sn_guest_walkup_cs.captcha.timeout	10 mins	The time after which the CAPTCHA validation on the welcome page times out.

Add a Walk-up Experience online check-in link on the Service Portal home page

Configure a Walk-up Experience link to enable guest users to check in online to a walk-up location via Service Portal.

Before you begin

Role required: admin and sp_admin

Service Portal for Enterprise Service Management (com.glide.service-portal.esm) and Walk-up for CSM (com.snc.walkup_for_csm) plugins must be activated.

Procedure

1. Navigate to **All** > **Service Portal** > **Pages**.
2. Select **ID** from the **Search** drop-down list and enter `csm_index` in the **Search** field.
3. Select **csm_index** to display the Customer Service Portal page.
4. Scroll down and select the **Open in Designer** related link.
5. Select the **Walk-up Check-In** widget from the **Widgets** list in the left pane and drag it to the desired location on the Customer Service Portal page where you want the link to appear.

Related topics

System properties for configuring Walk-up Experience for guest users

Configure Conversational Appointment Booking

Install and set up the Conversational Appointment Booking application to enable customers to book, reschedule, or cancel an appointment with a Virtual Agent.

Before you begin

Role required: va_admin

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About this task

This procedure provides general steps to set up the Conversational Appointment Booking application so that your customers can book appointments on your ServiceNow instance with a Virtual Agent.

Procedure

1. Install the Conversational Appointment Booking application.
   For more information, see Install Conversational Appointment Booking.
2. Navigate to **Virtual Agent** > **Designer**.
3. Publish the following topics:
   - Schedule a Walk-up Appointment
   - Reschedule a Walk-up Appointment
   - Cancel a Walk-up Appointment

   For more information, see Publish a Virtual Agent topic.

   These topics are read-only by default. To add custom controls.

   duplicate the topics.

   Note:
   Translation for custom controls is currently unavailable. You can manually add the translation in the ServiceNow® Walk-up Experience appointment booking application. See Walk-up Experience appointment booking configuration for more information.

4. Confirm that the **Appointment Booking** custom control is published.
5. Confirm that the **Book or Update Appointment** and **Get Walk-up Location** topic blocks are published.
6. Test the topics.
   See Test Virtual Agent topics for more information.

Conversational Appointment Booking

Book, reschedule, and cancel appointments from Virtual Agent conversations. The ServiceNow® Conversational Appointment Booking application uses Natural Language Understanding (NLU) to communicate with customers.

Booking an appointment

The appointment booking flow works as follows:

- The logged-in user contacts your business via your portal.
- The user enters the appointment booking request into the chat, and the Virtual Agent uses Natural Language Understanding (NLU) to understand the request.
- The Virtual Agent asks the user to share their location. If the user shares their location, the available appointment locations are displayed.
- The user chooses a location.
- The user chooses the purpose of the appointment.
- The user chooses a date and time slot for the appointment.
- The appointment booking is complete.

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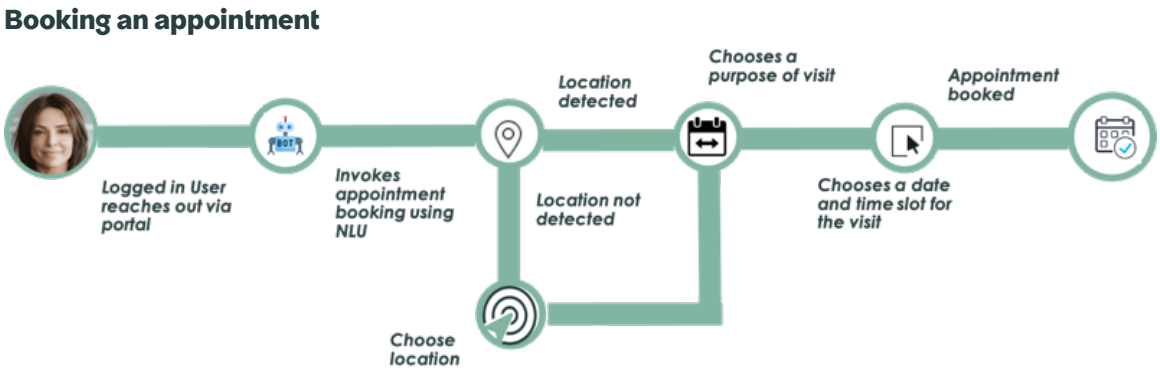
The following image illustrates the appointment booking flow.

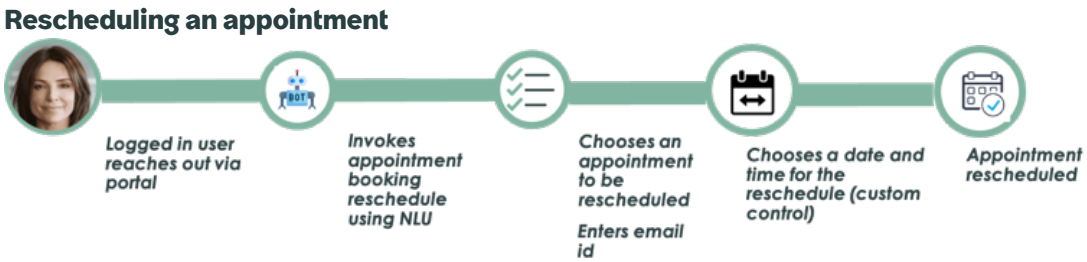


Rescheduling an appointment

The appointment rescheduling flow works as follows:

- The logged-in user contacts your business via your portal.
- The user enters the appointment booking request into the chat, and the Virtual Agent uses Natural Language Understanding (NLU) to understand the request.
- The user chooses an appointment to reschedule, and enters an email ID if needed.
- The user chooses the date and time for the rescheduled appointment.
- The appointment rescheduling is complete.

The following image illustrates the appointment rescheduling flow.



Cancelling an appointment

The appointment cancellation flow works as follows:

- The logged-in user contacts your business via your portal.
- The user enters the appointment booking request into the chat, and the Virtual Agent uses Natural Language Understanding (NLU) to understand the request.
- The user chooses an appointment to cancel.
- The appointment cancellation is complete.

The following image illustrates the appointment cancellation flow.

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Related topics

Configure Conversational Appointment Booking

Using Conversational Appointment Booking

Install Conversational Appointment Booking

Install the Conversational Appointment Booking application (sn_va_appt_schedul) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

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

Role required: admin

About this task

Conversational Appointment Booking requires the following plugins. Ensure that these plugins are activated before you install Conversational Appointment Booking.

Required ServiceNow plugins

Walk-Up for CSM (com.snc.walkup_for_csm)

Note:
Conversational Appointment Booking can be used without the Walk-Up for CSM plugin. However, custom control and Virtual Agent topic blocks shown in Configure Conversational Appointment Booking cannot be used without this plugin.

The following items are installed with this plugin:

- NLU model for Conversational Appointment Booking.

  Note:
  In order to use the NLU model, you need to train and publish the model. See Natural Language Understanding for more information.

- Virtual Agent topics: Schedule a Walk-up appointment, Reschedule a Walk-up appointment, and Cancel a Walk-up appointment.
- Virtual Agent topic blocks: Get Walk-up location and Walk-up appointment scheduling.

Appointment Booking (com.snc.appointment_booking)

Enables the appointment booking feature for Walk-up Experience.

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Glide Virtual Agent (com.glide.cs.chatbot)

Activates the Virtual Agent platform. Virtual Agent requires additional licensing. See Virtual Agent for more information.

NLU Workbench (com.snc.nlu_studio)

Enables the creation of custom ServiceNow Natural Language Understanding models used by Virtual Agent.

Studio (com.glide.dev-studio)

Used for adding and updating application files.

For information about plugin activation, see Activate a plugin.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Conversational Appointment Booking application (`sn_va_appt_schedul`) using the filter criteria and search bar.

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

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Conversational Appointment Booking.
4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Set up Configurable Portal widgets

Configurable Portal widgets provide you with the ability to configure the behavior, content, and layout of a portal by configuring instance options.

By using configurable widgets, you can configure widget behavior, visual appearance, and content to update the information presented on the widgets. Configurable widgets also reduce the amount of work required to implement and maintain widgets for your users.

Configurable Portal widget benefits

Configurable Portal widgets offer the following benefits:

- Configurable behavior: Configure widget instance options to achieve behavioral variations tailored to your business environment.
- Reusability: The ability to update instance options enables you to reconfigure widgets having to create new widgets from scratch.

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- Visual experience: Improve the usability and aesthetics of widgets and their conformance to your organization's look and feel by configuring visual aspects including colors, alignment, and styles.
- Content modification: Control the data sources or content that you want to display on the portal by mapping the widgets to data sets and configuring filters or parameters to control the information presented.
- No code or low code configuration: Update the data, behavior, and presentation of the widgets with minimal code or by updating the instance options.

For more information on using configurable widgets in your customer portals, see Using portal widgets.

Widget instances

You can use widget instances to configure the location, properties, and CSS specific to that instance. For more information, see Configure widget instances.

The following are Configurable Portal widgets that enable you to configure the portal homepage.

Widget	Description
Portal Polaris Header widget	Display access key features and pages from any place in portal. It shows logo, search, profile, and others on level 1 of the header, and menu items on level 2 of the header. The appearance of menu items in level 2 of the header is determined by the Portal Mega Menu widget selected.
Portal Mega Menu widget	The menu on the header of the portal home page to navigate to different pages. It displays topics in a menu format organized hierarchically.
Portal Browse Taxonomy widget	Display taxonomy topics along with the articles and catalog items related to them.
Portal Banner widget	Banner to display the announcements, new product or feature highlights, and important information on the top of the page.
Portal Banner Carousel widget	Displays multiple banners in a carousel to display information on multiple announcements, features, and products.
Portal Quick Links widget	Display different links for quick access including links to a knowledge article, a catalog item, a custom page, or an external URL. You can also select different layouts for quick links cards.
Portal Knowledge Quick Links widget	Display a list of articles for quick access. Articles can be selected based on featured articles, most viewed articles and more criteria or can be selected manually.
Portal Catalog Quick Links widget	Displays catalog items for important request items based on the criteria.
Portal Case Cards widget	Displays case records according to the filter criteria. You can display case details such as state, update, date, and more in a card format.
Portal Data List widget	Displays a list of cases, appointments, work orders, or other records from any ServiceNow table in list or card format.

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Widget	Description
Portal FAQ widget	Displays a list of frequently asked articles from a selected knowledge table that are categorized based on knowledge article category or related product.
Portal Polaris Footer widget	Display important information at the bottom of each page. The information includes company information and logo, site links, external links, and social media links.
Portal Object widget	Display key information of a record from the tables available on ServiceNow® table. Your users can also take related actions on the selected record.
Portal Taxonomy Topic widget	Displays topics as cards on your portal page enabling your users to access knowledge articles and catalog items related to a topic displayed on your portal in a Portal Browse Taxonomy widget.

Activate the UI Components for Customer Portals plugin

You can activate the UI Components for Customer Portals plugin (sn_ciwf_ui_cmpnt) to enable Configurable Portal widgets. The application installs related plugins if they aren't already installed.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

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

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Create a page for Configurable Portal widgets

Create a page into which you can add Configurable Portal widgets.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

Role required: ap_admin or admin

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.

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3. On the Service Portal Designer page, select **Add a new Page**.
4. Enter the text for the page title.
5. Enter an ID for the page that does not include spaces or any special character except for an underscore.
6. Select **Submit**.

Result
The page is created in the Service Portal Designer.

Portal Polaris Header widget

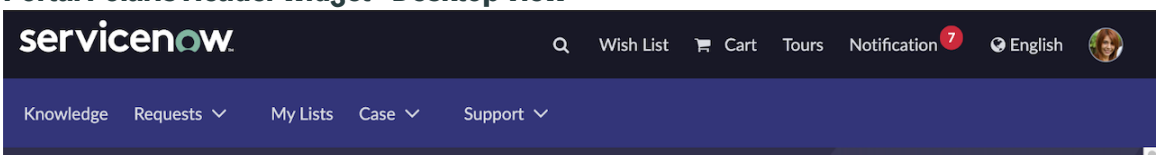
The Portal Polaris Header widget enables your users to quickly access key features, pages, and links from any place in the portal. You can select the Portal Polaris Header widget in the theme record, which is mapped to your portal.

You can display the logo, search, profile, and others on level 1 and menu items on level 2 of the header. The appearance of the menu items in level 2 of the header is determined by the widget selected in the menu record mapped to the portal. To enable a multi-level hierarchy for your menu items, you must select the Portal Mega Menu widget. For more information, Portal Mega Menu widget.

The following items that appear on level 1 and level 2 of the header menu and are configured on the portal record and menu record associated with the portal.

- Level 1 header consists of logo, search, language selector, profile, tours, notification approvals, surveys, wish list, and cart.
- Level 2 header consists of Main menu and sub menu items.

Portal Polaris Header widget - Desktop view



Additionally, in the mobile view, you can access all the menu items that are grouped by categories. Currently, the mobile view support isn't available for guided tours and language selector menu items.

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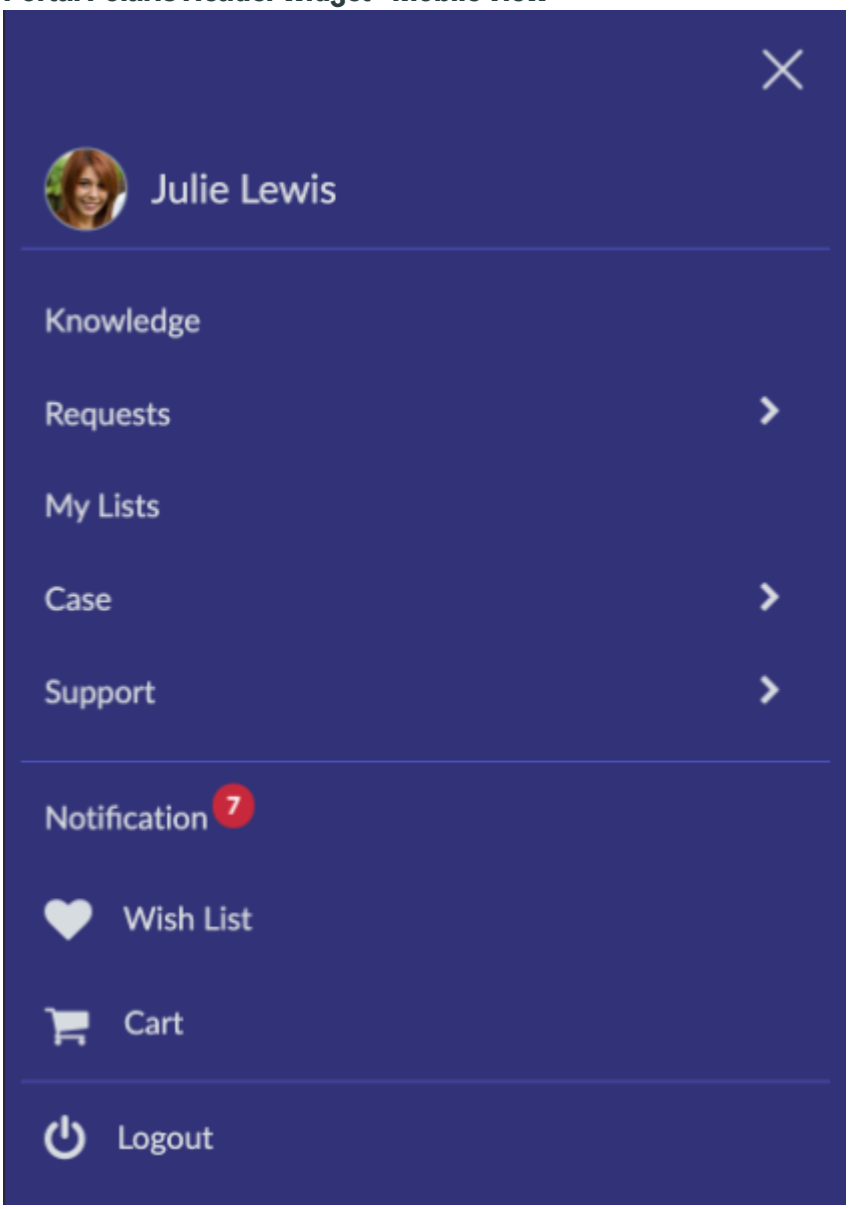
Portal Polaris Header widget - Mobile view



Configure the Portal Polaris Header widget for your portal

Associate the Portal Polaris Header widget as your header for the selected theme on your portal.

Before you begin

Role required: sp_admin or admin

About this task

Unlike other widgets in the Configurable Portal widgets, the Portal Polaris Header widget can't be dragged onto a page. Instead, you must configure it by associating the header menu with the selected theme for your portal.

Procedure

1. Navigate to **All** > **Service Portal** > **Portal**.
2. On the Service Portal page, search and select `Customer Support` in the Title column.
3. On the Customer Support page, in the **Theme** field, select the Preview this record icon (ⓘ).
4. Select **Open Record** on the Theme pop-up window.

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5. On the Portal Next Experience Theme page, in the **Header** field, select the Lookup using list icon ( ).

   Note:
   If a message appears about the application scope, select **here** to be able to edit the record.

6. On the Header | Footers page, search and select **Portal Polaris Header**.
7. Select **Update**.

Result
The Portal Polaris Header is set as a header for the Portal Next Experience theme.

Configure company logo on your portal header

Display your company logo on the header of your portal.

Before you begin
Role required: sp_admin or admin

Procedure
1. Navigate to **All** > **Service Portal** > **Portal**.
2. On the Service Portal page, search and select `Customer Support` in the Title column.
3. On the Customer Support page, add an image in the **Logo** field.
4. Select **Update**.

Result
Your company logo appears on the left side of the header of your portal.

Configure the search option for your portal header

Configure search feature to display search option on you portal.

Before you begin
Role required: sp_admin or admin

Procedure
1. Navigate to **All** > **Service Portal** > **Portal**.
2. On the Service Portal page, search and select `Customer Support` in the Title column.
3. On the Customer Support page, in the **Quick start config** field, modify the JSON as shown.

```
"headerSearch": {
                "display_search": true,
"search_placeholder_text": "Search articles and request items",
"exclude_search_for_pages": "csm_home_new"
```

   Note:
   You can also modify the placeholder text. The default text is `Search articles and request items`.

4. Modify the placeholder text.

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The default text is `Search articles and request items`.

5. Select **Update**.

Configure a wishlist and cart for your portal header

Display a wishlist and cart on your portal header.

Before you begin

Role required: sp_admin or admin

Procedure

1. Modify JSON.
   a. Navigate to **All** > **Service Portal** > **Portal**.
   b. On the Service Portal page, search and select `Customer Support` in the Title column.
   c. On the Customer Support page, in the **Main menu** field, select the Preview this record icon ( ).
   d. Select **Open Record** on the Instance with Menu pop-up window.
   e. On the Portal revamp demo menu page, in the **Additional options, JSON format** field, modify the JSON as shown.

```
{

  "enable_cart": {
    "displayValue" : "true",
    "value": false
  },
  "enable_wishlist": {
    "displayValue" : "true",
    "value": false
  }
}
```

   f. Select **Update**.

2. Enable wish list.
   a. Navigate to **Service Catalog** > **Maintain Catalogs**.
   b. Open **Customer Service** record.
   c. Select **Enable Wish List** check-box.
   d. Select **Update**.

Configure notification, approval, and survey for your portal header

Display menu items like notification, approval, and survey on your portal header.

Before you begin

Role required: sp_admin or admin

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Procedure

1. Navigate to **All** > **Service Portal** > **Portal**.
2. On the Service Portal page, search and select `Customer Support` in the Title column.
3. On the Customer Support page, in the **Main menu** field, select the Preview this record icon (ⓘ).
4. Select **Open Record** on the Instance with Menu pop-up window.
5. On the Portal revamp demo menu page, select **New** in the related list and create notifications, approvals, and surveys.
6. Create a notification item on the header.

   a. On the form, fill in the fields.

   Notification form

Field	Description
Label	Name that appears for the item on the header. The default text is `Notification`.
Parent Menu	This field should already contain the name of the menu you're adding items to.
Order	Value that determines where the item appears in the menu in relation to other menu items.
Type	The type of page the item links to. You must select **Scripted List** from the list.
Application	Application for the menu item
Condition	Determines what conditions are required for menu items to show on the header.
Glyph	Icon that appears next to the item.

   b. Select **Submit**.

7. Create an approval item on the header.

   a. On the form, fill the fields.

   Approval form

Field	Description
Label	Name that appears for the item on the header. The default text is `Approval`.
Parent Menu	This field should already contain the name of the menu you're adding items to.
Order	Value that determines where the item appears in the menu in relation to other menu items.
Type	The type of page the item links to. You must select **Scripted List** from the list.
Application	Application for the menu item

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Field	Description
Condition	Determines what conditions are required for menu items to show on the header.
Glyph	Icon that appears next to the item.

b. Select **Submit**.

8. Create a survey item on the header.

a. On the form, fill the fields.

Survey form

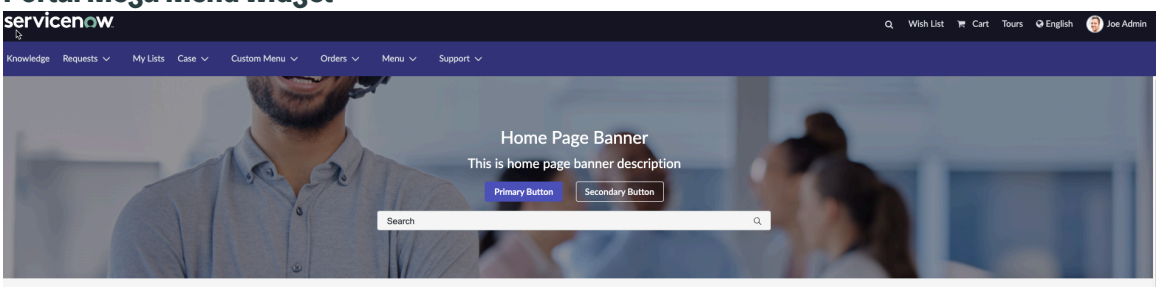
Field	Description
Label	Name that appears for the item on the header. The default text is `Survey`.
Parent Menu	This field should already contain the name of the menu you're adding items to.
Order	Value that determines where the item appears in the menu in relation to other menu items.
Type	The type of page the item links to. You must select **Scripted List** from the list.
Application	Application for the menu item
Condition	Determines what conditions are required for menu items to show on the header.
Glyph	Icon that appears next to the item.

b. Select **Submit**.

Portal Mega Menu widget

The Portal Mega Menu widget displays a hierarchical menu on the header of the portal home page to enable navigation to different pages. You can also display a cart, wish list, guided tour, and scripted list such as notification, approval, and survey on the header of your portal.

Portal Mega Menu widget



For more information about how to configure the Portal Mega Menu widget, see Configure the category of a Portal Mega Menu widget.

Configure the category of a Portal Mega Menu widget

Configure a Portal Mega Menu widget to define a menu category and associate pages to it to be able to navigate easily to different pages from the portal page.

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Before you begin

The UI Components for Customer Portals plugin must be installed. For more information, see Activate the UI Components for Customer Portals plugin.

Role required: sp_admin or admin

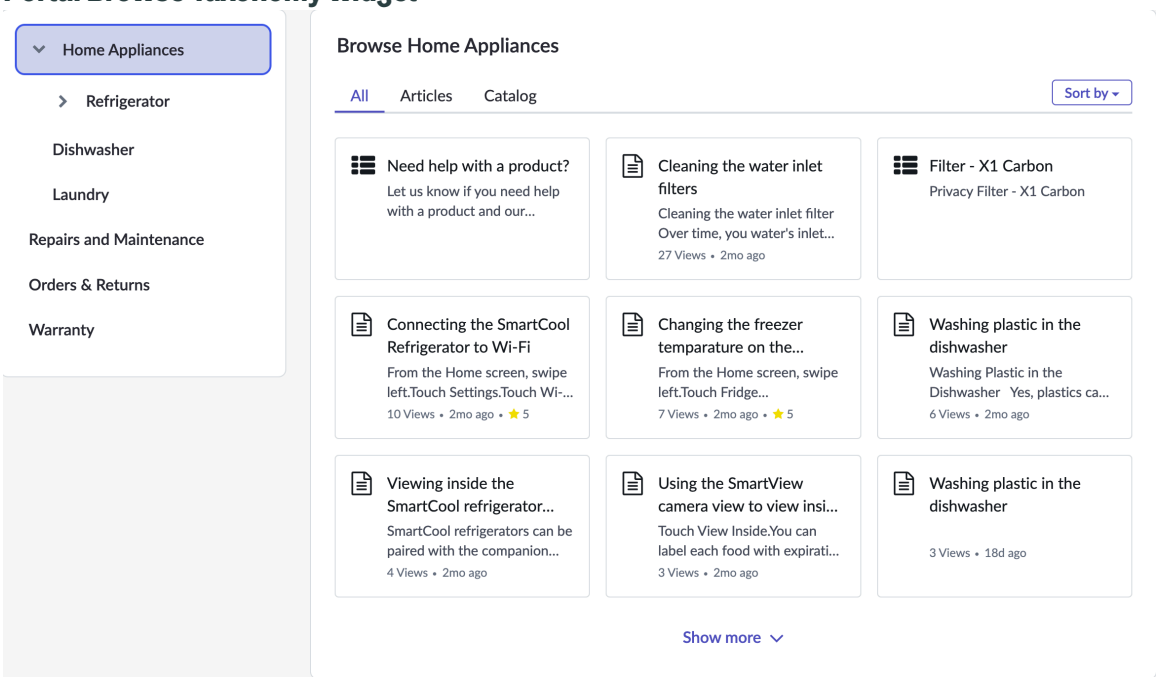
Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. On the Service Portals page, in the **Title** column, enter `Customer Service`.
3. Select **Customer Service**.
4. On the Customer Service form, in the **Main menu** field, select the Preview this record icon (ⓘ). If a message appears about the application scope, select **here** to be able to edit the record.
5. On the Instance with Menu form, select **Open Record**.
6. On the CSP Header Menu form, if Portal Mega Menu doesn't appear in the **Widget** field, search for and select it.
7. Select **Update**.
8. On the CSP Header Menu page, in the Related Links section, select the category that you want to update.
9. On the Menu item form, fill in the fields.
   For a description of the field values, see Menu Item form.
10. Select **Update**.

Portal Browse Taxonomy widget

The Portal Browse Taxonomy widget displays hierarchical taxonomy topics that enable your users to navigate to knowledge articles and catalog items through the widget's navigation pane.

Portal Browse Taxonomy widget



For more information about how to configure the Portal Browse Taxonomy widget using the instance options, see Add and configure the Portal Browse Taxonomy widget.

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Add and configure the Portal Browse Taxonomy widget

Add the Portal Browse Taxonomy widget to your portal and modify its behavior. The widget displays taxonomy topics along with the articles and catalog items related to them.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

You must have the following setup in order to add, update, and use this widget:

- The page to which you want to add the widget. For more information, see Create a page for Configurable Portal widgets
- A taxonomy to map your content. For more information, see Create taxonomy.
- At least one taxonomy associated with your portal. For more information, see Add a taxonomy to your portal.
- At least one topic associated with the taxonomy. For more information, see Create and associate topics.
- Topics associated with knowledge categories and catalog categories. For more information, see Associate content categories to topics and Associate content from catalog categories to a topic.

> **Note:**
> Topics cannot be associated with quick links. The Portal Browse Taxonomy widget does not support quick link configuration.

Role required: admin or sp_admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the Widgets pane, in the **Filter Widget** field, enter `Portal Browse Taxonomy`.
7. Drag the Portal Browse Taxonomy widget onto the container layout.
8. In the Edit page, select a Portal Browse Taxonomy widget.
9. Select the Pencil icon ( ).
10. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Browse Taxonomy widget instance options form.

Add a taxonomy to your portal

Create a taxonomy to organize knowledge articles and catalog items under topics which are relevant to your user. Associate a taxonomy to your portal to display the relevant topics on the widgets.

Before you begin

Role required: admin or sp_admin

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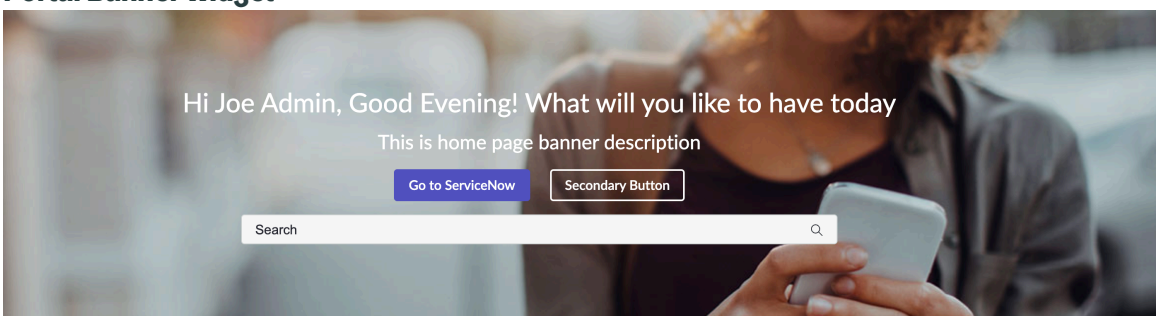
Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. On the Service Portal page, search `Customer Support` in the **Title** column.
   You can select any portals and a taxonomy to it.
3. On the Customer Support page, in the related list, select the **Taxonomy** tab.
4. In the Taxonomy tab, move any taxonomy from the Collection to the Taxonomy list.

Portal Banner widget

You can use the Portal Banner widget to display announcements, new product or feature highlights, and important information on the portal page.

Portal Banner widget



For information about how to configure instance options for the Portal Banner widget, see Add and configure the Portal Banner widget.

Add and configure the Portal Banner widget

Add a Portal Banner widget to your portal and modify its appearance and behavior. You can use the Portal Banner widget to display announcements, new product or feature highlights, and important information on the portal page.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin or admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, select the Pencil icon ( ).
7. In the **Width** field, select **Fluid**.
8. Select **Save**.

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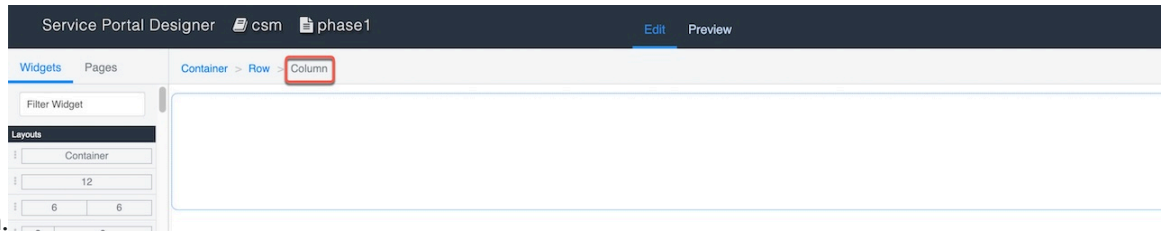
9. On the container, add a set of columns by selecting the plus button ( ).
10. In the column, select the Edit page properties icon ( ).

Note:
Verify that **Column** is selected in the breadcrumbs navigation.



11. Select the Edit page properties icon ( ) in the banner in Service Portal Designer.
12. On the Page window, in the **Page Specific CSS** field, paste the following CSS code.

```
.col-md-12{
     padding-left: 0;
     padding-right: 0;
 }
.padding-top {
     padding-top: 0;
 }
```

If a message appears about the application scope, select **here** to be able to edit the record.

13. Select **Save**.
14. On the Widgets pane, in the **Filter Widget** field, enter `Portal Banner`.
15. Drag the widget onto the container.
16. In the Edit page, select the Portal Banner widget.
17. Select the Pencil icon ( ).
18. On the Instance form, in the **Presentation** field, paste the following JSON code into the **Search Placeholder Text** field.

```
{
    "title": "enter the title",
    "size": "enter the size of search bar",
    "color": "enter color"
}
```

For more information about each parameter, see Script parameters for the search option in the Portal Banner widget.

19. On the Instance form, fill in the fields.
For a description of the field values, see Portal Banner widget instance options form.
20. Select **Save**.

Provide web page link buttons to display on the Portal Banner widget

Provide a link to a web page that you want to display by defining primary or secondary buttons on the Portal Banner widget. The widget displays these buttons by default.

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Before you begin

The UI Components for Customer Portals plugin must be installed. For more information, see Activate the UI Components for Customer Portals plugin.

Role required: sp_admin or admin

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. On the Extension Points page, in the API Name column, enter `*banner`.
3. Select **sn_ciwf_ui_cmpnt.BannerButtonsConditionScript** in the **API Name** column.
   If a message appears about the application scope, select **here** to be able to edit the record.
4. On the BannerButtonsConditionScript page, in the Related links section, select **Create Implementation**.
   If a message appears about the application scope, select **here** to be able to edit the record.
5. On the BannerButtonsConditionScript page, in the **Script** field, define the primary and secondary buttons by pasting the following CSS code and then customizing it.

```
var BannerButtonsConditionScript = Class.create();
BannerButtonsConditionScript.prototype = {
    initialize: function() {
    },

 showPrimaryButton: function() {
  // add your condition here
  return true;
 },

 showSecondaryButton: function() {
  // add your condition here
  return true;
 },

    type: 'BannerButtonsConditionScript'
};
```

6. Copy the name of the condition script from the **Name** field.
7. Select **Update**.
8. Navigate to your portal home page.
9. On the Edit page, select the Portal Banner widget.
10. Press Control+right-click.
11. Select **Instance Options**.
12. In the **Behavior** section, paste the name that you copied into the **Button Condition Script** field.
13. Select the condition script from the list.
14. Select **Save**.

Add a widget in the Portal Banner widget

Add a widget for additional functionality to the Portal Banner widget and configure it. For example, you could add the Portal Quick Links widget to enable users to access knowledge articles, external URLs, catalog items, or custom pages from the Portal Banner widget.

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Before you begin

The UI Components for Customer Portals plugin must be installed. For more information, see Activate the UI Components for Customer Portals plugin.

Role required: admin or sp_admin

Procedure

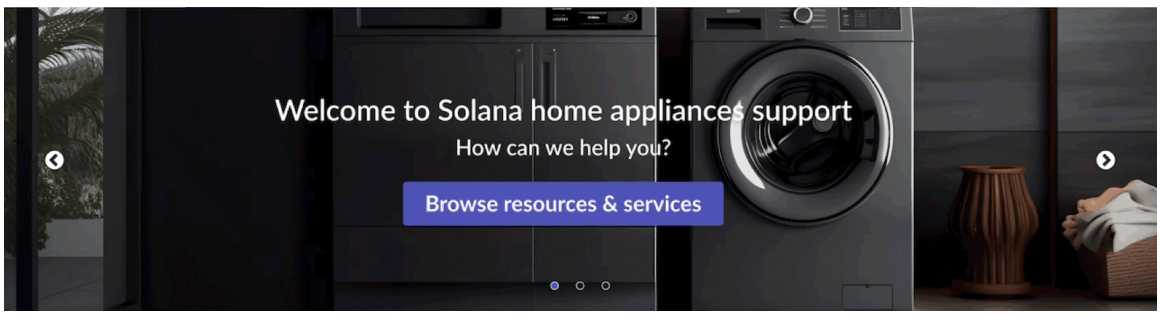
1. Navigate to your portal home page.
2. On the widget you want to add, press Control+right-click.
3. In the context menu, select **Instance in Page Editor**.
4. In the Edit section, select the Portal Quick Links widget from the flowchart.
   The Portal Quick Links widget has been considered as an example.
5. Select the **Instance 2**.
6. Copy the JSON code from the **Additional options, JSON format** field.
7. On your portal home page, press Control+right-click on the Portal Banner widget..
8. Select **Instance Options**.
9. In the **Behavior** section, paste the JSON code into the **Widget Option Schema** field.
10. In the **Widget Option Schema** field, modify the JSON code to update the configuration of the widget that you've added.
    For more information on each JSON parameters of the Portal Quick Links widget, see Portal Banner widget JSON parameters.
11. Select **Save**.

Portal Banner Carousel widget

A carousel in your home page banner can display multiple announcements and highlight brief information on features and products.

Portal Banner Carousel widget

The following image shows a sample carousel widget on a portal home page.



For more information, see Add and configure the Portal Banner Carousel widget

Add and configure the Portal Banner Carousel widget

Add a Portal Banner Carousel widget to the portal and modify its presentation and behavior.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

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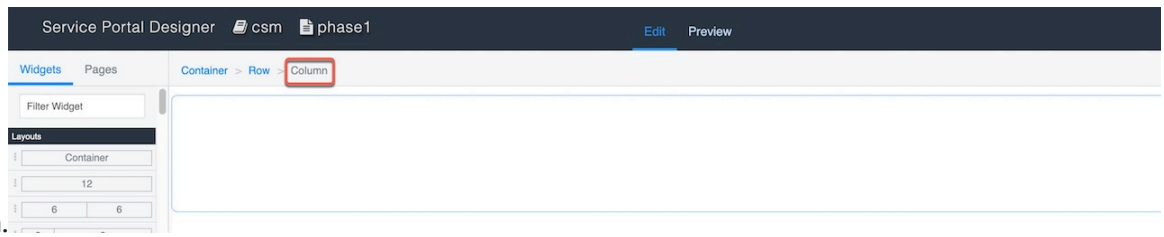
Role required: sp_admin or admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, select the Pencil icon ( ).
7. In the **Width** field, select **Fluid**.
8. Select **Save**.
9. On the container, add a set of columns by selecting the plus button ( ).
10. In the column, select the Edit page properties icon ( ) in the Service Portal Designer banner.

Note:
Verify that **Column** is selected in the breadcrumbs navigation.



11. On the Page window, in the **Page Specific CSS** field, paste the following CSS code:

```
.col-md-12{
     padding-left: 0;
     padding-right: 0;
 }
.padding-top {
     padding-top: 0;
 }
```

If a message appears about the application scope, select **here** to be able to edit the record.

12. Select **Save**.
13. On the Widgets pane, in the **Filter Widget** field, enter `Portal Banner Carousel`.
14. Drag the widget onto the container.
15. In the Edit page, select the Portal Banner Carousel widget.
16. Select the Pencil icon ( ).
17. On the Instance form, fill in the fields.
For a description of the field values, see Portal Banner Carousel widget instance options form.
18. Select **Save**.

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Create a slide for the Portal Banner Carousel widget

Create a slide to include images in the Portal Banner Carousel widget that a user can scroll through.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

Role required: sp_admin or admin

Procedure

1. Select **All**.
2. In the filter navigator, enter `sp_carousel_slide.list`.
3. On the Carousel Slides page, select **New**.
4. On the Carousel slides form, fill in the fields.

Carousel slides form

Field	Description
Name	Name of the carousel slide.
HREF/URL	The URL that opens an internal web page or a portal page in the same tab and an external page or a portal in a new tab. **Note:** For more information about linking to a page within a portal, see Page navigation in Service Portal by URL.
Application	The application that contains this configuration record. This field is automatically set to Global.
Background	Image to appear as the background of the slides in the carousel. The recommended dimension is 1022x300 pixels

5. Select **Submit**.

Result

The slide is created and appears on the Carousel Slides (sp_carousel_slide) page.

Portal Case Cards widget

The Portal Case Cards widget displays cards for cases that you define. By default, the displayed cases are those awaiting information or are resolved. You can choose to define different criteria.

The following illustration shows the default card view with cases that are currently in the awaiting info and resolved states.

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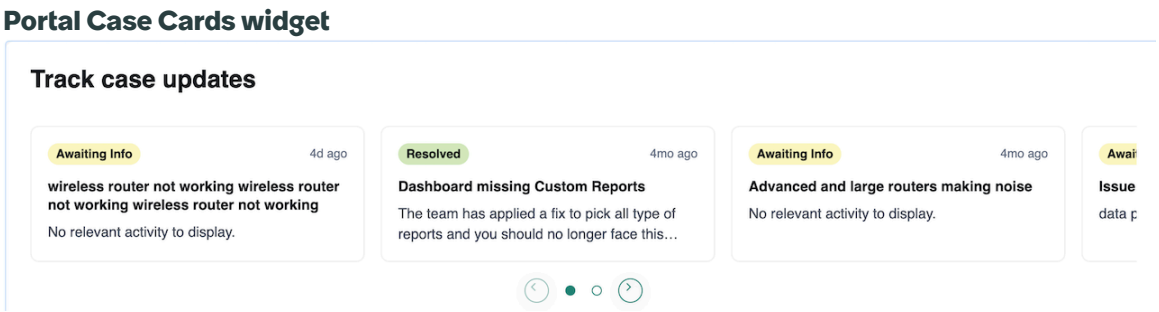

For more information about how to configure the instance options for the Portal Case Cards widget, see Add and configure the Portal Case Cards widget.

Add and configure the Portal Case Cards widget

Add a Portal Case Cards widget to your portal and modify its data, presentation, and behavior. You can use the Portal Case Cards widget to display status, priority, and other relevant details related to your cases.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin or admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( ).
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Case Cards`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Case Cards widget.
10. Select the Pencil icon ( ).
11. If you want to use configured background and text colors to indicate the state of the cases displayed in the widget, enter JSON code in the following format in the **State Highlight Color** field and modify it with your desired colors.

    The default text color for all case states is #181A1F (black). If you create a state, the default highlight color is #CBE9FC (light blue) and the text color is #181A1F (black). For more information about the default color values, see Default highlight color for different case states.

```
[
  {
    "value": "1",
    "background_colour": "#CBE9FC",
```

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```
    "text_colour": "#181A1F"
  },
  {
    "value": "10",
    "background_colour": "#D1D2EE",
    "text_colour": "#181A1F"
  },
  {
    "value": "18",
    "background_colour": "#FBF7BF",
    "text_colour": "#181A1F"
  },
  {
    "value": "6",
    "background_colour": "#D2EABC",
    "text_colour": "#181A1F"
  },
  {
    "value": "3",
    "background_colour": "#C2C4CA",
    "text_colour": "#181A1F"
  },
  {
    "value": "7",
    "background_colour": "#FFCCD2",
    "text_colour": "#181A1F"
  }
]
```

For <value>, enter an integer value of the case state for which you want to change the colors. For more information about finding this value, see Display the integer values of all case states.

12. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Case Cards widget instance options form.
13. Select **Save**.

Display the integer values of all case states

Display the integer values of all of the states associated with cases.

Before you begin

Role required: sp_admin or admin

Procedure

1. Navigate to **All** > **System Definitions** > **Choice Lists**.
2. On the Choices page, in the **Table** column, enter `*sn_customerservice_case`.
3. In the Element column, enter `state`.

Result

The Value column on the Choices page displays the integer values of all the states related to a case.

Portal Quick Links widget

The Portal Quick Links widget displays a variety of links to internal and external resources on the portal for quick access.

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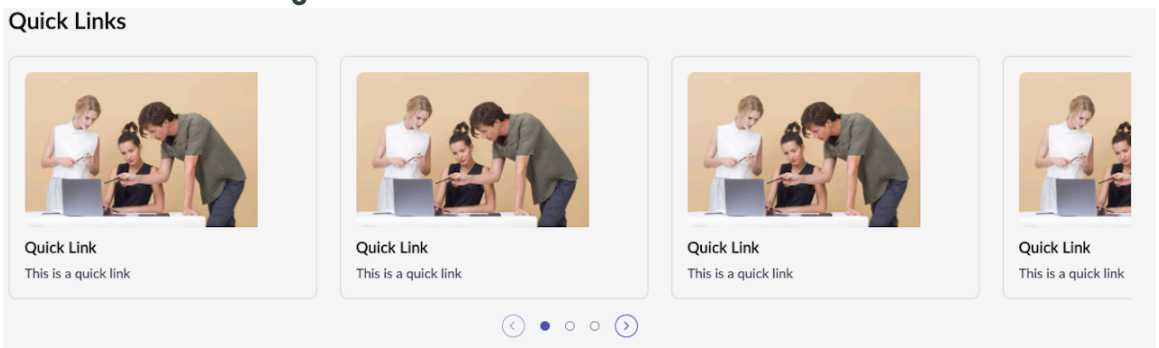
The quick links in the portal widget enable your users to quickly access content on the portal. These quick links can be related to different types of information: knowledge articles, external URLs, catalog items, or custom pages.

The following types of Portal Quick Links widgets display quick links related to a single type of information: knowledge articles or catalog items:

- Portal Knowledge Quick Links widget: Displays quick links in the widget associated with relevant knowledge articles. For more information, see Portal Knowledge Quick Links widget.
- Portal Catalog Quick Links widget: Displays quick links in the widget associated with relevant catalog items. For more information, see Portal Catalog Quick Links widget.

Portal Quick Links widget



For more information, see Add and configure the Portal Quick Links widget.

Add and configure the Portal Quick Links widget

Add a Portal Quick Links widget to the portal and modify its presentation and behavior. You can use the Portal Quick Links widget to display knowledge articles, external URLs, catalog items, or custom pages on your portal.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, seeActivate the UI Components for Customer Portals plugin.

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin or admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designers**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( )
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Quick Links`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Quick Links widget.

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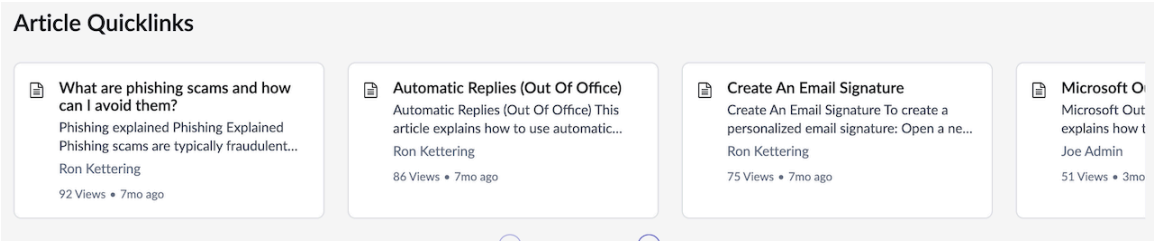
10. Select the Pencil icon ( ).
11. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Quick Links widget instance options form.
12. Select **Save**.

Portal Knowledge Quick Links widget

The Portal Knowledge Quick Links widget displays a list of relevant knowledge articles for quick access on the portal. The card displays article details such as the title, preview, author, view count, rating, and updated date in the widget.

Portal Knowledge Quick Links widget



For more information, see Add and configure the Portal Knowledge Quick Links widget.

Add and configure the Portal Knowledge Quick Links widget

Add a Portal Knowledge Quick Links widget to the portal and modify its data, presentation, and behavior.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, seeActivate the UI Components for Customer Portals plugin

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin or admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( )
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Knowledge Quick Links` .
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Knowledge Quick Links widget.
10. Select the Pencil icon ( ).
11. On the Instance form, fill in the fields.

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For a description of the field values, see Portal Knowledge Quick Links widget instance options form.

12. Select **Save**.

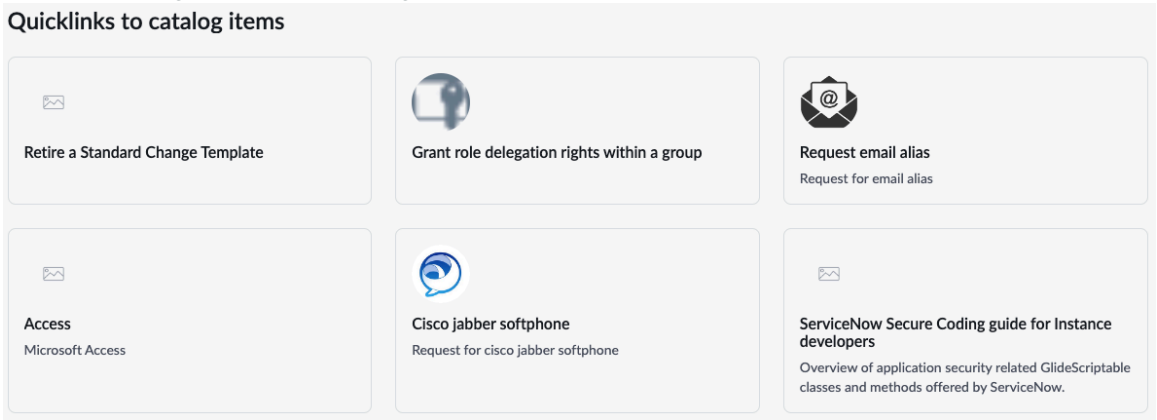
Result

The Portal Knowledge Quick Links widget appears in the widget according to the configured instance options.

Portal Catalog Quick Links widget

The Portal Catalog Quick Links widget displays catalog items according to filter criteria, enabling you to include an image, icon, name, and description on the card.

Portal Catalog Quick Links widget



For more information about how to configure the instance options for Portal Catalog Quick Links, see Add and configure the Portal Catalog Quick Links widget.

Add and configure the Portal Catalog Quick Links widget

Add a Portal Catalog Quick Links widget on your portal and modify its data, presentation, and behavior. You can use the Portal Catalog Quick Links widget to display frequently accessed catalog items on your portal.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, seeActivate the UI Components for Customer Portals plugin

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin or admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( )
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Catalog Quick Links`.

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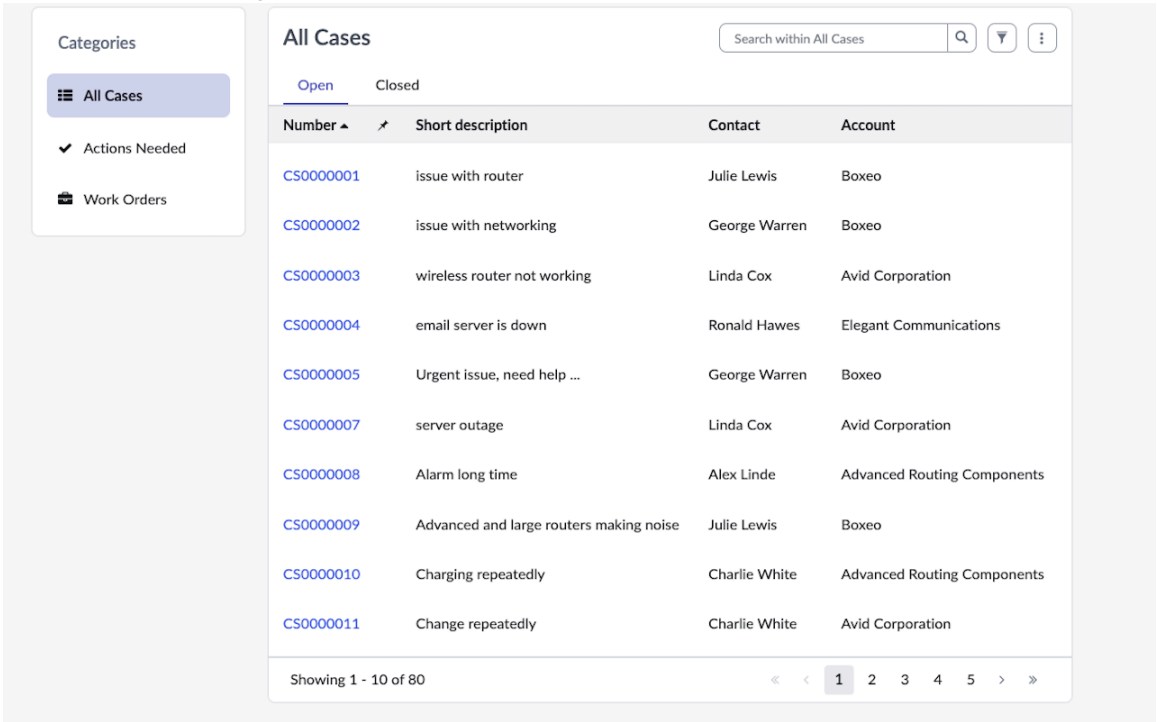
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Catalog Quick Links widget.
10. Select the Pencil icon ( ).
11. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Catalog Quick Links widget instance options form.
12. Select **Save**.

Portal Data List widget

The Portal Data List widget displays data related to cases from selected case tables in either a list or card format.

The list view displays a columnar list of cases and their information. You can also display the data list without the category on the left and pin the first column.

Portal Data List widget list view



The card view displays case information in stacked cards.

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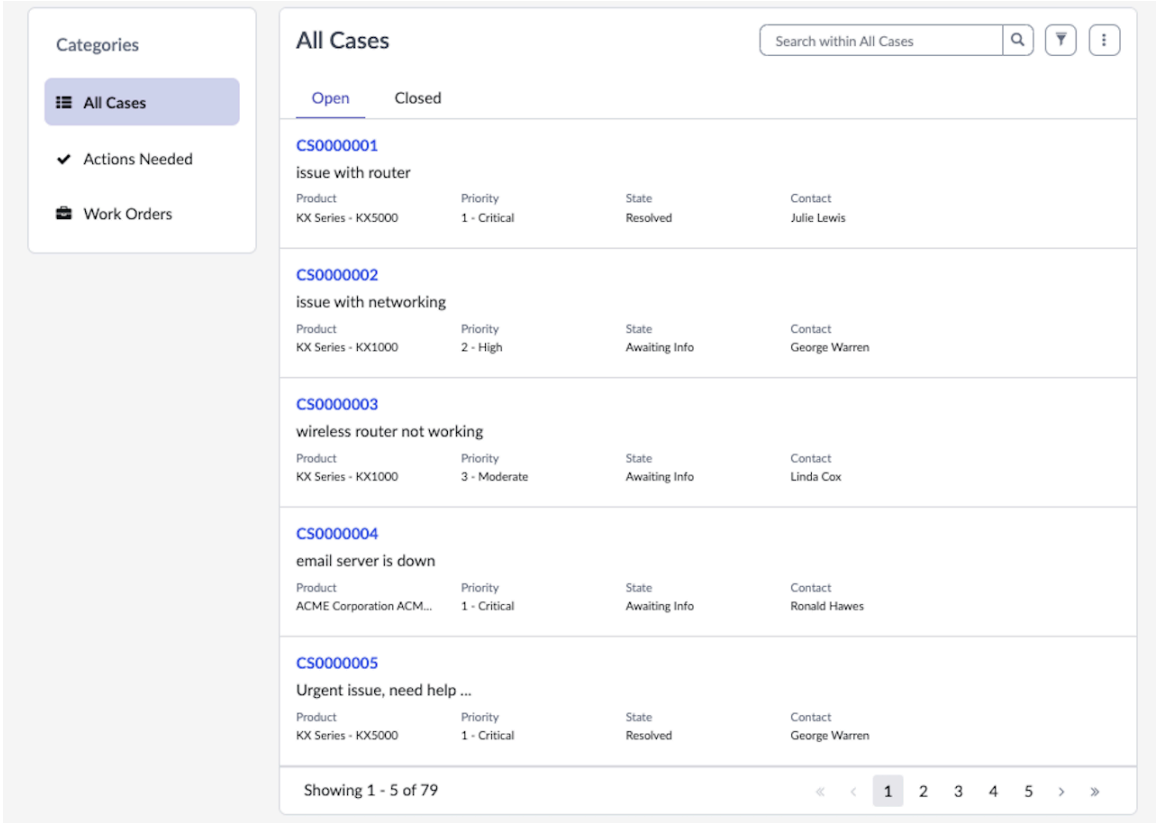
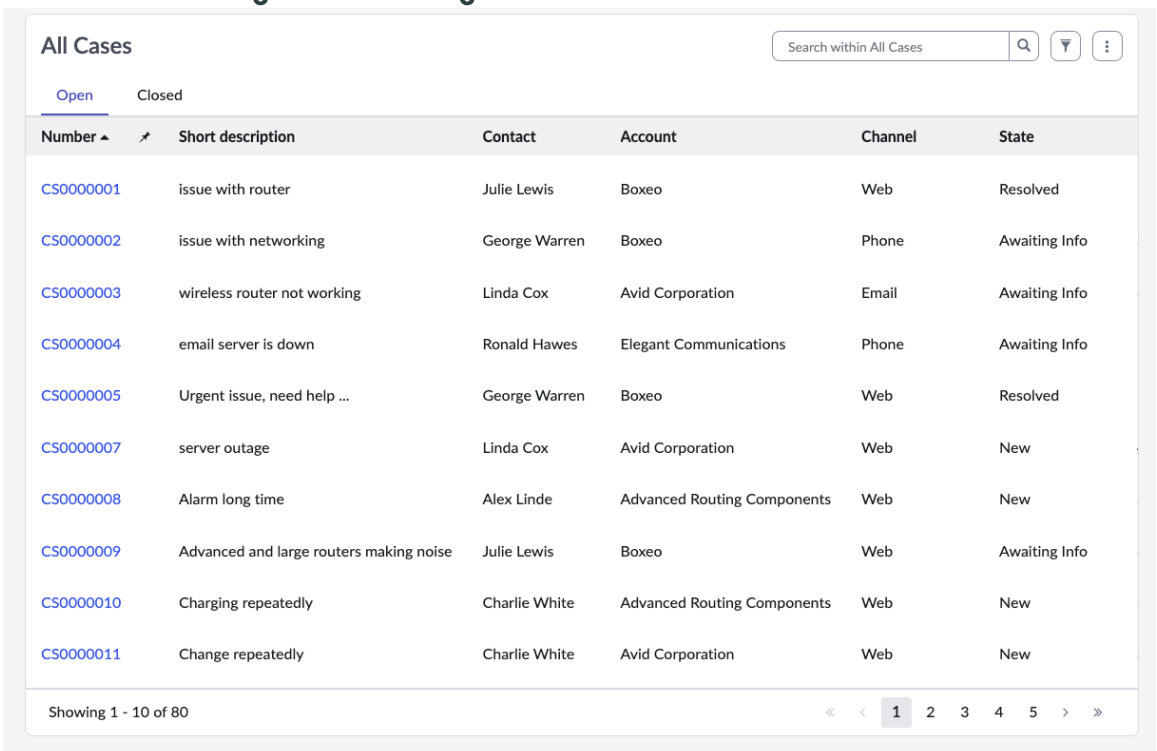
Portal Data List widget card view



Portal Data List widget without categories



Each row in the widget represents a record. You can search, view, sort, and interact with the information presented.

For more information about how to configure the instance options for the Portal Data List widget, see Add and configure the Portal Data List widget.

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The Data List portal widget can be used in the following scenarios:

- Dynamic data list: Enables you to display records dynamically based on the configuration provided in the URL parameters. It avoids the need to create duplicate list pages. You can use a common page to display records from any table by passing the following URL parameters: table, filter, sort order, view, and target view page.
- Static data list: Ability to display records from one or more tables specified in the widget instance options. It enables you to personalize the data list experience for a particular entity or table, such as cases, products, contacts, and so on.
- Related data list: Enables you to display records associated with an entity on the record view page. The data list is configured to identify the entity specified in the URL and filters the records accordingly.

Add and configure the Portal Data List widget

Add a Portal Data List widget to your portal and modify its data, appearance, and behavior. You can use the Portal Data List widget to display different case-related data in a card or list format on your portal.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin or admin

Procedure

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

```
[
  {
    "category": "All Cases",
    "table": "sn_customerservice_case",
    "list_view": "Case",
    "card_view_primary_column": "number",
    "card_view_secondary_column": "short_description",
    "card_view_additional_columns":
 "product|priority|state|contact",
```

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```
    "glyph": "th-list",
    "target_page_id": "csm_ticket",
    "sub_categories": [
      {
        "sub_category": "Open",
        "sub_category_query": "active=true"
      },
      {
        "sub_category": "Closed",
        "sub_category_query": "active=false"
      }
    ],
    "run_time_filters": [
      {
        "column": "priority",
        "selection_type": "single_select",
        "values": [
          {
            "label": "1-Critical",
            "value": 1
          },
          {
            "label": "2-High",
            "value": 2
          },
          {
            "label": "3-Moderate",
            "value": 3
          },
          {
            "label": "4-Low",
            "value": 4
          }
        ]
      },
      {
        "column": "state",
        "selection_type": "multi_select"
      },
      {
        "column": "contact",
        "selection_type": "multi_select"
      },
      {
        "column": "sys_updated_on",
        "selection_type": "single_select",
        "ranges": [
          {
            "label": "Last month",
            "query":
"sys_updated_on>javascript:gs.endOfLastMonth()"
          },
          {
            "label": "Last 3 months",
            "query":
"sys_updated_on>javascript:gs.beginningOfLast3Months()"
          },
```

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```
          {
            "label": "Last 6 months",
            "query":
 "sys_updated_on>javascript:gs.beginningOfLast6Months()"
          }
        ]
      }
    ]
  },
  {
    "category": "Actions Needed",
    "table": "sn_customerservice_case",
    "view": "Case",
    "card_view_primary_column": "number",
    "card_view_secondary_column": "short_description",
    "card_view_additional_columns":
 "product|priority|state|contact",
    "filter": "stateIN6,18",
    "glyph": "check",
    "target_page_id": "csm_ticket"
  },
  {
    "category": "Work Orders",
    "table": "wm_order",
    "card_view_primary_column": "number",
    "card_view_secondary_column": "short_description",
    "card_view_additional_columns": "priority|state",
    "glyph": "briefcase"
  }
]
```

For more information, see Portal Data List widget JSON parameters.

Each category in the widget displays a list of filtered records from a selected table. The default table is the Case [sn_customerservice_case] table. In a category, you can further filter the records and display them in tabs using the *pre_defined_filters* parameter. You can also configure the filter options displayed in the filter icon using the *run_time_filters* parameter.

12. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Data List widget instance options form.
13. Select **Save**.

Hide or show categories in the Data List widget

Create a condition script to hide or show a category in the Portal Data List widget.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, seeActivate the UI Components for Customer Portals plugin

Role required: admin or sp_admin

Procedure

1. Navigate to **All** > **System Extensions Points** > **Scripted Extensions Points**.
2. On the Extension Points page, in the **API Name column** search field, enter `*datalist`.

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3. Select the **sn_ciwf_ui_cmpnt.DatalistCategoryConditionScript** in the **API Name** column. If a message appears about the application scope, select **here** to be able to edit the record.
4. On the DatalistCategoryConditionScript page, in the Related links, select **Create implementation**.
5. In the **Script** field, paste the following CSS code:

```
showCategory: function(category_id) {

      /*

      if(category_id=="cases_category"){

          return true;
      }

      */

      return true;

    }
```

6. Copy the name of a condition script from the **Name** field.
7. Select **Update**.
8. Navigate to your portal home page.
9. On the Data List widget, press Control+right-click.
10. Select **Instance Options**.
11. In the Behavior section, paste the name that you copied into the **Categories condition script** field.
12. Select the condition script from the list.
13. Select **Save**.

Portal FAQ widget

The Portal FAQ widget displays a frequently asked questions list (FAQ) from the selected knowledge table in the widget on the portal. It enables your users to find answers to their queries without the need to contact customer support or navigate through multiple knowledge article pages. You can filter the FAQs using options in the main navigation.

The following illustration shows five FAQs as the default view.

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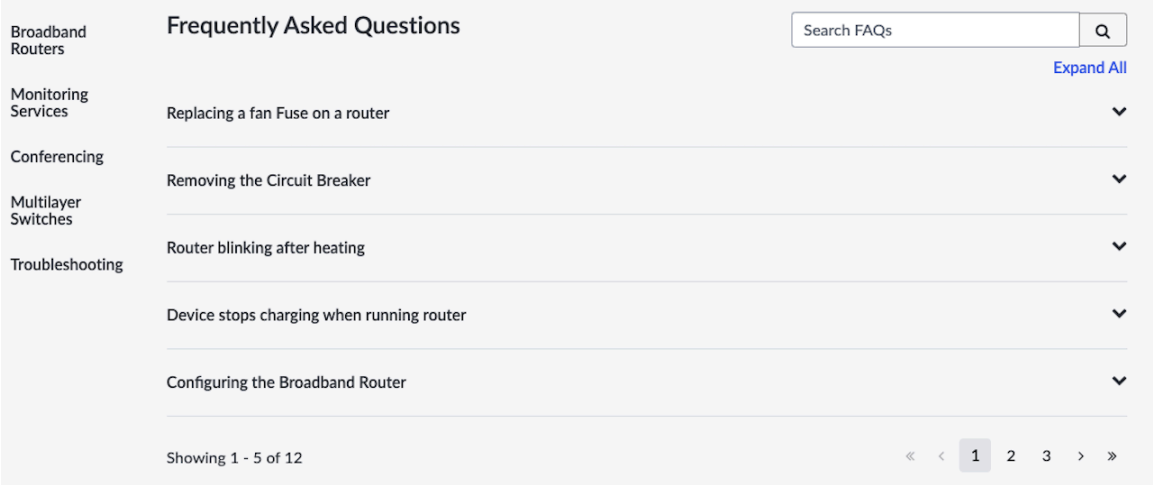
Portal FAQ widget



For more information, see Add and configure the Portal FAQ widget.

Add and configure the Portal FAQ widget

Add the Portal FAQ widget to your portal and modify its data, presentation, and behavior. You can use the Portal FAQ widget to display a frequently asked questions list (FAQ) from a knowledge table on the portal.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin or admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( ).
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal FAQ`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal FAQ widget.
10. Select the Pencil icon ( ).
11. On the Instance form, fill in the fields.
    For a description of the fields values, see Portal FAQ widget instance options form
12. Select **Save**.

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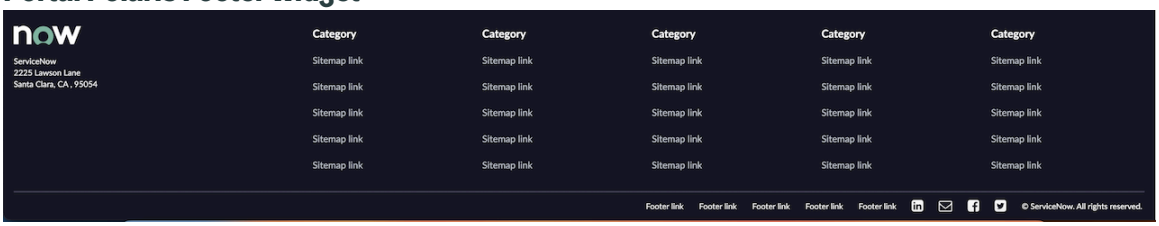
Portal Polaris Footer widget

The Portal Polaris Footer widget displays contact information, social media links, and other common links at the bottom of the portal page.

Include the Portal Footer widget on your portal page to display information about your company. The items you can display are:

- Organization logo on top-left corner of footer
- Organization address under the logo
- Sitemap links under different categories at the center of the footer
- Footer links at the bottom right of the footer
- Social media at the bottom right of the footer
- Copyright text on the bottom-right corner of the footer

Portal Polaris Footer widget



For more information, see Configure the Portal Polaris Footer widget.

Configure the Portal Polaris Footer widget

Configure the Portal Polaris Footer widget to display your company's corporate office address, email address, and more on the portal page.

Before you begin

The Portal Next Experience theme application should have been activated.

Role required: sp_admin

About this task

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. On the Service Portal page, in the **Title** column, enter `*customer support`.
3. Select **Customer Support**.
4. On the Customer Support form, in the **Quick start config** field, paste the following JSON code and update it.

```
 [{

"footer": {
      "org_info": [
         "<line #1>",
         "<line #2>",
         "<line #3>"
      ],
      "copyright": "<copyright text>",
      "logo_img_name": "<image name from db_image table>",
```

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```
        "sitemap_links_menu_sys_id": "<enter the sys_id>",
        "footer_links_menu_sys_id": "<enter the sys_id>",
        "social_links_menu_sys_id": "<enter the sys_id>"
    }
}]
```

For more information about the parameters, see Portal Footer widget JSON parameters.

5. Select a theme for your portal.
   Note that the predefined La Jolla theme, used as an example, is active by default.
   a. In the Theme field, select the Lookup using list icon ( )
   b. On the Themes page, in the **Name** column, search for and select the `La Jolla` theme.
   The La Jolla theme is set as your portal theme.
6. Select the Portal Footer as the footer for your portal theme.
   a. In the **Theme** field, select the Preview this record icon ( ).
   b. On the Theme form, select **Open Record**.
   c. On the La Jolla form, in the **Footer** field, select the Lookup using list icon ( ).
   d. On the Header | Footers window, in the **Name** column, search for and select `Portal Footer`.
   e. Select **Update**.

What to do next

Configure links to appear in the Portal Footer widget:

- To add pages or sections of your website in a sitemap, see Configure sitemap links for the Portal Polaris Footer widget
- To add the social media accounts of your organization, see Configure social media links in the Portal Polaris Footer widget
- To include a link to a site on a portal page, see Add related links in the Portal Polaris Footer widget.

Configure sitemap links for the Portal Polaris Footer widget

Display links to various important pages or sections of your website in a sitemap. Sitemaps help users explore the site's content.

Before you begin

The Portal Next Experience theme should have been activated.

The Portal Polaris Footer widget must have been configured. For more information, see Configure the Portal Polaris Footer widget

Role required: admin or sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Menus**.
2. On the Instances with Menu page, in the **Title** column, enter `Portal Footer Sitemap Links`.

> **Note:**
> You can create a new menu record by selecting **New**. After the record is created, update the Quick start config field with the new record's sys_id.

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3. Select the entry in the **Updated** column.
4. On the Portal Footer Sitemap Links page, in the Related Links, select the category that you want to configure.
5. On the Category page, in the Related links, select a sitemap link from the **Label** column.
6. On the Menu item form, fill in the fields.
   For a description of the field values, see Menu Item form.

   If a message appears about the application scope, select **here** to be able to edit the record.
7. Select **Update**.

Result
The sitemap links are configured and enabled.

Configure social media links in the Portal Polaris Footer widget

Configure links to your organization's social media accounts in the footer of the portal page.

Before you begin
The Portal Next Experience theme should have been activated.

The Portal Polaris Footer widget must have been configured. For more information, see Configure the Portal Polaris Footer widget.

Role required: admin or sp_admin

Procedure
1. Navigate to **All** > **Service Portal** > **Menus**.
2. On the Instances with Menu page, in the **Title** column, enter `Portal Footer Social Links`.

   Note:
   You can create a new menu record by selecting **New**. After the record is created, update the **Quick start config** field with the new record's sys_id.
3. Select the entry in the **Updated** column.
4. On the Portal Footer Social Links page, in the Related Links, select any social link from the **Label** column.
5. On the Menu item form, fill in the fields.
   For a description of the field values, see Menu Item form.

   If a message appears about the application scope, select **here** to be able to edit the record.
6. Repeat these steps for any social media account for which you want a link in the portal footer.
7. Select **Update**.

Add related links in the Portal Polaris Footer widget

Configure the footer link to include a link to a site you want your users to be able to access from your portal page.

Before you begin
The Portal Next Experience theme should have been activated.

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The Portal Polaris Footer widget must have been configured. For more information, see Configure the Portal Polaris Footer widget

Role required: admin or sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Menus**.
2. On the Instances with Menu page, in the **Title** column, enter `Portal Footer Links`.
3. Select the entry shown in the **Updated** column.
4. On the Portal Footer Links page, in the Related Links, select any category from the **Label** column.
5. On the Menu item form, fill in the fields.
   For a description of the field values, see Menu Item form .

   Note:
   If a message appears about the application scope, select **here** to be able to edit the record.

6. Select **Update**.

Result

The link is included in the portal footer and opens a web page when accessed.

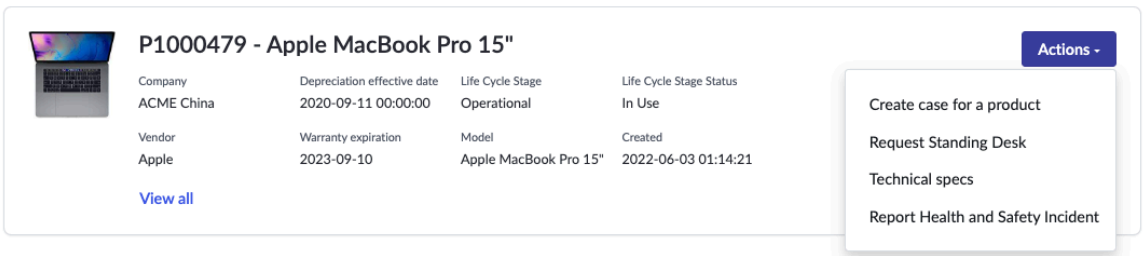
Portal Object widget

The Portal Object widget displays key information of a record from the tables available on your ServiceNow® instance. Additionally, your users can take related actions on the selected record.

The Portal Object widget enables you to display information from a specified table as cards on your portal. You can select any table from the ServiceNow® instance. The widget displays information based on the sys_id of the record. It also displays a list of actions your user can take on the selected record.

The Portal Object widget currently supports both desktop and mobile versions.

Portal Object widget



For more information about how to configure the Portal Object widget, see Add and configure the Portal Object widget.

Add and configure the Portal Object widget

Add a Portal Object widget to your portal and modify its data and behavior. You can use the Portal Object widget to display important information and actions related to records from a defined table on your portal homepage.

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Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin

If you haven't already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: admin or sp_admin

About this task

The Portal Object widget displays the information based on the sy_id entered in the widget instance options. If no sys_id is provided in the instance options, the widget uses the sys_id parameter provided in the URL.

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( ).
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Object`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Object widget.
10. Enable editing of the widget by selecting the Pencil icon ( ).
11. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Object widget instance options form.
12. Select **Save**.

Portal Taxonomy Topic widget

The Portal Taxonomy Topic widget displays topics as cards on your portal page. It enables your users to access knowledge articles and catalog items related to a topic displayed on your portal in a Portal Browse Taxonomy widget.

Display topic-related information to your users through cards displayed on your portal page that are defined through the Portal Browse Taxonomy widget. When a topic is selected on a card, your user is automatically redirected to a portal page that is defined when you configure a Portal Browse Taxonomy widget. This widget displays knowledge articles and catalog items related to the selected topic. You can display up to eight topics as cards.

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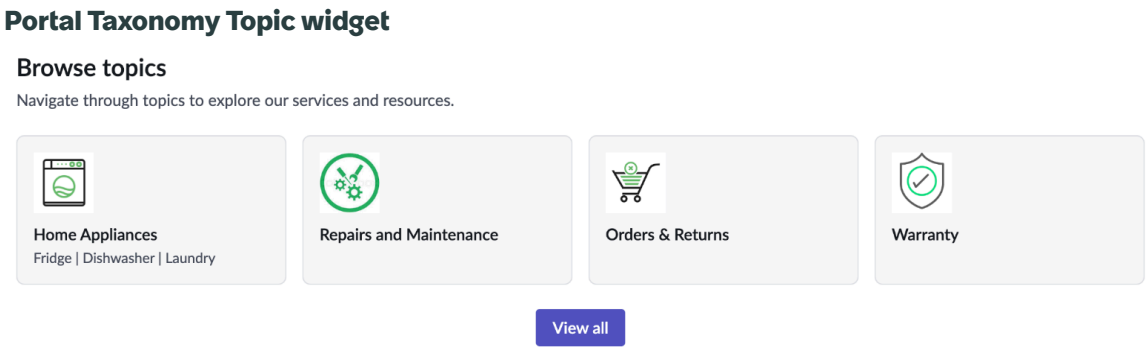

For more information, see Add and configure the Portal Taxonomy Topic widget.

Add and configure the Portal Taxonomy Topic widget

Add a Portal Taxonomy Topic widget to your portal to display topics that your users can get more information about and modify its presentation and behavior. Once a topic card is selected, users are redirected to relevant knowledge articles and catalog items configured through the Portal Browse Taxonomy widget.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, seeActivate the UI Components for Customer Portals plugin

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: admin or sp_admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( ).
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Taxonomy Topic`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Taxonomy Topic widget.
10. Enable editing the widget by selecting the Pencil icon ( ).
11. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Taxonomy Topic widget instance options form.
12. Select **Save**.

What to do next

Configure a Portal Browse Taxonomy widget to work with the Portal Taxonomy Topic widget

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Configure a Portal Browse Taxonomy widget to work with the Portal Taxonomy Topic widget

Enable users to access knowledge articles and catalog items in the Portal Taxonomy widget by selecting a topic on the card in the Topic widget.

Before you begin

You must add and configure the Portal Browse Taxonomy widget before accessing taxonomic topic on the Portal Taxonomy Topic widget. Otherwise, an empty page displays on the Portal Taxonomy Topic widget. For more information, see Add and configure the Portal Browse Taxonomy widget.

You must add and configure the Portal Taxonomy Topic widget in your portal. For more information, see Add and configure the Portal Taxonomy Topic widget.

Role required: admin or sp_admin

Procedure

1. On your portal home page, in the website URL, copy the page ID.

   ```
   https://<instance-url>/<portal-id>?id=<page-id>&sys_id=<record-id>
   ```

2. On your portal home page, press Control+right-click on the Portal Taxonomy Topic widget.
3. Select **Instance Options**.
4. On the Instance options window, in the Behavior section, paste the page ID into the **Browse taxonomy page** field.
5. Select **Save**.

Result

Selecting topics redirects the user to a Portal Browse Taxonomy widget that displays related knowledge articles and catalog items.

Extend capabilities

To extend your Customer Service Management environment, integrate additional applications and features. This enhances functionalities and improves support for more efficient interactions.

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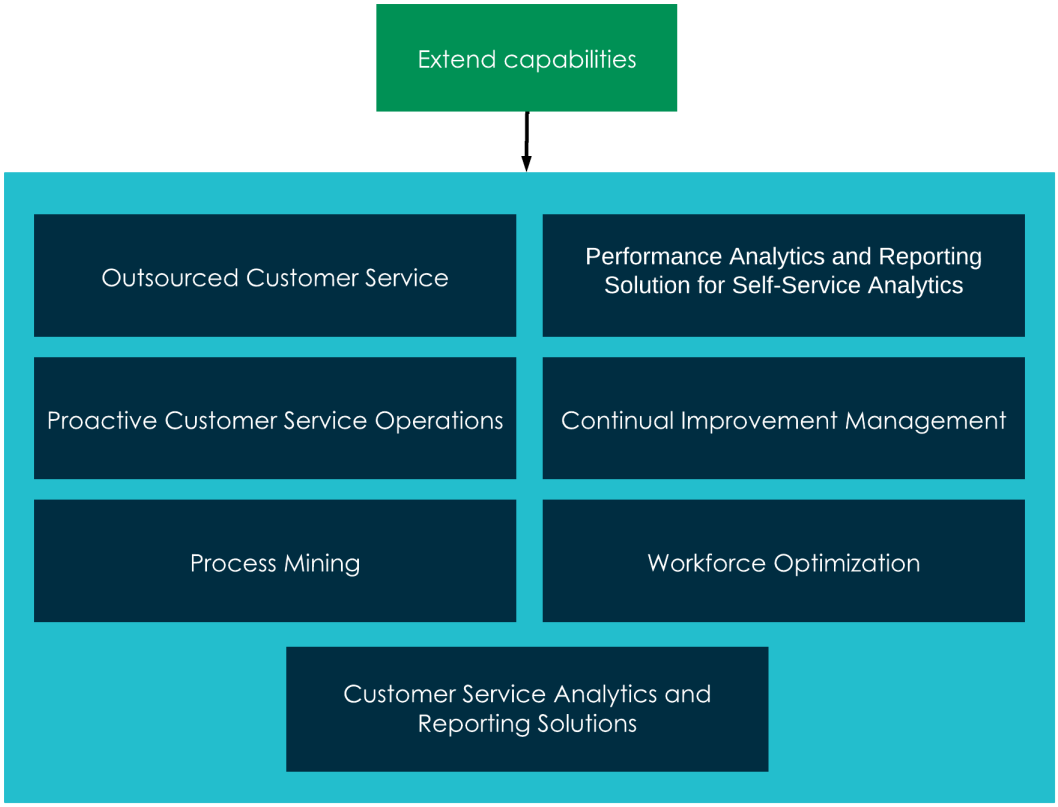
Extend capabilities overview



Setting up advanced features

Application or feature	Description
Outsourced Customer Service	Configure Outsourced Customer Service to enable the outsourced company or individuals to perform tasks, handle operations, or provide services.
Proactive Customer Service Operations	Configure Proactive Customer Service Operations to trigger case workflows and notify customers of any issues to resolve issues faster and lower inbound call volume.
Configure Customer Service Platform Analytics Solutions	Configure Customer Service Platform Analytics Solutions to view preconfigured dashboards with actionable data visualizations to improve your business processes.
Configure the Platform Analytics Solution for Self-Service Analytics for Customer Service	Configure Platform Analytics Solution for Self-Service Analytics to run diagnostics, review and customize components, and start collecting data.
Continual Improvement Management	Request improvement opportunities, and implement phases and tasks to meet performance goals, track progress, and measure success.

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Setting up advanced features (continued)

Application or feature	Description
Process Mining	Create automated business process flows from your data to help analysts and process owners to analyze and optimize their business processes.
Workforce Optimization for Customer Service	Manage and maintain the productivity of your workforce and efficiently route work to your team, manage your team's skills and schedules, and monitor their performance.

Outsourced Customer Service

Outsourcing is a business practice where an enterprise hires another company or individuals to perform tasks, manage operations, or provide services. These functions were previously handled by the enterprise's own employees.

Outsourced Service Providers (OSPs) are organizations engaged by enterprises to deliver customer service to external customers. These services can address various needs, including regional support, multilingual capabilities, and seasonal demand. Benefits of outsourcing services are as follows:

- Cost savings
- Increase support coverage
- Access to skilled expertise

Plugin

If you have the administrator role, you can activate the Outsourced Customer Service plugin (com.snc.outsourced_service_provider).

Note:
The Outsourced Customer Service plugin (com.snc.outsourced_service_provider) requires the Customer Service (com.sn_customerservice) plugin to get activated.

The Outsourced Customer Service plugin adds the **Customer Service** > **Outsourced Customer Service** module to the application navigator. If you have the administrator role, you can access this module. The administrator can assign the following roles to users:

- sn_csm_ocs.ext_manager (external OSP manager)
- sn_csm_ocs.ext_agent (external OSP agent)
- sn_csm_ocs.manager (internal OSP manager

Outsourced Customer Service Guided Setup

Activating the Outsourced Service Provider plugin adds the Outsourced Customer Service Guided Setup section. Navigate to **Outsourced Customer Service** > **Guided Setup** and use the tasks in this section to configure Outsourced Service Providers.

Related topics

Set up Outsourced Customer Service

Outsourced Service Provider agent tasks

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Outsourced Service Provider manager tasks

Roles for Outsourced Customer Service

Configure Outsourced Customer Service

Configure various components of Outsourced Customer Service based on the specific requirements of your organization.

Set up Outsourced Customer Service

Configure various aspects of Outsourced Customer Service based on the specific requirements of your organization.

Before you begin

Role required: admin

About this task

There's a sequence of tasks that enable you to configure Outsourced Customer Service. You can perform these tasks based on the plugin you activated. Certain setup tasks apply only if you activated the Outsourced Customer Service plugin and this point is noted at the top of each task. To configure Outsourced Customer Service, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Outsourced Customer Service** > **Guided Setup**.
   The Outsourced Customer Service Guided Setup page is displayed.
2. On the Onboarding Outsourced Service Provider (OSP) window, select **Get Started**.
3. View the list of tasks to configure the feature.

Onboarding Outsourced Service Provider configuration tasks

Task	Description
Setup Outsourced Service Provider	Creates an OSP by specifying the internal manager and setting up transfer group. **Note:** Whenever an OSP is set up and mapped, it automatically creates a company record.
Setup Outsourcing Criteria	Defines outsourcing criteria based on account, consumer, asset, and sold product. OSP agents can view all the cases matching the outsourcing criteria. For example, consumer-based criteria can be defined for all Spanish speaking consumers and all consumers based out of Australia.
Onboard Manager	Onboard OSP manager for managing cases and agents. Once onboarding is complete, a password reset email is sent to the manager's email id.

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Task	Description
Setup Assignment Groups	Creates a group and associates it to an OSP manager. OSP manager assigns cases to the agents assigned to the group.
Onboard Agent	Onboard agents for an OSP for fulfilling cases. Once onboarding is complete, a password reset email is sent to the agents email id.

4. Go back to the Outsourced Customer Service Guided Setup page.
5. On the Case Routing and Assignment window, click **Get Started**.
6. View the list of tasks to configure the feature.

Case Routing and Assignment configuration tasks

Task	Description
Create Matching Rules	Rules to identify customer service cases that meet certain conditions.
Create Assignment Rules	Cases that meet certain conditions based on the rules created are routed to customer service agents.

7. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Define outsourcing criteria

OSP managers and agents view cases based on the defined outsourced criteria. Defining outsourcing criteria can be based on account, asset, consumer, or sold product. For example, consumer-based criteria could be defined for all Spanish speaking consumers and all consumers based out of Australia.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Outsourced Service Providers**.
2. Select the OSP name.
3. Select **Outsourcing Criteria** related list.
4. Select **New**.
5. Fill in the fields on the new record form, as appropriate.

6. Select **Submit**.
   OSP managers and agents can now view assigned cases which meet the condition under **All Cases**, **Unassigned Cases**, **My Cases**, and **Open Cases**. For example, if an OSP organization has been created with outsourcing criteria with the consumer table selected, an agent belonging to this OSP can view cases created by a consumer.

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What to do next
Create groups and set assignment rules for the OSPs.

Create groups and assignment rules

An administrator creates groups and associates it to an OSP. This group is the default group to which the case is assigned to when an OSP agent transfers the unresolved case back to an enterprise.

Before you begin
Role required: admin

Procedure

1. Select an OSP you have created.
2. Go to **Groups** related list.
3. Click **New**.
4. Fill in the fields on the Outsourced Service Provider form, as appropriate.
5. Click **Submit**.
6. Click **Group Staff** related list to view the list of members for the selected group.
7. Click **Assignment Rules** related list to define assignment rules.
8. Click **Submit**.

Onboard Outsourced Service Provider staff

An administrator creates Outsourced Service Providers (OSPs) after which OSP managers and agents must be onboarded to manage and fulfill cases. As an administrator you can onboard both the OSP managers and agents.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Outsourced Service Providers**.
2. Select an existing OSP.
3. Select the **Onboard Staff** related link.
4. Fill in the fields on the Outsourced Service Provider form, as appropriate.

   Note:
   A new OSP staff member record is created and the OSP is created in the **Service Organization** field of the service organization external staff [sn_csm_service_organization_external_staff] table. Additionally, the same change applies to other related lists, including Onboard Agent, Onboard Manager, Create Group, Transfer Case, Register Staff, and Register Member.

5. Select **Submit**.

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The onboarded staff records are visible under the **Service Organization Staff** related list.

Note:
Once onboarding is complete, a password reset email is sent to the manager's or agent's email address.

Create an Outsourced Service Provider

An enterprise creates Outsourced Service Providers (OSPs) to provide customer service to external customers.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Outsourced Service Providers**.
2. Select **New**.
3. Fill in the fields on the Outsourced Service Provider form, as appropriate.
   The following fields on the company record are automatically updated whenever you update them on the OSP record:
   - **Name**
   - **Street**
   - **City**
   - **State**
   - **Zip/Postal Code**
   - **Country**
   - **Latitude**
   - **Longitude**
   - **Fax phone**
   - **Phone**
   - **Website**
   - **Active**
4. Select **Submit**.

What to do next
Define outsourcing criteria so that cases matching the criteria are visible to the OSP managers and agents.

Related topics

Outsourced Service Provider agent tasks

Outsourced Service Provider manager tasks

Configure the Performance Analytics components for the Outsourced Customer Service dashboard

Run diagnostics, review and customize components, and start collecting data.

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Before you begin

A ServiceNow AI Platform administrator must have installed the content pack plugins or ServiceNow Store application for this Platform Analytics Solution.

Role required: pa_admin

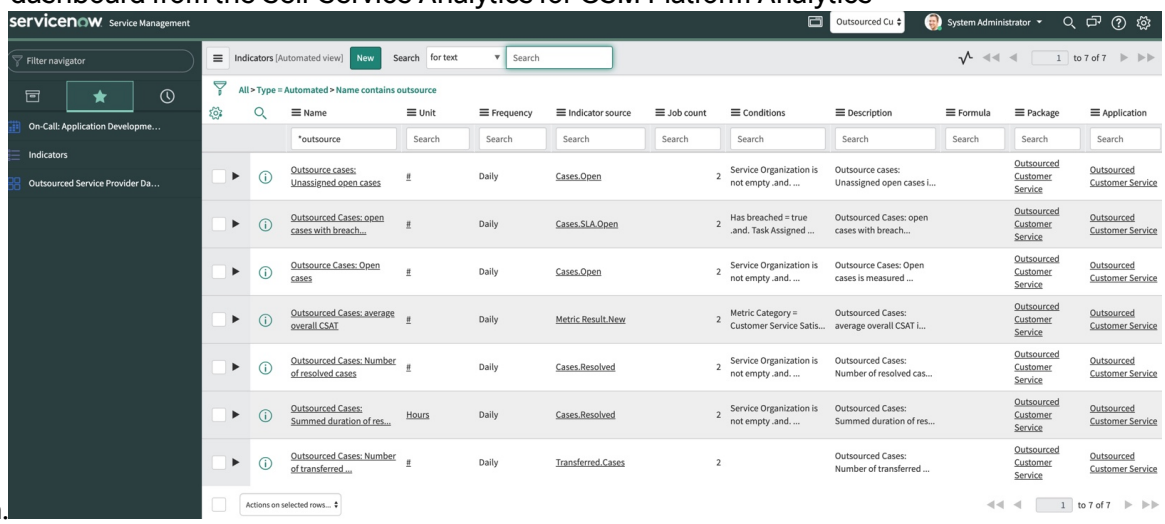
Procedure

1. Run all diagnostics on all records, as described in Performance Analytics diagnostics. These diagnostics can catch many mismatches between the configuration of your Platform Analytics Solutions and your tables.
2. Navigate to **Performance Analytics** > **Administration Console**.
3. Click the **Dashboards** link in the **Explore and Manage** tile.
4. Verify the names of the dashboards that have been installed with this Platform Analytics Solution
5. Open the **Indicator Sources** tab.
6. For each dashboard included in this Platform Analytics Solution:

   a. Filter the indicator sources on the dashboard name.

   Example

   This screenshot shows the indicator sources filtered on the Outsourced Service Provider dashboard from the Self-Service Analytics for CSM Platform Analytics Solution.



   b. Review the facts table, conditions, and frequency of the indicator sources compared to the data structure on your own instance.

   c. If necessary, open an indicator source and make corrections.

   d. If you are editing an indicator source record, go to the Indicators related list and review the **Conditions** field for each indicator.
   Changing the indicator source can also affect the additional conditions on the individual indicators.

7. If you changed the time field stamps in any indicator sources, also change any related Performance Analytics scripts.
   For more information, see Update Performance Analytics scripts.
8. Open the Breakdown Sources tab.

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9. For each dashboard included in this Platform Analytics Solution:
   a. Filter the breakdown sources on the dashboard name.
   b. Review the conditions on the breakdown source as described in Review the breakdown sources.
10. Navigate to **Performance Analytics** > **Jobs**.
11. Set up and run the historical job for this Platform Analytics Solution, <name of historical job>.
    Follow the procedure in Run historical data collection for an Platform Analytics Solution
12. Edit and activate the scheduled data collection job for this Platform Analytics Solution, <name of scheduled job>
    Follow the procedure in Schedule data collection for an Platform Analytics Solution.

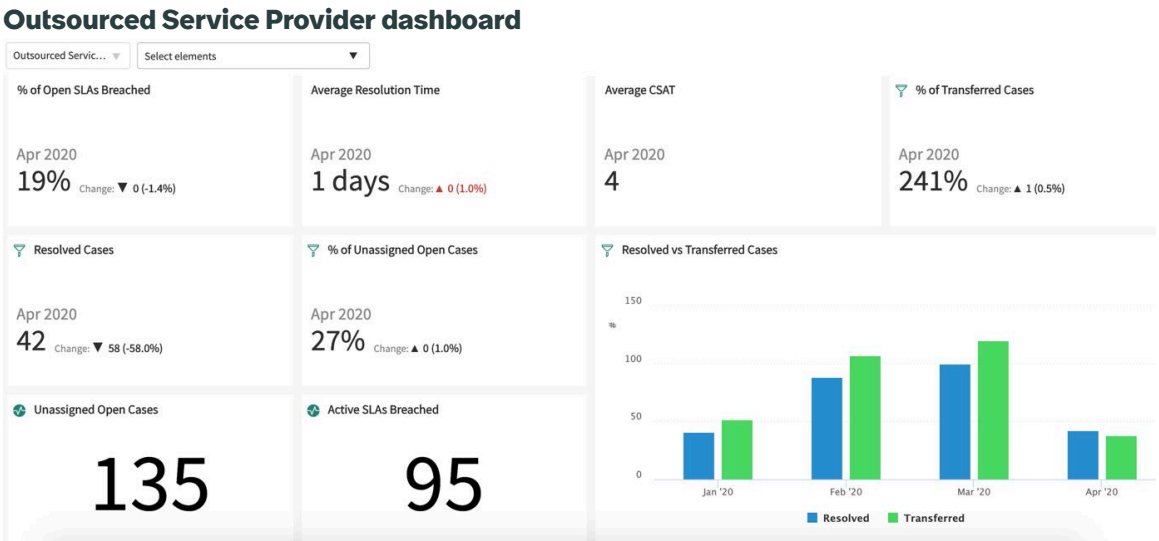
Outsourced Service Provider dashboard

The Outsourced Service Provider dashboard enables monitoring of breached service-level agreements (SLAs), average resolution time, and case transfer percentages, among other metrics. You can utilize the insights to identify the areas of concern and to plan your case management strategy.

Important:
Starting with the Xanadu release, the Outsourced Service Provider dashboard has a new, modernized look and feel.

To access the new Outsourced Service Provider dashboard, navigate to **All** > **Outsourced Customer Service** > **Analytics**, and select the outsourced service provider (OSP) name. Existing customers upgrading from earlier releases to the Xanadu release can also access the new Outsourced Service Provider dashboard.

However, existing customers on release versions prior to the Xanadu release can still view the old Outsourced Service Provider dashboard by navigating to **All** > **Outsourced Customer Service** > **Overview**.



End user and roles

End user and goal	Required role
Internal OSP Manager	sn_csm_ocs.manager

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Indicators

Outsource cases: Unassigned open cases

The number of open cases that are unassigned to the OSP agents.

Outsourced cases: open cases with breached SLAs

The number of cases that have remained open past the time required by the Service Level Agreement (SLA).

Outsource cases: open cases

The number of cases that are in the open state.

Outsourced cases: Average overall CSAT

Average customer satisfaction (CSAT) based on survey results. For more information about CSAT, see Customer service satisfaction surveys.

Outsourced cases: Number of resolved cases

The number of cases that the OSP agent has worked on and moved to resolved state.

Outsourced cases: Summed duration of resolved cases

The total time taken by the OSP agents to resolve the cases.

Outsourced cases: Number of transferred cases

Number of cases that are transferred to an internal ServiceNow agent when an OSP agent couldn't resolve the case.

Global filter

The Outsourced Service Provider dashboard utilizes the outsourced service providers as global filters. You can select one or more outsourced service providers to view different metrics and reports. By default, the dashboard displays data from all outsourced service providers.

Reports

Title	Type	Description
Unassigned Open Cases	42	The number of cases that are in the open state and isn't yet assigned to an OSP agent. In this report, for example, there are 42 cases that are yet to be assigned. The OSP manager views the number of such cases at a glance and assigns them.
Active SLAs Breached	42	This report shows all breached SLAs that are still active In this report, for example, there are 42 such active SLAs. The OSP manager views the number

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Title	Type	Description
		of breached SLAs at a glance, which helps in taking immediate action.

Configure Proactive Customer Service Operations

Configure various aspects of Proactive Customer Service Operations based on the specific requirements of your organization.

Before you begin

Role required: admin

About this task

There are a sequence of tasks that enable you to configure Proactive Customer Service Operations. You can perform these tasks based on which plugin or application you have installed. This is noted at the top of each task.

Note:
To use integration with Event Management, install the Proactive Customer Service Operations with Event Management plugin and the Event Management application from the ServiceNow store.

Event Management integration is only available if you are using the CSM Agent Workspace or the ServiceNow AI Platform interface.

To configure Proactive Customer Service Operations, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**
3. In the Proactive Customer Service Operations category, view the list of tasks to configure the feature.

Proactive Customer Service Operations configuration tasks

Task	Description
Activate Proactive Customer Service Operations plugin (com.snc.proactive_cs_ops). **Note:** This is a ServiceNow Store plugin. You must install this plugin separately from the ServiceNow Store.	Activate the Proactive Customer Service plugin to use Proactive Customer Service Operations.
Activate Proactive Customer Service Operations with Event Management plugin (com.snc.proactive_cs_itom). **Note:** This is a ServiceNow Store plugin. You must install this plugin separately from the ServiceNow Store.	Activate the Proactive Customer Service Operations with Event Management plugin to enable integration with Event Management. This plugin automatically installs the Proactive Customer Service Operations plugin.

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Task	Description
Install the Event Management application.	Install the Event Management application from the ServiceNow store.
Configure form views	Configure the form layout and related lists for the different views of the Case, Install Base Item, and Account forms to display the fields you require.
Activate an alert rule to automatically create a proactive case from an alert	Configure an alert rule to automatically create a proactive case when an incident is created from an alert that has one or more affected install base items. **Note:** This task is only applicable if you are using the integration with Event Management.
Configure proactive case flows	Automate workflows for proactive case creation to improve your operational efficiency and respond to customer issues faster. **Note:** This task is only applicable if you are using the integration with Event Management.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

- Using Proactive Customer Service Operations
- View install base information from the Customer Service Portal
- Create a case for install base from the Customer Service homepage
- View the install base in CSM Configurable Workspace
- View sold product information in CSM Configurable Workspace

Proactive Customer Service Operations

Proactively trigger case workflows and notify customers of any issues to resolve issues faster and lower inbound call volume.

Proactive Customer Service Operations enables you to track the digital services sold to and in use by your customers. This is referred to as install base.

If you identify any service disruptions to a customer's install base, you can proactively create a case to notify them.

These cases are resolved and closed in the same way as customer-reported cases. When multiple customers are affected, you can use the major issue management process.

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You can also associate outage information to a case to keep your customers informed about the impact of the outage and the status of the resolution. It also gives customers visibility into planned service disruptions, enhancing transparency and reducing the number of customer-reported cases.

Your customers can use the Customer Service Portal to view proactive cases that you opened on their behalf, any outages associated with their install base, and interact with you using the proactive case.

The Proactive Customer Service Operations plugin (com.snc.proactive_cs_itom) provides an integration between Customer Service Management and the Event Management console in IT Operations Management. For more information, see Integration with Event Management.

Before you begin

Meet with your stakeholders to define your requirements. Depending on your requirements, you can activate either the Proactive Customer Service Operations plugin or the Proactive Customer Services with Event Management plugin.

Note:
The Proactive Customer Service Operations with Event Management plugin provides all the features included in the Proactive Customer Service Operations plugin as well as additional features from the Event Management console in IT Operations Management.

Activation information

To enable Proactive Customer Service Operations, activate the Proactive Customer Service Operations plugin (com.snc.proactive_cs_ops).

To enable Proactive Customer Service Operations with Event Management, activate the Proactive Customer Services with Event Management plugin (com.snc.proactive_cs_itom)

For detailed steps on getting started with Proactive Customer Service Operations, see Configure Proactive Customer Service Operations.

Related topics

Major issue management overview

Configure install base

Outage tracking for install base

Provide visibility into any current or upcoming outages affecting a customer's install base, enhancing transparency and reducing the number of customer-reported cases.

Outage definition

An outage refers to a time period that a service delivering value to a customer is unavailable or experiencing performance issues.

A customer can experience the following types of outages:

- Unplanned outage: Outages such as those caused by hardware or network issues.
- Planned outage: Outages caused by planned maintenance or upgrades.
- Degradation: Problems affecting a service that does not result in a disruption of that service.

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Outage tracking overview

Proactively inform customers about planned or unplanned service disruptions by associating outages with a case. In doing so, your customers are aware of the impact of the outage and have visibility into the resolution status. They can then use this information to assess the business impact of different outage types over a period and calculate any charge backs, if necessary.

Outages are typically created automatically when an alert is created for a service or by service fulfillers when working on an incident.

An outage specifies the outage type, impacted service as well as the begin and end time. Multiple services used by a customer can be associated with an outage.

Roles

As a major issue manager or customer service manager, you can create, associate, and track all outages related to a case. Customer service managers can also view reports of business impact by outage type.

As a customer service agent, you can view any outages associated with the case.

Your customers can view outage information on the Customer Service Portal.

Activation information

This feature requires the Proactive Customer Service Operations Management plugin (com.snc.proactive_cs_ops).

Related topics

- Associate an outage to a major case
- Create an outage from a major case
- Track outages for install base items
- Proactive Customer Service - Advanced dashboard
- View install base information from the Customer Service Portal

Integration with Event Management

Create cases proactively from alerts either manually or through automation. Track the accounts and health status of the corresponding install base items affected by the alert to better correlate customer issues and provide faster responses.

Customer Service Management provides an integration with the Event Management console in IT Operations Management, which enables you to improve the customer experience by breaking down the silos that exist between the processes and systems used by front line customer service and back-office operations teams. By monitoring issues and creating cases proactively, you can be one step ahead of your customers and solve issues faster.

Network Operations Center (NOC) operators monitor alerts from the Service Operations Workspace. For more information, see Monitor service health.

When alerted to a service disruption, they can identify the accounts and corresponding install base items affected and create a case for customer service to review. Customer service can view the customers affected and notify#hem.

Customer service agents and managers can also track the service health status of install base items for an account to provide faster and more accurate support to customers.

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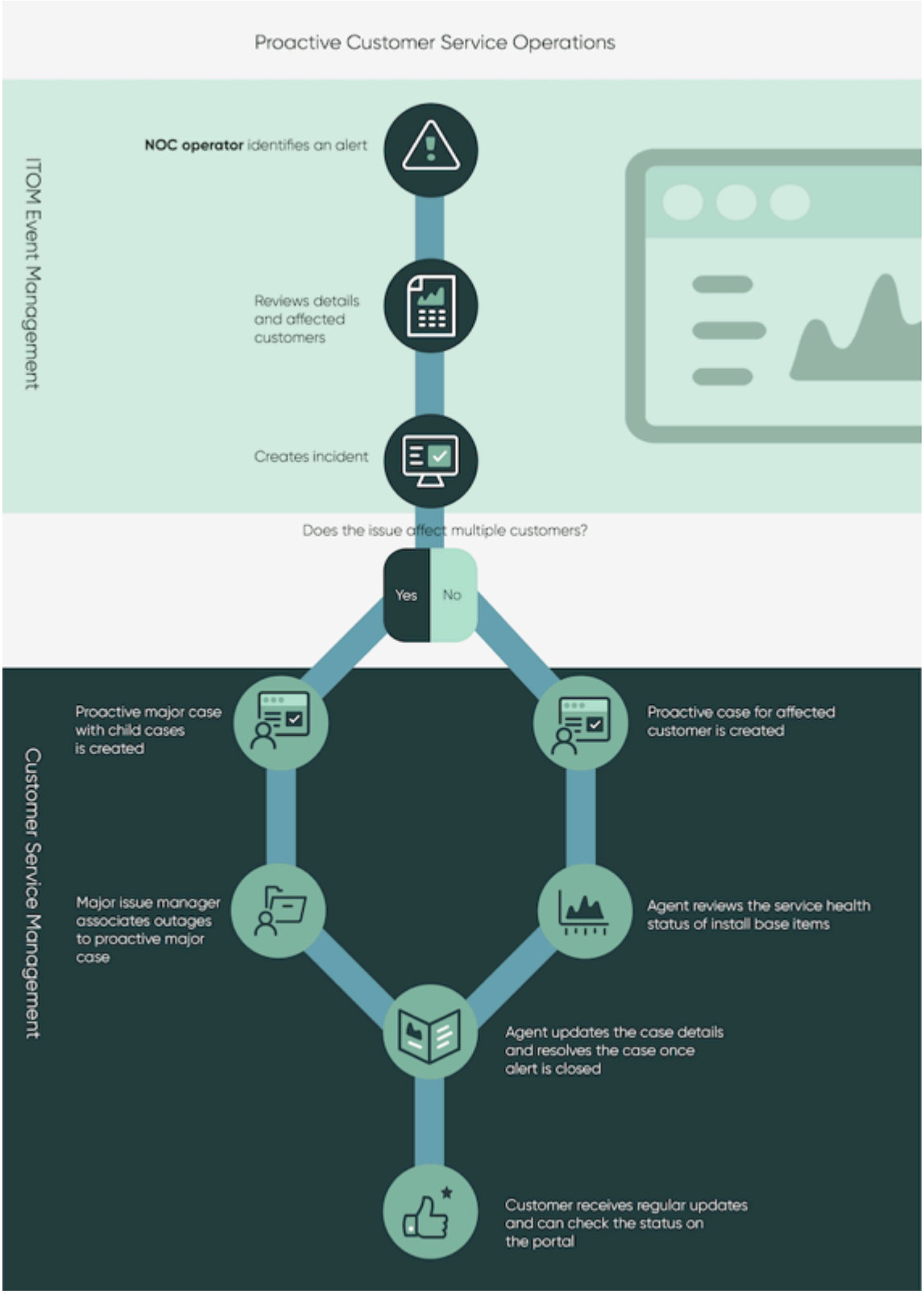
Overview of Proactive Customer Service Operations with Event Management



Learn about Proactive Customer Service Operations with Event Management from the following video tutorial.

Note:
This video was recorded in the New York release.

Proactive Customer Service Operations with Event Management

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Activation information

To enable Proactive Customer Service Operations with Event Management, activate the Proactive Customer Service with Event Management plugin (com.snc.proactive_cs_itom).

Service health status for install base

View the real-time health status of a customer's install base. Correlate customer issues with the operational health of their install base to provide more informed responses to your customers.

Service health tracking overview

The integration between Customer Service Management and the Event Management console in IT Operations Management enables you to track the service health status of a customer's install base.

When an issue affects one or more install base items and an alert is created, the severity of the alert is calculated in Event Management. It is calculated according to alert impact calculation rules. Based on the severity of the alert, the service health status of each install base item is calculated. Customer service agents can view the service health status of install base items in an account or a case in Customer Service Management.

For more information about how the severity of an alert is calculated, see Alert impact calculation.

To provide the service health status for an install base item in Customer Service Management, the following fields are mapped.

Event management fields for calculating alerts

Event Management (em_impact_status table)	Customer Service Management (sn_install_base_item table)
Business Service	Service Context
Element Identifier	Configuration Item
Severity	Health Status

Note:
The service health status is displayed only if the install base item has both a Configuration Item (CI) and a service context associated with it. Service context is the application service associated with the underlying CI for impact calculation in Event Management. For more information about application services, see Lesson 2 of the Event Management operator guide.

The service health status is displayed in Customer Service Management as follows.

Health status alerts

Severity of alert (Event Management)	Service health status on Account and Case forms (Customer Service Management)
Critical	Critical: Resource is either not functional or critical problems are imminent.
Major	Major: Major functionality is severely impaired or performance has degraded.

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Health status alerts (continued)

Severity of alert (Event Management)	Service health status on Account and Case forms (Customer Service Management)
Minor	Minor: Partial, non-critical loss of functionality or performance degradation occurred.
Warning	Warning: Attention is required, even though the resource is still functional.
Info	Normal: No severity. An alert is created. The resource is still functional.
Clear	Normal
Empty/Null	Not Available

For more information about alert severity, see Lesson 1 of the Event Management operator guide.

Roles

As a system administrator, configure form views to add the **Service Context**, **Health Status**, and **Health Status Last Updated** fields to the relevant forms.

As a customer service agent, view the service health status of install base items on the Account or Case form.

Activation information

This feature requires the Proactive Customer Service Operations with Event Management plugin (com.snc.proactive_cs_itom).

Related topics

- Integration with Event Management
- Configure form views for Proactive Customer Service Operations
- Track the service health of install base items in Agent Workspace

Activate Proactive Customer Service Operations

Activate the Proactive Customer Service plugin to use Proactive Customer Service Operations.

Before you begin

Role required: admin

About this task

Proactive Customer Service Operations is only available for customers who are licensed for the Customer Service Management application.

To activate Proactive Customer Service Operations, activate the Proactive Customer Service Operations Management plugin (com.snc.proactive_cs_ops). This plugin is not active by default.

Note:
This is a ServiceNow Store plugin. You must install this plugin separately from the ServiceNow Store.

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Activating this plugin also installs the Major Issue Management, Customer Service Install Base Management, Customer Service with Service Management, Customer Service Case Action Status, and Task-Outage Relationship plugins.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.snc.proactive_cs_ops.
3. Click **Activate**.

Activate Proactive Customer Service Operations with Event Management

Activate the Proactive Customer Service Operations with Event Management plugin to use Proactive Customer Service Operations with Event Management.

Before you begin
Role required: admin

About this task
Proactive Customer Service Operations with Event Management is only available for customers who are licensed for the Customer Service Management application.

To activate Proactive Customer Service Operations with Event Management, activate the Proactive Customer Service with Event Management plugin (com.snc.proactive_cs_itom). This plugin is not active by default.

Note:
This is a ServiceNow Store plugin. You must install this plugin separately from the ServiceNow Store.

Activating this plugin also activates the Proactive Customer Service Operations (com.snc.proactive_cs_ops) and Event Management (com.glideapp.itom.snac) plugins.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.snc.proactive_cs_itom.
3. Click **Activate**.

Configure form views for Proactive Customer Service Operations

Configure the form layout and related lists for the different views of the Case, Install Base Item, and Account forms to display the fields you require.

Before you begin
Role required: admin

Certain fields on the forms can only be added if you have activated the Proactive Customer Service Operations with Event Management plugin. This is noted in the following table.

Procedure

1. Navigate to **Customer Service**.
2. Add the following fields to forms and related lists, as required.

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Configure form views

Form	Procedure
Case	**a.** Click **Cases** > **Proactive**. **b.** Add the **Proactive** field to the **Proactive Case** and **Workspace** view, and other views as required: ▪ **Proactive** ▪ **Alert** **Note:** The **Alert** field is only available if you have activated the Proactive Customer Service Operations with Event Management plugin. **c.** **Note:** This only applies if you have activated the Proactive Customer Service Operations with Event Management plugin. Add the following fields to the **Affected Install Base Items** related list, **Proactive Case** and **Workspace** view, and other views as required. ▪ **Health Status** ▪ **Health Status Last Updated**
Account	**Note:** This only applies if you have activated the Proactive Customer Service Operations with Event Management plugin. **a.** Click **Customer** > **Accounts**. **b.** Add the following fields to the **Install Base Items**related list for the **Case** and **Workspace** views, and other views as required. ○ **Health Status** ○ **Health Last Updated**
Install Base Item	**Note:** This only applies if you have activated the Proactive Customer Service Operations with Event Management plugin. **a.** Click **Products** > **Install Base Items**. **b.** Add the **Service Context** field to the **Default** and **Workspace** views.

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Activate an alert rule to automatically create a proactive case from an alert

Configure an alert rule to automatically create a proactive case when an incident is created from an alert that has one or more affected install base items.

Before you begin
Role required: evt_mgmt_admin

About this task

Note:
This task is only applicable if you are using the integration with Event Management.

Procedure

1. Navigate to **All** > **Event Management** > **Rules** > **Alert Management**.
2. Click **Create Proactive Case**.
3. Select the **Active** check box.
4. Click **Update**.
   When an incident is created from an alert that contains affected install base items, a case is automatically created. The case number is added to the **Case** field on the Alert form.

Configure proactive case flows

Automate workflows for proactive case creation to improve your operational efficiency and respond to customer issues faster.

Before you begin
Role required: admin

About this task

Note:
This task is only applicable if you are using the integration with Event Management.

Configure the flow designer to automate the next steps in processing a proactive case. You can automate that a proactive case is proposed to a major case or is directly promoted to a major case. If promoted directly to a major case, child cases are automatically created when multiple customers are impacted.

If a single account is affected, you can also automate that an account and primary contact are associated to a case.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Proactive Case Flows**.
2. Click the **Process Proactive Cases Created from Alerts** flow.
3. Click the **Process Proactive Cases for Single and Multiple Accounts** subflow.
4. In the **Major Case Status** field, set the initial status of the major case for multiple accounts. By default, this field is set to **None**. Based on your selection, the proactive case is either **Proposed**, **Accepted**, or **None**. If you set the status to **Accepted**, child cases are created automatically.
5. In the **Affected Account Threshold** field, enter the number of affected accounts required for a proactive case to be eligible for major case processing.
   The default is two.

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6. Select the **Process Case for Single Account** check box to associate an account and primary contact to the case if a single account is affected.
   This also applies if multiple install base items from the same account are affected.
7. Click **Done**.

Configure Customer Service Platform Analytics Solutions

Enable Customer Service Platform Analytics Solutions to view preconfigured dashboards with actionable data visualizations to improve your business processes.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Performance Analytics** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Customer Service category, view the list of tasks to configure the feature.

Performance Analytics for configuration tasks

Task	Description
Activate Performance Analytics for Customer Service Management	Activate the Performance Analytics - Content Pack - Customer Service (com.snc.pa.customer_service) plugin to add Performance Analytics configuration records to your instance.
Review Indicator Sources	Review the provided indicator sources to ensure they match your Customer Service application table structure.
Review Indicators	Review the provided indicators to ensure that the metrics you want to measure are tracked.
Review Breakdown Sources	Review the provided breakdown sources to ensure they match your table structure and include the elements you want.
Review Breakdowns	Review breakdowns to ensure that you can filter scores by the appropriate elements.
Collect Data	Run historical data collection once to collect scores on existing data, and enable scheduled data collection to begin collecting scores on new data automatically.
View Analytics Hub	View the Analytics Hub for indicators that you collected data for to begin exploring your scores.
View Dashboards	View the provided dashboards to get an overview of your scores and view multiple metrics in a single location.

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4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Configure the Platform Analytics Solution for Self-Service Analytics for Customer Service

Run diagnostics, review and customize components, and start collecting data.

Before you begin

Role required: pa_admin

A ServiceNow AI Platform administrator must have installed the content pack plugins or ServiceNow Store application for this Platform Analytics Solution.

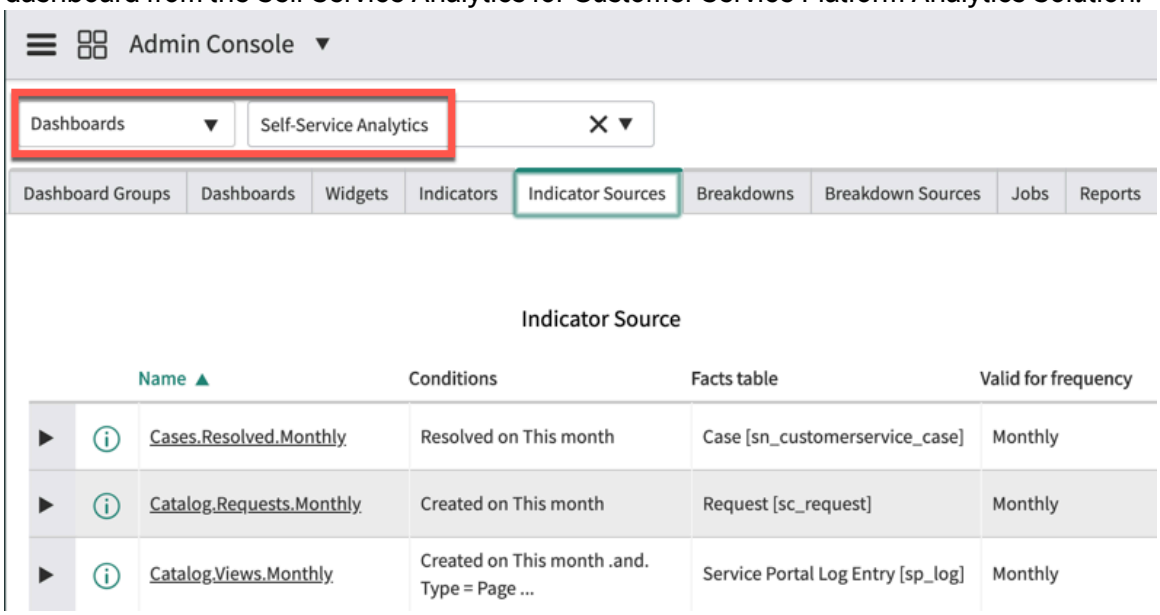
Procedure

1. Run all diagnostics on all records, as described in Performance Analytics diagnostics. These diagnostics can catch mismatches between the configuration of your Platform Analytics Solutions and your tables.
2. Navigate to **Performance Analytics** > **Admin Console**.
3. Click the **Dashboards** link in the **Explore and Manage** tile.
4. Verify the names of the dashboards that have been installed with the Self-Service Analytics Platform Analytics Solution.
5. Open the **Indicator Sources** tab.
6. For each dashboard included in this Platform Analytics Solution:

   a. Filter the indicator sources on the dashboard name.

   Example

   This screenshot shows the indicator sources filtered on the Self-Service Analytics dashboard from the Self Service Analytics for Customer Service Platform Analytics Solution.



   b. Review the facts table, conditions, and frequency of the indicator sources compared to the data structure on your own instance.

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Important:
Pay particular attention to time stamp fields such as Resolved or Created that are referenced in the **Conditions** field. You may need to use different time stamp fields.

c. If necessary, open an indicator source and make corrections.

d. If you are editing an indicator source record, go to the Indicators related list and review the **Conditions** field for each indicator.
Changing the indicator source can also affect the additional conditions on the individual indicators.

7. If you changed the time field stamps in any indicator sources, also change any related Performance Analytics scripts.
For more information, see Update Performance Analytics scripts.
8. Open the Breakdown Sources tab.
9. For each dashboard included in this Platform Analytics Solution:
   a. Filter the breakdown sources on the dashboard name.
   b. Review the conditions on the breakdown source as described in Review the breakdown sources.
10. Navigate to **Performance Analytics** > **Jobs**.
11. Set up and run the historical job for this Platform Analytics Solution, [SSA] Self-Service Analytics Data Collection.
Follow the procedure in Run historical data collection for a Platform Analytics Solution.
12. Edit and activate the scheduled data collection job for this Platform Analytics Solution, [SSA] Self-Service Analytics Data Collection.
Follow the procedure in Schedule data collection for a Platform Analytics Solution.

Related topics

Platform Analytics Solutions for Self-Service Analytics for Customer Service

Self-Service Analytics

Activate the Platform Analytics Solution for Self-Service Analytics for Customer Service

Activate the content pack plugins or ServiceNow Store application for the Platform Analytics Solution.

Before you begin
Activate the full, subscription version of Performance Analytics on the instance where you are activating this Platform Analytics Solution. You can activate Performance Analytics on a sub-production instance without purchasing a subscription. For more information, see Activate your Performance Analytics subscription.

Note:
The data for the Communities and Virtual Agent tabs on the Self-Service Analytics dashboard are generated when the Communities plugin (com.sn_communities) and Glide Virtual Agent plugin (com.glide.cs.chatbot) are activated respectively.

Role required: admin

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Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for Self-Service Analytics for Customer Service plugin (com.snc.pa.self_service_analytics_csm).
3. Install the application.
   When you install this application, you also activate the following plugins:
   - Customer Service (com.sn_customerservice)
   - Self-Service Analytics PA (com.snc.pa.self_service_analytics)
   - Self-Service Analytics Core (com.snc.self-service_analytics_core)

Related topics

List of plugins (Paris)

Administer Customer Service Management

Use a number of features and tools to administer the Customer Service Management application.

Features and applications for administering Customer Service Management

Feature or application	Description
Anonymous chat	With anonymous chat, consumers can chat with a consumer service agent without logging in to the Consumer Service Portal.
Customer Service Management Workflow Studio actions	Use Flow Designer actions as building blocks to create Customer Service Management business processes.
Domain separation and Customer Service Management	Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.
Extension points in Customer Service Management	Use extension points to call custom scripts in the Customer Service Management application.
Knowledge product entitlements	The Knowledge Product Entitlements application enables administrators to designate the knowledge bases and knowledge articles that customers can view from the Customer Service Portal.
Limit knowledge base access to internal users	Limit access to the information in a knowledge base to internal users.
Quick start tests for Customer Service Management	Use quick start tests to validate CSM functionality after making any configuration changes, such as applying an upgrade or developing an application.

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Features and applications for administering Customer Service Management (continued)

Feature or application	Description
Routing and assigning customer service cases	The case routing feature uses matching rules and assignment rules to identify customer service cases that meet certain conditions and then route those cases to customer service agents.
Assignment workbench	Customer service managers can use the assignment workbench to view a list of agents,evaluate skills and availability, and assign tasks efficiently and intelligently.
Special handling notes	Use the Special Handling Notes application to create notes that bring important information about individual records to the user's attention.
Case and account escalation	Use the escalation feature to highlight specific cases or accounts and raise awareness of important customer issues.
Administering case action status	Use the case action status feature to indicate the status of cases in the Case list. Agents can easily identify cases that need attention and quickly prioritize their work.
Major issue management overview	Major issue management enables customer communication for issues that impact a wider audience. Use this feature to proactively identify impacted customers, provide information to these customers, and manage the resolution process.
Automatically close customer service cases	Automatically close cases in the Resolved state if customers do not take any action.
Administer Customer Contracts and Entitlements	Customer service managers can perform tasks to maintain service contracts, contract lines, and entitlements.

Anonymous chat

Consumers can chat with a consumer service agent without logging in to the Consumer Service Portal.

From the Consumer Service Portal, guest users can click the **Chat** link in the portal header to initiate a chat session with a consumer service agent. Clicking this link opens a form that requests some basic information, including the user's name, email address, and type of issue. Completing and submitting the form creates a chat request that is routed to the appropriate agent queue based on the selected issue type. Once the assigned agent accepts the request, a chat session is established. If necessary, the agent can create a consumer record or a case for the guest user, or transfer the chat to another agent.

Setting up anonymous chat

Setting up the anonymous chat feature involves the following steps.

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1. Activate the Consumer Service Portal plugin (com.glide.service-portal.consumer-portal).
2. Modify the default anonymous chat record producer or create a new record producer.
3. Create one matching rule for each agent queue.
4. Configure anonymous chat properties.
5. If necessary, modify the Connect actions to provide the desired functionality for consumer service agents in chat conversations. The anonymous chat feature includes these actions: **Create Case for Guest** and **Create Consumer and Case for Guest**. For more information, see Administer Connect actions.

Anonymous chat plugins

The anonymous chat feature requires two plugins which are activated as part of the Consumer Service Portal plugin:

- Anonymous Connect Support (com.glide.connect.anonymous_support): enables the anonymous chat feature for Connect.
- Connect Support Routing (com.glide.connect.support.routing): routes Connect Support requests to the appropriate chat queue.

Anonymous chat record producer

The form used to request information from a guest user is a configurable record producer based on the Consumer Interaction table (sn_customerservice_customer_interaction), which is a new table in the Istanbul release. When a guest user submits the form, the information provided is stored as a record in the Customer Interaction table. This record is used for routing the chat request.

The default anonymous chat record producer, **What can we help you with?**, is located at **Service Catalog** > **Catalog Definition** > **Record Producers**. This is a public record producer. You can modify this record producer or create your own. If you choose to create your own, see Section 3 in the Making a record producer and catalog item public on a CMS page [KB0551300] article. You must also set the *glide.sc.use_user_criteria* property to **false**.

For more information, see Record Producer.

Anonymous chat routing

Information provided by the guest user assists with routing and also provides the conext of the request to the consumer service agent. The chat request is routed to the appropriate agent queue based on the type of issue selected. The routing for anonymous chat requests uses matching rules. Create one matching rule for each queue and tie a chat request to a chat queue based on the selected issue type. Matching rules for anonymous chat are based on the Customer Interaction table.

The following matching rules are provided:

- Anonymous Connect - Billing Support
- Anonymous Connect - Order Support
- Anonymous Connect - Product Support

These rules are based on the selections in the **Issue Type** field on the default anonymous chat record producer.

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Anonymous chat properties

There are two properties related to the anonymous chat feature. Set these properties to limit the number of chat requests created by guest users.

Properties of Anonymous chat

Property	Description
connect.support.max_guest_sessions_per_hour	Limit maximum number of guest conversations created in the last hour. • Type: integer • Default value: 200 • Location: **Collaborate > Connect Support > Support Administration > Properties**
connect.support.guest_sessions_rate_limit_reached_message	Message shown to user when rate limit for guest conversations is breached. • Type: string • Default value: Guest Chat is currently not available, please retry later. • Location: **Collaborate > Connect Support > Support Administration > Properties**

Related topics

Record Producer

Connect Support

Routing and assigning customer service cases

Modify the anonymous chat record producer

Modify the default anonymous chat record producer to gather the desired information from guest users.

Before you begin

Role required: admin

About this task

This record producer requests information from a guest user on the Consumer Service Portal and stores the information as a record in the Consumer Interaction table (sn_customerservice_customer_interaction). The record is then used for routing the chat request.

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Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definition** > **Record Producers**.
2. Click **What can we help you with?**.
3. Modify the record producer as necessary, including the variables in the **Variables** related list. For more information, see Create a record producer to log incidents.
4. Click **Update**.

Create a matching rule for anonymous chat

Create one matching rule for each agent queue.

Before you begin
Role required: admin

About this task
A chat request is tied to a chat queue based on the selected issue type.

Procedure

1. Navigate to **All** > **Routing and Assignment** > **Matching Rules**.
2. Click **New**.
3. Enter a **Name** for the matching rule.
4. In the **Table** field, select **Customer Interaction**.
5. In the **Conditions** field, use the condition builder to create the following conditions.

Create conditions with condition builder

Field	Operator	Value
Channel	is	Chat
Category	is	Select one of the categories created for anonymous users to define an issue on the record producer: ○ Product Issue ○ Billing Issue ○ Order Issue

6. Click **Submit**.

Configure anonymous chat properties

Users with the system administrator role can set properties to limit the number of chat requests created by guest users.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Collaborate** > **Connect Support** > **Support Administration** > **Properties**.
2. Set the following properties.

Option	Description
Limit maximum number of guest conversations created in the last hour. (*connect.support.max_guest_sessions_per_hour*)	Limits the number of guest chat requests that can be created in a one-hour timeframe. The default value is 200.
Message shown to user when rate limit for guest conversations is breached. (*connect.support.guest_sessions_rate_limit_reached_message*)	The message that is displayed on the Consumer Service Portal when the limit on the number of guest chat requests has been reached.

3. Click **Save**.

Respond to an anonymous chat request

Select a chat request from the chat queue and respond to a guest user's question or comment.

Before you begin

Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

Procedure

1. Navigate to **All** > **Collaborate** > **Connect Chat**.
   The Connect workspace opens in a new tab.
2. Click the support tab of the Connect sidebar, indicated by a headset icon.
   The support tab displays **Queues** to which you belong. It also displays your open support conversations under **Cases**. When a consumer starts a support conversation or an agent transfers a conversation to a queue, any agent who belongs to the associated queue has the option to accept the conversation. An agent can also request to transfer a conversation directly to you.
3. Accept a conversation in one of the following ways.
   - Accept a conversation from a queue
   - Accept a transfer request
4. Respond to the guest user and help resolve the issue.
   By default, your messages are added to the conversation record as comments and are visible to the user.

What to do next

If necessary, you can create a consumer record for a guest user and create a consumer service case from the conversation to track the issue. You can also transfer the conversation to a different agent or queue, or escalate the conversation to a higher priority queue. For more information, see Connect Support.

Customer Service Management Workflow Studio actions

Use Workflow Studio actions as building blocks to create Customer Service Management business processes.

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CSM Workflow Studio actions

Action	Description
Get Case	Retrieve a case record using the case number. If multiple records are found, only the first record is returned.
Create Case	Create a case using one or more attributes. This action mimics the structure of the Case table (sn_customerservice_case) and exposes all of the fields present on the Case table.
Create Quick Case	Create a case using the customer, description, channel, priority, and category attributes.
Create Task on Case	Create a case task and optionally associate it with a case.
Update Case	Update a case by providing the case reference and the fields that you want to update.
Assign Case	Assign a case using matching rules. To use this action, you must first define the matching rules that match cases with resources (assignment groups, agents).
Escalate Case	Request case escalation. This action does not automatically approve escalation. Approval is based on the selected escalation template.
Escalate Account	Request account escalation. This action does not automatically approve escalation. Approval is based on the selected escalation template.
Add Work Note to Task	Add a work note to a task or to task extended objects (for example, a case or case task).
Add Comment to Task	Add a comment to a task or to task extended objects (for example, a case or case task).

Related topics

Flow Designer

Action Designer

Domain separation and Customer Service Management

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

Support level: Basic

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

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview

Domain separation for Customer Service Management is designed for:

- **Customers using the application in a domain-separated environment or in a hybrid environment**. With domain separation, a customer can grant access to end users (contacts or consumers) to other entities in addition to customer service cases. For example, contacts or consumers can access problems, changes, or projects. Administrators can synchronize the CSM account model with the domain structure and maintain data separation for entities that don't have account-based data separation enabled.
- **Managed service providers (MSPs) using the application to provide customer support**. In this scenario, an MSP can provide support to multiple customers, where domains are necessary to contain all relevant customer data and processes. For example, an MSP providing support to customers related to billing questions, contract renewals, or other non-service operations.
- **Managed service providers offering the application as a service that customers can provide to their customers**. In this scenario, an MSP can offer Customer Service Management as a service to customers who, in turn, use the application to support their end customers. This scenario requires additional configuration due to domain support for some of the core entities in the platform such as Product Model.

How domain separation works in Customer Service Management

Domain separation for Customer Service Management aligns each customer account to one domain. To use domain separation with the application, all customer accounts must be assigned to a domain.

The customer account is the main entity within Customer Service Management. All entities related to the account, such as contacts and cases, are created in the same domain as the account. This rule also applies for all entities on customer service cases, including addresses, assets, and contacts.

When a new account is created, a domain of the same name is also created and assigned to the account. All related entities for an account, such as contacts and cases, must reside in the same domain. When a related entity for a domain-separated account is created, the entity is assigned to the account domain.

Setting up domain separation for Customer Service Management

Domain separation for Customer Service Management requires the domain separation plugin. Contact ServiceNow to activate domain separation.

Domain separation for Customer Service Management also requires enabling the **csm_auto_account_domain_generation** property. This property is installed with Customer

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Service Management and is available only after the domain separation plugin is active. Contact ServiceNow to enable this property.

When the **csm_auto_account_domain_generation** property is enabled, the Customer Service Management application automatically creates a domain of the same name when a new account is created.

Note:
Enabling the **csm_auto_account_domain_generation** property doesn't add domains for existing accounts. It only creates domains for newly created accounts. Adding domains for existing accounts requires a migration script. You can request for the migration script from the ServiceNow Professional Services team.

Changes to Customer Service Management tables

Domain separation for Customer Service Management adds the **Domain** and **Domain Path** fields to the Account [customer_account] table. These fields aren't exposed by default. Customers can customize lists and forms to view these fields.

Account domains and related entities

When creating related entities for an account, the domain for the related entities is set to the account domain. Related entities include:

- Contacts
- Cases
- Assets
- Contracts
- Entitlements
- Addresses
- Social profiles
- Escalations
- Sold Products
- Installed Products
- Install Base Items
- Affected Install Base Items
- Sold Product Covered

Changing the domain for an account also changes the domain for all the account's related entities.

Domain visibility for customer service agents and managers

Users with the customer service agent (sn_customerservice_agent) and customer service manager (sn_customerservice_manager) roles must be manually assigned to the **TOP/MSP/Default** domain. Agents and managers can't see case or account details until they're assigned to the **TOP** domain.

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Domain separation for case and account escalation

Escalation template records and escalation severity records are domain separated. By default, these records reside in the global domain. Users can configure the Escalation Template and Escalation Severity forms to display the **Domain** field and set the domain as needed.

When an escalation record is created from a case or account, it's created in the account domain.

Domain separation for ribbon configuration, Lookup and Verify configuration, and Special Handling Notes

Ribbon and Lookup Verify configurations and Special Handling Notes support domain separation as process-separated tables.

When inserting or updating a record for process-separated tables, the picker domain scope takes precedence by design with the Overrides [sys_override] field on process-separated tables. For more information, see Process administration.

Related topics

Domain separation for service providers

Domain separation and entity relationships

With domain separation in Customer Service Management, you can further control visibility and access to data by using contact, partner, and parent-child relationships.

Partner-customer account relationships

In partner-customer account relationships, the partner account can see data in the customer account's domain. When setting up an account relationship, the domain visibility direction is **From > To**. The account in the **From** field contains the domain of the account in the **To** field.

When a partner admin creates a case for a customer account, the case is created in the customer account's domain so that all relevant parties can access the case.

In partner-customer account relationships where the customer account has child relationships, the partner admin can create a case for the customer account but not for the child accounts. The partner admin can only create cases for the account with which the relationship has been established.

Contact relationships

In contact relationships, the contact included in the relationship can see data for the specified account domain.

Parent-child relationships

The account hierarchy feature creates a parent-child relationship between accounts. This relationship is defined by selecting the parent in the **Parent Account** field on the Account form for the child account. Domain hierarchy is also achieved using the **Parent Account** field. In parent-child account relationships, parent domains can see data in child domains.

To provide access from the child account to the parent account, you need to set domain visibility. Navigate to the child account and set visibility in the Visibility Domains related list (sys_user_visibility) by connecting the user to the domain.

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Extension points in Customer Service Management

Use extension points to call custom scripts in the Customer Service Management application.

To access the available extension points, type **sys_extension_point.list** in the application navigator and press **Enter**. Click the desired extension point to view the record details.

You can create multiple implementations for each extension point and provide an order number for each implementation. The implementation that has the lowest order number is the implementation that is executed.

Customer Service Management extension points

Extension point	Description
sn_customerservice.CSMService	Defines the default value logic for case objects. Available with the Customer Service (com.sn_customerservice) plugin.
sn_customerservice.CSMCaseSync	Use this extension point to customize the logic for parent-child case synchronization. This extension point can be used in one of two ways: • Define the conditions for parent case records that can be considered for synchronization to child cases. The default functionality is based on the **sn_customerservice.parent_child_case_sync** system property. Customers can add additional conditions using this extension point. • Customize the logic for parent-child case synchronization based on the state of the child case. By default, if the child case is in the **Resolved**, **Closed**, or **Cancelled** state, there is no sync from the parent case. This extension point is used by the *CSCaseSyncHelper* script include and is available with the Customer Service (com.sn_customerservice) plugin. **Note:** In the base system, parent-child case synchronization is available only for the Case table (sn_customerservice_case). This feature must be configured for tables that extend the Case table.
sn_majorissue_mgt.MajorCase	Available with the Major Issue Management (com.sn_majorissue_mgt) plugin.

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Customer Service Management extension points (continued)

Extension point	Description
sn_action_status.NeedsAttentionActionStatus	Enables each application to choose the user roles that can enable and disable the **Needs Attention** field on a case form. Available with the Customer Service Case Action Status plugin (com.snc.csm_action_status).
sn_cs_sm.CSMChangeIntegrations	Creates the logic for mapping the **Change Request** field on the case record. Available with the Customer Service with Service Management (com.sn_cs_sm) plugin.
sn_cs_sm.CSMIncidentIntegrations	Creates the logic for mapping the **Incident** field on the case record. Available with the Customer Service with Service Management (com.sn_cs_sm) plugin.
sn_cs_sm.CSMProblemIntegrations	Creates the logic for mapping the **Problem** field on the case record. Available with the Customer Service with Service Management (com.sn_cs_sm) plugin.
sn_cs_sm_request.CSMRequestIntegrations	Creates the logic for mapping the **Request** field on the case record. Available with the Customer Service with Request Management (com.sn_cs_sm_request) plugin.
global.CSMRelationshipServiceEP	Create CSM relationships with responsibilities. Available with the Customer Service (com.sn_customerservice) plugin.
global.CSMContentAccessEP	Creates the logic to implement ACLs for create, read, update, and delete (CRUD) operations. Available with the Customer Service (com.sn_customerservice) plugin.
AddressMgmtExtensionPoint	Enables users to customize the reference qualifiers of the location field in the Account Address table. Allows users to create an implementation of this extension point and override the “getAccountLocationsRefQual” function.

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Related topics

- Using extension points to extend application functionality
- Using scripted extension points in server-side scripts
- Using UI extension points in server-side UI macros
- Using client extension points in client-side UI scripting

Knowledge product entitlements

The Knowledge Product Entitlements application enables administrators to designate the knowledge bases and knowledge articles that customers can view from the Customer Service Portal.

Limit access on the Customer Service Portal to the following:

- The knowledge bases and articles for the products that a customer's company has purchased.
- The knowledge bases and articles for which a customer's company has entitlements.

The Knowledge Product Entitlements plugin (com.snc.kb_product_entitlements) must be activated to use this application. Installing this plugin adds the **Related Products** field to the Knowledge Base form and to the Knowledge form. The knowledge information available on the customer portal is limited to the products selected in this field.

Additional controls are available by enabling properties that allow you to:

- Limit access to knowledge bases based on product entitlements.
- Enable access if no products are specified in the **Related Products** fields.

Add a related product to a knowledge base or knowledge article

Add a product to a knowledge base or knowledge article using the **Related Products** field on the corresponding form.

Before you begin

Role required: admin

About this task

Note:
To access knowledge bases and articles associated with a product, a user must have read or contribute access and have the product included in the user's account as an asset. For more information about assets, see Configure assets.

Procedure

1. To add a related product to a knowledge base:
   a. Navigate to **Knowledge** > **Administration** > **Knowledge Bases**.
   b. Select the desired knowledge base.
   c. Add one or more products in the **Related Products** field.
   d. Select **Update**.
2. To add a related product to a knowledge article:
   a. Navigate to **Knowledge** > **Articles** > **All**.
   b. Select the desired knowledge article.

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c. Add one or more products in the **Affected Products** related list.

d. Select **Update**.

Set knowledge product entitlement properties

Set various properties to allow customers to access knowledge bases and knowledge articles on the Customer Service Portal.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Knowledge Product Entitlements** > **Properties**.
2. Set the following properties, as needed.

Option	Description
Enable access control of Knowledge Bases based on product entitlements	If enabled, customers can access all of the knowledge bases related to the products for which they have entitlements.
Allow access to Knowledge Bases with empty related_products	If enabled, customers can access all knowledge bases even if no products have been specified in the **Related Products** field on the Knowledge Base form.
Enable access control of Knowledge Articles based on product entitlements	If enabled, customers can access all of the knowledge articles related to the products for which they have entitlements.
Allow access to Knowledge Articles with empty related_products	If enabled, customers can access all knowledge articles even if no products have been specified in the **Related Products** field on the Knowledge form.

3. Click **Save**.

Limit knowledge base access to internal users

Limit access to the information in a knowledge base to internal users.

Before you begin
Role required: admin

About this task
The articles in a knowledge base are available to both internal users, such as customer service agents, and to external users (customers and partners). If the articles in a knowledge base are intended for internal users only, the system administrator can restrict access by customizing the knowledge base form.

Procedure

1. Navigate to **All** > **Knowledge** > **Administration** > **Knowledge Bases**.
2. Click the desired knowledge base.
3. Right-click the form header and select **Configure** > **Related Lists**.

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4. Select **Cannot Contribute** from the Available column and move it to the Selected column.
5. Click **Save**.
6. On the selected knowledge base form, click the **Cannot Contribute** related list.
7. Click **Edit**.
8. Click **All Customer Contacts** in the left column and move it to the right column.
9. Click **Save**.

Quick start tests for Customer Service Management

Quick start tests are part of the Automated Test Framework (ATF). Use these tests to validate that the Customer Service Management application still works after you make any configuration change, such as applying an upgrade or developing an application.

A quick start test is a test or test suite installed with the demo data of an application. You can use quick start tests as templates to build your own tests and test suites that ensure successful execution with your instance-specific data.

For more information about using quick start tests, see the following topics:

- Test your apps with the ATF
- Quick start tests
- Getting started with quick start tests

CSM test suites and tests

The CSM test suites and tests are listed in the tables below.

- CSM: Case management test suite
- CSM Configurable Workspace test suite
- CSM: Case Types - Complaint
- CSM: Case Types - Onboarding
- CSM: Operations Dashboard test suite
- CSM Portal test suite
- Guided Decision - Next Best Action ATF test suite
- TC: Targeted Communications test suite
- CSM Walkup Experience tests

Plugins

All Customer Service Management quick start tests require activating the Customer Service Management Demo Data plugin (com.snc.customerservice.demo). Some quick start tests also require activating the following plugins:

- Business Location (com.snc.business_location)
- Case Playbook for Complaints (sn_complaint)
- Case Playbook for Onboarding (sn_onboarding)
- Consumer Service Portal (com.glide.service-portal.consumer-portal)
- CSM Contributor User (com.snc_csm_contributor_user)
- CSM Extension for Proxy Contacts (com.snc.csm_proxy_contacts)

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- Customer Service Household (com.snc.household)
- Customer Service Management for Orders (com.snc.csm.order)
- Customer Service Portal (com.glide.service-portal.customer-portal)
- Customer Service with Request Management (com.sn_cs_sm_request)
- Customer Service with Service Management (com.sn_cs_sm)
- Guided Decisions Experience (com.snc.guided_decisions_playbook_experience)
- Guided Decision - Next Best Action (com.snc.next_best_action)
- Major Issue Management (com.sn_majorissue_mgt)
- Proactive Customer Service Operations with Event Management (com.snc.proactive_cs_itom)
- Skill Determination (com.snc.skill_determination)
- UX ATF Action (com.glide.ux.atf_action)
- Walk-Up for CSM (com.snc.walkup_for_csm)

CSM: Case Management test suite

Test	Description	Release version
CSM: Create Product Case	Create a case for a product.	Madrid
CSM: Assign Case to an Agent	Create a case and assign it to a customer service agent.	Madrid
CSM: Assign Asset on Case	Assign an asset to a case.	Madrid
CSM: Assign Entitlement	Assign an entitlement to a case.	Madrid
CSM: Escalate an Account	Escalate an account.	Madrid
CSM: Escalate a Case	Escalate a case.	Madrid
CSM: Create Special Handling Notes	Create special handling notes for a case.	Madrid
CSM: Close a Case	Close a case.	Madrid
CSM: Time Recording	Record the time worked on a case.	Madrid
CSM: Create CHG from Case	Create a change record from a case.	Madrid
CSM: Create Incident from Case	Create an incident record from a case.	Madrid
CSM: Create Order Case	Create a case for an order. **Note:** Requires Customer Service Management for Orders.	Madrid
CSM - Create Order Case as Customer from CSM Portal	Create an order case as a customer from the Customer Service Portal.	Madrid

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CSM: Case Management test suite (continued)

Test	Description	Release version
	Note: Requires the Customer Service Portal. Also requires that the test be run as admin.	
CSM: Create Problem from Case	Create a problem record from a case.	Madrid
CSM - Create Proactive Case by NOC Operator	Verify whether a proactive case is created. **Note:** Requires Proactive Customer Service Operations with Event Management.	New York
CSM - Employee creating case OBO customer	As an employee with the proxy contact role (sn_customerservice_proxy_contact), create a case from the self-service portal on behalf of a customer. **Note:** Requires the CSM Extension for Proxy Contacts.	New York
CSM - Lookup Type Skill Determination Rule Test	Create a lookup type skill determination rule. **Note:** Requires Skill Determination.	New York
CSM - Manager creating request OBO customer from CSM portal	As a user with the case manager role, create a case on behalf of a customer from the Customer Service Portal. **Note:** Requires Customer Service Request Integration.	New York
CSM - Simple Type Skill Determination Rule Test	Create a simple type skill determination rule.	New York

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CSM: Case Management test suite (continued)

Test	Description	Release version
	Note: Requires Skill Determination.	
CSM: Register New Case Type	Register a case type and verify the record is created.	Orlando
CSM - Project Manager create Project for an Account	Project Manager creates project for an account. **Note:** Requires Customer Project Management.	Orlando
CSM - Project Manager identify Project Contact	Project manager identifies customers to a project. **Note:** Requires Customer Project Management.	Orlando
CSM - Project Manager create project task and assign to a customer	Project manager creates project task and assigns to a customer. **Note:** Requires Customer Project Management.	Orlando
CSM - Create Case from Project	Create a case from a project.	Orlando
CSM - Create Case from Project Task	Create a case from a project task.	Orlando
CSM: Create Task from Case	Create a case task from a case.	Orlando
CSM: Agent Creating Request for Customer	As a customer service agent, create a request for a customer. **Note:** Requires Customer Service Request Integration.	Orlando
CSM - Agent Create Cases from a Project	As a customer service agent, create a case from a project.	Orlando

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CSM: Case Management test suite (continued)

Test	Description	Release version
	Note: Requires Customer Project Management.	
CSM - Agent Create Cases from a Project task	As a customer service agent, create a case from a project task. **Note:** Requires Customer Project Management.	Orlando
CSM - Agent Create Change Requests for a project	As a customer service agent, create a change request for a project.	Orlando
CSM: Create Major Case and its Child Cases	Create a major case and the associated child cases for the customer accounts in the recipient list. **Note:** Requires Major Issue Management.	Orlando
CSM: Advanced Type Skill Determination Rule Test	Create an advanced type skill determination rule. **Note:** Requires Skill Determination.	Orlando
CSM - Service Contracts covered under Sold Product	Create sold products and service contracts and associate service contracts to a sold product. Verify the association between the active contracts and the sold product. **Note:** Requires Customer Service Install Base Management.	Orlando
AWA - Create New Service Channel	Create a new service channel in the Advanced Work Assignment application.	Orlando

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CSM: Case Management test suite (continued)

Test	Description	Release version
	Note: Requires Advanced Work Assignment for CSM.	
CSM-ITOM - Create Child Cases for Proactive Major Case	Create a child case for a proactive major case using recipient list. **Note:** Requires Proactive Customer Service Operations with Event Management.	Orlando
CSM - Create Outage from Case	Validate if newly created outage is linked to a case.	Paris
CSM: Create Sold Product on Household	Create a sold product on a household and its member. **Note:** Requires Customer Service Install Base Management and Customer Service Household with **Load demo data** enabled.	Quebec
CSM: View Health Status of Install Base Item from Account and Case pages	Validates the functionality of the **Refresh Install Base Health** button on the Account and Case record pages.	Quebec
CSM: Assign Case Task to Case Task Agent	The customer service agent creates and assigns a case task to a case task agent.	Rome
CSM: Case Task Agent views assigned Case Task	Verifies that the case task agent can view an assigned case task.	Rome
CSM: Case Task Agent Completes Assigned Task	The case task agent completes an assigned case task.	Rome
CSM: Report a knowledge gap from a case in Agent Workspace	Verify that a knowledge gap related to a case was reported in Agent Workspace	Rome
CSM-Create a case using 'Create a case (POST)' API	Create a case using 'Create a case (POST)' API.	Rome

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CSM: Case Management test suite (continued)

Test	Description	Release version
	Note: Requires a user authentication record assigned to the **Basic authentication** field in step 1 of the ATF.	
CSM-Query a case using 'Query a case (GET)' API	Query a case using 'Query a case (GET)' API. **Note:** Requires a user authentication record assigned to the **Basic authentication** field in step 1 of the ATF.	Rome
CSM: OCS Manager creating New OSP	Verify that a new Outsourced Service Provider (OSP) is created by the OCS internal manager. **Note:** Requires Outsourced Customer Service.	Rome
CSM: Case Creation by OCS Agent	Verify that an Outsourced Customer Service agent is able to create a case. **Note:** Requires Outsourced Customer Service.	Rome
CSM: Manage Consumer Profile Locations	Create and manage consumer locations, and map them to consumer profiles.	Washington DC
CSM: Address sharing across Accounts	Implement reusable addresses for accounts to support complex customer operations and business models.	Washington DC
CSM: Create Case as Location Contributor from BLSP Portal	As a location contributor,create a case from the BLSP portal.	Yokohama
CSM: Create a Business Location And Onboard a Member To It	Verifies the creation of a business location and onboarding a member to it.	Yokohama

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CSM Configurable Workspace test suite

Test	Description	Release version
CSM Workspace: Case creation Workflow	Tests the creation of a case record by a customer service manager in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Case follow up workflow	Tests the requesting of information from a customer by a customer service manager in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Report knowledge gap workflow	Tests the creation of a knowledge feedback task for a case record by a customer service manager in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Case resolution workflow	Tests the resolution of a case record by a customer service manager in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Create Incident from Case	Tests the creation of an incident record from a case record by a customer service agent in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Create Problem from Case	Tests the creation of a problem record from a case record by a customer service agent in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Create Normal Change from Case	Tests the creation of a change record from a case record by a customer service agent in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Case creation from All Cases list	Tests the creation of a case from the All cases list by a customer service manager (sn_customerservice_manager) in CSM/FSM Configurable Workspace.	Yokohama
CSM Workspace: Case Creation from My Cases list	Tests the creation of a case from the My Cases list by a customer service manager (sn_customerservice_manager) in CSM/FSM Configurable Workspace.	Yokohama

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CSM Configurable Workspace test suite (continued)

Test	Description	Release version
CSM Workspace: Case Creation from My Open cases list	Tests the creation of a case from the My Open list by a customer service manager (sn_customerservice_manager) in CSM/FSM Configurable Workspace.	Yokohama
CSM Workspace: Interaction creation from My Interaction list	Tests the creation of an interaction record from the My Interactions list by a customer service manager (sn_customerservice_manager) in CSM/FSM Configurable Workspace.	Yokohama

CSM: Case Types - Complaint

Test	Description	Release version
Create a Complaint Case	Tests that a user can create a case that is of type complaint in the sn_complaint_case table.	Paris
Escalate a Complaint Case	Tests that a user can escalate a case that is of type complaint in the sn_complaint_case table.	Paris

CSM: Case Types - Onboarding

Test	Description	Release version
Create an Onboarding Case	Tests that a user can create a case that is of type onboarding in the sn_onboarding_case table.	Paris
Escalate an Onboarding Case	Tests that a user can escalate a case that is of type onboarding in the sn_onboarding_case table.	Paris

CSM: Operations Dashboard test suite

Test	Description	Release version
awa_admin_operations_dashboard	Verify whether user with role awa_admin is able to view the Advanced Work Assignment menu under Operations Dashboard and unassigned	Orlando

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CSM: Operations Dashboard test suite (continued)

Test	Description	Release version
	interactions and unassigned task work items modules.	
awa_manager_operations_dashboard	Verify whether user with role awa_manager is able to view the Advanced Work Assignment menu under Operations Dashboard and unassigned interactions and unassigned task work items modules.	Orlando

CSM Portal test suite

Test	Description	Release version
CSM - Create Product Case as Customer from CSM Portal	Create a product case as a customer from the Customer Service Portal. **Note:** Requires Customer Service Portal. Also requires that the test be run as admin.	Madrid
CSM - Create Product Case as Partner from CSM Portal	Create a product case as a partner from the Customer Service Portal. **Note:** Requires Customer Service Portal. Also requires that the test be run as admin.	Madrid
CSM - Search on Homepage	Search for information from the Customer Service Portal. The search includes cases, Knowledge articles, and Community threads.	New York
CSM - Update Support Profile	Update a contact's profile from the Customer Service Portal.	New York
CSM - Provide requested info on case	From the Customer Service Portal, the contact can provide information for a case that was requested by the agent.	New York
CSM - Accept Proposed Solution On Case	Accept a proposed solution for a case from the Customer Service Portal.	New York

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CSM Portal test suite (continued)

Test	Description	Release version
CSM - Provide Feedback on Survey	Provide feedback on a survey after a case is closed from the Customer Service Portal.	New York
CSM - View All Desktop Notifications	View all Customer Service Management specific desktop notifications.	Orlando
CSM - View Publications on CSM Portal	View publications on the Customer Service Management portal.	Orlando
CSM - Create Contact on CSM Portal	Create contacts on the Customer Service Management portal.	Orlando
CSM: Validate Outage widgets in CSM Portal	Validates various types of outages and the corresponding widgets shown on the Customer Service Portal home page and the Install Base page.	Quebec
CSM - Create case from Portal as Consumer Contributor	Creates a customer case from the portal by a user with the consumer contributor user role (sn_customerservice.consumer_contributor). **Note:** Requires Business Location, Customer Service Household, and CSM Contributor User.	Rome
CSM - Create case from Portal as Account Contributor	Creates a customer case from the portal by a user with the account contributor user role (sn_customerservice.account_contributor). **Note:** Requires Business Location, Customer Service Household, and CSM Contributor User.	Rome
CSM - Add Related parties on Case and perform action on case as Related party	Verify the ability to add related parties to the case and perform actions on the case as related parties through the CSM Portal.	Rome

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CSP Portal test suite

Test	Description	Release version
CSP - Create Product Case as Consumer from CSP Portal	Create a product case as a consumer from the Consumer Service Portal. **Note:** Requires the Consumer Service Portal. Also requires that the test be run as admin.	Madrid
CSP - Search on Homepage	Search for information from the Consumer Service Portal. The search includes cases, knowledge articles, and Community threads.	New York
CSP - Update Support Profile	Update a consumer's profile from the Consumer Service Portal.	New York
CSP - Register Your Product	Register a product from the Consumer Service Portal.	New York
CSP - Provide requested info on case	From the Consumer Service Portal, the consumer can provide information for a case that was requested by the agent.	New York
CSP - Accept Proposed Solution On Case	Accept a proposed solution for a case from the Consumer Service Portal.	New York
CSP - Provide Feedback on Survey	Provide feedback on a survey after a case is closed from the Consumer Service Portal.	New York
CSP - View Publications on CSP Portal	View publications on Customer Service portal.	Orlando
CSP - Create Product Case as an internal unified consumer from CSP Portal	This test verifies the functionality of creating a product case as an internal unified consumer from the CSP portal in conjunction with the Customer Service and Consumer Service Portal plugins, using the Customer Service Management (CSM) demo data plugin.	Yokohama
CSP - Create Product Case as an external unified consumer from CSP Portal	This test verifies the functionality of creating a product case as an external unified consumer from the CSP portal in conjunction	Yokohama

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CSP Portal test suite (continued)

Test	Description	Release version
	with the Customer Service and Consumer Service Portal plugins, using the Customer Service Management (CSM) demo data plugin.	

Guided Decision - Next Best Action ATF test suite

Test	Description	Release version
Validate Next Best Action List- Guided Decisions	Validates the list of next best actions recommended based on the configured rules.	San Diego
Validate Next Best Action Ranking- Guided Decisions	Validates the list of next best actions recommended based on the configured rules.	San Diego

TC: Targeted Communications test suite

Test	Description	Release version
TC - Create Recipient List	Create a recipient list with the required parameters. Verify the new recipient list in the related list "Recipients".	Orlando
TC - Create Publication	Create a publication. The publication is published based on the publication date and verify if an user in the recipient list gets the publication.	Orlando

CSM Walkup Experience tests

Test	Description	Release version
CSM Walkup: Check-in as a walkup user, look at the queue, and submit a survey	As a walk-up user, perform check-in, look at the queue, and submit feedback through a survey. **Note:** This test works when the Seattle location, available with demo data, is available.	Rome

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CSM: Customer Project Management tests

Test	Description	Release version
CSM PPM: Case creation from project workflow	As a customer service agent, create a case from a CSM project record in CSM Configurable Workspace.	Yokohama
CSM PPM: Case creation from project task workflow	As a customer service agent, create a case from a CSM project task record in CSM Configurable Workspace.	Yokohama

Routing and assigning customer service cases

The case routing feature uses matching rules and assignment rules to identify customer service cases that meet certain conditions and then route those cases to customer service agents.

This video covers various aspects of configuration for routing and assignment including creating assignment rules, the assignment workbench and advanced work assignment.

Overview

Create one or more matching rules that establish specific conditions that a case must meet before it can be routed to an agent. Then use an assignment rule to route those cases to agents based on product knowledge and availability. You can also invoke the MatchingRuleProcessor API to execute the matching rules and return a list of users (sys_ids).

Matching Rules

Matching rules are based on two defined sets of conditions, one that identifies specific case attributes and another that identifies the agent resources best suited to handle cases with these attributes. Matching rules are created using the Matching Rule form.

To identify case attributes, select a table that stores the task type (for example, the Case table) and then use a condition builder to create one or more conditions that a case must meet before being routed. For example, you can build conditions for a specific account and product or for a specific product and priority level.

To identify an agent resource, use one of the following resource matching methods:

- **Simple**: Select the resource name from a list of users.
- **Advanced**: Build conditions that filter the available agent resources. These conditions can be based on user role, agent group, specific skills, work load, or agent availability.
- **Scripted**: Create a customized script to identify agent resources.

Another resource matching method, Selection Criteria, can be used to create a matching rule with selected matching criteria for use with the assignment workbench.

Assignment Rules

Use assignment rules to automatically assign task to users and groups. Create an assignment rule for a matching rule by selecting the **Create assignment rule** related link on the Matching Rule form. When the matching rule conditions are met, a case can be routed to a user or a group using the assignment rule. The assignment rule is applied only if the task isn't already assigned to another user or group.

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Note:
Matching rules and assignment rules are independent records with no synchronization. If you change the **Applies to** component of the matching rule, it isn't reflected in the assignment rule.

When you create an assignment rule, you select the following:

- The table for the task type and the conditions that must be met before the task is assigned.
- The user or the group to which the task is assigned.

Alternately, you can create a script to further customize the assignment rule.

Related topics

Assignment rules module

Invoke the MatchingRuleProcessor API

After you create one or more matching rules, you can invoke the MatchingRuleProcessor API and run the rules.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, admin

Procedure

- You can invoke the matching engine using the `processAndGetCandidates` method of the `matchingRuleProcessor` class.
  Pass in the task record and the number of resources. The result is an array of resource sys_ids.
- The system processes the matching rules based on the number stored in the **Execution Order** field for each rule.
  The result is a list of users (sys_ids), which you can use for case routing and assignment.

Reverse matching

Reverse matching uses the same matching rules to match tasks to a resource rather than resources to a task.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, and admin

About this task

The resource matching engine can match resources and tasks in two ways:

- Forward: matches resources for a task
- Reverse: matches tasks for a resource

The same matching rule can be used for both forward and reverse matching.

Procedure

- In the Customer Service Management application, you can use reverse matching to determine which call the next available agent should take.
- Reverse matching returns a list of case sys_ids instead of user sys_ids.

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When using reverse matching, you can also limit the cases returned to a specific set. The following example shows how to use reverse matching.

```
MatchingRuleProcessor.processAndGetCandidates(resource,
 taskLimit, "sn_customerservice_case", "reverse", false,
 [<array of cases to consider>])
```

Limit the number of task sys_ids returned for reverse matching rules

Reverse matching rules return a list of case sys_ids. Limit the number of cases returned by configuring the number in the reverse.matchingrule.entity.limit system property.

Before you begin

Role required: admin

Procedure

1. In the navigation filter, type `sys_properties.list`.
2. Search for the reverse.matchingrule.entity.limit system property.
3. In the number field, change the number of cases returned.
   The default number is 30.

Result

If the number of cases returned is more than the value listed in the system property, the reverse matching rule doesn't run for Scripted and Selection Criteria matching rules.

Assignment workbench overview

The assignment workbench enables customer service managers to assign tasks to agents efficiently and intelligently. The workbench uses configurable criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking. Managers can view these results and click one button to assign a task.

The assignment workbench displays all the relevant information for task assignment, including:

- A list of the agents in the task assignment group.
- The matching criteria used to evaluate the agents.
- An overall ranking for each agent in the assignment group.
- A filter with the current assignment group and the skills identified for the task, including any mandatory skills.

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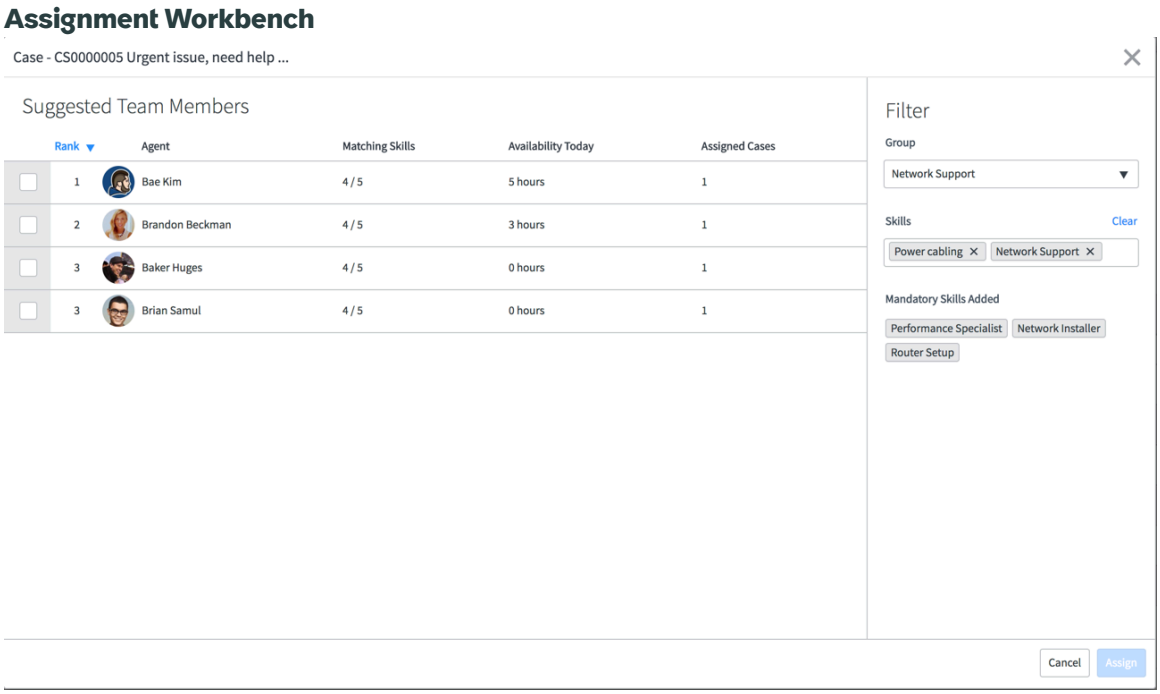

Agents are ranked from 1 to any number based on the criteria configured for the workbench. The more criteria that matches, the higher an agent's rank. When the criteria for two agents is the same, the agents have the same rank. Point to an agent's rank to display the details.

Use the filter to change the assignment group and to add or remove skills. Changes to the assignment group or to the skills lists are reflected immediately in the workbench:

- Changing the assignment group displays a different list of agents.
- Adding or removing skills can change the agent ranking.

If you are using the mandatory skills feature, the agents displayed in the assignment workbench are filtered by the skills in the **Mandatory Skills Added** list and then ranked by the other matching criteria.

Note:
Agents cannot add or remove mandatory skills or make a skill not mandatory.

Configuring the assignment workbench

The assignment workbench configuration is stored in a matching rule that is based on the **Selection criteria** matching type. The default configuration uses the **Recommendation for Case Assignment** matching rule, which includes three of the four default matching criteria:

- Availability Today
- Matching Skills
- Assigned Cases

Based on these matching criteria, the workbench calculates and displays an overall rank for each agent in the group. You can modify or create matching criteria and the **Recommendation for Case Assignment** matching rule as needed or you can create your own configuration following these steps:

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1. Create one or more matching criteria.
2. Create a matching rule with the **Selection criteria** matching type.
3. Open the matching rule and add the desired matching criteria.

If you are using mandatory skills, you must replace the **Matching Skills** criterion in this matching rule with the **Matching Skills - Mandatory Skills Support** criterion to match agents with mandatory skills required for a case.

Using the assignment workbench

Access the assignment workbench by clicking the Find Agents icon ( ) next to the **Assigned to** field on the task form.

Note:
The state of the current record determines the availability of the Find Agents icon. The icon is available for records in the **Open**, **Awaiting**, and **Cancelled** states, and if the user has write access for the **Assigned to** field. The icon is not available for records in the **New** or **Closed** states or when the **Assigned to** field is read-only for the current user.

Sort the list of agents by any of the matching criteria by clicking the desired column header, which reorders the suggested agents based on the selected criteria.

Select a different assignment group from the **Group** list in the filter. The list of agents is updated based on the selection. If the selected group does not contain any agents, a message is displayed to select another group.

Add or remove skills from the **Skills** list in the filter. These selections are reflected in the **Matching Skills** column.

Skills that have been identified as mandatory for a task are displayed in the **Mandatory Skills Added** list. These selections are also reflected in the **Matching Skills** column. You cannot add or remove skills from this list.

Select an agent and click **Assign** to assign the task. The workbench closes and returns to the Case form. The **Assigned to** field is updated with the selected agent. Click **Save** on Case form to save this assignment.

Plugins

The Assignment Workbench plugin (com.snc.assignment_workbench) is activated as part of Customer Service Management.

The Case Assignment Workbench Demo plugin (com.snc.case_assignment_workbench_demo) provides demo data for the workbench.

Tables

Assignment Workbench adds the following tables.

Assignment Workbench tables

Table	Description
Matching Criteria [matching_dimension]	Stores the matching criteria that can be used to create a configuration for the assignment workbench.

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Assignment Workbench tables (continued)

Table	Description
Select Criteria [matching_dimension_for_assignment]	Stores the matching criteria for an assignment workbench configuration matching rules.
Matching Rule [matching_rule]	Stores matching rules, including the matching rules that configurations for the assignment workbench.

User Roles

Assignment Workbench adds the following roles.

Assignment Workbench roles

Role title [name]	Description	Contains roles
Assignment workbench [assignment_workbench]	Provides access to the assignment workbench for customer service agents and consumer service agents.	Skill user [skill_user]

Properties

Assignment Workbench adds the following properties.

Assignment Workbench properties

Property	Description
assignment_workbench.find.agents.title	Title for the macro button. • **Type**: string • **Default value**: Find Agents • **Location**: **Routing and Assignment** > **Properties**
assignment_workbench.new.window	When enabled, opens the assignment workbench in a new window. • **Type**: true | false • **Default value**: false: • **Location**: **Routing and Assignment** > **Properties**
assignment_workbench_no_of_agents	Number of agents per page. (To get better performance, do not use more than 50 agents per page.)

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Assignment Workbench properties (continued)

Property	Description
	• **Type**: choice list • **Default value**: 30 • **Location**: **Routing and Assignment** > **Properties**

Related topics

Configure assignment workbench

Matching criteria for case assignment

The assignment workbench uses configurable matching criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking.

There are three types of matching criteria:

- **Simple Match**: Creates one-to-one matching, such as matching the time zone of an agent with the time zone of a task location.
- **Aggregate**: Uses a simple query and returns an aggregate result. For an aggregate type, select a table and create a filter, and then select an aggregate field such as the **Assigned to** field. This type of query returns a set of users.
- **Scripted**: Uses a scripted query which returns a list of users.

Several matching criteria are provided with the assignment workbench:

- **Availability Today**: Availability is calculated based on the agent's work schedule, assigned work, and personal time off. The more availability an agent has, the higher the contribution to the agent's overall rank.
- **Matching Skills**: The number of agent skills that match the skills required for the case. The more skills that match, the higher the contribution to the agent's overall rank.
- **Matching Skills - Mandatory Skills Support**: Calculates the number of agent skills that match the mandatory skills. The calculation is done by filtering out all agents who don't have the mandatory skills and ranks the remaining agents. The more skills that match, the higher the contribution to the agent's overall rank.

  Note:
  If using the mandatory skills feature, use the **Matching Skills - Mandatory Skills Support** criterion to match agents with the mandatory skills identified for a case.

- **Assigned Cases**: The number of cases already assigned to this agent. The more cases assigned, the lower the contribution to the agent's overall rank.
- **Last Assigned**: To balance assigned work, prioritize the agent based on their last assigned work.

To create matching criteria, select the type and use the fields related to that type to build the query. After creating matching criteria, you can create a configuration for the assignment workbench by creating a matching rule of the type **Selection criteria** and selecting the desired matching criteria.

As part of selecting the matching criteria for the workbench configuration, you can specify the following settings for each individual criterion:

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- ranking and display usage
- ranking method
- ranking weight
- threshold
- active/inactive

Ranking and display usage

In the **Use for** field, specify how you want that matching criterion to be used:

- Ranking and display: Uses the criterion to determine agent ranking and displays it in a column on the workbench.
- Display only: Displays the criterion in a column on the workbench but doesn't use it to determine agent ranking.
- Ranking only: Uses the criterion to determine agent ranking but doesn't display it on the workbench.

Ranking method

There are two ranking methods:

- More is better: For example, more availability is better when determining the agent ranking.
- Less is better: For example, fewer assigned cases are better when determining agent ranking.

Weight

Each matching criterion has an assigned weight. By default, the matching criteria in the **Recommendation for Case Assignment** matching rule have an assigned weight of 10. You can assign a higher weight to the criteria that are more important.

Threshold

A threshold sets a minimum requirement for a criterion. For example, set the threshold of the Matching Skills criterion to 3 if you want to see only those agents who have at least three of the required skills for a task. For availability, set the threshold to the desired number of hours to display only those agents who have that minimum number of work hours available. You can set the threshold in the **Select Criteria** related list on the Matching Rule form. If necessary, personalize the list and add the **Threshold** column.

Active/Inactive

There can be several matching criteria associated with the matching rule that determines the assignment workbench configuration. Each individual criterion can be set to active or inactive. Changing this setting has an immediate impact on the agent ranking. You can change the **Select Criteria** related list on the Matching Rule form. If necessary, personalize the list and add the **Active** column.

Calculating the agent ranking

The assignment workbench adds the values of the matching criteria and their respective weights and uses these values to determine the overall agent ranking.

1. Calculate a number for each criterion.
2. Multiply that number by the criterion weight.

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3. Divide the result by the total of all criterion weights.
4. Repeat for each criterion and add the results.

The following example shows how the ranking is determined for an agent with these matching criteria values:

- Matching Skills with Mandatory Skills Support: 5/6
- Availability Today: 7 hours
- Assigned Cases: 2

Calculations:

- **Matching Skills**: `2 / 3 = 0.666` (with 3 being the maximum number of skills)
- **Availability Today**: `7 / 8 = 0.875` (with 8 being the maximum number of hours)
- **Assigned Cases**: `2 / 26 = 0.0769` (with 26 being the total number of tasks in the table)
- **Weight**: Each matching criterion has an equal weight of 10

```
((0.666 x 10) / Total of criterion weight (10+10+10)) + ((0.875
 x 10) / Total of criterion weight (10+10+10)) + ((0.0769 x
 10) / Total of criterion weight (10+10+10))
```

```
(6.66 / 30) + (8.75 / 30) + (0.769 / 30)
```

```
0.222 + 0.291 + 0.0256 = 0.53
```

This calculation is performed for each agent in the assignment group. Agents are ranked based on the value of this calculation, with the highest number earning the highest ranking.

Matching rules for case assignment

Use a matching rule to create a configuration for the assignment workbench.

The assignment workbench configuration is stored in a matching rule that is based on the **Selection criteria** matching type.

The default configuration uses the **Recommendation for Case Assignment** matching rule, which uses three of the four default matching criteria:

- Availability Today
- Matching Skills
- Assigned Cases

> **Note:**
> If using the mandatory skills feature, use the **Matching Skills - Mandatory Skills Support** criterion to match agents with the mandatory skills identified for a case.

You can customize this matching rule to meet your specific need for calculating agent recommendations. This matching rule can also be used for auto assignment if you create an assignment rule.

Special handling notes

The Special Handling Notes application enables you to create notes that bring important information about individual records, such as a case or account record, to the user's attention.

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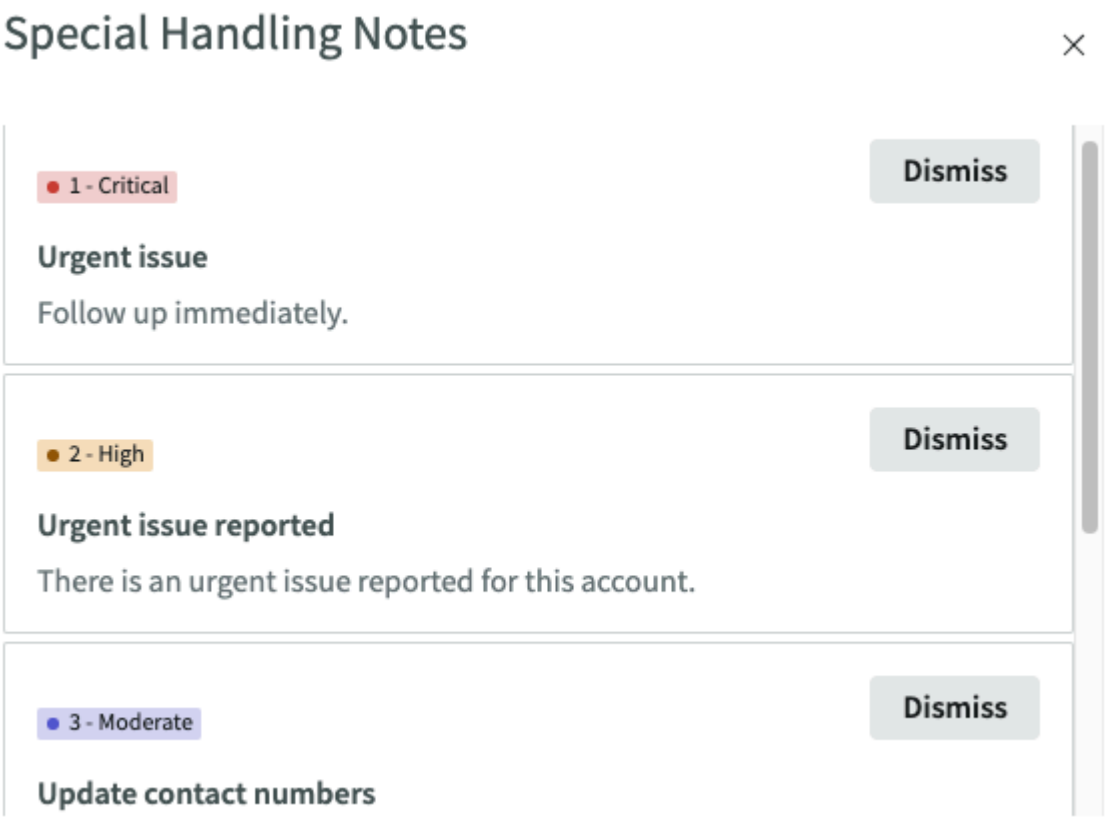
Special handling notes in CSM Configurable Workspace



You can create special handling notes for specific records or for a set of records that meet one or more conditions. You can also configure this application to display any special handling notes from related records, such as the account or the product associated with a customer service case.

Important:
Use special handling notes for special circumstances and not for the general case processing workflow. It is not recommended to have more than 10k special handling notes on an instance. In addition, avoid complex conditions and use dot walking sparingly when creating special handling notes. Having a large number of notes with complex conditions can affect the load time.

Configuring special handling notes

Users with the sn_shn.admin role can configure the desired entity tables, such as the Case table, to use special handling notes. Special handling notes can be configured to display in the following ways:

- In a pop-up window that appears when a user accesses a form.
- In an embedded list or a related list on a record form.

For more information, see the following configuration topics:

- Configure special handling notes
- Configure an entity table to use special handling notes
- Configure a form to show special handling notes

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Creating, updating, and deleting special handling notes

Users with the sn_shn.admin role can create, update, and delete special handling notes. Users with the sn_shn.editor role can view and update notes and users with the sn_shn.user role can view notes. For more information about creating special handling notes, see the following topics:

- Create a special handling note
- Components installed with Special Handling Notes

Special handling notes display important information to the user. In addition to a message, a special handling note also has a status, an assigned priority, and an expiration date.

The status of a note can be one of the following:

Special handling note states

Status	Definition
Active	The note is active. Active notes appear on the Special Handling Notes list or pop-up window. Active notes remain on the list until they are set to **Inactive** or **Expired**. Active notes remain on the pop-up window until dismissed or until they are set to **Inactive** or **Expired**.
Inactive	The note is no longer active. Users with the sn_shn.admin or sn_shn.editor role can set a note to **Inactive** if the information in the note is no longer useful. When a note is set to **Inactive**, it is removed from the Special Handling Notes list or pop-up window. Inactive notes can be viewed by navigating to **Special Handling Notes** > **Special Handling Notes**.
Expired	The note has reached it's expiration date or it has been expired manually. If a note is expired, the form becomes read-only for all user roles other than the system administrator. A note is expired automatically by a scheduled job when it reaches it's expiration date. The scheduled job also sets any inactive notes to expired if the inactive notes have reached their expiration date.

A note can be assigned one of the following priorities. Each priority has an associated color, which is displayed as a colored bar in the pop-up window and as a colored circle in the **Priority**

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field in a list. The Core UI and the CSM Configurable Workspace interface use different colors to represent priority.

Special handling note priorities

Priority	Core UI	CSM Configurable Workspace
1 - Critical	Red	Red
2 - High	Orange	Orange
3 - Moderate	Green	Purple
4 - Low	Blue	Gray

When creating a special handling note, you can make it effective right away or you can select a date when it becomes effective. You can also select an expiration date.

Special handling notes pop-up window

Special handling notes can be displayed on a form in a pop-up window. Users with the sn_shn.admin role can configure a form to display the Special Handling Notes pop-up window. This window appears when you access a record that has one or more active notes. The pop-up window displays the following information for each note:

- Message
- Priority

To dismiss a note, click **Dismiss**. Once you dismiss a note, it no longer appears in the pop-up window. To close the Special Handling Notes pop-up window, click **X**.

Special handling notes list

Special handling notes can be displayed on a form in an embedded or related list. Users with the sn_shn.admin role can configure a form to display the Special Handling Notes list. This list appears on a form when there are one or more active notes for a record. The Special Handling Notes list displays the following information for a note:

- Message
- Expiration date
- Priority
- Table

Resurfacing special handling notes

Special handling notes are typically displayed in a pop-up window when a record is opened. Agents can view the special handling notes, dismiss individual notes, and close the window. If an agent closes the window, they can open it again and display the special handling notes without closing and reopening the record tab in CSM Configurable Workspace.

To open the special handling notes pop-up window after it has been closed, select **Special handling notes** from the More actions menu (•••) on the action bar. If no special handling notes are available, the system displays an informational message: “No special handling notes are available.”

The **Special handling notes** action that agents can use to reopen the special handling notes window is currently available on the following record pages in CSM Configurable Workspace:

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- Front-line case page
- CSM default record page

Expiring special handling notes

The **Deactivate Special Handling Notes** scheduled job, which runs daily at midnight, checks the dates in the **Effective on** and **Expires on** fields for each note.

- If a special handling note has reached its **Effective on** date, the scheduled job sets the status of the note to **Active**.
- If a special handling note has reached its **Expires on** date, the scheduled job sets the status of the note to **Expired**.

Domain separation for Special Handling Notes

The Special Handling Notes application supports domain separation as a process-separated table.

When inserting or updating a special handling note, the picker domain scope takes precedence by design with the Overrides [sys_overrides] field on process-separated tables. For more information, see Process administration.

Related topics

Configure special handling notes

Manage special handling notes

Case and account escalation

Use the escalation feature to highlight specific cases or accounts and raise awareness of important customer issues.

Escalating a case or an account provides the following benefits:

- Increases attention about a customer issue.
- Facilitates communication about that issue.
- Provides a way to track progress toward a resolution.

Users with the escalation requester role can escalate a case or an account by selecting the **Escalate Case** related link on the case or account form.

Case and account escalation differences

While the escalation process is similar for cases and accounts, there are some important differences to note.

- Case escalations: A customer service agent typically manages a case escalation and works directly with the escalated case to resolve the issue.
- Account escalations: An escalation manager typically manages an account escalation, which can include multiple associated cases, and records details in the escalation record.

For more information, see Case and account escalation differences.

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Configuring case and account escalation

The following table includes an overview of case and account escalation configuration tasks. Users with the system administrator role can perform these tasks.

Case and account escalation configuration tasks

Task	Description
Configure escalation management	Configure case and account escalation using Customer Service Management guided setup.
Create a case or account escalation template	Escalation templates determine how an escalation request is processed, including the type of escalation and an optional approval process.
Create a case or account escalation severity	Create definitions for different levels of escalation severity and select color indicators to highlight escalated cases and accounts in the user interface.

Using case and account escalation

The following table includes an overview of case and account escalation user tasks.

Case and account escalation user tasks

Task	Description
Escalate a case or an account	Escalate cases or accounts, either on behalf of customers or for internal purposes. Escalating a case or account creates an associated escalation record. Role required: escalation requester
Manage an escalated case or account	Manage a case or account through the escalation process using the escalation record. The system identifies cases and accounts on lists and forms with color indicators that correspond to the escalation severity: red (high) or orange (medium). Role required: • Customer service agent • Escalation manager
De-escalate a case or an account	De-escalate cases or accounts when the cause of the escalation is resolved. Role required: de-escalation requester
Use an optional escalation approval process	Include an optional approval step for approvers to review a request and either approve or reject an escalation.

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Case and account escalation user tasks (continued)

Task	Description
	When using the optional approval step, the system creates the escalation record upon approval and associates it with the case or account.

Case and account escalation differences

An overview of the differences between case escalations and account escalations.

- **Case escalations**: A customer service agent typically manages a case escalation and performs most of the problem resolution work, which is recorded in the case record. For case escalations, the escalation record is used primarily for status reporting purposes. The escalation SLA is also associated with the case record rather than the escalation record because that is where the agent provides regular updates.
- **Account escalations**: An account escalation manager typically manages an account escalation because it is associated with multiple underlying cases. An account manager works with multiple case owners to resolve the customer escalation and uses the escalation record to consolidate the status of the associated cases and provide regular updates. Therefore, the SLA is associated with the escalation record.

Case and account escalation differences

Feature	Case Escalation	Account Escalation
Relationships	Corresponds one-to-one to a case.	Corresponds one-to-one to an account. Users can link specific cases to the escalation record to indicate which cases are causing the escalation.
Templates	Uses case escalation templates.	Uses account escalation templates.
Approval workflow	Includes an option to automatically add the manager of the case assignment group to the approver list when using the default approval workflow.	Does not include an option to automatically add the manager of the case assignment group to the approver list because an account escalation can be associated with multiple cases.
Escalation assignment	Does not include a separate assignment. A case escalation corresponds to an individual case and the customer service agent manages the escalation.	Includes a separate assignment. An account escalation can have multiple associated cases that are assigned to different agents so the escalation record includes an **Assigned to** field. An account escalation is typically assigned to an

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Case and account escalation differences (continued)

Feature	Case Escalation	Account Escalation
		escalation manager because account escalations are typically more serious than case escalations.
Watch list	Does not include an option to automatically add an account team to the escalation watch list.	Includes an option to automatically add an account team to the escalation watch list.
Escalation updates added to case	Updates to the escalation record are also added to the **Work notes** field on the corresponding case record.	Updates to the escalation record are not added to the account record.
SLAs	The case escalation SLAs provided with the escalation feature are attached to the case.	The account escalation SLAs provided with the escalation feature are attached to the account.

Case and account escalation process

The case and account escalation process follows several steps from request to completion.

1. A user with the escalation requester role requests an escalation for a case or account. As part of the request, the user provides the following information:
   - The reason for the request
   - Justification for the escalation
   - The escalation severity
   - The escalation template
   - The watch list for the escalation
2. If approval is required, the approval workflow or approvers identified in the escalation template review the request and accept or reject the escalation.
3. Following approval, the agent manages the escalation as it progresses using the escalation form. For example, the agent can add users to the watch list and update the escalation trend.

   Note:
   Updates to the escalation form send email notifications to the current user and to users on the watch list.

4. When the issue has been resolved, a user with the de-escalation requester role can de-escalate a case or an account.

Case and account escalation components

The roles, modules, and tables installed with the case and account escalation feature.

Roles

Roles included with the case and account escalation feature.

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Different roles with the case and account escalation feature

Role	Description
Escalation requester (sn_customerservice.escalation_requester)	Can request an escalation for a case or account.
De-escalation requester (sn_customerservice.deescalation_requester)	Can de-escalate a case or account. This role contains the sn_customerservice.escalation_requester role.

Escalation modules

The case and account escalation feature adds the Escalations module to the Customer Service menu:

- **All**: lists all escalation records for cases and accounts.
- **Escalation Templates**: lists the case and account escalation templates.
- **Escalation Severity**: lists the types of escalation severity.

This feature also adds a list of escalated cases to the Customer Service menu: **Customer Service** > **Cases** > **Escalated**

Tables

Tables included with the case and account escalation feature:

Different tables with the case and account escalation feature

Table	Description
Escalation Templates [sn_customerservice_escalation_template]	Stores escalation template records.
Escalations [sn_customerservice_escalation]	Stores records created for escalated cases and accounts.
Escalation Severities [sn_customerservice_escalation_severity]	Stores escalation severity definition records.

Case and account escalation form

Customer service agents use the Escalation form to manage escalations for cases and accounts.

The Escalation form includes information about the escalation, such as the associated case or account, and the reason and justification for the escalation. It also includes information about the escalation as it progresses, including the trend and notes about the work being done to resolve the issue.

An escalation record can contain one or more associated cases. When updating escalation records, customer service agents can enter comments or work notes. For case escalations, updates are replicated to the case activity history as work notes so they aren't visible to the customer.

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The Escalation form has a **Related Cases** related list that includes the related cases for account escalations. The user can associate specific cases using this related list to indicate which cases are causing the escalation. The Escalation form also includes **Task SLAs** and **Approvers** related lists.

Escalation form fields

Field	Description
Number	The number automatically assigned to the escalation request.
Source Record	The case or account for which escalation is requested. **Note:** The case or account form for the source record includes an **Escalations** related list.
State	The current state of the escalation: • **Requested**: An agent with the escalation requester role has requested an escalation for the case or account. • **Escalated**: The escalation request has been approved. • **Declined**: The escalation request hasn't been approved. • **Closed**: The reason for the escalation has been resolved and the escalation has been closed.
Request Source	The source of the case escalation request: • Customer requested • Internally requested
Reason	The reason for requesting the case escalation: • Inactivity • Lack of Progress • Customer Imposed Deadline
Watch List	The watch list for this particular escalation record. For account escalations, you can **Add account team members to watch list**. Users added to the watch list for a case, account, or escalation record receive email notification when the case or account has been escalated and when updates are made to the escalation record.
Assignment group	For account escalations, the assignment group for this account.
Assigned to	For account escalations, the customer service agent assigned to this account.
Request By	The user who requested the escalation.
Approved By	If approved, the user who approved the escalation request.
Declined By	If declined, the user who declined the escalation request.

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Escalation form fields (continued)

Field	Description
De-escalated By	The user who de-escalated the case or account escalation.
Escalation Type	The escalation type selected by the user who requested the escalation.
Escalation Severity	The escalation severity associated with this escalation, which defines the severity level for the escalation and the color used to highlight the escalated record in the user interface. • **High Severity**: Escalated records are highlighted in red. • **Medium Severity**: Escalated records are highlighted in orange.
Escalation Trend	The current state of the escalation: • **Improving** • **Same** • **Declining**
Escalation Justification	Additional information that explains why this escalation is needed.

Administering case and account escalation

Create escalation templates and escalation severity definitions to control the escalation process for cases and accounts.

Escalation templates

An escalation template determines how an escalation request is processed by defining the following information:

- The type of escalation (case or account)
- If approval is required:
  - If no, the escalation request is automatically approved.
  - If yes, provide the approver list required by the default approval workflow or provide a different approval workflow.
- The escalation watch list. Users added to the watch list receive email notifications when an escalation record is updated.

The escalation feature provides two standard escalation templates, one for case escalation and one for account escalation. If needed, users with the system administrator role can modify these templates or create templates.

Escalation severity

An escalation severity record defines the severity level for the escalation and the color that is used to highlight the escalated case or account record in the user interface. This assigned severity enables agents to easily identify escalated cases and accounts on lists and forms. The escalation feature provides two escalation severity definitions:

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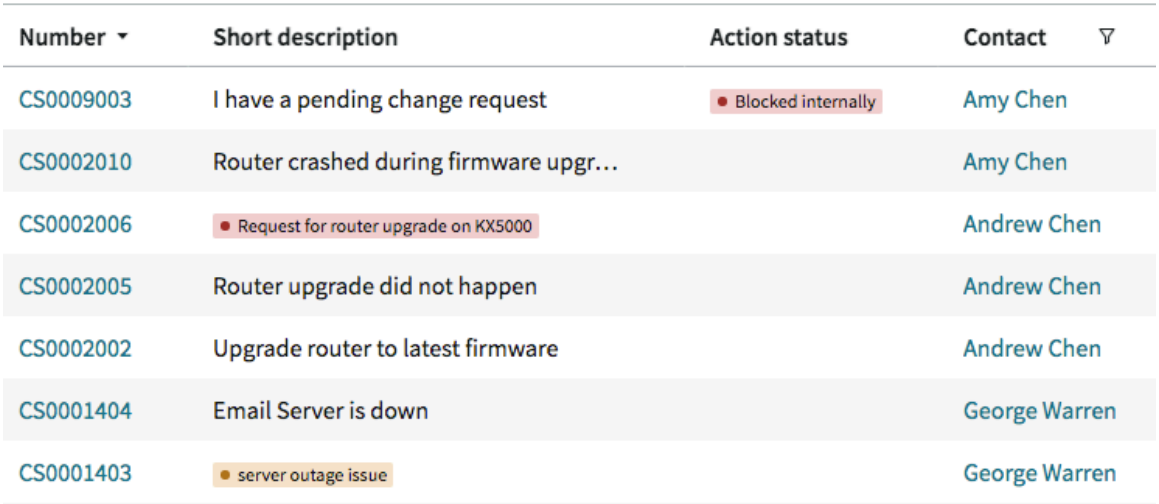
- **High Severity**: Escalated records are highlighted in red.
- **Medium Severity**: Escalated records are highlighted in orange.

The user interface determines which fields are highlighted for escalated cases and accounts.

User interface indicators to identify escalated cases and accounts

User interface	Description
CSM Agent Workspace	Field indicators and field highlights appear on the **Short description** field for escalated cases and on the **Name** field for escalated accounts. **Note:** You can move indicators and highlights to any field that is not a hyperlinked field.
Platform interface	Escalated case and account numbers are indicated with a colored dot on a list and a colored background on a form.

CSM Agent Workspace case list with escalated cases



The CSM Agent Workspace case list shows these escalation details:

- Number: Automatically generated case number.
- Short description: Describes the case.
- Action status: Indicates the status of the case.
- Contact: Shows the contact person for the case.

In addition to defining the field indicator and field highlight of an escalated case or account, the severity can be used when configuring SLAs. To configure additional escalation severity definitions, the system administrator must configure a new style with the desired color. For more information, see Highlight list fields.

Escalation SLAs

Escalation SLAs are typically used to govern the frequency of updates required for different types and severities of escalations. An escalation SLA is associated with an escalation severity

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in the SLA definition. When a user creates an escalation request, the selection in the **Escalation Severity** field determines the SLA for the escalation record. The escalation feature provides the following case and account escalation SLAs. The following table provides information about the escalation SLAs and their descriptions.

Case and Account Escalation SLAs

Escalation SLAs	Description
Case escalation SLAs	On case escalations, because the escalation corresponds one-to-one with a case, the default SLAs are associated with the case: • **Escalated case response - 4 hours**: De-escalate the case within four hours. • **Escalated case response - 8 hours**: De-escalate the case within eight hours. For case escalation, update the SLA reset condition to `complete the old SLA and start a new one when the case has new comments`
Account escalation SLAs	On account escalations, because the escalation corresponds to an account which typically doesn't support SLAs, the SLAs are associated with the escalation. • **Escalated account response - 4 hours**: De-escalate the account within four hours. • **Escalated account response - 8 hours**: De-escalate the account within eight hours.

Users with the system administrator role can configure case and account escalation SLAs that are based on escalation attributes such as the escalation type, severity, and trend. Escalation SLAs are stored in the following locations:

- For account records, on the Escalation form in the **Task SLAs** related list.
- For case records, on the Case form in the **Task SLAs** related list.

Administering case action status

The case action status feature displays the status of cases in the Case list. With this feature, customer service agents can easily identify cases that need attention.

The case action status feature provides visual indicators in the **Action status** column on the My Cases and My Open lists to highlight case status. In addition to the colored indicators, the **Action status** column also displays a brief status message.

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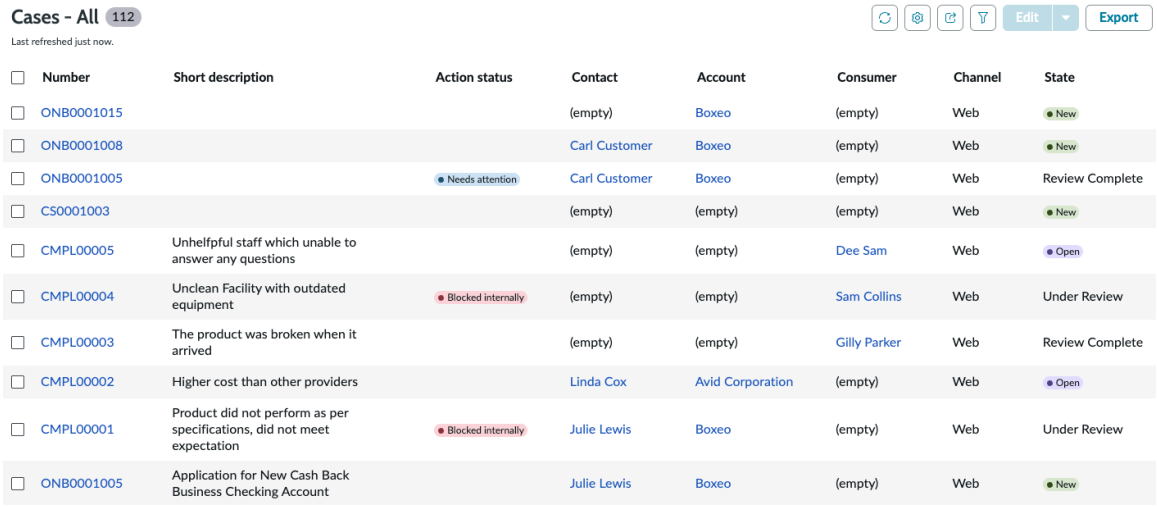
Action status column on the Case list



Actionable case flows

The case action status feature uses actionable case flows to automatically determine the action status for customer service cases. These flows create and resolve blocking tasks for different case-related actions and automatically update the action status indicators. Certain agent actions trigger these case flows, which in turn create and resolve the blocking tasks.

Customer service agents and managers can also manually set the action status for cases by enabling the **Needs Attention** field on the Case form.

Blocking tasks

A blocking task is something that prevents an agent from making progress toward case resolution. For example, a case might have one or more open related case task records or be waiting for customer feedback.

Certain agent actions trigger case flows that create and resolve blocking tasks for customer service cases. These tasks determine the case action status. Additionally, there are actions that resolve these blocking tasks, such as the customer responding to an agent's question or an internal user resolving a problem task. For more information, see .

Related topics

- Case action status
- Configure case action status
- Activate Case Action Status

Actionable case flows

Actionable case flows contain predefined user actions that automatically create and resolve blocking tasks for customer service cases.

The Case Action Status plugin provides several actionable case flows that create and resolve blocking tasks for different case-related actions. These flows are enabled by default. If you don't want to create blocking tasks for a specific action, disable the associated flow.

To view these flows, navigate to **Customer Service** > **Administration** > **Actionable Case Flows**.

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Flow Designer actions

Case flows use the following predefined Flow Designer actions:

- Add Blocking Task
- Inactivate Blocking Task
- Set Needs Attention Flag

Flows for customer service cases

The case action status feature provides the following flows for customer service cases.

- Create blocked by record if case needs customer information
- Create blocked by record if Case Task is associated with case
- Create blocked by record if Change Request is associated with case
- Create blocked by record if SC Request is associated with case
- Create blocked by record if Work Order is associated with case
- Create blocked by record if Incident is associated with case
- Create blocked by record if Problem is associated with case
- Resolve blocked by record if Case Task is closed
- Resolve blocked by record if Change Request is closed
- Resolve blocked by record if Incident is closed
- Resolve blocked by record if Problem is closed or Fix is communicated
- Resolve blocked by record if Problem is closed or Fix/Workaround is communicated
- Resolve blocked by record if SC Request is closed
- Resolve blocked by record if user information is provided for case
- Resolve blocked by record if Work Order is closed or canceled
- Set Needs Attention if additional comments are added by others
- Update case when blocked by record is created
- Update case when Needs attention field is toggled

Flows for customer service orders

The case action status feature provides the following flows for customer service orders.

- Create blocked by record if order case needs customer information
- Resolve blocked by record if user information is provided for order case
- Set Needs Attention if additional comments are added by others on order case
- Update order case when Needs attention field is toggled

Flows for problem records associated with a case

If a problem is associated with a case with the **Need task resolution** blocking reason, a case flow is provided to resolve the blocking task when a fix is communicated or the problem record is closed or canceled.

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If a problem is associated with a case with the **Need PRB workaround** blocking reason, a case flow is provided to resolve the blocking task when a workaround is provided or the problem record is closed or canceled.

Blocking tasks

Certain agent actions trigger case flows which create and resolve blocking tasks for customer service cases. These tasks determine the case action status.

When an agent performs certain actions, such as asking a customer for more information or associating a problem with a case, the system:

- Adds a blocking task to the case. This task appears on the Case form in the **Blocked by** form section.
- Updates the **Action Status** field on the Case form and Case list.

Note:
A blocking task is something that prevents an agent from making progress toward case resolution. For example, a case might have one or more open related task records or be waiting for customer feedback.

Additionally, there are actions that resolve these blocking tasks, such as the customer responding to an agent's question or an internal user resolving a problem task. When one of these actions occur, the system:

- Updates the status of the blocking task on the Case form.
- Updates the **Action Status** field on the Case form and Case list.
- Enables the **Needs Attention** field on the Case form.

Actions that create blocking tasks

The following actions create blocking task for customer service cases:

- The agent sets the state of the case to **Needs More Information**.
- The agent associates one of the following to the case:
  - Problem
  - Request
  - Change
  - Incident
  - Case task
  - Work order

Actions that resolve blocking tasks

The following actions resolve blocking tasks for customer service cases:

- A customer provides the requested information.
- A fix or a workaround is associated with a related problem record.
- A related problem, request, change, or incident record is resolved.
- A related case task or work order is closed or canceled.

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Needs attention field

When the **Needs attention** field on the Case form is enabled, the **Action Status** column on the Case list displays a blue indicator.

The **Needs attention** field is enabled automatically when:

- A blocking task for a case is resolved.
- A customer or someone other than the case owner comments on a case.
- A work note is added to a case that is a child of a major case.

Customer service agents and managers can manually enable the **Needs attention** field if information is required from customers or internal users. This field can be deactivated only by the agent assigned to the case or by the customer service manager or admin.

Requesting additional information from a customer

When an agent requests additional information from a customer, the system enables the **Needs attention** field and sets the **Action status** field to Needs attention.

If an agent must request additional information from a customer for a second time on the same case, be sure to clear the **Needs attention** field on the Case form before requesting the information. This ensures that the status updates correctly.

Case action status and major issue management

When using the case action status feature with major issue management, the following actions enable the **Needs attention** field for a major case:

- A customer provides comments for a case that is a child of a major case.
- An agent adds a work note to a case that is a child of a major case.

Blocked by related list

Blocking tasks that are created for a case are added to the **Blocked by** related list. Each blocking task is assigned one of the following blocking reasons:

- Need information from the customer
- Need task resolution
- Need PRB workaround
- Other

Note:
When a problem is associated with a case and a blocking task is created, the blocking reason is set to **Need task resolution**. If necessary, the agent can change this reason to **Need PRB workaround**.

When a blocking task is resolved:

- The **Unblocked By** field displays the user who performed the unblocking action.
- The **Unblocked On** field displays the date that the blocking task was resolved.

Blocking Tasks table

Records that have blocking tasks are stored in the Blocked By table [sn_action_status_blocked_by]. Records are periodically removed from this table. Six months

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after a blocked record is closed, the entries in the Blocked By table related to the blocked record are removed.

Case action status analytics

The Customer Service Manager dashboard displays the percentage of the case backlog that is waiting for an agent response, customer input, or a response for other users.

The dashboard includes the **Open Backlog - Blocked** widget which breaks down the remaining work to show cases that are with the following users:

- Agent
- Customer
- Other Internal Stakeholder

As blocking tasks for a case get created and resolved, this dashboard widget tracks the case time spent with each of these users. The breakdown is set for:

- Blocked internally
- Blocked by customer
- Blocked internally and by customer

Case action status logging

Logging for the case action status feature uses a metric definition to view information about blocking tasks associated with customer service cases.

Defined metrics can track how long a specific field holds a certain value. The **Case Actor Duration** metric definition logs the events related to case blocking tasks.

When a case blocking task is created or resolved, the system logs the information. This information can be used to report on the duration of the case with the customer, the agent, or other internal stakeholders.

As a case gets blocked and unblocked by a customer or an internal user, the metric definition tracks the duration of the case with each of these actors.

The metrics include:

- Case number
- Metric definition
- Value
  - Needs attention
  - Blocked by customer
  - Blocked internally and by customer
- Start and end times
- Duration

To access the **Case Actor Duration** metric definition, navigate to **All** > **Metrics** > **Definitions** and select the definition from the list. For more information about metric definitions, see the following topics:

- Metrics
- Define a metric

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Major issue management overview

Major issue management enables customer communication for issues that impact a wider audience. Use this feature to proactively identify impacted customers, provide information to these customers, and manage the resolution process.

This feature enables you to efficiently manage the communication and resolution process for issues that impact multiple customers. With major issue management, you can identify impacted customers who have not yet reported an issue and proactively create cases for these customers.

Major issue management introduces the concept of a major case which contains the details about a particular issue. Child cases can easily be created for a major case, with one child case created for each customer affected by the issue. These child cases contain the customer-specific information.

Identify affected customers by creating a recipients list of accounts or consumers and attaching it to the major case. Create this list using the Targeted Communications application. Build a recipients list by identifying dynamic conditions, running a script, or importing customer information into a template. Once attached to a major case, use the recipients list to create a child case for each customer included in the list.

A major case is created in one of two ways:

- A customer service manager can create a major case.
- A customer service manager or major issue manager can promote a major case candidate.

Major case candidates are created either by promoting an existing customer service case (for customer reported issues) or by creating a candidate case directly (for non-customer reported issues). Candidate cases require approval before being promoted to major cases.

Major issue management also provides properties that enable automatic synchronization from a major case to the associated child cases. Use these properties to enable synchronization and to identify the synchronized fields.

Major Issue Management menu can be used in the ServiceNow AI Platform interface and in the Agent Workspace interface.

Identifying issues and creating major cases

Customer service agents, managers, and major issue managers can use the following process to identify potential issues, create major cases, and identify impacted customers.

1. Create a major case candidate or flag an existing customer service case as a major case candidate.
2. Review the major case candidate and either approve it as a major case or reject it.
    - If approved, the candidate case becomes a child case of the major case.
    - If rejected, the candidate case returns to a normal case.
3. Associate other cases reported for the same issue as child cases of the major case.
4. Identify other customers impacted by the issue by creating a recipients list and attaching it to the major case.
5. Create child cases for the customers included in the recipients list.
6. Manage the issue to resolution using the major case.

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- Update the major case as needed, which automatically updates the child cases.
- Close the major case when the issue is resolved. Closing the major case automatically closes all the child cases.

Major, candidate, and child cases

Major issue management uses major case candidates to identify potential issues that impact multiple customers. With approval, candidate cases are promoted to major cases, which you can use to manage issues to resolution. Child cases are created for customers impacted by an issue and are associated with the corresponding major case.

Major cases

A major case contains information about a specific issue that impacts multiple customers. It is not associated with any accounts, contacts, or consumers. This customer-specific information resides in the child cases associated with the major case.

The recipients list associated with the major case identifies customers impacted by the issue. Select a list in the **Affected Customers** field in the Major Case Information form section of the Major Case form. After adding the list, you can automatically create child cases for all customers on the list. These cases are added to the **Child Cases** related list on the Major Case form.

With synchronization enabled, updates to the parent major case are automatically synchronized to the associated child cases. When the major case is closed, the associated child cases in the following states are also closed: New, Open, Awaiting Customer Info.

To identify major cases in the list view, check the value in the **Major case state** field.

- Major cases have a state of Accepted.
- Major case candidates have a state of either Proposed or Rejected.
- Regular cases have a blank value.

In the form view, major cases and major case candidates display the Major Case Information form section.

Note:
Related links on a major case form do not synchronize to associated child cases.

Major case candidates

A customer service agent uses a major case candidate, or candidate case, to flag an issue that could be a wider issue impacting multiple customers. An agent can create a major case candidate in the following ways:

- By promoting an existing customer service case with a reported issue to a major case candidate.
- By creating a new major case candidate.

A major case candidate requires the approval of the customer service manager or major case manager before being promoted to a major case.

- If a major case candidate was promoted from an existing case, a new major case is created and the candidate case becomes a child case of that major case.
- If a new major case candidate was created directly, that same case becomes the major case.

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If a major case candidate is rejected, it reverts to a regular case.

Child cases

Child cases are associated with a major case. One child case is created for each account (B2B) or consumer (B2C) impacted by the major case issue. Child cases are created from the recipients list on the major case and can also be added manually by the major issue manager.

When child cases are created, the short description from the major case is copied to each of the child cases. Duplicate child cases are not created. If a child case already exists for an account or consumer, it is not created again.

As child cases are created, you can enter text in a pop-up window that is added to the **Additional comments** field on the child case form. These comments are added only to the newly created child cases. The major case and any existing associated child cases are not updated.

The primary contact for an account is the contact on the child case and is automatically added to the child case watchlist.

Synchronization between major cases and associated child cases

The system administrator can set system properties that enable or disable the synchronization between the major case and associated child cases and also define the fields to synchronize. Synchronization occurs from the major case to the child cases. If the state of a child case is Resolved, Closed, or Canceled, the synchronization does not take place.

A major case and the associated child cases maintain synchronization on the fields identified by the **sn_customerservice.case_fields_to_sync** property. This property specifies the list of fields to synchronize from the major case to the associated child cases. By default, these fields include:

- Priority
- State
- Comments
- Work notes
- Close notes
- Resolution code

If the **State** field is synchronized from the major case to the child cases, the **Close notes** and **Resolution code** fields must also be synchronized.

Note:
Child cases can be manually added to a major case at any time. There is no retroactive synchronization for newly added child cases.

When synchronization is enabled, saving changes to a major case results in a pop-up window. Verify the update by clicking **OK**.

Note:
In the base system, parent-child case synchronization is available only for the Case table (sn_customerservice_case). This feature must be configured for tables that extend the Case table.

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Recipients lists

Use recipients lists that contain account or consumer information to create the child cases for a major case.

Major issue managers and customer service managers can select the desired list in the **Affected Customers** field on the Major Case form. Selecting **Create Child Cases** then creates a child case for each account or consumer in the recipients list.

Managers can change the recipients list before child cases are created. After child cases are created, the **Affected Customers** field becomes read only.

Creating recipients lists

Recipients lists are created using the Targeted Communications application. With this application, managers can select the type of list to create and the method used to create the list: by uploading files, selecting dynamic conditions, or using scripts.

The Targeted Communications application creates several types of recipients lists, including accounts, contacts, consumers, and internal users. The recipients list for a major case must be of type accounts or consumers. Recipients lists are limited to one specific type and can't contain mixed types, for example accounts and consumers.

Note:
The Major Issue Management plugin is dependent on the Targeted Communications plugin. If Targeted Communications is active, recipients lists can be created for internal users. If Targeted Communications and Customer Service Management are both active, recipients lists can also be created for accounts, contacts, and consumers.

Manually editing a recipients list

Major issue managers and customer service managers can manually add or remove accounts or consumers from a recipients list by navigating to the Recipients List form, selecting **Edit** in the **Recipients** related list, and then using the arrows to add or remove records.

The **Recipients** related list includes the **Dynamically Added** column which displays either True or False, depending on how a record was added:

- True for records that are dynamically generated, either by using the condition builder or by running a script.
- False for records that are added manually, either by using the **Edit** button on the **Recipients** related list or by file upload.

The **Active Communication** column is set to True by default for both dynamically and manually added records. This field indicates whether the recipient requires active communication.

Refreshing a recipients list

Refresh a recipients list by selecting **Refresh Recipient List** on the Recipients List form. For major issue management, the following guidelines apply to refreshing a recipients list:

- Refreshing a recipients list doesn't impact manually created records.
- If you remove a manually created record from a recipients list, it doesn't reappear when the list is refreshed unless it meets the dynamic conditions used to filter the list.
- If you remove a dynamically generated record from a recipients list, it may reappear when the list is refreshed if it meets the dynamic conditions used to filter the list.

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- If the **Active Communication** field is set to false for a record, this setting doesn't change when a recipients list is refreshed.
- If created using the Upload File method, you don't need to refresh the recipients list.

Related topics

Create a recipients list

Major Case form view

Major issue management provides the Major Case form view, which includes the Major Case Information form section and the Child Cases related list.

The Major Case form view does not display account-related information because a major case is not linked to a specific account, contact, or consumer. This information is stored in the child cases associated with a major case.

Major Case Information form section

Major cases and major case candidates include the Major Case Information form section which includes the following fields.

Major Case Information form

Field	Description
Major case state	A major case can be in one of these states: • **Proposed**: the initial state when a candidate case is created or proposed by an agent or manager. • **Accepted**: the Initial state when a major case is created by a manager or when a candidate case is promoted by a manager. • **Rejected**: the candidate case is rejected by a manager. • **Canceled**: the case is canceled.
Business impact	The business impact of the issue identified in the major case.
Probable cause	The probable cause of the issue identified in the major case.
Affected Customers	The recipients list selected for the major case. Child cases are created for the accounts or consumers included in the recipients list. This field is only visible when the major case state is Accepted.

Customer service agents can update the **Business impact** and **Probable cause** fields as well as add **work notes**. Major issue managers can update the **Business Impact** and **Probable Cause** fields and attach a recipients list. The **Affected Customers** field is only visible when the major case state is Accepted.

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The **Work notes** field on the major case form is updated when a major case is proposed or a candidate case is created manually. The **Work notes** field on associated child cases is updated when a major case is accepted.

When a major issue manager rejects a candidate case, the **Major Case State** field is set to Rejected and the **Work notes** field is updated with the case state. The candidate case reverts to a regular case.

Child Cases related list

Major issue management adds the **Child Cases** related list to the Customer Service Case form. All child cases associated with a major case are added to this list. Child cases are created automatically from the recipients list and can also be added or removed manually.

Propose a case as a major case candidate

A customer service agent role can propose an existing customer service case as a major case candidate.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

Cases in these states can be proposed as a major case candidate:

- New
- Open
- Awaiting Info

Cases that are Resolved, Closed, or Canceled can't be proposed as a major case candidate.

When proposing a case as a major case candidate, agents can specify the reason or justification for the case in the Propose Major Case pop-up window. Information provided in the **Work notes** and **Business Impact** fields are added to the Case form.

The major issue manager role receives a notification email when a case is proposed as a major case candidate. These users can select the link in the notification email to open the major case candidate in the platform interface.

Note:
You can also propose a case as a major case on Agent Workspace.

Procedure

1. Navigate to the desired customer service case.
2. Select **Propose Major Case** in the Additional Actions menu on the Case form.
3. In the Propose Major Case pop-up window, enter a reason for the proposal in the **Work notes** field.
   If desired, enter the business impact of the selected case in the **Business Impact** field.
   This information is added in the Case form in the **Work notes** field and the **Business Impact** field in the Major Case Information section.
4. Select **Propose**.
   An entry is added to the **Work notes** on the Case form that the case was proposed as a major case candidate. The information entered in the Propose Major Case pop-up window is also added to the Case form.

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Create a major case candidate

Users with the customer service agent role can create a major case candidate.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

Users with the major issue manager role receive a notification email when a major case candidate is created. These users can click the link in the notification email to open the major case candidate in the platform interface.

Note:
All major case candidates are automatically created as proactive cases as they are created internally and on behalf of the customer. To leverage the full capabilities of Proactive Customer Service Operations, install the Proactive Operations Management (com.snc.proactive_cs_ops) plugin.

You can also create a major case candidate from Agent Workspace.

Procedure

1. Navigate to **All** > **Major Issue Management** > **Create Major Case Candidate**.
2. Enter a description in the **Short description** field.
3. In the Major Case Information form section, enter the relevant information in the **Business impact** and **Probable cause** fields.
4. Click **Submit**.

Approve or reject a major case candidate

Users with the major issue manager role can approve or reject a major case candidate.

Before you begin

Role required: sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

You can also approve or reject a major case candidate from Agent Workspace.

Procedure

1. Navigate to **All** > **Major Issue Management** > **Candidates**.
2. Select the desired candidate case.
3. Select one of the following from the Case form context menu.

4. Click **Update**.

Create a major case

Users with the customer service manager role can create a major case.

Before you begin

Role required: sn_customerservice_manager

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Procedure

1. Navigate to **All** > **Major Issue Management** > **Create Major Case**.
2. Fill in the fields on the Case form.
3. In the Major Case Information form section, fill in the **Business impact** and **Probable case** fields.
4. Click **Submit**.

What to do next

You can view all cases by navigating to **Customer Service** > **Cases** > **Proactive**.

Create child cases for a major case

Users with the customer service manager role can create a child case for each of the customers included in the major case recipients list.

Before you begin

Role required: sn_majorissue_mgt.major_issue_manager, sn_customerservice_manager

About this task

The **Create Child Cases** button on the Major Case form creates a child case for each account or consumer in the recipients list selected in the **Affected Customers** field. If a child case for an account or consumer exists, the system doesn't create a duplicate child case.

> **Note:**
> Use caution when selecting the recipients list for a major case. Selecting the wrong recipients list can have a serious impact by creating a large number of cases for incorrect accounts or consumers. Verify that you have selected the correct recipients list before selecting **Create Child Cases**.
>
> You can also create child cases for a major case from Agent Workspace.

Once child cases have been created, you can't change the recipients list. Any additional recipients must be added manually. After manually adding recipients to the list, select **Create Child Cases** again to create child cases for these new recipients.

Creating child cases copies information from the major case to each of the child cases. The field values that are copied to the child cases are identified by the **sn_customerservice.case_fields_to_sync system** property.

Procedure

1. Open the desired major case.
2. In the Major Issue Management form section, select a recipients list in the **Affected Customers** field.
3. Select **Update**.
4. Select **Create Child Cases**.
5. In the Create Child Cases pop-up window, enter information about the major case. This information is added as additional comments to each of the newly created child cases. If child cases for this major case exist, these child cases aren't updated.
6. Select **Continue**.
   The child cases are created and added to the **Child Cases** related list.

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Related topics

Recipients lists

Add an existing case as a child to a major case

A customer service manager can add an existing customer service case as a child to a major case.

Before you begin

Role required: sn_majorissue_mgt.major_issue_manager, sn_customerservice_manager

About this task

Identify and narrow a list of cases, then select the desired case or cases to add to the major case.

- Filter and narrow down the child case list.
- Select one or more cases and add as child to the major case.
- Add work notes/activity log when a parent is added or removed

Messages on the pop-up window:

You can also create child cases for a major case from Agent Workspace.

Procedure

1. Open the desired major case.
2. In the **Child Cases** related list, select **Add** to display the Added Child Cases pop-up window. The Add Child Cases pop-up window displays a list of customer service cases that aren't major cases.
3. **Optional:** Use the filters to narrow the list of cases displayed in the window.
4. Select the cases to add to the major case by enabling the check box for each case.
5. Select **Submit**.
   The system evaluates the selected cases and adds none, some, or all cases to the **Child Cases** related list. A message on the major case form informs you of the results by displaying one of the following:
   - No selected cases were added as child cases.
   - (x) of (y) selected cases were added as child cases.
   - All (y) selected cases were added as child cases.

   A work note is added to the **Activities** field for each child case added to the major case.

Related topics

Recipients lists

Components installed with Major Issue Management

Several types of components are installed with the major issue management feature.

Roles installed with Major Issue Management

Major Issue Management provides these roles.

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Role	Description	Contains Roles
Major issue manager [sn_majorissue_mgt.major_issue_manager]	Users with this role can: • Create major cases • Approve or reject major case candidates • Add or remove child cases from major cases • Add or remove impacted accounts (B2B) or consumers (B2C) The customer service manager role [sn_customerservice_manager] contains the major issue manager role.	• sn_customerservice_agent • sn_customerservice_consumer • sn_publications_recipients_use • sn_publications_recipients_list

Properties installed with Major Issue Management

Major Issue Management provides these properties.

To access these properties, navigate to **Customer Service** > **Administration** > **Properties**.

Note:
To open the System Property [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Major issue management properties

Property	Description
Synchronize fields from parent to child case sn_customerservice.parent_child_case_sync	Enable this property to synchronize fields from a major, or pa associated child cases. • Type: true|false • Default value: false • Location: **Customer Service** > **Administration** > **Propertie**
Comma-separated list of fields that synchronize from parent case to child cases sn_customerservice.case_fields_to_sync	Specifies the list of fields to synchronize from the major, or p associated child cases. • Type: string • Default value: priority,state,comments,work_notes,assigned_to,close_no • Location: **Customer Service** > **Administration** > **Propertie**
Processes SLA asynchronously during parent to child case creation and synchronization	Enables major issue management to process the SLA asyncl child case creation and parent-to-child case synchronizatior

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Major issue management properties (continued)

Property	Description
sn_customerservice.parent_child_case_sla_async	• Type: true|false • Default value: true • Location: **Customer Service** > **Administration** > **Properties**

Automatically close customer service cases

Customer service cases in the **Resolved** state can be closed automatically if customers don't act.

This feature uses the **Auto Close Resolved Cases** Flow Designer flow.

Note:
This flow isn't active by default.

The **Auto Close Resolved Cases** Flow Designer Flow identifies cases in the **Resolved** state that are waiting for a customer response and takes the following actions:

- Sends a reminder notification to the customer after five days with no response that the case is pending solution acceptance.
- Closes the case and sends a reminder notification to the customer after 10 days that the case has been auto-closed.

The notifications are added to the **Additional comments** field on the Case form.

The administrator can enable the **Auto Close Resolved Cases** flow and configure the timing of the reminder notifications. The default settings include two notifications that are sent at 5 days and 10 days after a case has been resolved. The administrator can also create additional notifications to the flow.

The administrator can also create a configuration that enables both the system and agents to exclude cases from auto-closure.

Using the Auto Close field on the Case form

Customer service agents can use the **Auto Close** field on the Case form to exclude cases from auto-closure. This field is hidden by default. To use this field, configure the Case form to display the **Auto Close** field.

Configuring business rules for auto closure

The administrator can configure business rules to enable or disable the **Auto Close** field on the Case form.

Rules for Auto Close on the Case form

Business rule	Description
Mark for Auto Close	Use this business rule to configure when the system sets the **Auto Close** field to true. The default configuration is as follows:

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Rules for Auto Close on the Case form (continued)

Business rule	Description
	• The case status is Resolved. • The **Needs attention** field on the Case form is false. • The case isn't escalated. • The account isn't escalated.
Clear Auto Close	Use this business rule to configure when the system automatically sets the **Auto Close** field to false. By default, the case status returns to **Open** if the solution is rejected.

Related topics

Workflow Studio

Notifications for resolved cases

Customers receive notifications about resolved cases that are automatically closed if no action is taken.

When an agent proposes a solution for a customer service case, the customer has a time window in which to accept or reject the solution. If the customer doesn't take action within this window, the case is automatically closed.

The system administrator can configure the settings for the notifications that are sent to the customer. The default settings include two notifications that are sent at 5 days and 10 days after a case has been resolved.

- After 5 days, the customer receives a reminder message about the resolved case on the Customer Service Portal: **This case is pending solution acceptance. It will be auto closed if you do not take action.**
- If the customer doesn't take any action after 10 days, the system automatically closes the case and adds the following message to the case: **This case was auto closed.**

This feature uses the **Auto Close Resolved Cases** Flow Designer flow. For more information, see Automatically close customer service cases.

Note:
The **Auto Close Resolved Cases** flow isn't active by default.

Administer Customer Contracts and Entitlements

Set up the Customer Contracts and Entitlements application to enable maintaining service contracts, contract lines, and entitlements.

Administration tasks for Customer Contracts and Entitlements

Task	Description
Add related lists to sold products and install base items	Add related lists to the Sold Product and Install Base Item forms to see the

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Administration tasks for Customer Contracts and Entitlements (continued)

Task	Description
	associated contracts, contract line items, and entitlements.
Add a service contract related list	Add related lists to the Account, Consumer, and Household forms to see the associated contracts.

Add related lists to sold products and install base items

Add Customer Contracts and Entitlements entities' related lists on the sold products and install base Items pages.

Before you begin
Role required: admin

About this task
To see the contracts, contract line items, and entitlements associated with a sold product, or an Install base Item on the same page, you must add the respective related lists manually on the form.

Note:
You can only add the related lists on the platform interface. The same settings are implemented on the CSM Configurable Workspace.

Procedure

1. Add related lists to sold products and install base items.
2. From the Additional actions menu, select **Configure** > **Related Lists**.
3. Select the following related lists from the Available menu and move them to the **Selected** menu using the **Add** option (forward arrow):
   - Service Contracts
   - Service Contract Lines
   - Service Entitlements
4. Select **Save**.
   The related lists are added on the Sold Product or Install Base Item form.

Add a service contract related list

Add a service contract related list to the Accounts, Consumers, and Households pages.

Before you begin
Role required: manager

About this task
To see the contracts associated with Accounts, Consumers, and Households, respectively, on the same page, you must add the related list manually on the form.

Note:
You can only add the related list on the platform interface in the Workspace view. The same setting is implemented on the CSM Configurable Workspace.

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Procedure

1. Add related lists to sold products and install base items.

2. From the Additional actions menu, select **Configure** > **Related Lists**.
3. Select **Workspace** in the **View name** field.
4. Select the **Service Contracts** from the **Available** menu and move to the **Selected** menu using the **Add** option (forward arrow):
5. Select **Save**.
   The related lists are added on the Sold Product or Install Base Item form.

Integrating Customer Service Management with other applications

Extend the capabilities of Customer Service Management and connect with other departments to assist with case resolution by integrating with other applications.

Customer Service Management provides integrations with the applications listed in the following table:

Customer Service Management Application Integrations

Step	Description
Integrating with IT Service Management	Integrate with Incident, Problem, Change, and Request Management applications.
Integrating with Service Portfolio Management	Get visibility into sold products and their associated service offerings with this integration.
Integrating with Continual Improvement Management	Get help with setting goals, organizing effort, and completing tasks.
Integrating with Field Service Management	Create and view all FSM work orders and appointments as a Customer Service Management user.
Integrating with IT Operations Management	Create cases proactively from alerts and track the corresponding install base items affected by the alert.
Integrating with Customer Project Management	Use this integration to create projects and project tasks for your customer accounts.
Integrating with Financial Management	Allocate, track, and get report on expenses in your organization using this integration.
Integrating with Adobe Experience Manager	Deliver a pre-integrated web experience built on AEM by embedding Customer Service Management and Knowledge Management capabilities.
Integrating with Computer Telephony Integration (CTI)	Enable the Customer Service application to support inbound and outbound telephone calls with this integration.

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Customer Service Management Application Integrations (continued)

Step	Description
Integrating with Microsoft Outlook	Manage contacts and cases from within Microsoft Outlook using this integration.
Integrating with Safe Workplace applications	Enable contacts or consumers to safely enter locations and comply with health and safety policies after emergencies and pandemics
Integrating with consumer messaging apps	Let customers use their choice of messaging apps to message anytime to your company's account.
Integrating with Process Mining	Analyze processes relevant to your KPIs, and identify bottlenecks associated with customer service cases.
Integrating with contact centers	Integrate with your contact center as a service (CCaaS) provider.

Integrating with IT Service Management

Integrate Customer Service Management with IT Service Management that includes the Incident, Problem, Change, and Request Management applications. With this integration, users can create request, incident, problem, and change records from customer service cases and external users can view these records from the Customer and Consumer Service Portals.

Integration with the Service Management applications provides the following functionality for internal and external users.

User roles and tasks

User	Tasks
Agents	• Create incident, problem, change, and request records from open cases. • Associate existing incident, problem, change, and request records with cases • Remove associated records from cases.
Agents and managers	• View cases with Service Management -related indicators on the Customer Service dashboards. • View updates to records associated with a case. These updates automatically update the case work notes. • Use the updates to records associated with a case to communicate with customers.
External users	• View problem, change, and request records associated with cases from the Customer and Consumer Service Portals. • Create requests from the Customer and Consumer Service Portals.

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User roles and tasks (continued)

User	Tasks
	• Approve changes and requests from the Customer Service Portal. • View Known Error articles for a problem related to a case.

Integration with Incident Management

Integration with the Incident Management application enables customer service agents to create incident records from cases or associate existing incident records to cases. For more information, see CSM integration with Incident Management.

Integration with Problem Management

Integration with the Problem Management application enables customer service agents to create problem records from cases or associate existing problem records to cases. For more information, see CSM integration with Problem Management.

Integration with Change Management

Integration with the Change Management application enables customer service agents to create change records from cases or associate existing change records to cases. For more information, see CSM integration with Change Management.

Integration with Request Management

Integration with the Request Management application enables customer service agents to create request records from cases or associate existing request records to cases. It also enables customers to create requests from the Customer and Consumer Service Portals. For more information, see CSM integration with Request Management.

CSM integration with IT Service Management overview

Customer Service Management provides an integration with the Incident, Problem, Change, and Request Management applications.

Plugins

Customer Service Management integration with Service Management requires the following plugins:

- Customer Service with Service Management plugin (com.sn_cs_sm)
- Customer Service with Request Management plugin (com.sn_cs_sm_request)

For additional information, see Integrate with Service Management.

Roles

The Service Management integration plugins do not add any roles to the customer service agent (sn_customerservice_agent) role. To enable the Service Management integration features, you must assign the CSM/ITSM integration roles included with the Incident Management application to the agents who need this capability. For more information, see Assign CSM/ITSM integration roles.

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Creating records for a case

The Service Management integration plugins add the following menu items to the Additional Actions menu on the Case form. Agents can use these menu items to create records for a case.

- Create Incident
- Create Problem
- Create Request
- Create Normal Change
- Create Standard Change

Note:
Agents can create or associate one incident, problem, or change record with a case. After a record is created or associated with a case, the corresponding menu items are no longer available on the Additional Actions menu.

For more information, see Creating incident, problem, change, and request records from Agent Workspace.

Viewing incident, problem, and change records related to a case

The Service Management integration plugins add the Related Records form section to the Case form. This section includes the following fields:

- Incident
- Problem
- Change Request
- Caused by Change

When an incident, problem, or change record is created from a case, or an existing record is associated with a case, the record number is added to the corresponding field in the Related Records form section.

Viewing requests related to a case

When a request is created from a case, or an existing request is associated with a case, the request record number is added to the **Requests** related list on the Case form.

Note:
Agents can create multiple requests for a case.

Related records list widget for external customers

When viewing a case on the Customer or Consumer Service Portal, external users can see other records that are associated with the case in the Related Records list widget. These records can include problems, changes, and requests. Users can click a record in the Related Records widget to view additional details in a pop-up window.

Note:
If a case does not have any related records, the Related Records widget does not appear on the case view page.

From the Customer and Consumer Service Portals, users can view lists of cases and requests by doing one of the following:

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- Clicking **My Lists** in the portal menu header.
- Clicking **Requests** > **All Requests** in the portal menu header.

For more information, see View case records from the Customer and Consumer Service Portals.

Using case resolution codes

The Service Management integration plugins provide the following case resolution codes.

Agents can select these codes from the **Resolution code** field in the **Resolution Information** section on the Case form.

- Solved – Fixed by closing related PRB
- Solved – Workaround provided based on open PRB
- Solved – Fixed by closing related Change Request
- Solved – Fixed by closing related Incident
- Solved – Related Request is Closed Complete

IT Service Management integration and Major Issue Management

The major issue management feature works with the CSM integration with IT Service Management as follows:

- A major issue manager with the itil role can create incident, problem, change, and request records from a major case.
- When a major case candidate with an associated record is accepted as a major case:
  - A new major case is created and the candidate becomes a child of the major case.
  - The related record information is copied from the child case to the major case.
  - For the child case, the options to create related records are removed from the Additional Actions menu.
  - For the child case, the fields in the Related Records form section are read-only.
  - Updates to the related records appear in the work notes of the major case. These updates are added to the child case when fields are synchronized from the major case to the child case.
- A major case and child cases can have different types of related records. This can happen when an existing case with a related incident, problem, change, or request record is added as a child of a major case. When updates are made to the record related to the child case, information about the update is added to the child case work notes.
- If a major case and child cases have the same related record, updates to that record are added to the major case work notes. These notes are copied from the major case to the child cases if:
  - The **sn_customerservice.case_fields_to_sync** property is enabled.
  - The field in the in the Related Records form section is added to the **sn_customerservice.case_fields_to_sync** property.
- If a major case and child cases have different related records of the same type, updates to the records are copied only to the respective cases.

CSM integration with Incident Management

Integration with the Incident Management application enables customer service agents to create incident records from cases or associate existing incident records to cases.

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With this integration, customer service agents can:

- Create an incident from a case.
- Associate an existing open incident to a case.
- Remove an associated incident from a case.
- View the following in the case work notes:
  - Incident state changes.
  - Additional comments added to the incident record.

Note:
A case can be associated with one incident. If a case is already associated with an incident, the **Create Incident** item does not appear on the Additional Actions menu.

Plugins

Integration with Incident Management requires the Customer Service with Service Management plugin (com.sn_cs_sm).

Roles

The following roles enable customer service agents to view and create incidents for customer service cases.

- sn_incident_read
- sn_incident_write

For more information, see Assign CSM/ITSM integration roles.

Determining the incident priority, impact, and urgency

When creating an incident from a case:

- If the incident data lookup is active, the system copies the case priority to the incident priority and calculates the incident impact and urgency based on the Priority Data Lookup [dl_u_priority] table.
- If the Incident data lookup is inactive, the system uses these default settings for the incident fields:
  - Priority: 5 - Planning
  - Impact: 3 - Low
  - Urgency: 3 - Low

Synchronizing data between the incident and the case

Work notes are synchronized from the incident to the case when:

- The incident state changes. If the incident state changes to On Hold, the hold reason is copied to the case work notes.
- The incident is resolved or closed. The incident resolution notes and resolution code are copied to the case work notes.
- Additional comments are added to the incident.

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Note:
When an incident is created or an existing incident is associated with a case, notification from the incident is suppressed if the caller is an external user (contact or consumer).

CSM integration with Problem Management

Integration with the Problem Management application enables customer service agents to create problem records from cases or associate existing problem records to cases.

With this integration, customer service agents can:

- Create a problem from a case.
- Associate an existing open problem to a case.
- Remove an associated problem from a case.
- View problem state changes in the case work notes.

Note:
A case can be associated with one problem. If a case is already associated with a problem, the **Create Problem** item doesn't appear on the Additional Actions menu.

Plugins

Integration with Problem Management requires the Customer Service with Service Management plugin (com.sn_cs_sm).

Roles

The following roles enable customer service agents to view and create problems for customer service cases.

- sn_problem_read
- sn_problem_write

For more information, see Assign CSM/ITSM integration roles.

Synchronizing data between the problem and the case

With the Problem Management Best Practice – Madrid plugin activated, customer service agents can view the following information in the case work notes:

- When the state of a related problem is updated, the text of the work note includes a link to the problem.
- When **Communicate Workaround** is selected from the related problem, the workaround text is copied to the case work notes.
- When **Communicate Fix** is selected from the related problem, the fix text is copied to the case work notes.
- When the problem is resolved or closed with a specific resolution code:
  - State is Closed and Resolution Code is Canceled. The Canceled Reason text is copied to the case work notes.
  - State is Closed and Resolution Code is Risk Accepted, the Cause notes, Risk accepted reason, and Fix notes are copied to the case work notes.

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- State is Resolved and Resolution Code is Fix Applied, the Cause notes, and Fix notes are copied to the case work notes.
- State is Closed and the Resolution Code is Fix Applied, the Cause notes, and Fix notes are copied to the case work notes.

With the Problem Management Best Practice - Madrid - Knowledge Integration plugin activated, the customer service agent can view information in the case work notes when a Known Error Article is created for or associated with a related problem. The work note includes a link to the article.

CSM integration with Change Management

Integration with the Change Management application enables customer service agents to create change records from cases or associate existing change records to cases.

With this integration, customer service agents can perform the following tasks:

- Create a change from a case.
- Associate an existing open change to a case.
- Remove an associated change from a case.
- View the following information in the case work notes:
  - State changes for the change record.
  - Additional comments added to the change record.

Note:
A case can be associated with one change. If a case is already associated with a change, the **Create Normal Change** and **Create Standard Change** options do not appear on the Additional Actions menu.

Plugins

Integration with Change Management requires the Customer Service with Service Management plugin (com.sn_cs_sm).

Roles

The following roles enable customer service agents to view and create changes for customer service cases.

- sn_change_read
- sn_change_write

For more information, see Assign CSM/ITSM integration roles.

Synchronizing data between the change and the case

Work notes are synchronized from the change to the case when:

- The change state or change type is updated.
- Additional comments are added to the change record.
- When the change associated with a case is put on hold, the work notes are updated with the hold reason.

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- When a hold on the change associated with a case is removed, the work notes on the case are updated.
- When the change is resolved or closed.

Change form related lists

Integration with the Change Management application adds the following related lists to the Change form:

- Cases Fixed by Change
- Cases Caused by Change

Standard change record producer behavior

When a record producer for a standard change or normal change is created and exposed to customer service agents from the Customer or Consumer Service Portals:

- The record producer only appears in the portal after clicking the **Create Request** UI action.
- The record producer does not appear as part of Standard Change catalog items.
- If the agent chooses to create a Standard Change from the normal record producer, the Standard Change is created but the change record is not linked with the case.

CSM integration with Request Management

Integration with the Request Management application enables customer service agents to create request records from cases or associate existing request records to cases. It also enables customers to create requests from the Customer and Consumer Service Portals.

With this integration, customer service agents can:

- Create one or more requests on behalf of a customer from an existing customer service case.
- Associate an existing request to a case.
- Remove an associated request from a case.
- View a list of requests associated with a case in the **Requests** related list.
- View the following in the case work notes:
  - Request state changes.
  - Additional comments added to the request item record.

Note:
When creating a request from a case, if the agent chooses a catalog item that is using cart v1 (the use_sc_layout field is not checked), the case is not set as the parent of the request.

Plugins

Integration with Request Management requires the Customer Service with Request Management plugin (com.sn_cs_sm_request).

Roles

The following roles enable customer service agents to view and create requests for customer service cases.

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- sn_request_read
- sn_request_write

For more information, see Assign CSM/ITSM integration roles.

Enabling the Create Request UI action for case types

To enable the **Create Request** UI action for a case type table that extends the Case [sn_customerservice_case] table, add an entry for the case type to the Request Parent Mapping [request_parent_mapping] table. For more information, see Enable the Create Request UI action for case types.

Synchronizing data between the request and the case

Work notes are synchronized from the request to the case when:

- The request state changes.
- The request is closed.
- Additional comments are added to the request.

Note:
When a request is closed, the case does not automatically move to solution proposed.

Communicating with the requester

The task fulfiller can communicate with the requester if additional information is needed. Use the **Additional comments** field on the request to communicate with the requester through the case. Information added to the **Additional comments** field on the request is synchronized to the case work notes.

If the case is the parent of the request, notifications to the requester are suppressed when additional comments are added to the request by the fulfiller.

Related topics

Create a request on behalf of a customer or consumer

Create a request record from Agent workspace

Create a request from the Customer and Consumer Service Portals

Service catalog integration with the Customer and Consumer Service Portals

Users with the customer administrator role (sn_customerservice.customer_admin) can associate a portal with a service catalog.

The following catalog pages and widgets are provided as part of the Customer Service with Request Management integration.

For more information, see Associate a portal with a catalog.

CSM Catalog page

The CSM Catalog page is the display page for catalog items on the Customer and Consumer Service Portals. This page serves as the landing page for any service catalog item exposed on a CSM portal. All request items exposed on the CSM portals are either service catalog items or service catalog record producers. Navigate to **Service Portal** > **Pages** to view this page.

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- Page ID: csm_sc_cat_item
- Update name: sp_page_7ea80b123bb31300bfe04d72f3efc4b7
- Available to roles: snc_internal, snc_external

CSM Catalog Item widget

This widget handles the redirection logic on submission of the catalog item and embeds the default catalog item widget. This widget listens to event **$sp.sc_cat_item.submitted**. On submission of a catalog item, it handles the portal redirection logic based on the page_id and the catalog portal URL. When there's no parent set in the Requests (sc_request) table, the URL is redirected to the default service portal ticket page. If a record producer has a redirect URL, this widget uses the redirect URL from the record producer instead of redirecting to the ticket page.

- Widget ID: csm-sc-cat-item
- Update name: sp_widget_ec837c713bbb1300bfe04d72f3efc4d1
- Available to roles: snc_internal, snc_external

Page route map

It's important to set up a page route map for any new Service Portals to handle the redirection to the Case ticket page. The redirection is based on the logic described in the CSM Catalog Item widget.

- CSM Catalog item page route map: For the Customer Service Portal, this page route map routes the URL redirect from the sc_cat_item page to the csm_sc_cat_item page.
- CSP Catalog item page route map: For the Consumer Service Portal, this page route map routes the URL redirect from the sc_cat_item page to the csm_sc_cat_item page.

Portal settings for catalog items

Once the catalog items are defined, visibility of the **Submit**/**Add to Cart** button can be controlled by navigating to **Service Catalog** > **Catalog Definitions** > **Maintain Items**, selecting the desired item, and enabling or disabling the fields in the Portal Settings form section.

Maintain Items Portal settings fields

Field	Description
Request method	Select Order, Request, or Submit as the type of catalog item.
Hide 'Add to Cart'	Enable if the **Add to Cart** button should be disabled for the catalog item. **Note:** The **Add to Cart** button isn't currently supported on the Customer Service Portal or the Consumer Service Portal.
Hide Quantity	Enable if the **Quantity** of the catalog item should be hidden.
Hide Delivery Time	Enable if the **Delivery Time** of the catalog item should be hidden.

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Maintain Items Portal settings fields (continued)

Field	Description
Hide 'Add to Wish List'	Enable if the **Add to Wish List** button for the catalog item should be hidden.
Hide Attachment	Enable if the attachment of the catalog item should be hidden.

Extension points for CSM integration with IT Service Management

Use the extension points available with CSM integration with IT Service Management to extend the functionality of your application.

Extension points enable you to extend the functionality of an application and integrate customizations without altering the application code. Extension points are stored in the Extension Point [sys_extension_point] table.

Using an extension point to map the Incident field

Customers can create the logic for mapping the **Incident** field by using the `sn_cs_sm.CSMIncidentIntegrations` extension point.

For more information about mapping fields, see the How to map or copy field values from Case to Incident when using CSM Integration with Incident Management [KB0817494] article in the HI Knowledge Base.

Using an extension point to map the Problem field

Customers can create the logic for mapping the **Problem** field by using the `sn_cs_sm.CSMProblemIntegrations` extension point.

Using an extension point to map the Change Request field

The Customer Service with Service Management plugin (com.sn_cs_sm) adds the `CSMChangeIntegrations` extension point, which exposes generic APIs that are used for Case to Change integration.

Note:
The `CSMChangeIntegrations` extension point is read only. To modify this extension point, contact ServiceNow Customer Support.

The Customer Service with Service Management plugin also adds an implementation of the `CSMChangeIntegrations` extension point. This implementation can be modified and deactivated. However, this isn't recommended.

If it's necessary to modify the APIs within the `CSMChangeIntegrations` extension point, the system administrator can:

- Create an implementation of an extension point.
- Make the necessary changes in the implementation.
- Update the order of the implementation to a lower number. The system executes the implementation with the lowest order number.

Note:
API names used in the implementation must remain the same, otherwise the extension point won't be able to identify the implementation, causing an error.

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For example, the *CSMChangeIntegrations* extension point includes the following *copyFieldsFromCaseToChange* API for creating a change from a case record.

```
copyFieldsFromCaseToChange: function(changeGr, caseGr) {
  changeGr.short_description = caseGr.short_description;
  changeGr.cmdb_ci = caseGr.cmdb_ci;
  changeGr.impact = caseGr.impact;
  changeGr.urgency = caseGr.urgency;
  changeGr.priority = caseGr.priority;
  changeGr.company = caseGr.account;
  changeGr.sys_domain = caseGr.sys_domain;
},
```

To modify this API, create an implementation of the extension point and make the desired changes without changing the API name.

```
copyFieldsFromCaseToChange: function(changeGr, caseGr) {
  changeGr.abcd = caseGr.abcd;
},
```

Using an extension point to map the Request field

Customers can create the logic for mapping the **Request** field by using the *sn_cs_sm_request.CSMRequestIntegrations* extension point.

Using an extension point to approve changes and requests from the Customer Service Portal

This feature includes an extension point that can be used to configure approval entities: **global.CSMApprovalsManagement**. Use this extension point to extend the approval functionality to any other entity, such as a problem.

Related topics

Using extension points to extend application functionality

Setting up CSM integration with IT Service Management

Integrate Customer Service Management with IT Service Management that includes the Request, Incident, Problem, and Change Management applications. With this integration, users can create request, incident, problem, and change records from customer service cases. External users can view these records from the Customer and Consumer Service Portals.

IT Service Management configuration tasks

Task	Description
Integrate with IT Service Management using Guided Setup	Use the Guided Setup to integrate CSM with IT Service Management.
Activate Customer Service Management with Service Management	Activate the CSM with Service Management plugin (com.sn_cs_sm) to enable the integration the following applications: • Incident Management • Problem Management • Change Management

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IT Service Management configuration tasks (continued)

Task	Description
Activate Customer Service Management with Request Management	Activate the CSM with Request Management plugin (com.sn_cs_sm_request) to use the integration with the Request Management application.
Assigning CSM/ITSM integration roles	Assign the required roles to the customer service agents and managers who will be creating the request, incident, problem, and change records from customer service cases.
Enable external customers to access problem, change, and request records	Assign access controls (ACLs) to the external user roles to provide visibility to case-related request, problem, and change records from the Customer and Consumer Service Portals.
Enable external customers to create requests	Assign roles to external customers which enable them to create requests.

Enable external customers to approve requests and changes	Enable external customers to approve changes and requests:
	• Add external users to approval groups or assign roles for approval users.
	• Add the necessary ACLs to the snc_external role for the following table:
	  ○ Change Request (change_request)
	  ○ Request (sc_request)
	  ○ Request Item (sc_req_item)

Enable the Create Request UI action for case types	Enable the **Create Request** UI action for case type tables that extend the Case [sn_customerservice_case] table.

Integrate with IT Service Management using Guided Setup

Use the Guided Setup to integrate Customer Service Management with the Request, Incident, Problem, and Change Management applications.

Before you begin

Role required: admin

About this task

To configure the integration with the Request, Incident, Problem, and Change Management applications, use the Customer Service guided setup. The guided setup takes you through the setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Integration with Service Management category, click **Get Started**.

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The Integration with Service Management page opens with a list of tasks to activate plugins and assign roles.

4. To perform a task, click **Configure**.
   This button opens the page in your instance where the configuration is completed.

Activate Customer Service Management with Service Management

Activate the CSM with Service Management plugin to use the integration with Service Management.

Before you begin

Instead of doing the configuration through this procedure, consider using guided setup. For more information, see Integrate with IT Service Management using Guided Setup.

Role required: admin

Procedure

1. Navigate to **System Definition** > **Plugins**.
2. Search for the Customer Service with Service Management plugin (com.sn_cs_sm).
3. Click **Activate**.

Activate Customer Service Management with Request Management

Activate the CSM with Request Management plugin to use the integration with Request Management.

Before you begin

Instead of doing the configuration through this procedure, consider using guided setup. For more information, see Integrate with IT Service Management using Guided Setup.

Role required: admin

Procedure

1. Navigate to **System Definition** > **Plugins**.
2. Search for the Customer Service with Request Management plugin (com.sn_cs_sm_request).
3. Click **Activate**.

Assigning CSM/ITSM integration roles

To enable the Service Management integration features, assign the CSM/ITSM integration roles that are included with the Incident Management application.

The Service Management integration plugins do not add any roles to the customer service agent role (sn_customerservice_agent). To enable the Service Management integration features, you must assign the CSM/ITSM integration roles included with the Incident Management application.

- Assign roles to agents using guided setup. For more information, see Integrate with IT Service Management using Guided Setup.
- Assign roles to agents using the *ServiceNow AI Platform* user administration feature. For more information, see Assign a role to a user.

CSM/ITSM integration roles

Several types of roles are available with CSM integration with ITSM.

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CSM/ITSM integration roles for agents

These roles enable customer service agents to view and create incident, problem, change, and request records for customer service cases.

CSM/ITSM integration roles for agents

Role title [name]	Description	Contains roles
sn_incident_read	Customer service agents with this role can: • View information about an incident record associated with a customer service case. • Associate an existing incident record with a customer service case. • Remove an incident record associated with a customer service case.	• dependency_views • workspace_agent • view_changer • sn_comm_management.comm_plan_viewer • cmdb_read • cmdb_query_builder_read
sn_incident_write	Customer service agents with this role can: • Create an incident record for a customer services case. • Associate an existing incident record with a customer service case. • Remove an incident record associated with a customer service case.	sn_incident_read
sn_problem_read	Customer service agents with this role can: • View information about a problem record associated with a customer service case. • Associate an existing problem record with a customer service case. • Remove a problem record associated with a customer service case.	• dependency_views • workspace_agent • view_changer • cmdb_read • cmdb_query_builder_read
sn_problem_write	Customer service agents with this role can:	sn_problem_read

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CSM/ITSM integration roles for agents (continued)

Role title [name]	Description	Contains roles
	• Create a problem record for a customer services case. • Associate an existing problem record with a customer service case. • Remove a problem record associated with a customer service case.	
sn_change_read	Customer service agents with this role can: • View information about a change record associated with a customer service case. • Associate an existing change record with a customer service case. • Remove a change record associated with a customer service case.	• dependency_views • workspace_agent • view_changer • cmdb_read • app_service_user • cmdb_query_builder_read
sn_change_write	Customer service agents with this role can: • Create a change record for a customer services case. • Associate an existing change record with a customer service case. • Remove a change record associated with a customer service case.	• sn_change_read • template_editor • cmdb_query_builder
sn_request_read	Customer service agents with this role can view information about request records associated with a customer service case in the **Requests** related list.	None
sn_request_write	Customer service agents with this role can create request records for customer service cases.	• sn_request_read • task_editor • dependency_views • workspace_agent • view_changer

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CSM/ITSM integration roles for agents (continued)

Role title [name]	Description	Contains roles
		• cmdb_read • cmdb_query_builder_read

CSM/ITSM integration roles for external customers

These roles enable external customers to take the following actions:

- View and create request records from the Customer and Consumer Service Portals.
- Approve changes and requests from the Customer Service Portal.

CSM/ITSM integration roles for external customers

Role	Actions
Customer administrator [sn_customerservice.customer_admin]	Users with this role can: • Browse the service catalog and catalog items and make a selection. • Create requests for themselves, for other contacts from the same account, or for child accounts. • View the request details.
Partner [sn_customerservice.partner]	Users with this role can: • Browse the service catalog and catalog items and make a selection. • Create requests for themselves (if they also have the customer role). • Create requests on behalf of the accounts with which they have established relationships. • View cases and requests.
Customer case manager [sn_customerservice.customer_case_manager]	Users with this role can: • Browse the service catalog and catalog items and make a selection. • Create requests for themselves or for other contacts from the same account. • View the request details.
Customer [sn_customerservice.customer]	Users with this role can: • Create a request. • View the request details.

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CSM/ITSM integration roles for external customers (continued)

Role	Actions
Proxy contact [sn_customerservice.proxy_contact]	Users with this role can: • Browse the service catalog and catalog items and make a selection. • Create requests on behalf of customers. • Add the account and contact information of the customers. • View the details of the case and the related request.

Enable external customers to access problem, change, and request records

With access to problem, change, and request records, external customers can view these records associated with their customer service cases from the Customer and Consumer Service Portals.

Before you begin

Role required: admin

About this task

The snc_internal or snc_external role and with read access to the related problem, change, and request records can view these records from the Customer and Consumer Service Portals. After logging in, users can:

- Select a case and view the records related to that case in the Case Related Records widget.
- Select a record in the Case Related Records widget to open the record details in the Ticket Fields widget.

Note:
The Related Records list shows data only if the logged-in user has access to view the related records.

Customers, customer partners, and internal users with the proxy contact role (sn_customerservice.proxy_contact) can also create requests from the Customer and Consumer Service Portals. For more information about this feature, see Create cases as a proxy contact.

Customers can also view Known Error articles for a problem related to a case. These articles are displayed:

- If there's a KE article present for the problem record. If there are multiple articles associated with the problem, the customer has access to the primary article. If there are no articles, the customer doesn't see the link.
- If the customer has access to the KE article.

Procedure

1. Provide access to problem, change, and request records by configuring ACLs for the snc_external role.
   This access isn't provided out of box. You must add these ACLs to the snc_external user role based on case access. For more information, see Access control list rules.

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Note:
Existing ACLs on the problem, change, and request records might impact the visibility for external users.

2. Configure the Case Related Records widget.
   By default, this widget is displayed for users with the snc_internal and snc_external roles. For more information, see Service Portal widgets.
3. Define the views for the problem, change, and request records and select the fields that are visible to external customers.
   For more information, see Create and delete views.

Note:
For the Consumer Service Portal, you can define views and select fields for problem and change records. Request records display a default set of fields in the Ticket Fields widget.

Related records list widget

When viewing a case on the Customer or Consumer Service Portal, external users can see other records associated with the case in the Related Records list widget.

These records can include problems, changes, and requests. Users can select a record in the Related Records widget to view additional details in a pop-up window.

Request records

For request records, users can:

- Expand or collapse a request and view a list of the items associated with the request.
- Select an item in this list to see additional information, including the state of the requested item.

Note:
If a case does not have any related records, the Related Records widget does not appear on the case view page.

From the Customer and Consumer Service Portals, users can view lists of cases and requests by doing one of the following:

- Selecting **My Lists** in the portal menu header.
- Selecting **Requests** > **All Requests** in the portal menu header.

The list view page includes a **My Lists** filter with the following options:

- **All**: Displays all case and request records.
- **Action Needed**: Displays cases in the **Resolved** state that are waiting for a customer response.
- **My Issues**: Displays the cases that were not initiated as a request.
- **My Requests**: Displays the cases that were created as a request.

Enable external customers to create requests

Enable your external customers to create and track requests from the Customer and Consumer Service Portals.

Before you begin
Role required: admin

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About this task
Each submitted request generates a case, with the request record associated to that case. Customer service agents can also create requests on behalf of contacts and consumers.

Note:
This feature requires activation of the Customer Service with Request Management plugin (com.sn_cs_sm_request).

Procedure

Configure the Case form to display the **Initiated as request** field.
When a request is created from the portal, the system creates a case for the request and sets this field to true.

Note:
The **Initiated as request** field is read-only for all users.

Related topics

Create a request on behalf of a customer or consumer

Request an item or service from the Customer Service Portal

Enable external customers to approve requests and changes

Enable your external customers to approve change and request records related to customer service cases from the Customer Service Portal.

Before you begin
Role required: admin

About this task
Changes and requests related to a case typically require end user approval before the tasks can be completed. The tasks can be initiated by customers and by external users. For example:

- A customer creates a change in order to apply a patch. This change requires approval from the contact before the patch can be applied.
- A contact requests a catalog item from the Customer Service Portal. This request requires approval by another employee within the contact's organization before the request can be fulfilled.

Use this feature to send approval requests and enable external customers with the snc_external role to approve those requests as part of the task approval workflow. From the Customer Service Portal, external customers can:

- View and approve requests and change requests.
- View the details of the requested items in a request record.
- View the status of a request or change request in the Related Records widget.

Important:
Approving requests and changes requires the approver_user role, which is a licensed role. For more information, see KB0716592.

Procedure

1. Add external users to approval groups or assign roles for approval users in order to see approval records on the Customer Service Portal.
2. Add the necessary ACLs to the snc_external role for the following tables.

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- Change Request (change_request)
- Request (sc_request)
- Request Item (sc_req_item)

Note:
The sn_esm_user role provides access to the approval records where the logged-in user is the approver and enables the logged-in user to either approve or reject the approval request. Customer Service Management requester roles (including the customer contact, partner contact, customer admin, and partner admin roles) contain the sn_esm_user role, which enables these roles to perform the approve and actions.

Enable the Create Request UI action for case types

Enable the **Create Request** UI action for case type tables that extend the Case [sn_customerservice_case] table.

Before you begin
Role required: admin

About this task
To enable the **Create Request** UI action for a case type table that extends the Case table, add an entry for the case type to the Request Parent Mapping [request_parent_mapping] table.

When an agent creates a request for a case in the case type table, the system adds the request to the Requests tab on the case record.

Procedure
1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the Request Parent Mapping [request_parent_mapping] table.
3. Select the Show List related link to open the list view for the table.
4. Select **New** to create an entry for the case type table.
5. Fill in the following fields in the Request Parent Mapping record.
   a. Enter a name for the entry in the **Name** field.
   b. Select the case type table in the **Parent table** field.
   c. In the **Request parent** field, select Parent.
   d. In the **Parent requestor** field, select Contact.
6. Select **Submit**.

Creating incident, problem, change, and request records from Agent Workspace

As customer service agents, create incident, problem, change, and request records from open cases in Agent Workspace.

Create an incident record from Agent workspace

As a customer service agent, create an incident record from a case or associate an existing incident to a case in Agent Workspace.

Before you begin
Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

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Procedure

1. Open a customer service case.
2. Select the More UI Actions icon (•••) and select **Create Incident**.
   The following information is copied from the case to the incident record:

Case to incident field mapping

Case fields	Incident fields
Short description	Short description
Default impact	Impact
Urgency	Urgency
Contact	Caller
Configuration item (if available)	Configuration item

Note:
You can manually change the incident impact and urgency to different values on the incident record as needed.

Result

Information about the incident is added as follows:

- An update with the incident number is added to the case work notes.
- The incident is added to the **Incident** field in the **Related Records** form section on the case form.
- The case number is added to the Customer Cases related list on the Incident record.
- If the case has an associated Problem, Change Request, or Caused by Change record, this information is also copied to the incident record.
- The domain of the incident is mapped to the domain of the case.

Create a problem record from Agent workspace

As a customer service agent, create a problem record from a case or associate an existing problem to a case in Agent Workspace.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

Procedure

1. Open a customer service case.
2. Select the More Actions icon (•••) and select **Create Problem**.
   The following information is copied from the case to the Problem record:

Case to problem field mapping

Case fields	Problem fields
Short description	Problem statement
Impact	Impact
Urgency	Urgency

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Case fields	Problem fields
Priority	Priority
Company	Company
Configuration item (if available)	Configuration item (if blank on case, agent can manually update on problem record)
Case sys_id	First reported by

Note:
You can manually change the problem impact and urgency to different values on the Problem record as needed.

Result
Information about the problem is added as follows:

- An update with the problem number is added to the case work notes.
- The problem is added to the **Problem** field in the **Related Records** form section on the case form.
- The case number is added to the Customer Cases related list on the Problem record.
- The domain of the problem is mapped to the domain of the case.

Create a normal change record from Agent workspace

As a customer service agent, create a normal change record from a case or associate an existing normal change to a case in Agent Workspace.

Before you begin
Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

Procedure

1. Open a customer service case.
2. Select the More Actions icon (•••) and select **Create Normal Change**.
   The following information is copied from the case to the change record:

Normal Change record fields

Case fields	Change fields
Short description	Short description
Description	Description
Impact	Impact
Urgency	Urgency
Priority	Priority
Company	Company
Contact	Caller
Configuration item (if available)	Configuration item

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Case fields	Change fields
	Note: The change manager can update the configuration item on the change record. If the configuration item is not available, the agent can also manually update this information.

Note: You can manually change the change impact and urgency to different values on the change record as needed.

Default values are added to the following fields on the change record:

- **Type**: Normal
- **State**: New
- **Category**: Other
- **Risk**: Moderate

Result

Information about the change is added as follows:

- An update with the change number is added to the case work notes.
- The change is added to the **Change Request** field within the **Related Records** form section on the case form.
- The case number is added to the Customer Cases related list on the Change record.
- The **Requested by** field on the change record is updated with the case agent.
- The domain of the change is mapped to the domain of the case.

Create a standard change record from Agent workspace

As a customer service agent, create a standard change record from a case or associate an existing standard change to a case in Agent Workspace.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

Procedure

1. Open a customer service case.
2. Select the More Actions icon (•••) and select **Create Standard Change**.
   The standard change record is created using the Standard Change template, which is defined in the Standard Change catalog. The data mapping is created from the template; no data is copied from the case to the change record.

Create a request record from Agent workspace

As a customer service agent, create a request record from a case or associate an existing request to a case in Agent Workspace.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

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Procedure

1. Open a customer service case.
2. Select the More Actions icon (•••) and select **Create Request**.
   The following information is copied from the case to the request record:

Case to request field mapping

Case fields	Request fields
Short description	Short description
Contact	Contact

Note:
You can manually change the request impact and urgency to different values on the request record as needed.

Result

Information about the incident is added as follows:

- An update with the request number is added to the case work notes.
- The request is associated with the case and is added to the **Requests** related list on the Case form.
- The case number is added to the Customer Cases related list on the request record.
- The domain of the request is mapped to the domain of the case.

Create a request from the Customer and Consumer Service Portals

As customers, you can create and submit requests from the Customer and Consumer Service Portals. The request process is integrated with Service Catalog.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.customer_case_manager, sn_customerservice.customer, sn_customerservice.consumer, sn_customerservice.proxy_contact

About this task

Note:
Creating a request from the Customer and Consumer Service Portals requires activation of the Customer Service with Request Management plugin (com.sn_cs_sm_request). It also requires that the system administrator provide external customers with access to request records.

Partners, partner administrators, and proxy contacts can submit requests on behalf of other accounts or contacts with the addition of the following variable set to the desired catalog items: **csm_request_variable_set**. This variable set adds the **Account** and **Contact** fields. For more information, see Service catalog variable sets.

Procedure

1. Do one of the following to create a request:
   - Click the **Request Something** link on the portal landing page.
   - Click **Requests** > **Request Something** in the portal menu header.
2. Browse the service catalog and select the desired item or service.

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You can also use the Category filters to filter the available items.

3. Fill in any necessary information related to the request.
4. Click **Submit**.
   The following information is copied from the request to the case:

Request to case field mapping

Request fields	Case fields
Short description	Short description
Requested for	Contact
Account	Account

Result

- A new case is created, which becomes the parent of the request. One request is associated with a case and a request contains one item.
- The case is used as the reference for the customer, who can see the request status and updates from the case on the Customer Service Portal.
- All cases associated with a request appear on the request record in the **Cases** related list.

Integrating with Service Portfolio Management

Integrate Customer Service Management with the Service Portfolio Management (SPM) application. This integration gives customer service managers, customer service agents, and service owners visibility into sold products and their associated service offerings.

Using the integration between Customer Service Management and Service Portfolio Management has the following benefits:

- Increase customer service agent productivity: Empower customer service agents to quickly view the service offerings and associated definitions for sold products.
- Increase service owner productivity: Empower service owners to quickly identify customers subscribed to services.

The Customer Service Management integration with Service Portfolio Management can be used in the following ways.

1. Customer service managers can associate service offerings to product models. For more details, see Associate services with product models
2. Customer service managers can associate service offerings to sold products. For more details, see Associate service offerings with sold products
3. Service owners can view service offerings and which customers have subscribed to them.
4. Customer service agents can view which service offerings are associated to the sold products affected by an issue. They can also see the service commitments and availability. For more details, see View sold product information in CSM Configurable Workspace

Activation information

Activate the following plugin.

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Name	Description
CSM with Service Portfolio Management (SPM) [sn_csm_spm]	Enables integration with the Service Portfolio Management (SPM) application. This integration gives customer service managers, customer service agents, and service owners visibility into sold products and their service offerings.

Roles

Ensure that users can perform all the necessary actions by assigning roles.

Roles required for Service Portfolio Management (SPM) application integration

Role	Description
service_editor	Assign this role to customer service managers if they need to update any service offerings they own.
portfolio_admin	Assign this role to customer service managers if they need to associate service offerings to a product model.

Integrate with Service Portfolio Management using Guided Setup

Use the Guided Setup to integrate Customer Service Management with the Service Portfolio Management (SPM) application.

Before you begin

Role required: admin

About this task

To configure the integration with Service Portfolio Management, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Integration with Service Portfolio Management (SPM) category, view the list of tasks to configure the feature.

Service Portfolio Management configuration tasks

Task	Description
Activate Customer Service Management with Service Portfolio Management	Activate the CSM with Service Portfolio Management (SPM) plugin to use the integration with Service Portfolio Management.
Configure form views	Configure the form layout and related lists for the Sold Product, Case, Account, and Service Offering forms. Configuration provides users with information regarding which service

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Task	Description
	offerings are associated with each sold product.
Assign roles	Assign the required roles to customer service managers based on your organization's existing roles and responsibilities.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Service Portfolio Management

Activate Customer Service Management with Service Portfolio Management

Activate the CSM with Service Portfolio Management (SPM) plugin to use the integration with Service Portfolio Management.

Before you begin

Consider using guided setup to complete the Service Portfolio Management configuration. For more information, see Integrate with Service Portfolio Management using Guided Setup.

Note:
Check your entitlements to determine whether you have access to the integration with Service Portfolio Management and the CSM with Service Portfolio Management (SPM) plugin (sn_csm_spm).

Role required: admin

Procedure

1. Navigate to **System Definition** > **Plugins**.
2. Search for the sn_csm_spm plugin.
3. Select **Activate**.

Configure form views for Service Portfolio Management integration

Configure the form layout and related lists for the Sold Product, Case, Account, and Service Offering forms to provide users with the correct visibility into which service offerings are associated with which sold products.

Before you begin

Role required: admin

Instead of doing the configuration through this procedure, consider using guided setup. For more information, see Integrate with Service Portfolio Management using Guided Setup.

Procedure

1. Navigate to **Customer Service**.
2. Add the following fields to forms and related lists, as required.

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Configure form views

Form	Procedure
Service Offering	Add the **Add the Sold Products** related list to provide service owners visibility into which customers have subscribed to which service offerings.
Product Model forms	Add the **Offerings** (**Offering** > **Model ID**) related list on the Product Model/Service Model forms to enable customer service managers to associate service offerings to product models. To enable the **Edit** button on the Offerings related list: **a.** Configure the list control and deselect the **Omit Edit** check box. **b.** Add the sn_customerservice_manager role. If you do not see the **Edit** button enabled, see Assign roles for Service Portfolio Management integration for more details. **Note:** To configure catalog items for product models, add the Catalog Items related list. For more information, see Configure product model and catalog item relationships.
Sold Products on the Account form	Add the **Service Offering** column to the Sold Products related list to enable customer service agents or managers to view service offerings associated with the sold product for an account or consumer.
Case	Add the **Service Offering** field for the Sold Product to the Case form. This enables customer service agents dealing with customer issues to see the service offering associated with sold product for a case.
Sold Product	Add the **Service Offering** field to the Sold Product form to enable customer service managers to associate a service offering to a sold product for an account or consumer.

Assign roles for Service Portfolio Management integration

Assign the required roles to customer service managers based on the roles and responsibilities in your organization.

Before you begin

Role required: admin

Instead of doing the configuration through this procedure, consider using guided setup. For more information, see Integrate with Service Portfolio Management using Guided Setup.

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Procedure

1. Assign the service_editor role to customer service managers if they need to update any service offerings they own.
2. Assign the portfolio_admin role to customer service managers if they need to associate service offerings to a product model.

Integrating with Continual Improvement Management

Integrate Customer Service Management (CSM) with the Continual Improvement Management (CIM) application to request improvement opportunities and to implement phases and tasks to meet performance goals, track progress, and measure success.

You can use CIM for improvements to Performance Analytics (PA) indicators and to service operations. For example, create a new improvement initiative to:

- Reduce the open case backlog.
- Improve the average case response time.

See Continual Improvement Management for more information about how CIM can help you with setting goals, organizing effort, and completing tasks.

Use CIM with Customer Service Management

To use CIM with Customer Service Management, you must request the Continual Improvement Management (com.sn_cim) plugin. For more information, see Request Continual Improvement Management.

Related topics

Continual Improvement Management overview

Continual Improvement Management roles

Requesting improvements

Managing improvements

Integrate with Continual Improvement Management

Customer Service Management provides an integration with the Continual Improvement Management application. This integration enables you to request improvement opportunities and to implement phases and tasks to meet performance goals, track progress, and measure success.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Continual Improvement Management (com.sn_cim) plugin.
3. Click **Activate**.

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Integrating with Field Service Management

The Customer Service with Field Service Management plugin (com.snc.csm_fsm_integration) provides an integration between the Customer Service Management and Field Service Management applications.

Users can view account and contact information on work orders and work order tasks in the Field Service Management application. Customers and consumers can view case-related work orders from the Customer Service and Consumer Service Portals.

When an agent creates a work order from a customer service case, the work order and task forms include case-related information such as the account and contact.

When a customer or a consumer views a case from either the Customer or Consumer Service Portals, they can view the details of any work orders and tasks related to the case.

Product use rights included with this application

If you have purchased a subscription for the Field Service Management (FSM) application, Customer Service Management users can create and view all FSM work orders and appointments. External CSM users can create and view FSM work orders and appointments of their own or related#accounts.

Changes to the Field Service Management application

In the Field Service Management application, this integration adds the following fields to the Work Order form. These fields are visible in the Case view. To display these fields, right-click the Work Order form header and select **View** > **Case**.

- Account
- Consumer
- Contact
- Asset
- Partner
- Partner Contact

Updating the **Account** field on the Work order form also updates the **Company** field. Updating the **Contact** field on the Work Order form updates the **Caller** field.

Changes to the Customer Service Management application

In the Customer Service Management application, this integration adds the **Work Orders** link to the Customer Service Portal and Consumer Service Portal headers. Click this link to view a list of work orders, including the work order number, priority, state, and short description. The work orders displayed in this list on the Customer Service Portal depend on the customer role: customer, customer admin, partner, or partner admin.

Click a work order in this list to display the work order details.

Known Limitations

There is no synchronization between the Work Order form and the associated Case form. If information changes on the Case form, it does not get updated on the Work Order form.

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Integrate with Field Service Management

Customer Service Management provides an integration with the Field Service Management application. This integration enables you to view work order and work order task information from a case.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Customer Service with Field Service Management plugin (com.snc.csm_fsm_integration).
3. Click **Activate**.

Integrating with IT Operations Management

The Proactive Customer Service Operations plugin (com.snc.proactive_cs_itom) provides an integration between Customer Service Management and the Event Management console in IT Operations Management.

This integration enables you to create cases proactively from alerts either manually or through automation and track the accounts and the corresponding install base items affected by the alert. It also enables you to view the service health status of their install base items.

For more information, see Integration with Event Management.

Integrate with ITOM Event Management

Customer Service Management provides an integration with the ITOM Event Management application. This integration enables you to create cases proactively from alerts either manually or through automation and track the accounts and the corresponding install base items affected by the alert.

Before you begin
Role required: admin

About this task
For more information about this integration, see Integration with Event Management.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Proactive Customer Service with Event Management plugin (com.snc.proactive_cs_itom).
3. Select **Activate**.

Integrating with Customer Project Management

Integrate Customer Service Management with the Project Portfolio Management application. This integration enables customers to manage complex projects with multiple tasks and provide end users with visibility into these projects.

Customer Service Management provides an integration with the ServiceNow® PPM Standard application, earlier known as Project Portfolio Suite with Financials.

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Customers can use this integration to create projects and project tasks for their customer accounts. Customers can also provide end users with visibility into their projects and tasks from the Customer Service Portal and enable them to request additional actions.

Product use rights included with this application

When subscribed to the Strategic Portfolio Management (SPM) Subscription Product, Customer Service Management users can create and edit projects. External CSM users can view projects#and#edit project tasks of their own or related#accounts.

Plugin

Users with the system administrator role can activate the Customer Project Management plugin (com.snc.csm_ppm).

Note:
This plugin requires the Customer Service plugin (com.sn_customerservice) and the PPM Standard plugin (com.snc.financial_planning_pmo).

The Customer Project Management plugin adds the **Customer Service** > **Projects** module to the application navigator. Users with the customer project manager role can access this module.

Customer Project Management Guided Setup

Activating the Customer Project Management plugin adds the Customer Project Management section to the Customer Service Management Guided Setup. For more information, see Integrate with Customer Project Management using Guided Setup.

Integrate with Customer Project Management using Guided Setup

Use the Customer Service Management Guided Setup to configure Customer Project Management.

Before you begin
Role required: admin

About this task
You can configure a number of different processes and components for the Customer Project Management feature using Guided Setup.

Procedure

1. Navigate to **Customer Service** > **Administration** > **Guided Setup**.
2. Select **Get Started** on the Customer Service Management home page.
3. Scroll through the list of categories, locate Customer Project Management, and select **Get Started**.

   The following table provides a description of the configuration steps included in this guided setup section.

Customer Project Management configuration tasks

Task	Description
Activate PPM Standard.	Activate the PPM Standard plugin (com.snc.financial_planning_pmo).

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Task	Description
Activate Customer Project Management.	Activate the Customer Project Management plugin (com.snc.csm_ppm).
Configure form views.	Configure the Case form and add the following fields to the Case view, Workspace view, and Customer Self-Service view: ○ Project ○ Project Task ○ Issue ○ Project Change Request
Configure related lists.	Configure the Account form and add the **Projects** related list to the Case view and Workspace view. Configure the Contact form and add the **Projects** related list to the Case view and Workspace view. Configure the Customer Project Task form and add the following related lists to the **Default** view: **Work Order** > **Initiated From**. This step can only be completed if the following plugins are active: ○ Customer Service with Field Service Management (com.snc.csm_fsm_integration) ○ Field Service with Project Management (com.snc.wm_ppm)
Configure notifications.	Configure the **Send Email to Contact when Customer Project Task is assigned** Flow Designer flow to send an email to the assigned contact when a customer project task is assigned. Configure the **Send Email to SO member when SO Customer Project Task is assigned** flow to send an email to assignees when assigned is changed on a customer project task that is customer visible. On selecting **Configure**, the following details of the selected flow are displayed and can be configured as required: ○ Project number and name ○ Task number and short description ○ Task planned start and end dates and duration
Configure Flow Designer flows.	Use Flow Designer flows provided with Customer Project Management to:

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Task	Description
	○ Configure the fields that are copied over, when you create a project issue or project change request from a case. ○ Update the work notes for a case record when the state of an associated project issue or project change request is updated. ○ Close a case record when an associated project issue or project change request is closed. **Create Project Issue from Case**: When a project issue is created from a case, this flow copies the **Priority** and **Short description** fields from the case to the project issue record. This flow is active by default. **Create Project Change Request from Case**: When a project change request is created from a case, this flow copies the **Priority** and **Short description** fields from the case to the project change request record. This flow is active by default. **Update and Close Case Record on Issue Closure**: This flow enables you to automatically: ○ Update the case work notes when the state of an associated issue is updated. ○ Close a case if the state of the associated issue is set to Closed. Activate this flow as needed. **Update and Close Case Record on Project Change Closure**: This flow enables you to automatically: ○ Update the case work notes when the state of an associated project change request is updated. ○ Close a case if the state of the associated project change request is set to Closed. Activate this flow as needed.
Assign Access Controls (ACLs)	Assign ACLs to the Customer Service Management user roles to provide access to the Project Portfolio Management tables, including the Project Change Request, Status Report, and Issues tables.

Customer Project Management personas, roles, and tables

An overview of the tasks that can be performed by the different Customer Project Management roles.

Personas and roles

The following table lists the personas, their description, and the roles included with them.

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Customer Service Management personas and roles

Persona	Description	Required roles
Customer project manager	A user who creates and manages projects for customer accounts. • Creates projects. • Set up project tasks and resource plans. • Identifies customer contacts who have access to projects and project tasks. • Assigns and manages tasks and dependencies.	• it_project_manager • sn_customerservice.projectmanager
Location Project Member [sn_bus_loc.location_project_stakeholder]	Views project details and project tasks of their respective business location. Marks project task as complete.	None
Location Project Manager Contributor [sn_bus_loc.location_manager_project_stakeholder]	Views project details and project tasks of their respective business location and child business locations. Marks project task as complete.	None
Service Organization Project Manager [sn_service_org.project_manager]	This role can perform the following actions: • Project initiation: Creates and launches projects **Note:** Service Organization project manager and customer project manager can access all project modules. • Project planning: Develops project plans, such as, task assignments and resource allocation.	• sn_bus_loc.ibl_viewer • sn_bus_loc.ebl_viewer

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Customer Service Management personas and roles (continued)

Persona	Description	Required roles
	Note: On task assignment, an automated mail is generated. Update "Send Email to Contact when Customer Project Task is assigned" flow to disable or enable notifications. • Task management: Monitors and manages task dependencies and execution. • Coordination: Views and collaborates with location staff, assigning, and tracking tasks of their respective location.	
Project stakeholder	A user who is responsible for activities that require viewing customer project details and project tasks.	• sn_customerservice.projectstakeholder • Minimum one CSM role
Customer service agent	A user who can create cases from projects and project tasks and resolve cases within the set SLA. • work on cases created from projects and project tasks. • Communicates with the customer on case status.	• sn_customerservice_agent • sn_customerservice.projectstakeholder
Customer	An external user who is responsible for overseeing the project delivery. • Review project status and progress on the Customer Service Portal. • Completes assigned tasks. • Creates cases for project issues.	Any of the following CSM external roles: • sn_customerservice.customer • sn_customerservice.customer_admin • sn_customerservice.partner • sn_customerservice.partner_admin

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Tables

Tables are added with activation of the Customer Project Management plugin.

Customer Project Management tables

Table	Description
Customer Project [customer_project]	Stores customer projects.
Customer Project Task [customer_project_task]	Stores customer project tasks
Project Contact [project_contact]	Stores project contacts.

The following columns are added to the Case table:

- Customer Project
- Customer Project Task
- Issue
- Project Change Request

Customer Project Management domain separation

With Customer Project Management, you can create customer projects for customer accounts. Domain separation for customer projects is based on the account domain. New projects are created in the same domain as the associated customer account.

Customer project child entities use the domain of the parent project. Child entities include:

- Project tasks
- Requirements
- Project budget
- Status reports
- Risks
- Issues
- Decisions
- Actions
- Project change requests
- Stakeholders
- Project contacts
- Expense lines
- Time cards

The project manager can add sub projects to a customer project if the sub projects belong to the following accounts:

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- Accounts in the same hierarchy as the main project account.
- Accounts that have a relationship to the main project account.

Customer project manager tasks

A customer project manager can perform specific tasks to manage projects for customer accounts.

A customer project manager requires the following roles to perform the tasks described in the following table:

- it_project_manager
- sn_customerservice.projectmanager

Customer project manager tasks

Task	Details
Create a project for a customer account	1. Navigate to **Customer Service** > **Projects** > **Create New**. 2. Enter a name for the project in the **Project Name** field. 3. Select an account in the **Account** field. 4. Fill in additional project information. 5. Click **Save**.
Create a project for a customer account from a project template	1. Navigate to **Customer Service** > **Projects** > **Create New**. 2. Click a template at the bottom of the form to apply the template to the project. If the templates do not appear at the bottom of the form, click the More options icon at the top of the form and select **Toggle Template Bar**. 3. Enter a name for the project in the **Project Name** field. 4. Select an account in the **Account** field. 5. Fill in additional project information. 6. Click **Save**.
Create a project task for a customer project	1. Navigate to **Customer Service** > **Projects** > **All**. 2. Select a project. 3. In the **Project Tasks** related list, click **New**. 4. Add a short description for the task.

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Customer project manager tasks (continued)

Task	Details
	5. Fill in additional project task information. 6. Click **Save**.
Identify the project tasks on a project template that are visible to external customers	1. Navigate to **Customer Service** > **Projects** > **Templates**. 2. Select a template. 3. In the **Project Template Tasks** related list, select a task. 4. In the Data section of the Project Template Task form, add the **Visible to customer** field and set it to **true**. 5. Click **Update**. 6. Repeat for other project tasks as needed.
Identify project tasks that are visible to external users	1. Navigate to **Customer Service** > **Projects** > **All**. 2. Select a project. 3. In the **Project Tasks** related list, select a task. 4. Enable the **Visible to customers** field. 5. Click **Save**.
Identify the account contacts who have access to a project	To give customers visibility into projects from the Customer Service Portal, you must add one or more contacts to the project. • Contacts must belong to the account linked with the project. • Partner contacts must have access to the account linked with the project. • Contacts who have a relationship with the account can also be added to the project. 1. Navigate to **Customer Service** > **Projects** > **All**. 2. Select a project. 3. In the **Project Contacts** related list, click **New**. 4. Select a contact in the **Contact** field and click **Submit**.

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Customer project manager tasks (continued)

Task	Details
Assign project tasks to internal users, customer contacts, or customer partner contacts	See Assign a project task .
See the cases that have been created for a project or project task	View cases in the **Cases** related list on the Customer Project form and Customer Project Task form. Click a case to view the case details. **Note:** The customer project manager has read-only access to the Case form.
Add a comment or an attachment to a case that has been created for a project or project task	1. Navigate to **Customer Service** > **Projects** > **All**. 2. Select a project. 3. In the **Cases** related list, select a case. 4. Add a comment in **Additional comments** field. 5. Click the attachment icon, select a file, and attach it to the case. 6. Click **Update**.
Create project change requests and project issues for cases that have been created for a project or project task	See the following tasks: • Create a project issue for a case • Create a project change request for a case
Save a customer project as a template	1. Navigate to **Customer Service** > **Projects** > **All**. 2. Select a project. 3. Click the **Save as New Template** related link. 4. In the Create Template popup window, enter a template name and description. 5. Click **OK**. 6. Update the template as needed and click **Update**.

Assign a project task

The customer project manager can assign a customer project task to an internal user, a customer or partner contact, or a contact that has a relationships to the account.

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Before you begin
Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

About this task
Assigning a task to an external user enables the **Visible to customer** field on the Project Task form. Customers can view assigned tasks in the Project Tasks list on the Customer Service Portal. The system sends an email notification to the customer when a customer project task is assigned.

Procedure
1. Navigate to **Customer Service** > **Projects** > **All**.
2. Click a project in the Customer Projects list.
3. Click the **Project Tasks** related list on the Customer Project form.
4. Click a task to open the Customer Project Task form.
5. Select a contact or partner contact in the **Assigned to** field.
   Users are stored in the User [sys_user] table.
6. Click **Update**.
   The system sends an email notification to the assigned user.

Create a project issue for a case

The customer project manager can create project issues for cases that have been created for customer projects and project tasks.

Before you begin
Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

About this task
The project manager can create one issue for a case.

Procedure
1. Navigate to **Customer Service** > **Projects** > **All**.
2. Click a project in the Customer Projects list.
3. In the **Cases** related list, click a case.
4. Click **Create Issue** on the Case form.
   The system creates a new issue for the project and copies the **Short description** and **Priority** from the case.
5. Fill in the details for the issue and click **Save**.
   The system does the following after you save the issue:
   - Adds the case number to the activity stream on the Issue form.
   - Adds the issue number to the activity stream on the Case form.
   - Adds the issue to the **Issues** related list on the Customer Project form.
   - Adds the issue to the **Issue** field in the Related Records section of the Case form.

Create a project change request for a case

The customer project manager can create project change requests for cases that have been created for customer projects and project tasks.

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Before you begin
Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

About this task
The project manager can create one project change request for a case.

Procedure
1. Navigate to **Customer Service** > **Projects** > **All**.
2. Click a project in the Customer Projects list.
3. In the **Cases** related list, click a case.
4. Click **Create Project Change Request** on the Case form.
   The system creates a new change request for the project, copies the case short description to the **Title** field, and the case priority to the **Priority** field.
5. Fill in the details for the change request and click **Save**.
   The system does the following after you save the change request:
   - Adds the case number to the activity stream on the Project Change Request form.
   - Adds the project change request number to the activity stream on the Case form.
   - Adds the project change request to the **Project Change Requests** related list on the Customer Project form.
   - Adds the project change request to the **Project Change Request** field in the Related Records section of the Case form.

Create a customer project from an idea

Create a customer project from an idea on the Idea Portal.

Before you begin
Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

About this task
The Idea Portal provides a central location to collect, curate, and promote ideas into demand, project, epic, or story. With the Customer Service Management integration with Project Portfolio Management, you can also create a customer project from an idea. For more information, see Idea Portal.

Procedure
1. Navigate to **All** > **Ideas** > **Idea Portal**.
2. Click the title of an idea that you want to create a task for.
3. Open the idea in form view by clicking the More Options icon and selecting **Open in platform**.
4. In the Idea pop-up window, click **Create Task**.
5. In the Convert Idea to Task pop-up window, select Customer Project in the **Select task type** field and click **OK**.
   The system creates the project and displays the project number in an information message at the top of the Idea pop-up window. On the Customer Project form, the idea record is added to the Ideas related list.

Create a customer project from a demand

Create a customer project from a demand record.

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Before you begin

Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

Procedure

1. Create a demand record by navigating to **Demand** > **Demands** > **Create New**.
2. Fill in the fields on the Demand form and click **Save**.
   For more information about the fields on this form, see Create a demand.
3. Open the demand record and click the **Create Project** related link.
4. In the Create Project pop-up window, select Customer Project in the **Project class** field.
5. Click **OK**.
   The system creates the project and displays the project number in an information message at the top of the Demand form. On the Customer Project form, the demand record is added to the Demands related list.

Customer service agent tasks

A customer service agent can view customer projects and create cases for customer projects and tasks.

An agent must have the following roles to perform the tasks described in the following table:

- sn_customerservice_agent
- sn_customerservice.projectstakeholder

Customer service agent tasks

Task	Details
View customer projects	Customer service agents can view a list of customer projects by navigating to **Customer Service** > **Projects** > **All**. Click a project in this list to view project details on the Customer Project form, including project tasks, project contacts, and sub projects. **Note:** Agents have read-only access to project details.
View the projects and project tasks created for an account	Customer service agents can see projects that are linked to customer accounts. From a customer account record, agents can see the projects for that account in the **Projects** related list. Click a project in this list to view project details on the Customer Project form, including project tasks, project contacts, and sub projects.

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Customer service agent tasks (continued)

Task	Details
	Note: Agents have read-only access to project details.
See the projects and project tasks associated with a contact	Customer service agents can see the projects and project tasks that are associated with a contact. Navigate to **Customer Service** > **Customer** > **Contacts** and select a contact. • Click the **Projects** related list to see projects. • Click the **Project Tasks** related list to see tasks. **Note:** If necessary, configure the Contact form to add these related lists.
Create a case for a project	Customer service agents and agent managers can create cases for customer projects. When creating a case, the agent selects a project in the **Project** field on the Case form. • If an account has been selected in the **Account** field, the agent can select from the projects that are associated with that account. • If the **Account** field is empty, the agent can select from all projects that have been created for an account. Upon selection, the **Account** field is populated with the associated account. When created from a project, these fields are automatically set on the Case form. Cases created for a project appear in the **Cases** related list on the Customer Project form.
Create a case for a project task	Customer service agents and agent managers can create cases for customer project tasks. When creating a case, the agent selects a task in the **Project Task** field on the Case form. • If a project has been selected in the **Project** field, the agent can select from the project tasks that have been created for that project.

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Customer service agent tasks (continued)

Task	Details
	• If the **Project** field is empty, the agent can select from the project tasks for all projects that have been created for an account. Upon selection, the **Project** and **Account** fields are populated with the associated project and account. When created from a project task, these fields are automatically set on the Case form. Cases created for a project task appear in the **Cases** related list on the Customer Project form and the Customer Project Task form.

Customer tasks

From the Customer Service Portal, external users can view projects, complete assigned tasks, and create cases for project issues.

A user must have one of the following CSM external roles to perform the tasks described in the following table:

- sn_customerservice.customer
- sn_customerservice.customer_admin
- sn_customerservice.partner
- sn_customerservice.partner_admin

Various customer tasks

Task	Details
View projects and project details	Customers can view the projects created for their accounts if they've been associated with the project as a project contact. Customers have read-only access to project details on the Customer Project form. Customers can also view records in the following related lists if the system administrator has configured the corresponding ACLs for each of the tables. • Customer Project Tasks • Project Change Requests • Status Reports • Sub Projects • Work Orders • Project Contacts

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Various customer tasks (continued)

Task	Details
	Note: The Work Orders related list is displayed if the following plugins are active: Field Service with Project Management (com.snc.wm_ppm) and Customer Service with Field Service Management (com.snc.csm_fsm_integration). To view projects: 1. Click **Support** in the Customer Service Portal header. 2. Click **Projects** and select a project from the Customer Projects list. 3. View the details in the Customer Project form.
View and update project tasks	Customers can view project tasks for the projects that have been created for their accounts if: • They have been associated with the project as a project contact. • The project tasks have been marked as **Visible to customer**. Customers can view and update project tasks that have been assigned to them by the customer project manager. To view and update project tasks: 1. Click **My Lists** in the Customer Service Portal header. 2. Click **My Project Tasks** and select a task from the Customer Project Tasks list. 3. View the details in the Customer Project Task form. 4. Update the **Actual start date** and **Actual end date** fields as needed and click **Save**. 5. Add a comment in the **Activity** field and click **Post**. **Note:** Customers can also view tasks directly from **Support** > **Projects** > **Project Tasks**.
Complete project tasks	When a customer completes the work for a project task, they can mark the task as complete.

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Various customer tasks (continued)

Task	Details
	1. Click **My Lists** in the Customer Service Portal header. 2. Click **My Project Tasks** and select a task from the Customer Project Tasks list. 3. Click **Mark Complete** in the Actions widget.
Create cases for projects and project tasks	Customers can create cases for projects and project tasks if they have been associated with a project as a project contact. Customers can create cases in two ways: • From a project or, project task form. • From the Case menu in the Customer Service Portal header. To create a case from a project or project task: 1. Navigate to a Customer Project form or a Customer Project Task form. 2. Click **Create Case** in the Actions widget. 3. Fill in the fields on the Create Project Case record producer. The **Project** and **Project Task** fields are auto populated. 4. Click **Submit**. To create a case from the Case menu. 1. Click **Case** in the Customer Service Portal header and select **Create Project Case**. 2. Fill in the fields on the Create Project Case record producer. 3. Click **Submit**. The Create Project Case record producer includes **Project** and **Project Task** fields. These fields are displayed if a customer has access to any of the project tasks. Project and project task selection is limited to the projects for the customer's account.
View a list of cases created for the projects and project tasks for an account	Customer administrators, partner administrators, and customer case managers can see all cases that have been created for the projects and project tasks for an account. 1. Click **My Lists** in the Customer Service Portal header. 2. Click **All Cases** in the My Lists widget.

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Various customer tasks (continued)

Task	Details
View the project change request and project issue records created for a case	Customer contacts can view the project change request and project issue records that have been created for a case if: • They have been added to a project as a project contact. • The system administrator has configured the corresponding ACLs for each of the tables. 1. Click **My Lists** in the Customer Service Portal header. 2. Click **All Cases** in the My Lists widget. 3. Select a case from the Cases list. 4. View the records in the Related Records widget.

Customer Service Investment Portal

The Customer Service Management integration with Project Portfolio Management provides access to a CSM-specific view of the Investment Portal, which displays customer projects.

Use the CSM Investment Portal to do the following:

- Add CSM-specific columns to investment boards
- Add filters to CSM-specific columns on investment boards

You can view both customer projects and IT projects in the IT Investment Portal. For more information, see Investment Portal in the Project Management documentation.

Create an investment board on the CSM Investment Portal

Create an investment board on the CSM Investment Portal and add the desired customer service project-specific information.

Before you begin

Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

Procedure

1. Navigate to **All** > **Customer Service** > **Projects** > **Investment Portal**.
2. Click **New**.
3. Fill in the fields on the Create New pop-up window.
   For more information about these fields, see Create an investment board.
4. Click **Create**.
   Once the investment board is created, it opens up in the CSM Investment Portal page.

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Integrating with Financial Management

Customer Service Management and Field Service Management provide an integration with the ServiceNow® Financial Management application as well as dashboards and reports.

The Financial Management application enables you to allocate, track, and report on expenses in your organization. When the Financial Management application allocates an expense, it breaks down the expense into detailed amounts of money called allocations. These allocations can be associated with specific segments and accounts for a specific cost model. The integration with Financial Management provides cost allocations for Customer Service Management and Field Service Management.

Use these cost allocations on the Financial Management workbench, which provides financial administrators with a graphical interface to allocate expenses. Access the workbench through the **Cost Transparency** > **Workbench** module.

Plugins

Two different plugins, one for Customer Service Management and one for Field Service Management, enable the integration with Financial Management. These plugins also add dashboards based on cost allocations.

- Performance Analytics - Content Pack - Financial Management for Customer Service plugin (com.snc.pa.fm.csm).
- Performance Analytics - Content Pack - Financial Management for Field Service Management plugin (com.snc.pa.fm.fsm)

The Performance Analytics - Content Pack - Financial Management for Customer Service plugin includes demo data for FY16: Q1 through FY17: Q2. The demo data includes records with the CSFM prefix, which indicates that the records are for the Customer Service Management integration with Financial Management. Activating the plugin adds these records to the Case (sn_customerservice_case) table.

Note:
The Performance Analytics - Content Pack - Financial Management for Field Service Management plugin doesn't include demo data.

Cost models

A cost model is a set of rules, methods, and metrics that determines the allocation of expenses. Select cost models on the Data Definitions tab of the Financial Management workbench.

For Customer Service Management, the integration with Financial Management provides these cost models:

- **CSM Allocation Model for Cost Account**: Allocates expenses for individual B2B customer accounts.
- **CSM Allocation Model for Channels**: Allocates expenses for communication channels.

For Field Service Management, the integration with Financial Management provides this cost model:

FSM Allocation Model for Company: Allocates expenses for companies.

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Segment hierarchy

All accounts in the chart of accounts belong to segments which are structured in a hierarchy. This hierarchy enables the roll-up of expenses from lower-level accounts and segments to higher-level accounts and segments.

- **CSM Allocation Model for Cust Account** uses this segment hierarchy: Assignment Group > Product > Customer Account.
- **CSM Allocation Model for Channels** uses this segment hierarchy: Assignment Group > Product > Channels.
- **FSM Allocation Model for Company** uses this segment hierarchy: Assignment Group > Product > Company.

Account buckets

Use account buckets to categorize cleansed expenses before assigning them to accounts and segments. Account buckets can be organized in parent-child relationships so that several child buckets can refer to a single parent bucket.

The Customer Support and Field Service Support account buckets include:

- Facilities
- IT Chargeback
- Payroll and Labor Expenses
- Professional Fees & Services
- Supplies
- Training
- Other expenses

Allocation metrics

Allocation metrics are rules that you can create and use to split an allocation based on dimensions such as:

- Number of Customer Service cases: Allocate expenses to a product based on the number of cases closed in a fiscal period.
- Total Customer Service case resolution time: Allocate expenses to a product based on the total hours worked on cases closed in a fiscal period.
- Number of Field Service work order tasks: Allocates expenses to a product based on the number of work order tasks completed in a fiscal period.
- Total work order completion time: Allocates expenses to a product based on the total hours worked on tasks completed in a fiscal period.

For Customer Service Management, the integration with Financial Management provides these allocation metrics:

- CSM Allocate to Assignment Groups by Headcount
- CSM Allocate to Product by # Cases
- CSM Allocate to Product by Case Time Worked Duration
- CSM Rollup from AssgGrp to Product by # Cases
- CSM Rollup from AssgGrp to Product by Case Time Worked Duration

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- CSM Rollup from Product to Account by # Cases
- CSM Rollup from Product to Account by Case Time Worked Duration

For Field Service Management, the integration with Financial Management provides these allocation metrics:

- FSM Allocate to Assignment Groups by Headcount
- FSM Allocate to Product by # Work Orders
- FSM Rollup from Product to Company by # Work Orders

User roles

These roles can access the Financial Management workbench (**Cost Transparency** > **Workbench**):

- cost_transparency_analyst
- cost_transparency_admin
- financial_mgmt_user
- financial_mgmt_admin

Dashboards and reports

The Performance Analytics - Content Pack - Financial Management for Customer Service and Performance Analytics - Content Pack - Financial Management for Field Service Management plugins provide the following dashboards:

- CSM Financials Dashboard
- FSM Financials Dashboard

Navigate to **Performance Analytics** > **Dashboards** and select the desired dashboard from the Dashboard menu.

Related topics

Financial Management

Financial Management Workbench

Integrate with Financial Management

Customer Service Management provides an integration with the ServiceNow® Financial Management application as well as dashboards and reports.

Before you begin

Role required: admin

About this task

Note:
The Financial Management For CSM plugin (com.snc.financial_management_for_csm) is no longer available for direct activation by the system administrator. You can request this plugin through the HI Customer Service system.

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Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Performance Analytics - Content Pack - Financial Management for Customer Service plugin (com.snc.pa.fm.csm).
3. Click **Activate**.

Integrating with Adobe Experience Manager

Extend Customer Service Management and Knowledge Management capabilities through ServiceNow components in Adobe Experience Manager (AEM) to deliver a pre-integrated web experience for external customers.

When working with a website built on AEM, you can embed Customer Service Management and Knowledge Management capabilities related to customer service cases and knowledge articles respectively within the website. The integration with AEM provides the following advantages:

- Use ServiceNow knowledge and case components on your branded websites built on AEM.
- Ensure a unified and consistent experience for end users to access information when and where they need it.

Supported AEM versions

Beginning with AEM 6.5, you can add knowledge and case components to pages of your websites built on AEM and use pages available within the ServiceNow site in AEM as a reference to design your website content. For more information, see ServiceNow pages in Adobe Experience Manager, Display ServiceNow knowledge articles on an Adobe Experience Manager page, and Display ServiceNow cases on an Adobe Experience Manager page.

ServiceNow Components for AEM package

Install the **ServiceNow Components for AEM** package on your AEM instance. You can download the package by using the direct download URL or accessing the package at https://experience.adobe.com/downloads. For more information, see Experience Cloud Software Distribution in the Adobe Help Center.

After you install the package, configure authentication and integration settings for ServiceNow services and components in AEM. For more information, see Configuring authentication settings for ServiceNow services and components in AEM and Configuring integration settings for ServiceNow services and components in AEM.

Integrate Customer Service Management with Adobe Experience Manager

Deliver a pre-integrated web experience for external customers by using ServiceNow components in Adobe Experience Manager (AEM).

Before you begin

Role required: admin

About this task

This task provides the general steps to integrate Customer Service Management and Knowledge Management capabilities with AEM.

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Procedure

1. Install the **ServiceNow Components for AEM** package on your AEM instance.
   You can download the package by using the direct download URL or accessing the package at https://experience.adobe.com/downloads. For more information, see Experience Cloud Software Distribution in the Adobe Help Center.
2. Configuring authentication settings for ServiceNow services and components in AEM.
3. Configuring integration settings for ServiceNow services and components in AEM.

Configuring authentication settings for ServiceNow services and components in AEM

Enable logging in to both the Adobe Experience Manager (AEM) instance of your website and the ServiceNow instance using a third-party OpenID Connect (OIDC) provider that supports both OIDC and single sign-on (SSO) protocols.

You can select Okta or Microsoft Azure as the third-party OIDC provider that supports both OIDC and single sign-on (SSO) protocols.

Note:
Your AEM instance must use the selected third-party OIDC provider as the SSO provider.

Register ServiceNow with a third-party OIDC provider

Register ServiceNow as a web application with a third-party OIDC provider to validate the identity of a user using a JSON Web Token (JWT).

Before you begin

ServiceNow identifies an end user by sending the JWT token containing the end user information to the OIDC provider. The process to register ServiceNow with the OIDC provider varies depending on the provider.

Note:

This topic uses Okta as an example, but you can substitute the details of your own OIDC provider.

Role required: Okta account (Third-party OIDC provider account)

Procedure

1. Log in to your Okta account.
2. Select the Applications menu.
3. On the Applications page, click **Add Application**.
4. On the Create New Application page, select **Web**.
5. Fill in the fields.

OIDC settings

Field	Value
Application label	Unique application name for your ServiceNow instance.
Authorization Code	Selected

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Field	Value
Refresh Token	Selected
Login redirect URIs	Callback URL of your AEM instance. The URL structure is: `https://<AEM-instance>:<AEM_port>/bin/now/auth/callback`
Login initiated	App Only

6. Click **Done**.

What to do next
In the Client Credentials section, record the Client ID and Client secret values for when you set up Okta as an OAuth provider in your ServiceNow and AEM instances.

Add an OIDC provider to the ServiceNow instance

Add a third-party OIDC provider service to your ServiceNow instance to verify the identity of end users.

Before you begin
You must have configured the third-party OIDC provider service as an OAuth provider and recorded your **Client ID** and **Client secret** values. For more information, see Register ServiceNow with a third-party OIDC provider.

Role required: oauth_admin

Procedure
1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Set up OAuth for your ServiceNow instance.
   - Click **New**, select **Configure an OIDC provider to verify ID tokens**, and then fill in the Application Registries form.
   - Select an existing template for your OIDC provider (Okta or Microsoft Azure), and then either accept the default values in the Application Registries form or modify them.

     Note:
     OIDC provider templates are available after loading demo data with the OAuth 2.0 plugin. For more information, see Configure an OAuth OIDC provider.

Application Registries form

Field	Description
Name	Unique name for the OAuth provider.
Client ID	Client ID you recorded earlier for your ServiceNow instance registered in the third-party OIDC server. The ServiceNow instance uses the client ID when requesting an access token.
Client Secret	Client secret you recorded earlier for your ServiceNow instance registered in the third-party OIDC server.

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Field	Description
OAuth OIDC Provider Configuration	OIDC provider with which you registered your ServiceNow instance. **Note:** Select the record of your OIDC provider configuration or create another configuration, if not available, to ensure that the **OIDC Metadata URL** field value is correct and the **User Claim** and **User Field** fields are mapped correctly.

3. Save your changes.
   - For an existing template, click **Update**.
   - For a new template, click **Submit**.

Configure OIDC provider details in Adobe Experience Manager

Configure the third-party OIDC provider details in your Adobe Experience Manager (AEM) instance to access the ServiceNow components as an authenticated user.

Before you begin

You must have configured the third-party OIDC provider service as an OAuth provider and recorded your **Client ID** and **Client secret** values (see Register ServiceNow with a third-party OIDC provider).

Role required: AEM administrator

About this task

Configure the OIDC provider details in AEM to enable the AEM users to access the ServiceNow instance as authenticated users. If you don't configure the OIDC provider details in AEM, an AEM user is considered as a public user when accessing the ServiceNow instance.

Procedure

1. Access the web console in AEM with a URL in the following format: `https://<AEM_hostname>:<AEM_port>/system/console/configMgr`.
2. Search for `ServiceNow OAuth Configuration`.
3. In the **Name** column, click the **ServiceNow OAuth Configuration** link.
4. Provide values for the configuration settings.

ServiceNow OAuth Configuration settings

Field	Description
ServiceNow Client ID	Client ID you recorded when setting up the OAuth for your ServiceNow instance.
ServiceNow Client Secret	Client secret you recorded when setting up the OAuth for your ServiceNow portal.
OAuth Provider Auth URL	Authorization server end point used for obtaining the authorization code. In the following URL structure, substitute the domain name of the authorization server of your third-party OIDC provider. Example: `https://<auth_server_domain>/oauth2/authorize`

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Field	Description
OAuth Provider Access Token URL	Authentication server endpoint used for exchanging the authorization code for an access token. In the following URL structure, substitute the domain name of the authorization server of your third-party OIDC provider. Example: `https://<auth_server_domain>/oauth2/token`
Authorization request scope	List of scopes for limiting the authorization access. **Note:** The default value `openid email profile offline_access` works for most OIDC providers (for example, Okta).
User property to store refresh token	Name of the user property to store the authentication refresh token. **Note:** Once filled, this token is used to obtain access tokens for that user in all future requests.

5. Click **Save**.

Configuring integration settings for ServiceNow services and components in AEM

You have to set up your ServiceNow services and components to integrate with your Adobe Experience Manager (AEM) instance.

Settings to enable use of ServiceNow services in AEM

You can define the following types of configuration settings for ServiceNow services in AEM:

- Authentication settings with a third-party OIDC provider (see Configure OIDC provider details in Adobe Experience Manager).
- Specific settings for ServiceNow services (see Define OSGi configuration settings for ServiceNow services).
- Log file settings for ServiceNow services (see Configure log file settings for ServiceNow services in Adobe Experience Manager).

Settings for using ServiceNow components in AEM

To use the Knowledge API endpoint on your AEM instance, you have to define the cross-origin resource sharing (CORS) rule on your ServiceNow instance. For more information, see Define a cross-origin resource sharing rule to access ServiceNow API endpoints from AEM.

Define OSGi configuration settings for ServiceNow services

Define OSGi configuration settings for ServiceNow services used by ServiceNow components in Adobe Experience Manager (AEM).

Before you begin
Role required: AEM administrator

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Procedure

1. Access the web console in AEM using a URL in the following format: `https://<AEM_hostname>:<AEM_port>/system/console/configMgr`.
2. Search for `ServiceNow Configuration`.
3. In the **Name** column, click the **ServiceNow Configuration** link.
4. Provide values for the configuration settings.

ServiceNow Configuration settings

Field	Description
Base Instance URL	Complete URL of your ServiceNow instance.
Knowledge Bases	System identifier (sys_id) of a knowledge base that contains associated knowledge articles. For multiple entries, separate the knowledge bases with commas. **Note:** A blank value indicates articles from all knowledge bases in your ServiceNow instance are accessible to a user with appropriate permissions.
Show Articles in All Languages	Option to show knowledge articles in all languages for ServiceNow components.

5. Click **Save**.

Configure log file settings for ServiceNow services in Adobe Experience Manager

Configure log file settings for ServiceNow services in Adobe Experience Manager (AEM) to generate debug logs to help identify issues in the authentication process.

Before you begin

Role required: AEM administrator

Procedure

1. Access the web console in AEM using a URL in the following format: `https://<AEM_hostname>:<AEM_port>/system/console/configMgr`.
2. Navigate to **OSGi** > **Configuration**.
3. Search for and select **logs/project-servicenow-components.log: info**.
4. Verify the default field values, or fill in your own values for a custom configuration.

Logger configuration settings

Field	Value
Log Level	Debug
Log File	Path of the ServiceNow log file.
Message Pattern	Message-format pattern for formatting log messages.

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Field	Value
Logger	Logger name for ServiceNow login services.
Additivity	Option to disable sending logs to an appender attached higher in the hierarchy.

5. Click **Save**.

Define a cross-origin resource sharing rule to access ServiceNow API endpoints from AEM

Define a cross-origin resource sharing (CORS) rule on your ServiceNow instance to access endpoints of the Knowledge Management REST API, Case API, or CSM Attachment API from your Adobe Experience Manager (AEM) instance.

Before you begin

Ensure that you have configured the API for which you are defining the CORS rule.

- Activate the Knowledge API plugin (sn_km_api) to use the Knowledge Management REST API endpoints for knowledge articles. For more information, see Knowledge Management REST API.
- Activate the Customer Service plugin (com.sn_customerservice) to use the Case API endpoints for customer service cases. For more information, see Case API.
- Configure the *glide.rest.attachment_csm_api.allowed_tables* system property and include the Case [sn_customerservice_case] table to use the CSM Attachment API end points for case attachments. For more information, see CSM Attachment API.

Role required: web_service_admin

About this task

Procedure

1. Navigate to **All** > **System Web Services** > **CORS Rules**.
2. Click **New**.
3. On the CORS Rule form, fill in the fields.

CORS Rule form

Field	Description
Name	Name for identifying your CORS rule.
REST API	REST API this CORS rule applies to. ○ For knowledge articles, select **Knowledge Management REST API [sn_km_api/knowledge]**. ○ For customer service cases, select **Case [sn_customerservice/case]**. ○ For case attachments, select **CSM Attachment API [now/attachment_csm]**
Domain	AEM instance that this CORS rule applies to.
Max age	Number of seconds to cache the client session.

4. In the HTTP Methods related list, select HTTP methods to send a request to a web service provider.

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- For knowledge articles, select **GET**.
- For customer service cases, select **GET**, **PUT**, **POST**.
- For case attachments, select **GET**, **POST**, **DELETE**.

5. For Case API, in the **Exposed headers** field of the HTTP Headers related list, enter `X-Total-Count`.
6. Click **Submit**.

Customizing the colors of ServiceNow components in AEM

You can define the look and feel of the ServiceNow components in Adobe Experience Manager (AEM) by specifying colors for them.

As an AEM administrator, you can either modify the color variables preconfigured for all components or use the *`initializeCSS`* function for customizing the colors of a particular component using a custom CSS class. You specify the custom CSS class for a component in the **Custom CSS Class** property. For more information, see Display ServiceNow knowledge articles on an Adobe Experience Manager page and Display ServiceNow cases on an Adobe Experience Manager page.

Note:
By default, the ServiceNow components are configured using the Bootstrap v4.4.1 CSS styles. If your AEM page uses a different Bootstrap version, the ServiceNow components style is overridden by the page style.

Modify the color theme for all ServiceNow components in AEM

Set the color theme for the ServiceNow components in Adobe Experience Manager (AEM) all at once by configuring the color variables.

Before you begin
Role required: AEM administrator

About this task
Note:
By default, the ServiceNow components are configured using the Bootstrap v4.4.1 CSS styles. If your AEM page uses a different Bootstrap version, the ServiceNow components style is overridden by the page style.

Procedure
1. Open CRXDE Lite in your browser.
   For example, in your browser, enter the URL in the format `http://<AEM_hostname>:<AEM_port>/crx/de`. The default URL for CRXDE Lite is `http://localhost:4502/crx/de`.
2. Navigate to **apps** > **servicenow-components** > **clientlibs** > **clientlib-common**.
3. Open the `variables.less` file.
4. Configure the color variables available for the HTML elements in the ServiceNow components.

Color variable settings

Color setting	Variable
Text content	@text-color
Hyperlinks	@link-color

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Color setting	Variable
Badges	@badge-text-color
Badges background	@badge-background-color
Primary color for visual emphasis	@primary-color
Color complementary to the primary color, for visual emphasis	@secondary-color
Component titles	@title-color
Primary button text	@primary-btn-text-color
Primary button background	@primary-btn-bkg-color
Secondary button text	@secondary-btn-text-color
Secondary button background	@secondary-btn-bkg-color

Note:
You specify a color for a variable in one of the following ways:

- Color name

  For example, `red`

- HEX value

  For example, `#FF0000`

- RGB value

  For example, `rgb(255,0,0)`

- *`var`* function

  Use the var function to specify a custom property for a color. For example, `var(--gray-dark)`.

5. From the CRXDE Lite menu, click **Save All** to save the changes on the AEM server.

Modify the color theme for a ServiceNow component in AEM

Override the color theme for a ServiceNow component in Adobe Experience Manager (AEM) by using the *`initialize`* function.

Before you begin
Role required: AEM administrator

About this task
The color variables specified in the `variables.less` file are applied to all ServiceNow components in AEM. You can override the default colors for a particular component by setting the color variables for the component in the *`initializeCSS`* function.

Note:
By default, the ServiceNow components are configured using the Bootstrap v4.4.1 CSS styles. If your AEM page uses a different Bootstrap version, the ServiceNow components style is overridden by the page style.

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Procedure

1. Open CRXDE Lite in your browser.
   For example, in your browser, enter the URL in the format `http://<AEM_hostname>:<AEM_port>/crx/de`. The default URL for CRXDE Lite is `http://localhost:4502/crx/de`.
2. Navigate to **apps** > **servicenow-components** > **clientlibs** > **clientlib-common**.
3. Open the `variables.less` file.
4. Specify the *`initializeCSS`* function for a component in the format `<component_type>;<class_name>;<color_variable_1>;<color_variable_2>;<color_`
   - component_type: The type of the component on which you want to apply the custom color theme, for example, articlelist, articleview, casecards, and so on.
   - class_name: The Custom CSS class you enter in the **Custom CSS class** property of your component.
   - color_variable_1, color_variable_2, color_variable_n: The color variables that you specify for the HTML elements in a component. For more information, see the Color variable settings table.

   Use the following sample code as a reference for color styling at the component level.

```
.initialize(@componentType:articlelist;@className:now-article-l
ist;@text-color:red;
 @link-color:orange;@badge-text-color:blue;@badge-background-co
lor:yellow;@title-color:magenta;@secondary-color:indigo;);
.initialize(@componentType:articleview;
 @className:now-article-view;@text-color:red;
 @link-color:orange;@badge-text-color:blue;@badge-background-co
lor:yellow;@secondary-color:indigo;);
.initialize(@componentType:casecards;
 @className:now-case-cards;
 @text-color:red;@link-color:orange;@badge-text-color:blue;@bad
ge-background-color:yellow;@title-color:magenta;@secondary-colo
r:indigo;);
.initialize(@componentType:caselist;
 @className:now-case-list; @text-color:red;
 @link-color:orange;@title-color:magenta;@primary-color:green;@
secondary-btn-text-color:white;@secondary-btn-bkg-color:black
;);
.initialize(@componentType:searchbox;
 @className:now-search-box; @text-color:red;
 @link-color:orange;@title-color:magenta;@primary-color:green;@
secondary-btn-text-color:white;@secondary-btn-bkg-color:black
;);
.initialize(@componentType:searchresults;@className:now-search-
results;@text-color:gray;
 @link-color:orange;@badge-text-color:blue;@badge-background-co
lor:yellow;@title-color:magenta;@secondary-color:indigo;);
.initialize(@componentType:caseview;@className:now-case-view;@t
ext-color:red;@link-color:orange;@primary-color:green;@secondar
y-color:indigo;@primary-btn-text-color:blue;@primary-btn-bkg-co
lor:white;@secondary-btn-text-color:white;@secondary-btn-bkg-co
lor:blue;);
.initialize(@componentType:createcase;@className:now-create-cas
e;@text-color:red;@link-color:orange;@primary-color:green;@seco
ndary-color:indigo;@primary-btn-text-color:blue;@primary-btn-bk
```

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```
g-color:white;@secondary-btn-text-color:white;@secondary-btn-bk
g-color:blue;)
```

5. From the CRXDE Lite menu, select **Save All** to save the changes on the AEM server.

ServiceNow pages in Adobe Experience Manager

Use pages provided on the ServiceNow site in the Adobe Experience Manager (AEM) as a reference to organize your AEM-based websites and provide a consistent user experience.

An AEM page houses containers, which in turn contain components. By manipulating the layout of the page and the components within it, you can construct a consistent user experience.

By default, ServiceNow sites and pages aren't accessible to public users, which are anonymous AEM users who are not logged in. For information about how to publish them and make them available to anonymous AEM users, see the Adobe documentation topic Publishing pages.

ServiceNow page in AEM for knowledge articles

The following table shows default pages available in the ServiceNow site in AEM and the knowledge components available on these pages.

ServiceNow pages in AEM for knowledge articles

Page	Description	Knowledge components on the page
ServiceNow Article Search	Reference page to view knowledge article search results.	• Search Box • Search Results
ServiceNow Article View	Reference page to view a knowledge article.	Article View
ServiceNow Article List	Reference page to browse and search for knowledge articles.	• Search Box • Article List (one each for featured articles and the most viewed articles lists)

ServiceNow page in AEM for customer service cases

The following table shows default pages available in the ServiceNow site in AEM and the case components available on these pages.

ServiceNow pages in AEM for customer service cases

Page	Description	Case components on the page
ServiceNow Create Case	Reference page to create a customer service case.	New Case
ServiceNow Case View	Reference page to view a customer service case.	Case View
ServiceNow Case List	Reference page to browse and search for customer service cases.	Case List

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ServiceNow home page in AEM

The following table shows default home page available in the ServiceNow site in AEM and the knowledge and case components available on this page.

ServiceNow home page in AEM

Page	Description	ServiceNow components on the page
ServiceNow Home	Reference page to browse and search for knowledge articles and create a case.	• Article List • Search Box • Case Cards

Display ServiceNow knowledge articles on an Adobe Experience Manager page

Use knowledge components available within Adobe Experience Manager (AEM) to access knowledge bases from the ServiceNow instance and display associated knowledge articles on an AEM-based website.

Before you begin

- Activate the Knowledge API plugin (sn_km_api) to use the Knowledge Management REST API endpoints for knowledge articles. For more information, see Knowledge Management REST API.
- Define the cross-origin resource sharing (CORS) rule to access the Knowledge API from your AEM instance. For more information, see Define a cross-origin resource sharing rule to access ServiceNow API endpoints from AEM.

Role required: AEM author

Procedure

1. Log in to your AEM instance.
2. Open your AEM page in Edit mode.
3. Open the components browser.
4. From the **All** list, select **ServiceNow**.
5. Drag a component to the required position on the page.

> **Note:**
> If components are not available, update your template configuration to include the knowledge components. In addition, you must modify the properties of the site template and add each knowledge article component to the list of allowed components.

6. Open the component dialog for editing.

> **Note:**
> By default, the knowledge components in the Edit mode of a page in AEM aren't accessible by public users, which are anonymous AEM users who are not logged in. To change the default behavior, you must enable the **Public** property for each knowledge component.

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7. Set the Search Results component properties to display knowledge search results that include a list of knowledge articles from the knowledge bases in the ServiceNow instance.

Search Results component properties

Property	Description
Public	Option to make the content of the component visible to public users. When selected, the knowledge articles available to unauthenticated users included in the component are available to all users, including public users.
Knowledge Bases	System identifier (sys_id) of a knowledge base that contains associated knowledge articles. Click **Add field** and enter the sys_id of a knowledge base. You can add multiple entries. **Note:** If you don't add a value, knowledge bases from the OSGi configuration settings are used for ServiceNow components.
Language	Enables the display of knowledge article search results in different languages. Select one of the following options: ○ **Select from ServiceNow OSGi Configuration**: Knowledge articles are displayed in the language configured in the OSGi configuration for ServiceNow components. This value is selected by default. ○ **Restrict to portal language**: Knowledge articles are displayed in the language configured in the AEM site. ○ **All languages**: Knowledge articles are displayed in all languages.
Search parameter	Parameter key for the search query. Example: `kb_query`
Secondary fields	Metadata of a knowledge article that appear with the article. Metadata include information such as the author, the date the article was last updated, and the date the article was last viewed. For multiple entries, separate the fields by commas. Example: `author,sys_view_count,sys_updated_on,rating`
Search results count	Maximum number of articles included in the search results list. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.
Article page URL	Relative URL of the article page to redirect to. Example: `/content/NOWApp/now_article_view.html`
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

8. Set the Search Box component properties to display a search box for users to enter search text and find knowledge articles in the ServiceNow instance matching the search text.

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Note:
Triggering a search from the Search Box component leads to the Search Results component.

Search Box component properties

Property	Description
Public	Option to make the content of the component visible to public users. When selected, the knowledge articles available to unauthenticated users included in the component are available to all users, including public users.
Placeholder	Hint text displayed in the search box to provide information about what users can search for or conditions for the search text. Example: `Search (minimum three characters)`
Knowledge Bases	System identifier (sys_id) of a knowledge base that contains associated knowledge articles. Click **Add field** and enter the sys_id of a knowledge base. You can add multiple entries. **Note:** If you don't add a value, knowledge bases from the OSGi configuration settings are used for ServiceNow components.
Language	Enables the display of knowledge articles in different languages in the search box. Select one of the following options: ○ **Select from ServiceNow OSGi Configuration**: Knowledge articles are displayed in the language configured in the OSGi configuration for ServiceNow components. This value is selected by default. ○ **Restrict to portal language**: Knowledge articles are displayed in the language configured in the AEM site. ○ **All languages**: Knowledge articles are displayed in all languages.
Search page URL	Relative URL of the search page to redirect to. Example: `/content/NOWApp/now_article_search.html`
Search parameter	Parameter key for the search query. Example: `kb_query`
Typeahead	Option to enable typeahead search.
Typeahead search results count	Maximum number of articles to include in the typeahead search results list. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.
Article page URL	Relative URL of the article page to redirect to. Example: `/content/NOWApp/now_article_view.html`

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Property	Description
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

9. Set the Article View component properties to display knowledge articles and their attachments, if available, from a ServiceNow instance.

Article View component properties

Property	Description
Public	Option to make the content of the component visible to public users. When selected, the knowledge articles available to unauthenticated users included in the component are available to all users, including public users.
Article parameter	Name of the URL query parameter for the article number. Example: `kb_article`
Secondary fields	Metadata of a knowledge article that appear with the article. Metadata include information such as the author, the date the article was last updated, and the date the article was last viewed. For multiple entries, separate the fields by commas. Example: `author,sys_view_count,sys_updated_on,rating`
Language parameter	Name of the URL query parameter containing the requested language for a knowledge article. Example: `kb_lang`
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

10. Set the Article List component properties to display a list of knowledge articles depending on the list criteria.

Article List component properties

Property	Description
Public	Option to make the content of the component visible to public users. When selected, the knowledge articles available to unauthenticated users included in the component are available to all users, including public users.
Title	Title corresponding to the articles list that appears as the component header. Example: `Most viewed articles`
Knowledge Bases	System identifier (sys_id) of a knowledge base that contains associated knowledge articles. Click **Add field** and enter the sys_id of a knowledge base. You can add multiple entries.

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Property	Description
	Note: If you don't add a value, knowledge bases from the OSGi configuration settings are used for ServiceNow components.
Language	Enables the display of a knowledge article in different languages when viewing the article. Select one of the following options: ○ **Select from ServiceNow OSGi Configuration**: Knowledge articles are displayed in the language configured in the OSGi configuration for ServiceNow components. This value is selected by default. ○ **Restrict to portal language**: Knowledge articles are displayed in the language configured in the AEM site. ○ **All languages**: Knowledge articles are displayed in all languages.
Secondary fields	Metadata of a knowledge article that appear with the article. Metadata include information such as the author, the date the article was last updated, and the date the article was last viewed. For multiple entries, separate the fields by commas. Example: `author,sys_view_count,sys_updated_on,rating`
Criteria	List of criteria for the knowledge articles list. Select one of the following options: ○ **Featured**: List of featured knowledge articles based on the keywords configured in the *`glide.knowman.default_keyword`* property. For information about featured articles, see Add a knowledge article to featured content and Knowledge properties. ○ **Most Viewed**: List of knowledge articles with the most views.
Article count	Maximum number of articles to include in the articles list. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.
Article page URL	Relative URL of the article page to redirect to. Example: `/content/NOWApp/now_article_view.html`
Hide component when empty	Option to hide the component when there are no knowledge articles to display.
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

Display ServiceNow cases on an Adobe Experience Manager page

Use case components available within Adobe Experience Manager (AEM) to access customer service cases from the ServiceNow instance and display them on an AEM-based website.

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Before you begin

Define the cross-origin resource sharing (CORS) rule to access the Case API and CSM Attachment API from your AEM instance. For more information, see Define a cross-origin resource sharing rule to access ServiceNow API endpoints from AEM.

Role required: AEM author

About this task

The Case REST API enables you to create, retrieve, and update customer service case records. For more information, see Case API.

The CSM Attachment API enables you to upload, download, and remove attachments associated with customer service cases and to retrieve attachment metadata. For more information, see CSM Attachment API.

Procedure

1. Log in to your AEM instance.
2. Open your AEM page in Edit mode.
3. Open the components browser.
4. From the **All** list, select **ServiceNow**.
5. Drag a component to the required position on the page.

> **Note:**
> If components are not available, update your template configuration to include the case components. In addition, you must modify the properties of the site template and add each case component to the list of allowed components.

6. Open the component dialog for editing.

> **Note:**
> The case components in the Edit mode of a page in AEM are accessible to all users, including public users. Public users are anonymous AEM users who are not logged in.

7. Set the Case Cards component properties to display all open customer service cases from your ServiceNow instance as column cards.

Case Cards component properties

Property	Description
Title	Title of this component that appears on the AEM page.
Label parameters	Comma-separated label parameters for Case [sn_customerservice_case] table columns. Each parameter is specified in the format *label*:*column* . Where *label* is displayed on the component and *column* is the name of a column from the Case [sn_customerservice_case] table. Example: `Number:number,Priority:priority,Product:product`
Case list page URL	Relative URL of the case list page to redirect to. Example: `/content/servicenow/en/now_case_list.html`
Case view page URL	Relative URL of the case view page to redirect to.

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Property	Description
	Example: `/content/servicenow/en/now_case_view.html`
Hide component for no cases	Option to hide the component when there are no cases to display.
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

8. Set the New Case component properties for users to create a customer service case in your ServiceNow instance from your AEM page.

New Case component properties

Property	Description
Title	Title of this component that appears on the AEM page.
Short description label	Label for the field to enter a brief description of the case.
Description label	Label for the field to enter a description of the case.
Product label	Semicolon-separated parameters to define the label and the placeholder text for the product list.
Asset label	Semicolon-separated parameters to define the label and the placeholder text for the asset list
Number of list items	Maximum number of items to include in the product and asset lists. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than 1.
Show assets	Option to display the asset list on the component.
Case list page URL	Relative URL of the case list page to redirect to. Example: `/content/servicenow/en/now_case_list.html`
Case view page URL	Relative URL of the case view page to redirect to. Example: `/content/servicenow/en/now_case_view.html` **Note:** You need to enter a value for this property to navigate to the case view page from the Case created window.
Attachment file size limit in MB	Maximum size limit for an attachment file that can be added to a case.
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

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9. Set the Case View component properties to display customer service cases and any comments and attachments, if available, from a ServiceNow instance.

Case View component properties

Property	Description
Case parameter	Name of the URL query parameter for the case number. Example: `case_no`
Label parameters	Comma-separated label parameters for Case [sn_customerservice_case] table columns. Each parameter is specified in the format *`label`*`:`*`column`* . Where *`label`* is displayed on the component and *`column`* is the name of a column from the Case [sn_customerservice_case] table. Example: `Number:number,Priority:priority,Product:product`
Activities count	Maximum number of activities such as comments and attachments to be displayed on the Activity tab. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.
Attachment file size limit in MB	Maximum size limit for an attachment file that can be added to a case. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.
Article page URL	Relative URL of the article page to redirect to. Example: `/content/servicenow/en/now_article_view.html` **Note:** If an article link is included in a case, you need to enter a value for this property to navigate to the knowledge article view page from the case.
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

10. Set the Case List component properties to display a list of customer service cases.

Case List component properties

Property	Description
Title	Title of this component that appears on the AEM page.
Label parameters	Comma-separated label parameters for Case [sn_customerservice_case] table columns. Each parameter is specified in the format *`label`*`:`*`column`* . Where *`label`* is displayed on the component and *`column`* is the name of a column from the Case [sn_customerservice_case] table. Example: `Number:number,Priority:priority,Product:product`
Case count	Maximum number of cases to display on the component. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.

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Property	Description
	The maximum value you can enter for this field is 50.
Show create case	Option to display the button to create a case on the component.
Create case button label	Label for the button to create a case.
Case create page URL	Relative URL of the case create page to redirect to. Example: `/content/servicenow/en/now_case_create.html`
Case view page URL	Relative URL of the case view page to redirect to. Example: `/content/servicenow/en/now_case_view.html`
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

Integrating with Computer Telephony Integration (CTI)

Integrate Customer Service Management with Computer Telephony Integration (CTI). This integration enables the Customer Service application to support inbound and outbound telephone calls.

Customer service agents can do the following with CTI:

- Make an outgoing call to a phone number.
- Receive an incoming call from a phone number or from another user within the system.
- Transfer a call to another user within the system.
- Place a call on mute.
- Set their availability status.

CTI does not require any specific user role except the OpenFrame user (sn_openframe_user) role. Roles are based on the application using CTI.

For more information, see the following topics:

- Computer Telephony Integration
- Computer Telephony Integration workflows
- Integrating contact centers with Interaction Controls Component (ICC) for voice calls

OpenFrame overview

OpenFrame provides a communication frame that customer service agents use to place and receive customer calls.

OpenFrame user roles

The OpenFrame window is available to agents who belong to one of the user groups specified in the OpenFrame configuration, and with any of the following roles:

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- sn_openframe_user
- sn_customerservice_agent
- sn_customerservice.consumer_agent
- admin

About OpenFrame

Use OpenFrame to integrate telephony systems into the ServiceNow AI Platform®. Use the OpenFrame API to communicate between the ServiceNow AI Platform and the domain opened in the OpenFrame window.

OpenFrame includes these components:

- TopFrame, a ServiceNow application.
- OpenFrame API, which gets sourced from the partner application. This API communicates with TopFrame and controls the OpenFrame visual features.

  The location of the API is `https://[servicenow instance]/scripts/openframe/1.0.5/openFrameAPI.min.js`. This minified version includes other needed libraries and should be used for integration.

  For API reference, you can use the unminified version: `https://[servicenow instance]/scripts/openframe/1.0.5/openFrameAPI.js`. This version can't be used directly for integration purposes.

Note:

- To stay current with reference to the OpenFrame library, use the following resource URI: `https://[servicenow instance]/scripts/openframe/latest/openFrameAPI.min.js`.
- To integrate softphone into the ServiceNow AI Platform using OpenFrame, add the third-party URLs of telephony services in the following property: *`glide.ui.concourse.onmessage_enforce_same_origin_whitelist`*. For more information see, Available system properties, and Enable URL allow list for cross-origin iframe communication in Instance Security Hardening Settings.

Using the OpenFrame window

OpenFrame provides support for embedded and contextual phone conversations, including:

- Context identification: Incoming calls maximize the OpenFrame window and display details about the caller, including the account, contact or consumer name, and phone number.
- Links to forms: Use the openFrameAPI (openServiceNowForm) to create links to forms. When an incoming call is received, an agent can select the account, contact, consumer, or case number in the OpenFrame window to open the corresponding record.
  - In Agent Workspace, records open in either a primary tab or a subtab depending on the tab configuration.
  - In the platform interface, records open in TopFrame (that is, the current page).
- Select-to-call capability: Click phone number fields to make a call.
  - In Agent Workspace, agents can select phone number fields on forms and in the Customer 360 ribbon component to make a call.
  - In the platform interface, agents can select the phone icon next to the **Contact** or **Consumer** fields.

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- If a contact or consumer has one phone number, the call is placed to that number.
- If a contact or consumer has more than one phone number, a dialog box displays the available numbers. Select a number to place the call.

- OpenFrame window actions:

OpenFrame window actions

User action	Description
Open the window	In Agent Workspace, select the phone icon: ○ In the navigation bar. ○ Next to the **Contact** or **Consumer** fields on the Case form. In the platform interface, select the phone icon: ○ In the banner frame. ○ Next to the **Contact** or **Consumer** fields on the Case form. With the admin role, you can configure the phone icon. For more information, see CTI integration with the Case form.
Hide the window	Select the **X** in the OpenFrame window header. **Note:** The OpenFrame window remains on top of other forms or pages until hidden.
Expand or collapse the window	Select the **+ / –** buttons in the OpenFrame window header (if **Enable collapsed view** is set to **True** in the OpenFrame configuration). **Note:** When collapsed, agents can still access call control actions.
Move the window	Select and drag the OpenFrame window header.

Using OpenFrame in CSM Configurable Workspace

In the CSM Configurable Workspace, you can:

- Integrate OpenFrame with the Interaction Management System (IMS) and interaction records. This enables agents to manage the phone interaction life cycle. For more information, see Integration with Interaction Management System (IMS).
- Use the native voice control capability from the Interaction Controls Component (ICC) plugin to integrate to the contact center voicechannel. You would need to be enable this in the CSM Configurable Workspace to manage the voice channel. For more information, see Interaction Controls Component and Interaction Controls Component (ICC) call interaction features.

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Creating an OpenFrame configuration

With the admin role, you can create or modify an OpenFrame configuration. This configuration stores information about the OpenFrame window settings, including:

- The window height and width.
- The icon, title, and subtitle displayed in the window header.
- Users and groups that have access to the window.

Related topics

openFrameAPI - Client

Interaction Controls Component

Interaction Controls Component (ICC) is a component that allows for a native call controls interface embedded in Agent Workspace.

- Create state context in OpenFrame to read the state of idle and active call state
- Create the state context in OpenFrame to read the state of transfer
- Provide iframe sandbox parameters to allow iframe access to security features and to enable additional iframe restrictions
- Create an extension point implementation to hide the conversation panel when real-time transcription is turned on/off
- Create an extension point implementation to create and get phone log segments
- Implement Click to Dial on CSM Workspace with ICC enabled
- Seismic event emitted to the Polaris shell via Active call component when any action clicked related to the transfer component
- Screen pop for Interaction should be available on Dialpad and Click-to-call outbound call
- sn_openframe.create_interaction will be ignored when using ICC. All inbound and outbound calls will have interactions created.

Use Interaction Controls Component (ICC) and OpenFrame to integrate with the voice channel for contact centers. For more information, see Integrating contact centers with Interaction Controls Component (ICC) for voice calls.

Computer Telephony Integration Workflows

Computer Telephony Integration (CTI) enables customer service agents to place and receive phone calls in ServiceNow applications.

The following sample workflows show how CTI can be integrated with Interaction Management System (IMS) and OpenFrame (OF) to support outgoing and incoming telephone calls.

CTI integration for outgoing call

The following workflow describes the logical sequence of actions when an outgoing call is triggered using the OpenFrame window.

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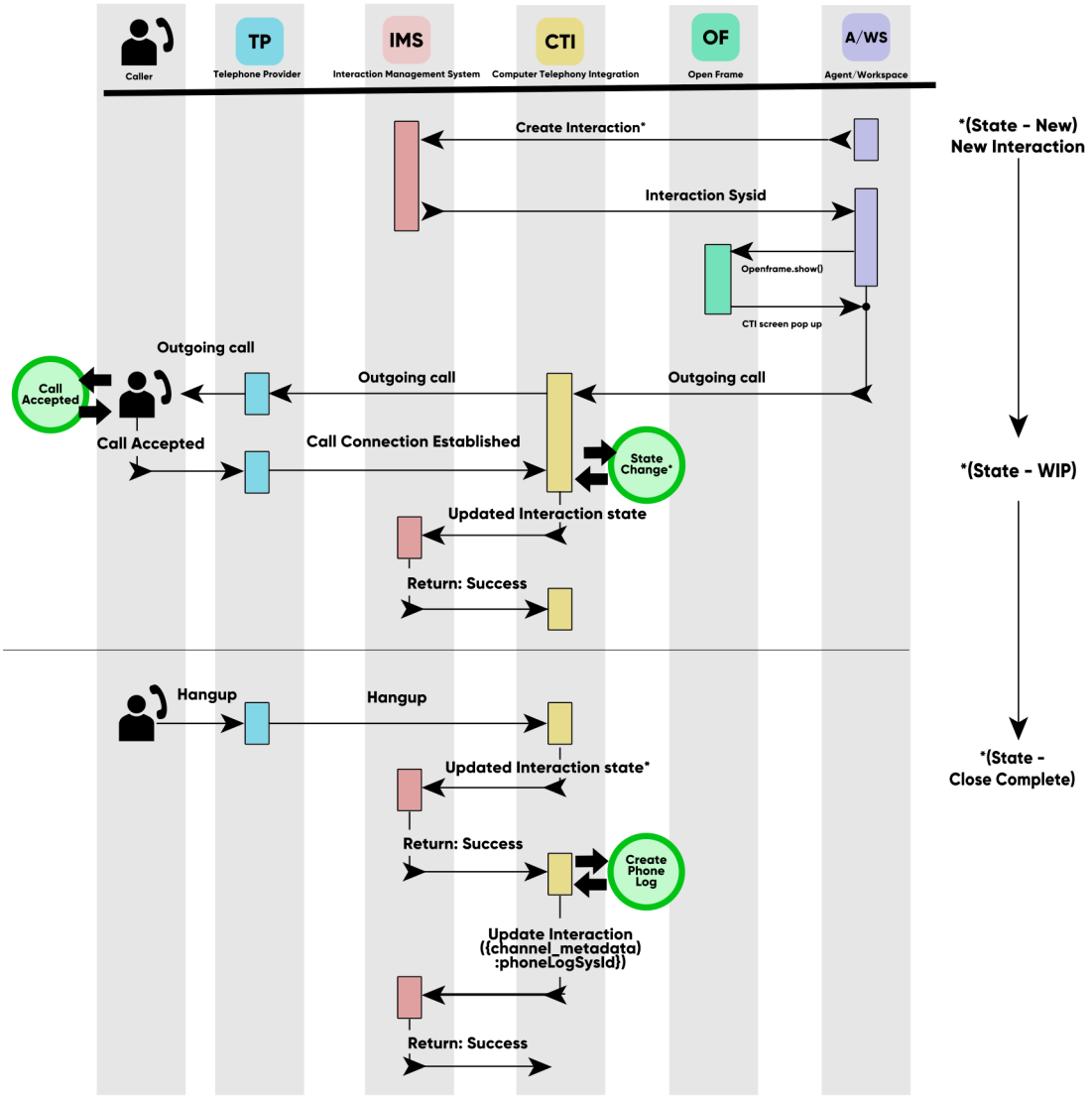
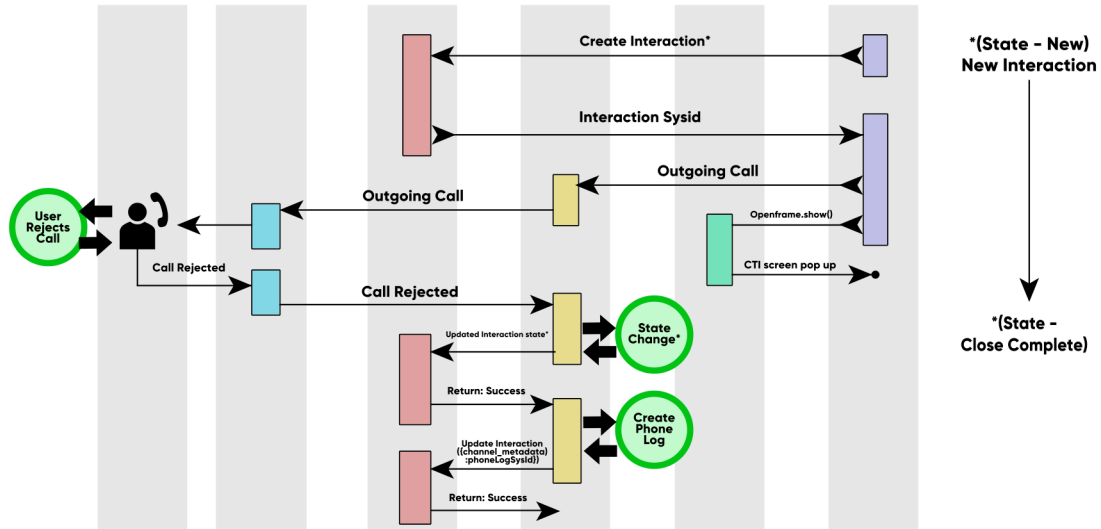
CTI Integration - Outgoing Call Success Path



Reject/Busy Path



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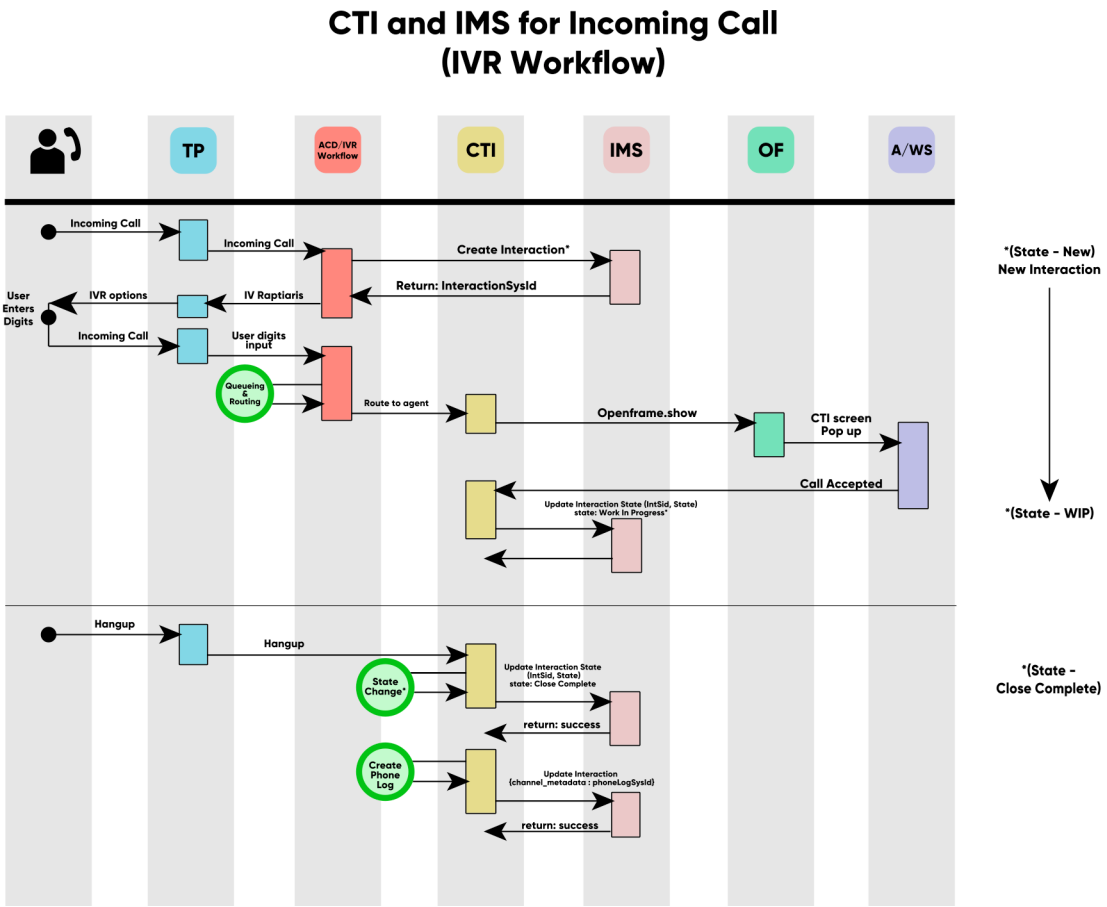
CTI integration for incoming call

The following workflow describes the logical sequence of actions when an incoming call is received using the OpenFrame window.



CTI integration for transferring call

The following workflow describes the logical sequence of actions when an incoming call is transferred to an agent.

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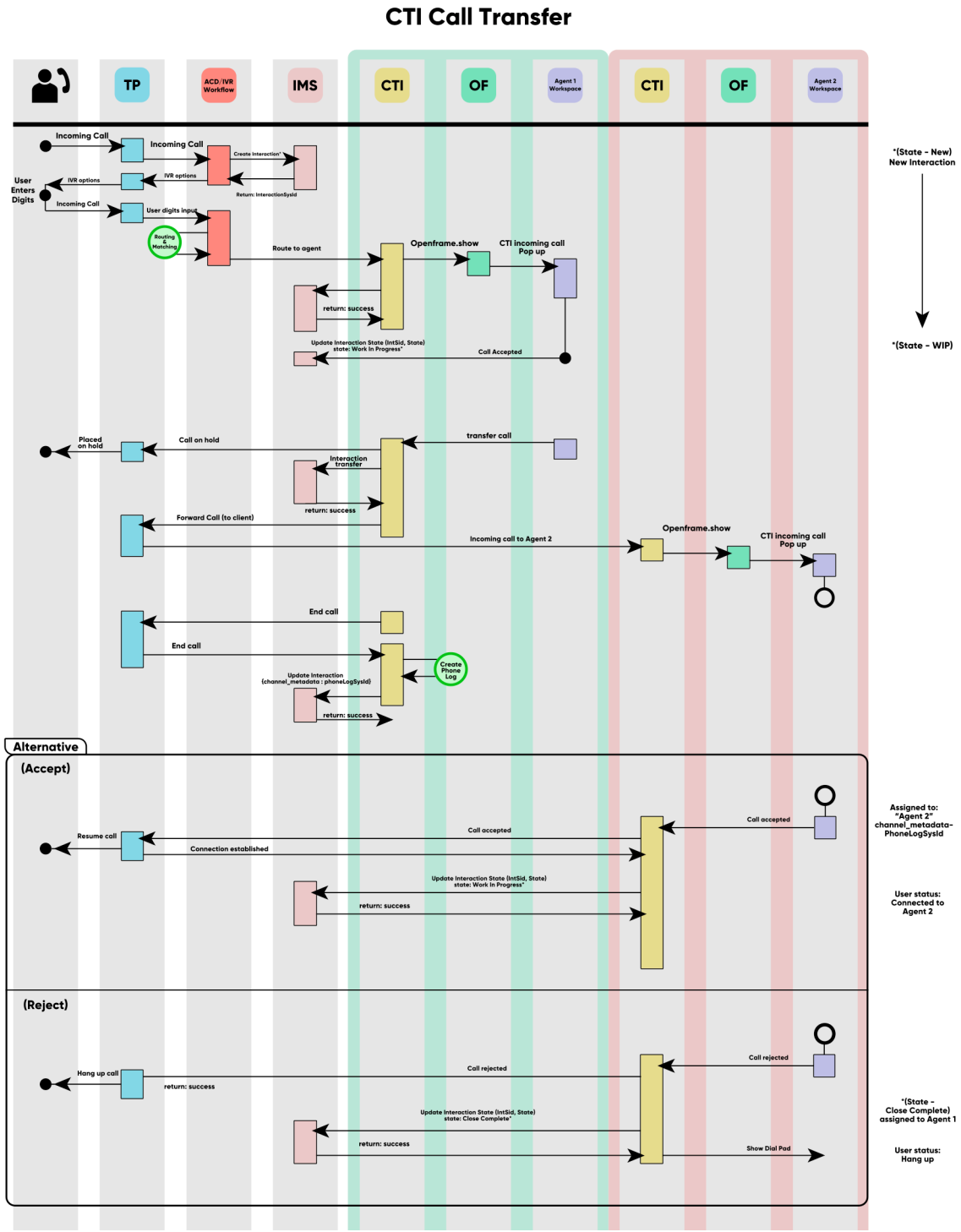

CTI call interactions operations

CTI integration with IMS and OF uses the `OpenframeInteractionUtility` script. You can use the`createOrUpdateInteractionForOpenframe` method from the utility script to create an interaction. For more information about creating interaction using APIs, see Interaction Management API.

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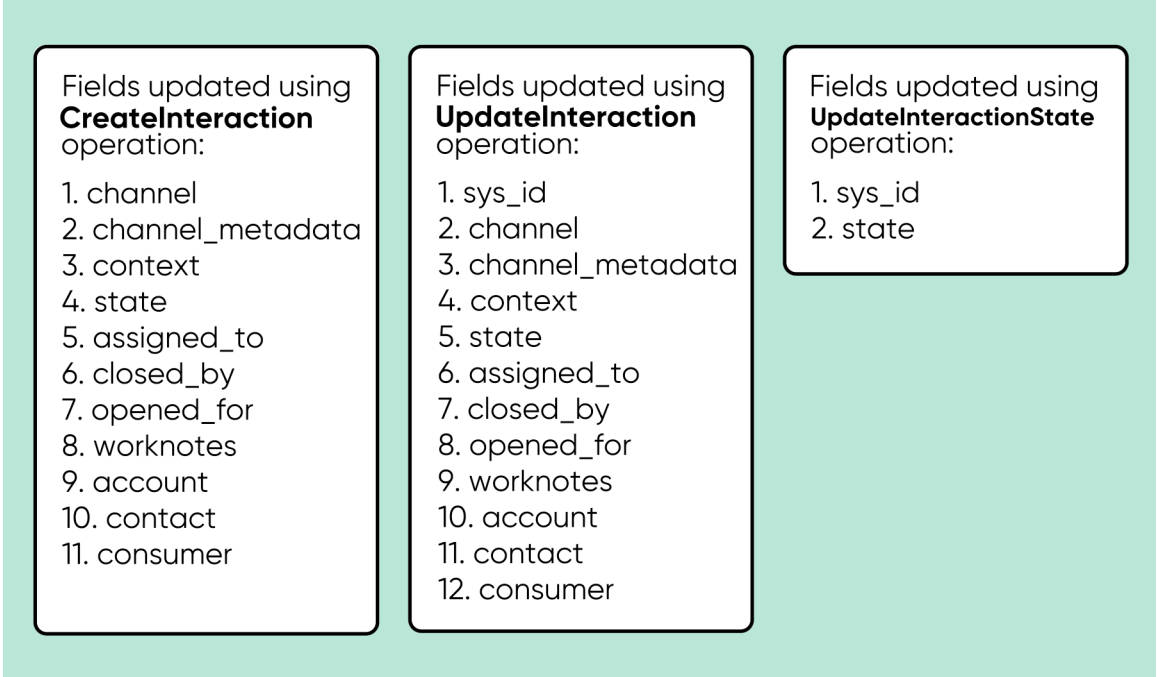

CTI demo implementation

Use the CTI demo implementation to test the phone communication channel between customer service agents and external customers in a non-production instance.

The CTI Softphone plugin enables softphone functions and call center capabilities. This plugin provides integration between the ServiceNow platform and the Twilio Voice service using the Notify application. This plugin can be activated any time after activating Notify.

The CTI Softphone plugin includes one OpenFrame configuration, called CTI. This configuration specifies the necessary OpenFrame window settings as well as the URL to be launched within OpenFrame.

Note:
The included CTI configuration does not have the **Default** field enabled. You must enable this field to use the CTI configuration as the default.

Configure the CTI demo

Before the phone communication channel between customer service agents and external customers can be used, the Notify, CTI Softphone, Customer Service Management, and Openframe plugins must be activated and configured, and a Twilio Voice account must be set up.

Before you begin
Role required: admin

Procedure

1. Activate Notify (com.snc.notify).
2. Set up a Twilio Voice account.
   You can create an account at `https://www.twilio.com`.
3. Configure Notify with Twilio.
4. Activate the CTI Softphone plugin (com.snc.cti).

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If you want to load the demo data for CTI Softphone, you must also activate the Customer Service CTI Demo Data plugin (com.snc.customerservice_cti_demo). This demo data includes sample workflows.

5. Activate the Customer Service plugin (com.sn_customerservice).
6. Activate the Openframe plugin (com.sn_openframe).
   Activating the Customer Service Management plugin automatically activates the Openframe plugin.
7. Create an OpenFrame configuration or use the default CTI configuration by enabling the **Default** field.

Working with the CTI using the OpenFrame window

Use the OpenFrame window to make a call, answer a call, transfer a call, or set status.

Answer an incoming call

Use the OpenFrame window to answer an incoming call.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_open_frame, or admin

About this task

The OpenFrame window displays the incoming call, including the phone number and the customer contact or consumer information.

Procedure

1. Click **Accept**.
2. When the call is finished, click **End**.

Make an outgoing call

Use the OpenFrame window to make an outgoing call.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_open_frame, or admin

Procedure

1. Select one of the following options.

Option	Description
Click the phone icon in the banner frame.	Enter the phone number in the **Number** field and click **Call**.
Click the phone icon next to the Contact or Consumer fields on the Case form.	Customer contacts and consumers can have multiple phone numbers.

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Option	Description
	○ If only one phone field is populated, a call is placed to that number. ○ If more than one phone field is populated, a dialog box displays the available numbers. Click the desired number to place the call and close the dialog box.

2. When finished with the call, click **End**.

Transfer a call

After accepting an incoming call, a customer service agent can transfer a call to another agent.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_open_frame, or admin

Procedure

1. Answer an incoming call.
2. Click **Transfer**.
3. Select an agent from the drop-down list.
4. Click **Call**.

Set agent call status

Customer service agents can set their current call status.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_open_frame, or admin

Procedure

1. Click the phone icon in the banner frame.
2. Select your availability.

Option	Description
Available	The agent is available to take a call.
Not Available	The agent is not available to take a call.
Busy	The agent is currently on a call with a cus tomer.
Wrap Up	The agent is updating case information after completing a call.

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Option	Description
	After completing a call and the subsequent wrap up, an agent must manually change the status from **Wrap Up** to **Available**.

The **Presence** field in the **OpenFrame** > **OpenFrame Agent Presence** record is updated with the availability status set for the agent.

Computer Telephony demo integration with the Case form

Activating the CTI Softphone plugin enables call-related features on the Case form.

The customer service or consumer service agent can use the phone icon next to the **Contact** and **Consumer** fields on the Case form to make a phone call. The phone icon appears next to these fields if the entity record has at least one phone field (ph_number) and at least one of those phone fields contains a phone number.

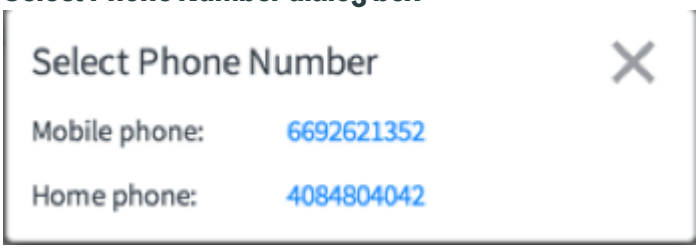
The phone icon is a reference contribution that can be added to any reference field by modifying the dictionary and adding the following attribute: *ref_contributions=show_phone_customer_service*.

Note:
If you're using a third-party provided CTI application, then you can integrate with the show_phone UI macro to make calls. For more information on UI macros, refer to UI macros installed with OpenFrame

Select the phone icon to call a consumer or contact.

- If only one phone field is populated, a call is placed to that number.
- If more than one phone field is populated, a dialog box displays the available numbers. Select the desired number to call and close the dialog box.

Select Phone Number dialog box



Incoming and outgoing calls are logged in the Phone Log [sn_openframe_phone_log] table. Call details are recorded in the **Activity** field on the Case form and in the **Phone** related list.

CTI demo integration with case routing

An incoming call from a customer contact or a consumer can be routed to an available customer service agent.

Similar to the other communication channels, incoming calls from customer contacts and consumers can be routed to a specific agent by using matching rules. If an agent is not available, the call can be placed in a queue. After the agent is free, the matching call in the queue with the longest wait time is rerouted to the agent.

Case routing is enabled as an activity in a workflow. In the Call Center demo workflow (available with the Customer Service CTI Demo Data plugin), a call is forwarded to an agent after the caller either creates a new case or enters a valid number for an existing case.

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If no agents are available, the call goes into a queue and remains there until an agent becomes available. If a call is in the queue for longer than 10 minutes, it is forwarded to voice mail and the caller is asked to leave a message.

Related topics

Routing and assigning customer service cases

Computer Telephone demo integration with tasks

The CTI Softphone component can be integrated with other task entities on the ServiceNow AI Platform.

A workflow can be implemented to operate on the Incident table.

Note:
The Call Center for Incident Management workflow, a demo workflow, is available with the Customer Service CTI Demo Data plugin.

Incoming or outgoing calls are logged in the Phone Log [sn_openframe_phone_log] table. The call logs also appear in the activity history of the task.

Associate a phone number with a workflow

You can associate a Notify phone number with a workflow.

Before you begin

You must create a Twilio Voice account and configure Notify with Twilio Voice before you can associate a phone number with a number group and workflow.
A number group allows you to group Notify phone numbers and then share workflows across grouped numbers. For each number group, you can specify a workflow for incoming and outgoing calls.

The CTI Softphone demo data includes these sample workflows:

- Call Center, for use with the Customer Service Management application
- Call Center for Incident Management

The Call Center workflow uses several Notify workflow activities that determine workflow functionality. Each activity performs a different task, such as playing a message greeting or creating a list of user input options. Activities can succeed or fail, which can result in actions performed by other activities.

You can use the default Call Center workflow or modify this work flow as needed.

Role required: admin

Procedure

1. Navigate to **All** > **Notify** > **Numbers**.
2. From the Notify Phone Numbers list, click the phone number that you want to edit.
3. Select a **Notify Group** that uses the incoming call workflow that you want to handle this phone number.
   The CTIDemo group uses the Call Center workflow for incoming calls.
4. Click **Update**.

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Related topics

Numbers and number groups

Configure Notify with\n Twilio

Integrating with Microsoft Outlook

Integrate Customer Service Management with Microsoft Outlook to perform tasks such as managing contacts and cases from within Microsoft Outlook.

The following plugins are required to enable you to interact with the ServiceNow platform and customers from within Microsoft Outlook:

- ServiceNow Add-In for Microsoft Outlook (com.sn_outlook_addin)
- CSM Extension for Proxy Contacts (com.snc.csm_proxy_contacts)

Integrate Customer Service Management with Microsoft Outlook

Customer Service Management provides an integration with Microsoft Outlook. This integration enables you to manage workflows such as creating and updating contacts and cases from within Microsoft Outlook.

Before you begin

Role required: admin

About this task

Note:
You must be an Office 365 administrator to deploy the ServiceNow Add-in for Microsoft Outlook. This add-in is supported only for use with Microsoft Outlook 2016+ for MacOS and for Windows.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the ServiceNow Add-In for Microsoft Outlook plugin (com.sn_outlook_addin).
3. Click **Activate**.
4. Search for the CSM Extension for Proxy Contacts plugin (com.snc.csm_proxy_contacts).
5. Click **Activate**.

Related topics

Using Microsoft Outlook with CSM

Configure the ServiceNow Add-in for Microsoft Outlook

Configure user roles and download the office add-in manifest file in order to use the ServiceNow Add-in for Microsoft Outlook.

Before you begin

Role required: admin or both sn_customerservice.proxy_contact and sn_customerservice.contact_manager roles.

Procedure

1. Go to your ServiceNow instance.
2. Navigate to **ServiceNow Add-Ins for Office** > **Office Add-In-Manifests**.

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3. Click **ServiceNow for CSM**.
4. Click **Download Manifest** to download the Microsoft Office add-in manifest file.
5. Provide the downloaded `manifest.xml` file to the account manager to enable the installation of the add-in.

Related topics

Install the ServiceNow Add-in for Microsoft Outlook

Include a combined CSM and ITSM add-in icon in Microsoft Outlook

Enable users to access both CSM and ITSM through one combined add-in icon.

Before you begin

Role required: sn_customerservice.contact_manager and sn_customerservice.proxy_contact

Procedure

1. Go to your ServiceNow instance.
2. Navigate to **ServiceNow Add-Ins for Office** > **Office Add-in Manifests**.
3. Download the manifest files for CSM and ITSM.
4. Click **Download Manifest**.
5. Install the ServiceNow Add-in for Microsoft Outlook add-in.
   Follow the procedure in Install the ServiceNow Add-in for Microsoft Outlook.
   The ServiceNow for CSM/ITSM icon appears in the header and users can view both the CSM and ITSM tasks through it.

Install the ServiceNow Add-in for Microsoft Outlook

Installing the ServiceNow Add-in for Microsoft Outlook enables you to interact with the ServiceNow platform from within Microsoft Outlook.

Before you begin

Role required: sn_customerservice.contact_manager

Procedure

1. Navigate to **All** > **Microsoft Outlook** > **Get Add-ins**.
2. Select **My add-ins**.
3. Go to the Custom add-ins tile and select **Add from file** from the Add a custom add-in drop-down list.
4. Select the `manifest.xml` file that your admin provided.
5. Click **Install**.
6. Click **View in ServiceNow** in Microsoft Outlook and log in with the credentials your admin provided.
7. Click **Allow**.

Result

You can now connect to your account on your ServiceNow instance and interact with its records from within Microsoft Outlook.

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Integrating with Safe Workplace applications

Integrate Customer Service Management with ServiceNow® Safe Workplace applications. This integration helps you safely reopen locations and support the health and safety of contacts and consumers after emergencies and pandemics.

Overview

Integrate with Safe Workplace applications, specifically with the Employee Health Screening application, to enable contacts or consumers to safely enter locations and comply with health and safety policies.

As a consumer or contact, verify that you understand and comply with requirements and policies by filling out the Health Verification form on the Consumer or Customer Service Portal.

As a customer or consumer service agent, screen contacts or consumers entering a location to ensure compliance with entry requirements such as a temperature check and Personal Protection Equipment (PPE).

For more information on the Employee Health Screening application, see Employee Health Screening.

Key features

- Access for consumers and contacts to the Health Verification form on the Consumer or Customer Service Portals.
- Ability for customer or consumer service agents to screen consumers and contacts on visiting a location.

Set up Customer Service Management integration with Safe Workplace applications

Enable the integration with Safe Workplace applications to help contacts or consumers safely enter locations and comply with health and safety policies.

Before you begin

Ensure that the Customer Service plugin (com.sn_customerservice) is installed.

If you are supporting business-to-consumer (B2C) customers, ensure that the Consumer Service Portal plugin (com.glide.service-portal.consumer-portal) is installed.

Role required: admin

Procedure

1. Install Employee Health Screening.
2. Give external users access to the Health Verification form.
   For more information, see the Allow external users access to "Health Verification" catalog item [KB0856301] article in the HI Knowledge Base.
3. Assign the sn_imt_monitoring.monitoring_user role to a customer or consumer service agent.
4. **Optional:** Configure the health screening form.
5. **Optional:** Create relationships to show health screening information on Agent Workspace.
6. **Optional:** Customize the Consumer or Customer Service Portal to display a link to the Health Verification form in the portal header menu.

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Configure the health screening form

Provide additional information on contacts or consumers to health screeners by adding fields to the health screening form.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definition** > **Record Producers**.
   a. In the Record Producers list, search for `Screen a person` in the **Name** column.
   b. In the Variables related list, click **New**.
   c. Create a variable.
   For more information about the different types of variables and how to configure them, see Creating variables.
   d. Click **Submit**.
   e. In the Catalog Client Scripts related list, open **Show additional CSM fields**.
   f. Add the variable to the client script as a consumer or contact field.
   For more information on client scripts, see Client scripts.
2. Navigate to **Activity Subscriptions** > **Script Includes**.
   a. Add the variables to the **HealthScreeningUtil** script include.
   For more information on script includes, see Script includes.

Using Customer Service Management with Safe Workplace applications

Screen consumers and contacts for compliance with health and safety policies to determine whether they are permitted to enter a location.

To ensure that consumers and contacts can enter a location safely after emergencies and pandemics, consumers or contacts fill out a Health Verification form and health screeners or customer or consumer service agents perform a health screening.

Note:
Typically, you receive an email or a mobile notification with a link to the health verification form. Alternatively, you can search for the health verification form on the Consumer or Customer Service Portal.

Roles required

Users with the roles listed in the following table can use Customer Service Management with Safe Workplace applications.

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Roles Required for Safe Workplace applications

Role	Task
sn_customerservice.consumer or sn_customerservice_customer	Access and complete the Health Verification form on the Consumer or Customer Service Portals. **Note:** For more information on filling out the form, see Verify your health status and compliance.
sn_imt_monitoring.monitoring _user	Screen external users entering a location to ensure compliance with entry requirements. **Note:** Health screeners cannot view additional Customer Service Management information on the screening form. For more information on screening, see Conduct a health screen for entry.
sn_customerserviceagent with the sn_imt_monitoring.monitoring_user role	Screen contacts entering a location to ensure compliance with entry requirements. The **Accounts** field for contacts is displayed by default on the screening form. Other fields that have been configured for contacts are also visible.
sn_customerservice.consumer_agent with the sn_imt_monitoring.monitoring_user role	Screen consumers entering a location to ensure compliance with entry requirements. The **Suffix** field for consumers is displayed by default on the screening form. Other fields that have been configured for consumers are also visible.

Integrating with consumer messaging apps

Integrate Customer Service Management with each consumer messaging app to deliver a conversational mobile messaging experience for consumers and customer contacts.

Engage customers wherever they are with useful conversations by enabling them to message anytime to your company's account using their choice of messaging apps. Consumers and customer contacts can start conversations with a virtual agent by sending messages to your company's designated mobile number. They can also select to chat with a live agent from the same messaging app.

The following consumer messaging apps can be integrated with Customer Service Management:

- WhatsApp
- LINE

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- Facebook Messenger
- Apple Messages for Business

Integrating WhatsApp with Customer Service Management through Twilio

Deliver a pre-integrated chat conversation experience with the WhatsApp messaging app for consumers and customer contacts. Integrate WhatsApp by using the ServiceNow® Conversational Integration with WhatsApp (powered by Twilio) application.

As an administrator, if you have configured the Conversational Integration with WhatsApp (powered by Twilio) application, then your customer contacts and consumers can initiate a WhatsApp chat conversation with a virtual agent or live agent. An agent can initiate a conversation or accept a conversation initiated from a WhatsApp chat conversation. For more information, see Configure Conversational Integration with WhatsApp (powered by Twilio).

Note:
As an administrator, you can also use any predefined Customer Service Virtual Agent conversations to capture information from customer contacts or consumers. For more information, see Customer Service Virtual Agent conversations.

Key features of the integration include the following:

- Initiate WhatsApp chat conversations with a virtual agent, live agent, or customer.
- Use the chat to search for articles in community posts and knowledge articles, access service catalogs, or create a customer service case.
- View the WhatsApp chat conversation details from which a work item was initiated in Agent Workspace.
- Indicate your presence in the Agent Workspace Inbox with the WhatsApp service channel.
- Make outbound chat conversations to connect with a customer's WhatsApp chat conversation, and automatically capture interaction details to simplify data entry.

Example workflows

The following example workflow shows the use of the Conversational Integration with WhatsApp (powered by Twilio) application in resolving a consumer issue:

1. A customer has an issue with a product and initiates a WhatsApp chat conversation using the Virtual Agent bot.
2. The Customer Service Management application identifies the customer and starts an interaction of type **Messaging**.
3. The customer selects the product and views the knowledge articles associated with the product.
4. The customer then selects to chat with a live agent.
5. A live agent accepts the customer request. The Customer Service Management application starts another interaction of type **Messaging**.
6. The live agent creates a case on the product, and then closes the conversation.

The following example workflow shows the use of the Conversational Integration with WhatsApp (powered by Twilio) application in addressing customer feedback:

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1. A customer purchases a new product and opts in to receive notifications from your business on the WhatsApp app.
2. The customer receives a welcome message from customer support.
3. After two months, the customer receives another message asking for feedback on the product.
4. The customer shares negative feedback.
5. An agent reviews the feedback and starts a conversation with the customer to offer help and find out more about the customer's experience with the product.

End users and roles

The users with the roles listed in the following table can use the Conversational Integration with WhatsApp (powered by Twilio) application.

Roles required for Conversational Integration with WhatsApp (powered by Twilio)

Roles	Tasks
agent_workspace_user	Accept an ongoing WhatsApp chat conversation with a customer through the WhatsApp service channel in Advanced Work Assignment.
sn_customerservice_manager	View details of a WhatsApp chat conversation by using interaction records of type **Messaging** and subtype **WhatsApp**.
sn_customerservice.consumer, sn_customerservice.customer	Initiate WhatsApp chat conversations with a virtual agent or live agent so that you can search for articles in Communities and Knowledge Management, access service catalogs, and create a customer service case.

Integrating LINE with Customer Service Management

Deliver a pre-integrated chat conversation experience with the LINE messaging app for consumers and customer contacts. Integrate LINE with the ServiceNow® Conversational Integration with LINE application.

As an administrator, if you have configured the Conversational Integration with LINE application, your customer contacts and consumers can initiate a LINE chat conversation with a virtual agent or live agent. An agent can initiate a conversation or accept a conversation initiated from a LINE chat conversation. You can configure system-initiated messages to be sent to the customer. For more information, see Configure Conversational Integration with LINE.

Note:
As an administrator, you can also use any predefined Customer Service Virtual Agent conversations to capture information from customer contacts or consumers. For more information, see Customer Service Virtual Agent conversations.

Key features of the integration include the following:

- Initiate LINE chat conversations with a virtual agent, live agent, or customer.
- Use the chat to search for articles in community posts and knowledge articles, access service catalogs, or create a customer service case.
- View the LINE chat conversation details from which a work item was initiated in Agent Workspace.

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- Indicate your presence in the Agent Workspace Inbox with the Line service channel.
- Make outbound chat conversations to connect with a LINE chat conversation from a customer contact or consumer, and automatically capture interaction details to simplify data entry.

Example workflows

The following example workflow shows the use of the Conversational Integration with LINE application in helping a customer to resolve an issue with the recently purchased router:

1. The customer initiates a LINE chat conversation using the Virtual Agent bot.
2. The Customer Service Management application identifies the customer and starts an interaction of type **Messaging**.
3. The customer selects the router as a product and finds knowledge articles associated with it.
4. The customer ends the conversation because the issue was resolved with the help of a knowledge article.

The following example workflow shows the use of the Conversational Integration with LINE application in addressing customer feedback:

1. A customer purchases a new product and opts in to receive notifications from your business on the LINE app.
2. The customer receives a welcome message from customer support.
3. After two months, the customer receives another message asking for feedback on the product.
4. The customer shares negative feedback.
5. An agent reviews the feedback and starts a conversation with the customer to offer help and find out more about the customer's experience with the product.

End users and roles

Users with the roles listed in the following table can use the Conversational Integration with LINE application.

Roles required for Conversational Integration with LINE

Roles	Tasks
agent_workspace_user	Accept an ongoing LINE chat conversation with a customer through the LINE service channel in Advanced Work Assignment.
sn_customerservice_manager	View details of a LINE chat conversation by using interaction records of type **Messaging** and subtype **Line**.
sn_customerservice.consumer, sn_customerservice.customer	Initiate LINE chat conversations with a virtual agent or live agent so that you can search for articles in Communities and Knowledge Management, access service catalogs, and create a customer service case.

Integrating Facebook Messenger with Customer Service Management

Integrate Facebook Messenger chat conversations with your ServiceNow® instance so that consumers and customer contacts can communicate with your business using the Conversational Integration with Facebook Messenger application.

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As an administrator, if you have configured the Conversational Integration with Facebook Messenger application, your customer contacts and consumers can initiate a Facebook Messenger chat conversation with a virtual agent or live agent. An agent can accept a conversation initiated from a Facebook Messenger chat conversation. For more information, see Configure Conversational Integration with Facebook Messenger.

Note:
As an administrator, you can also use any predefined Customer Service Virtual Agent conversations to capture information from customer contacts or consumers. For more information, see Customer Service Virtual Agent conversations.

Key features

Customer experience

Initiate Facebook Messenger chat conversations with a virtual agent or live agent to search for articles in community posts and knowledge articles, access service catalogs, or create a customer service case.

Agent experience

- View the Facebook Messenger chat conversation details from which the work item was initiated in Agent Workspace after accepting a work item associated with the Facebook Messenger service channel.
- Indicate your presence in the Agent Workspace Inbox with the Facebook Messenger service channel.
- Make outbound chat conversations to connect with a Facebook Messenger chat conversation from a customer contact or consumer and automatically capture interaction details to simplify data entry.

End users and roles

Users with the roles listed in the following table can use the Conversational Integration with Facebook Messenger application.

Roles required for Conversational Integration with Facebook Messenger

Roles	Tasks
agent_workspace_user	Accept an ongoing Facebook Messenger chat conversation with a customer through the Facebook Messenger service channel in Advanced Work Assignment.
sn_customerservice_manager	View details of a Facebook Messenger chat conversation using the interaction record of the type as **Messaging** and subtype as **Facebook Messenger**.
sn_customerservice.consumer, sn_customerservice.customer	Initiate Facebook Messenger chat conversations with a virtual agent or live agent to search for articles in Communities and Knowledge Management, access service catalogs, and create a customer service case.

Example workflow

The following example workflow shows the use of the Conversational Integration with Facebook Messenger application in helping a customer to resolve an issue with the recently purchased router:

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1. The customer initiates a Facebook Messenger chat conversation using the Virtual Agent bot.
2. The Customer Service Management application identifies the customer and starts an interaction of type **Messaging**.
3. The customer selects the router as a product and finds knowledge articles associated with it.
4. The customer ends the conversation because the issue was resolved with the help of a knowledge article.

Integrating Apple Messages for Business with Customer Service Management

Deliver a pre-integrated chat conversation experience with the Conversational Integration with Apple Messages for Business app for consumers and customer contacts. Integrate Apple Messages for Business by using the ServiceNow® Conversational Integration with Apple Messages for Business application.

As an administrator, if you have configured the Conversational Integration with Apple Messages for Business application, then your customer contacts and consumers can initiate a Apple Messages for Business chat conversation with a virtual agent or live agent. An agent can accept a conversation initiated from a Apple Messages for Business chat conversation. For more information, see Integrating Virtual Agent with Apple Messages for Business. Refer to the Apple documentation for more details about Apple Messages for Business.

Note:
As an administrator, you can also use any predefined Customer Service Virtual Agent conversations to capture information from customer contacts or consumers. For more information, see Customer Service Virtual Agent conversations.

Key features of the integration include the following:

- Customers can initiate Apple Messages for Business chat conversations with a virtual agent or live agent.
- Use the chat to search for articles in community posts and knowledge articles, access service catalogs, or create a customer service case.
- View the Apple Messages for Business chat conversation details from which a work item was initiated in Agent Workspace.
- Indicate your presence in the Agent Workspace Inbox with the Apple Messages for Business service channel.

Example workflow

In this example workflow, the Conversational Integration with Apple Messages for Business application is used to resolve a consumer issue:

1. A customer wants to get a replacement credit card, and initiates a Apple Messages for Business chat conversation on iMessage using the Virtual Agent bot.
2. The Customer Service Management application identifies the customer and starts an interaction of type **Messaging**.
3. The customer is presented with a list of credit card options that they own and picks that card that they want to replace.
4. A form opens and asks about the reason for replacement, date lost, address, and phone number. The customer submits the form.
5. The customer selects the iMessage app to schedule the delivery.
6. The replacement card is scheduled to arrive in 3-5 business days.

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7. The customer additionally wants to know about home refinance options, and is shown links on refinancing.
8. The customer then selects to chat with a live agent.
9. A live agent schedules a call back with a mortgage specialist. The Customer Service Management application starts another interaction of type **Messaging**.
10. The customer sends feedback on the interaction using the quick reply action.

End users and roles

Users with the roles listed in the following table can use the Conversational Integration with Apple Messages for Business application.

Roles required for Conversational Integration with Apple Messages for Business

Roles	Tasks
agent_workspace_user	Accept an ongoing Apple Messages for Business chat conversation with a customer through the Apple Messages for Business service channel in Advanced Work Assignment.
sn_customerservice_manager	View details of a Apple Messages for Business chat conversation by using interaction records of type **Messaging** and subtype Apple.
sn_customerservice.consumer, sn_customerservice.customer	Initiate Apple Messages for Business chat conversations with a virtual agent or live agent so that you can search for articles in Communities and Knowledge Management, access service catalogs, and create a customer service case.

Integrating with Process Mining

Integrate Customer Service Management with the Process Mining application to analyze processes relevant to your KPIs, and identify bottlenecks associated with customer service cases.

For more information about enabling the Process Mining Content Pack for CSM, see Activate Process Mining content packs.

End user and roles

If you have the required roles, you can use Analyst Workbench to access the visualized process workflow data, and tools for analyzing data related to customer service cases. For more information, see Overview of the Analyst Workbench.

The following combinations of roles are required for using the Process Mining application with Customer Service Management.

Combinations of roles

Process Mining role	Customer Service Management role
sn_process_optimization_admin	sn_customerservice_manager
sn_process_optimization_power_user	sn_customerservice_manager
sn_process_optimization_analyst	sn_customer_service_agent

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Optimization project for customer service cases

The Process Mining Content Pack for CSM (com.snc.csm_process_optimization) adds a prebuilt project that includes a predefined **Customer Service Cases** process model definition for customer service cases. By default, the **Customer Service Cases** project filters customer service cases for the last two quarters. You can also configure a new process project based on the prebuilt project. For more information, see Create a project using ServiceNow platform.

The **Customer Service Cases** process model definition includes default activity definitions and breakdown definitions for customer service cases. Use the definitions as they are or modify them for a custom configuration.

- Use activity definitions to understand state transitions and analyze the linked processes such as Problem (PRB) records. Transitions can include, for example, going from the work in progress state to the solution proposed state.
- Use breakdown definitions to filter records and analyze a process map by categories. For example, you can filter the customer service case data by different channels, products, assignment groups, and locations.

Continual Improvement Management initiative for customer service cases

If the Continual Improvement Management (CIM) application is enabled, the CIM project from the Analyst Workbench can be used to track customer service case improvement initiative progress. The improvement initiative and the process mining model are automatically linked. For more information, see Integration with Continual Improvement Management.

Performance Analytics for customer service cases

If the Performance Analytics application is enabled, the available template configurations can also open the Process Mining application from a Performance Analytics (PA) indicator based on the customer service case data. For more information, see Integration with Performance Analytics (PA).

Related topics

Process Optimization for CSM

Integrating with contact centers

Integrate your contact center platform with the ServiceNow Customer Service Management (CSM) application to unify customer service teams through a single user interface. This integration centralizes routing across departments and channels, and optimizes workforce engagement for more personalized customer experiences and simplified employee experiences.

Contact Center integration overview

Prerequisite: Ensure that agents are set up via configuration through their contact center integration to access the ServiceNow Workspace. The agent profiles are synced automatically when the agent logs in through the contact center connector in OpenFrame. For example, agent John Jason in the ServiceNow workspace must be able to log into the contact center.

Additionally, the agent presence state must match between the ServiceNow workspace and the contact center. In some cases, the state “available” might have a different name in the contact center environment, “on queue” for example.

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External routing with Contact Centers

Contact center spokes allow communication between ServiceNow and contact centers via the contact center API. Using a spoke requires the use of Integration Hub, and each contact center provider creates a spoke with actions to initiate the routing instructions. In general, the actions should correspond to these external routing events:

- New interaction
- End interaction
- Transfer to agent
- Transfer to queue

The spoke should also have the ability to retrieve data, such as skills, queues, and wrap-up codes. To learn more about creating a spoke, refer to Building spokes using Spoke Generator.

The contact center provider uses the AWA Work Offer API to provide the agent target for the work items. This allows the contact center provider to provide parameters to accept conversations, reject conversations, set timeout duration, and set the ServiceNow agent ID. See .

In the ServiceNow platform, you can import contact center platform skills, queues, and wrap-up codes between the ServiceNow instance and the contact center provider.

Contact center integration gives you the ability to route ServiceNow chats, emails, or cases via an external routing platform.

Implementing the integration includes the following high level steps:

1. Set up the ServiceNow environment, including credentials, the AWA queue, and the OpenFrame configuration.
2. Set up the integration on the contact center side, matching the ServiceNow set up.
3. Create test users and test the integration.

For specific instructions for integrating with Genesys Cloud, refer to the Genesys Cloud documentation.

For agents

As an agent, you can manage the chat with the customer using the inbox card alert by accepting or rejecting the chat. After accepting a chat, you can continue chatting with the customer through the workspace chat panel.

Agents using the integration can do the following:

- Accept work items.

  Note:
  Work items may time out and return to the queue if the agent doesn't accept in the configured timeout period.

- Reject work items
- Transfer to another agent
- Transfer to a queue
- Cancel a transfer to another agent

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CCaaS Admin Console

The Admin Console is a tool that administrators use to automate the import of data from CCaaS (Contact Center as a Service) providers into ServiceNow. This integration enhances Customer Service Management by enabling Unified Desktop and External Routing, which improves agent efficiency and customer experience.

The Admin Console streamlines the integration of CCaaS providers with the ServiceNow platform, providing a seamless and unified experience for both customers and partners using ServiceNow.

Note:
CCaaS providers can use the following features by integrating with the capabilities through their custom plugins. Review. prerequisites and plugin requirements to enable the CCaaS Admin Console. See: Plugin requirements for external call routing integration with contact centers

Data Import

The key capability of the Admin Console is importing skills, queues, and wrap-up codes from the CCaaS provider platform into ServiceNow. This ensures data synchronization between both platforms for seamless and efficient interaction routing. Queues and skills routing helps direct incoming interactions to the right queue based on agent skills and interaction metadata, ensuring efficient handling of customer queries.

Data import helps customers set up and execute External Routing and Unified Desktop by ensuring data is synchronized across platforms. The Unified Desktop experience allows agents to handle both digital and voice interactions from a single ServiceNow Workspace, eliminating the need to switch between different interfaces and improving efficiency. Customers can choose between different routing engines to manage incoming calls and messages. The routing engine intelligently matches interactions with agents based on skills and experience, ensuring a better customer experience.

For more information, see: Importing skills, queues, and wrap-up codes.

Importing skills, queues, and wrap-up codes

Import the skills, queues, and wrap-up codes that you have configured in your contact center provider to your ServiceNow® instance.

Routing

Skills and queues are a way that admins can route incoming work items to the agent best suited to handle customer inquiries.

Skills

In a contact center, skills are the specific areas of knowledge or expertise that agents have, enabling them to handle certain types of calls or tasks. They can be associated with specific agents or groups of agents. These skills help direct customer inquiries to the agent who can best meet their needs. Common skills include the following:

- Language proficiency
- Technical support
- Product knowledge
- Customer service abilities

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By setting up and importing these skills, contact centers can route customer queries to the agents most capable of solving them.

To import skills from your contact center to your ServiceNow® instance, refer to Import skills.

Queues

Queues are systems used to manage and organize incoming customer inquiries. They help calls, emails, or messages get routed to the appropriate agents based on the defined skills and availability. Queues help in distributing the workload evenly among agents and minimize wait times for customers. They can be set up to handle various service channels, such as phone, email, chat, and social media, so that customer interactions are managed efficiently.

To import queues from your contact center to your ServiceNow® instance, refer to Import queues.

Wrap-up codes

Wrap-up codes are labels or categories that agents use to classify the outcome of a customer interaction after it has concluded. These codes help in tracking the nature of interactions and identifying trends or common issues. Wrap-up codes provide insights into the types of customer inquiries received, the efficiency of issue resolutions, and areas that need improvement. This information provides insights that help with reporting and analytics.

For example, wrap-up codes can indicate whether a call was for technical support, billing inquiries, or a product return. Accurately assigning wrap-up codes helps data get correctly captured for future reference and analysis.

To import wrap-up codes from your contact center to your ServiceNow® instance, refer to Import wrap-up codes.

Import queues

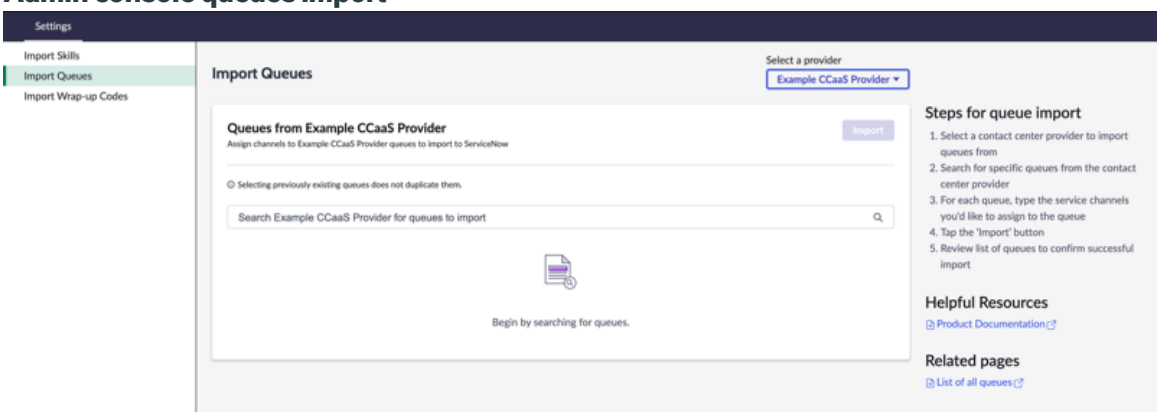
Import queues from your contact center provider to ensure that customer interactions are routed to the appropriate agents based on their skills and availability.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Contact Center Integration Center** > **CCaaS Admin Console**

Admin console queues import



2. Select a contact center provider to import queues from.
3. Search for specific queues from the contact center provider.

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4. For each queue, select the service channels you'd like to assign to the queue.
5. Tap the **Import** button.
6. Review list of queues to confirm successful import.

Import wrap-up codes

Import wrap-up codes from your contact center provider to ensure that each customer interaction is classified appropriately. For example, you can specify whether a call was for technical support, billing, or a product return.

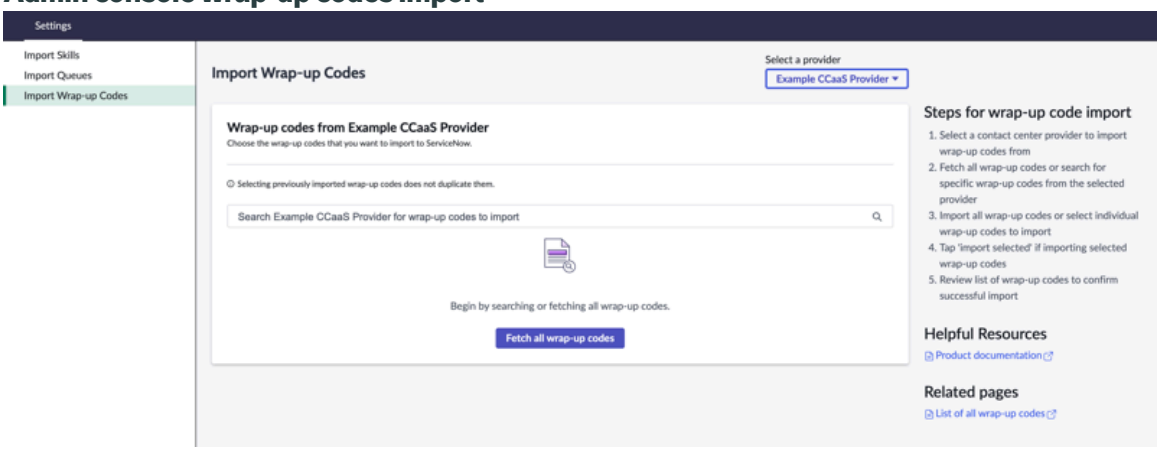
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Contact Center Integration Center** > **CCaaS Admin Console**

Admin console wrap-up codes import



2. Select a contact center provider to import wrap-up codes from.
3. Either fetch all wrap-up codes or search for specific wrap-up codes from the provider.
4. Import all of the wrap-up codes or select individual wrap-up codes to import.
5. Tap **Import selected** to import the wrap-up codes.
6. Review the list of wrap-up codes to confirm that the import was successful.

> **Note:**
> Newly imported wrap up codes and wrap up codes that previously existed in your ServiceNow® instance are shown in two separate lists on the confirmation page.

Import skills

Import skills to assign the right agent to the customer interaction so that customer inquiries can be handled efficiently.

Before you begin

Role required: admin

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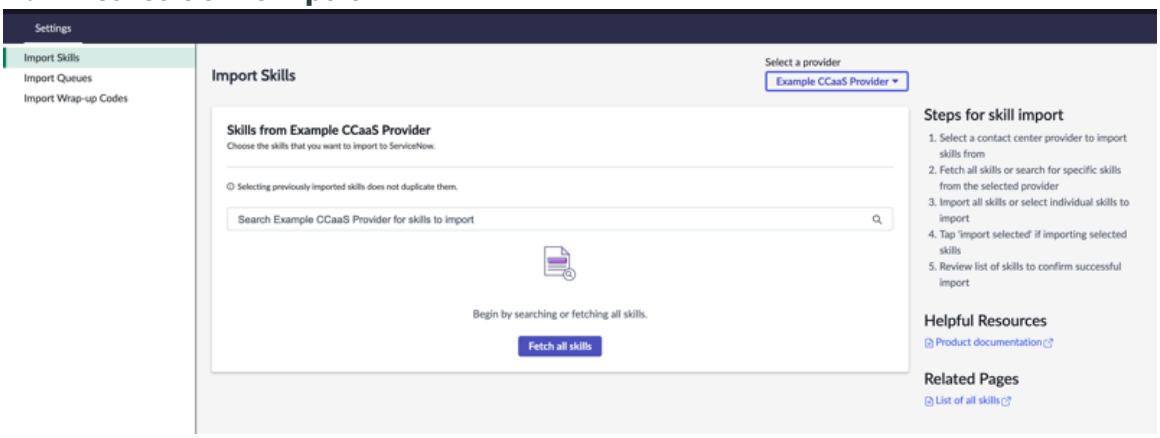
Procedure

1. Navigate to **All** > **Contact Center Integration Center** > **CCaaS Admin Console**

Admin console skills import



2. Select a contact center provider to import skills from.
3. Import all skills or select individual skills to import.
4. Fetch all skills or search for specific skills from the selected provider
5. Tap **Import selected** if imported selected skills.
6. Review list of skills to confirm successful import.

> **Note:**
> Newly imported skills and skills that previously existed in your ServiceNow® instance are shown in two separate lists on the confirmation page.

Integrating contact centers with Interaction Controls Component (ICC) for voice calls

The ServiceNow® Configurable Workspace offers voice interaction and call control capabilities to agents within a single pane view, equipping them with the tools needed to enhance agent productivity and customer experience.

Overview of CSM Configurable Workspace with ICC integration

ICC integration with CSM Configurable Workspace enables agents to manage voice calls directly within their interaction screen using call controls. This feature helps reduce the need to switch between the contact center applications and the Configurable Workspace.

The CSM Configurable Workspace provides a unified interface that integrates contact center platform with the Customer Service Management (CSM) service offering. This integration helps you manage inbound and outbound interactions within a single interface.

With this expanded framework, voice interactions from a contact center platform and native digital channels can be routed seamlessly. Skills, queues, agents, and presence statuses can be synced automatically to optimize the admin experience and help reduce operational costs.

The following CCaaS Store Apps offer voice channel integration:

- Unified Experience from Genesys - Core
- Unified Experience from Genesys

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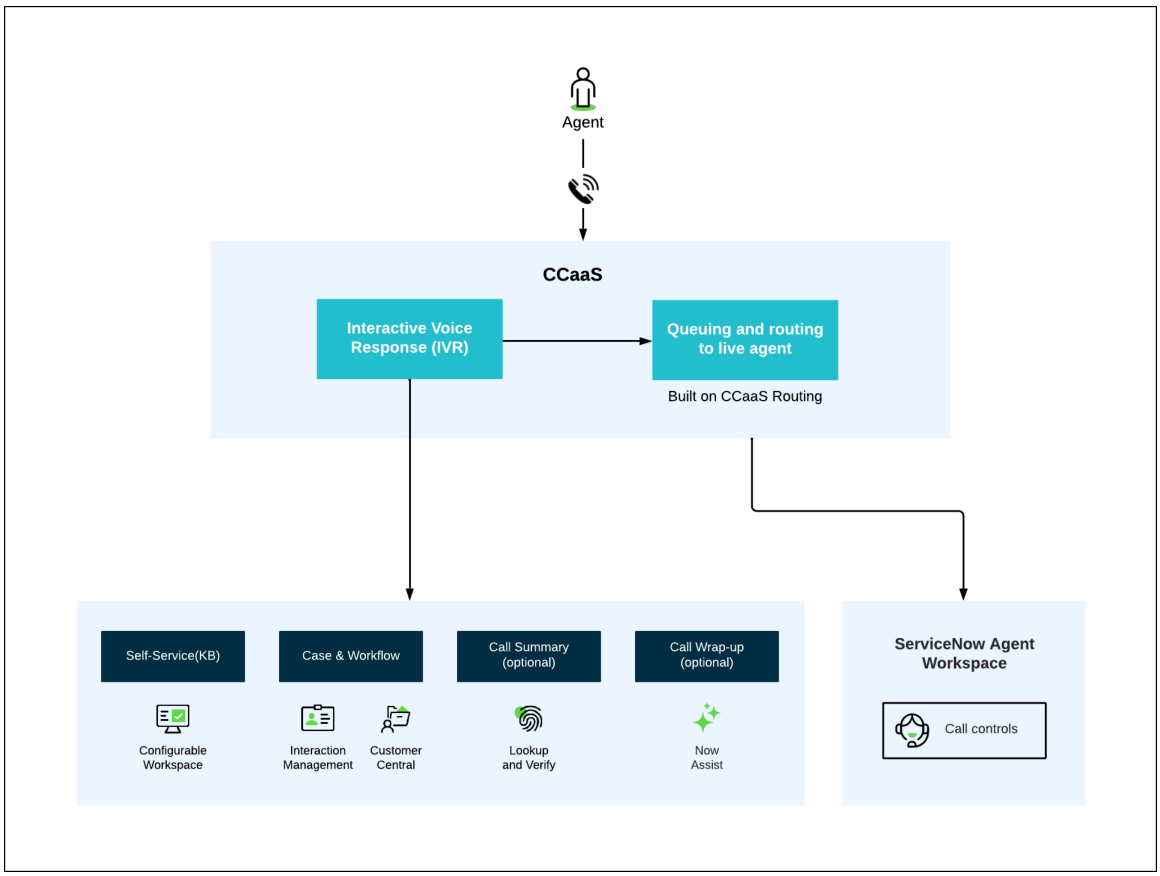
The following visual displays the voice workflow when CCaaS integrates with ICC within the CSM Configurable Workspace .

Voice call flow



Key benefits

The primary benefits of this integration are as follows:

Centralized routing

Manages routing across departments and channels without switching interfaces.

Consistent agent experience

Promotes a consistent experience across all channels with a universal inbox.

Fast resolution

Helps reduce resolution time by reducing the need to switch between CCaaS and ServiceNow Workspace.

Enhanced efficiency

Streamlines workflows with direct access to consult and blind call transfer controls in the CSM Configurable Workspace.

Interaction Controls Component (ICC) call interaction features

The Contact Center Integration framework integrates traditional contact center capabilities, including telephony, intelligent routing, and workforce engagement management (WEM), with the CSM Configurable Workspace. This integration consolidates tools and workflows into a single, intuitive platform for both customers and agents.

The voice interaction feature is available for integration via Interaction Controls Component (ICC) for contact centers.

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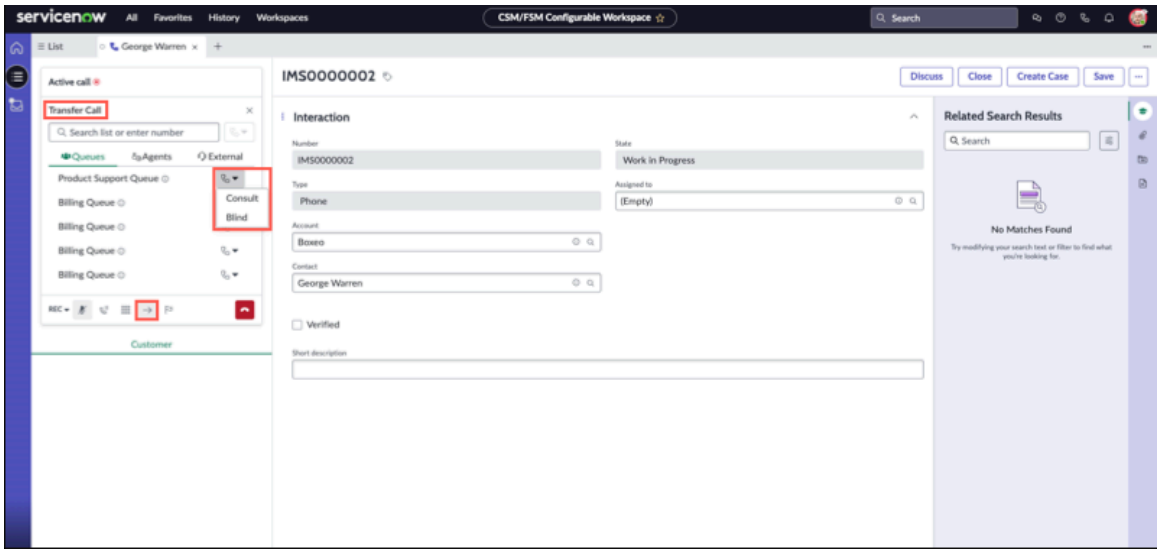
Note:
See Implement the Interaction Controls Component (ICC) for contact center integration to manage the integration dependencies before using the feature.



The following features are available from ICC call interactions to promote streamlined operations and an enhanced agent experience:

Inbound call

Manages inbound calls by accepting or rejecting them directly from the Agent Workspace. During an active call, you can use buttons to hold, start, or stop recording, mute yourself or other parties, and transfer calls to a queue, other agents, or external numbers.

Outbound call

Initiates outbound calls to contact customers, using the phone keypad to dial manually or by selecting the call icon on the record phone field to call directly.

Call transfer

Transfers calls using either consult or blind transfer methods. In a consult transfer, you share the call context with the external contact before completing the transfer. A blind transfer immediately transfers the call to the external contact.

How does it work

As an agent, you log in to the Configurable Workspace and the integrated contact center to start handling interactions from both of them. The agent inbox acts as a universal workspace where you receive and manage interactions for cases, emails, and chats, creating a consistent experience across all communication channels.

You can accept an incoming call to view the voice interactions page and verify the customer. The voice interaction page includes the following main components:

Call control panel

Provides all call control buttons, such as record, mute, hold, and transfer (consult or blind).

Customer details section

Offers an overview of the customer and their interaction history.

Call transcript section

Displays a history of the live conversation between the agent and the customer.

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Note:
CCaaS providers must turn on the Call Transcript feature.

An interaction record is automatically created for each call. Opening the interaction record expands any voice interaction to show additional call details, including call transcript, wrap-up options, and customer context. The agent can view and update this record during the call and in the wrap-up interaction.

Note:
You can use an identity property and extension point to hide the conversation panel when real-time transcription is turned on or off. See: Show or hide the conversation panel.

When an agent receives a customer call, they can verify the customer's details, view the interaction history, and see suggested knowledge articles for the customer's issue. They can also determine if the issue requires escalation to a specialized team.

For a smooth handoff, the agent can opt for a consult transfer to a specialized agent, providing context before transferring the call. Alternatively, the agent can transfer the call to an existing queue or an available agent.

During the transfer, the agent's call is automatically placed on hold. Once the consult transfer is complete, the first agent finalizes the transfer and leaves the call with the new agent. After the call transfer is complete, the agent's initial call is automatically placed in wrap-up mode, where they can finalize the interaction.

In wrap-up mode, ServiceNow® Now Assist automatically generates a call summary and adds it to the interaction. The agent can review the summary, select a suggested wrap-up code from Now Assist, generate their own code, add additional notes, and then end the interaction.

Note:
The call transcription capability must be enabled to implement this feature.

Show or hide the conversation panel

Show or hide the conversation panel in the real-time transcription (RTT) interface using the *rtt_show_conversation_tab* identity property. This feature allows the contact center providers to control the visibility of the conversation panel using the identity property.

Configure and set up the conversation panel

Show or hide the conversation panel using the *rtt_show_conversation_tab* property:

- true – Displays the conversation panel
- false – Hides the conversation panel

Follow these steps to add the property to enable or disable the conversation panel feature in your application as follows:

1. Navigate to the provider application associated with your Interactions.
2. Create the property *rtt_show_conversation_tab*.

The **Call Transcript** tab doesn't show if the *rtt_show_conversation_tab* property is false or doesn't exist.

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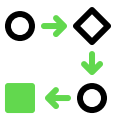
Using Customer Service Management

Agents and managers can use Customer Service Management application to create cases for customers, route cases to agents with the required skills and availability, manage customer information and case activity, and connect with other applications and departments to assist with case resolution.

Manage cases

Find tools for creating cases, interacting with customers, and resolving questions and issues

Manage schedules and sites



Find tools for managing your calendar, using the mobile app to manage work, and plan install base tasks.

Automate and optimize

Find tools to automate your work, and use AI tools to streamline cases.

Agent management

Manage tasks and schedules for agents on your team.

Customer management

Oversee customer-related tasks, including location and access management, handling contracts and entitlements, managing social media, and outsourcing customer service.

Customer communication

Learn about tools for portals and case deflection. Find examples and information on using self-service tools and contacting agents for assistance.

Manage cases

Efficiently manage customer and consumer interactions by creating, assigning, and resolving cases received through various channels like chat, email, and calls.

Use advanced tools, configurable workspaces, and knowledge resources to streamline workflows, and ensure personalized and timely support.

Manage schedules and sites

Manage agent schedules, customer service cases, and install base plans using tools like agent calendars, Microsoft Outlook integrated with CSM, and the CSM mobile app.

You can get real-time updates, streamlined collaboration, and service contracts to enhance customer service efficiency and support.

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Automate and optimize

Integrate Virtual Agent for automation and Proactive Customer Service Operations for early issue resolution. Use Task Intelligence, Guided Decisions, and Playbooks to streamline case management.

Agent management

Agent Management involves recruiting, training, and monitoring agents to improve customer service. Key tasks include time entries, case assignment, managing special handling note, chat support and overseeing outsourced service provider tasks.

Customer management

Streamline customer access, contract management, and social media integration to enhance service efficiency. Support B2B2C models for better customer relationships and improve workflows across multiple service channels.

Customer communication

Optimize customer service with Playbooks, reducing resolution time and guiding users through tasks. Empower customers with seamless service via auto-responders, omnichannel callbacks, and personalized portal experiences for faster, smarter support.

Manage cases

Case management within provides a structured and efficient approach to handling a wide variety of service requests, incidents, and inquiries. It encompasses the processes and tools used to manage individual cases from initiation through resolution, ensuring that service delivery is consistent, timely, and aligned with organizational goals.

Manage cases for Customer Service Management

Application or feature	Description
Create customer service cases	• Create a customer service case- Customer service agents and agent managers can create cases using the Customer Service Management application. • Create a customer service case of a specific type-Customer service agents can create different types of cases by making selections from the case type selector. • Create a customer service case from a chat-If a customer chat results in the need to open a case, create the case directly from the conversation.
Assign a customer service case	Agents can assign cases to themselves or to other customer service agents.
Create a task for a customer service case	Create a task for a customer service case for additional work that needs to be completed as part of resolving the case.

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Manage cases for Customer Service Management (continued)

Application or feature	Description
Create a case task of a specific type for a customer service case	Customer service agents can create different types of case tasks by making selections from the case task type selector screen.
Create a work order for a customer service case	Create a work order for a customer service case as part of the case resolution process.
Create a request on behalf of a customer or consumer	Customer service agents can create requests on behalf of customers from CSM Configurable Workspace or from the platform interface.
Close a customer service case	Close a case at any time, except when it is in the Resolved state.
Create a consumer case	• Create a consumer case from a chat- If a consumer chat results in the need to open a case, create the case directly from the conversation. • Create a consumer case from an anonymous chat- If an anonymous chat results in the need to create a consumer case, create the case directly from the conversation.
Create a consumer record	• Create a consumer record- Consumer service agents and managers can create consumer records from the Customer Service Management application. • Create a consumer record from an anonymous chat- If an anonymous chat results in the need to create a consumer record, create the record directly from the conversation.
Create additional consumer addresses	Consumers can have multiple addresses, including one primary address.
Respond to a case using an email quick message	Use predefined quick email messages to quickly draft replies to customers. Agents can select predefined quick messages to add content into the message body of emails.
Initiate a conference call from a case	As part of resolving a customer service case, you can initiate a conference call between involved users.
Use the Activity Stream	Enhancements in the Activity stream help reduce cluttering in the Activity stream and reduce the agent effort to understand the case context.

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Manage cases for Customer Service Management (continued)

Application or feature	Description
Resolve cases with knowledge and community content	Enable agents to resolve a case more quickly by searching for information from the knowledge base and community and, if helpful, associating it to the case.
Manage skills for a customer service case	Add or remove optional and mandatory skills for a customer service case.
Using Chat Zoom Connector	As an agent you can initiate a Zoom meeting from a chat to understand and resolve customer issues faster through live interactions.
Using CSM Configurable Workspace in Customer Service Management	Use CSM Configurable Workspace to interact with customers, create and work on cases, and resolve questions and issues.
Using Business Location 360	Enable customer service agents to get a comprehensive, 360-degree view of the business location issues, so that they get the required contextual data to effectively resolve the reported issues within the Customer Service Management (CSM) application.
Outsourced Service Provider agent tasks	Outsourced service provider agents extend the capabilities and reach of an organization's customer service operations by providing basic customer service to customers and consumers.

Create a customer service case

Customer service agents and agent managers can create cases using the Customer Service Management application.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

Procedure

1. Create a case.

2. Fill in the fields on the Create Case form.

Create Case form fields

Field	Description
Number	The automatically assigned case number.
Channel	The method by which the customer initiated contact and the case was opened.

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Field	Description
	○ Web (default) ○ Phone ○ Email ○ Chat ○ Social
Contact Local Time	The local time of the contact assigned to the case. It is automatically filled according to the time zone set on the Contact form. If no time zone is set on the Contact form, it is filled according to the **Contact Timezone** set on the case itself. If no time zone is set on the Contact form or in the case, the field is left blank and is read-only. If a case is closed or canceled, the **Contact Local Time** field is hidden. **Note:** Configure the form layout to add this field to the Case form.
Contact time zone	The contact time zone if the customer is working in a different time zone for the case. It overrides the Contact form time zone. If no contact local time or contact time zone is set, the instance time zone is displayed. Once the case is created, the field is read-only. **Note:** Configure the form layout to add this field to the Case form.
Account	The name of the company associated with this case. If you select a contact in the **Contact** field, this field is auto-filled if the account information is available in the contact record.
Contact	The name of the customer contact for this case.
Consumer	The name of the consumer for this case. **Note:** This field is active only when the Customer Data Models for B2B2C plugin (com.sn_csm_b2b_consumers) is installed. Once Account is selected, only consumers belonging to the account are displayed.

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Field	Description
Service Organization	Internal or external entity that is involved in providing service to the requester.
Requesting Service Organization	The name of the service organization requesting assistance.
Product	The product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro). If you select an asset in the **Asset** field, this field is auto-filled if the associated product information is available in the asset record. A product may be associated with multiple assets.
Asset	The asset tag number or the serial number of the asset associated with this case.
Partner Contact	The name of the partner contact for this case. If you select a partner in the **Partner** field, the list of available partner contacts is based on this selection.
Follow the sun	A check box to indicate that a case should be handed-off for global follow-up. If a customer enters additional comments on a **Priority 1 - Critical** or a**Priority 2 - High** case, or if the case is escalated, the flag is automatically selected. You can also manually select the check box. The activity stream on the case form is updated with any changes. **Note:** Enable the **Follow the sun** check box on the Customer Service case form by setting the value of the property *sn_customerservice.FTS_flag_enabled* to **true**. Configure the form layout to add this field to the Case form.
Short description	A brief description of the customer question, issue, or problem.
Opened	The date and time that the case was opened.
Priority	The assigned priority: ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low (default)
Assignment group	The assigned customer service agent group.

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Field	Description
Assigned to	The assigned agent. This field displays all users with the sn_customerservice_manager and sn_customerservice_agent roles. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Assigned on	The data and time when the case is assigned. This field is updated when a user is added or changed in the **Assigned to** field.
Contract	The contract number associated with this case. If you selected an asset in the **Asset** field, the **Contract** field displays those contracts that include a line item for that asset.
Entitlement	The service entitlement associated with this case. The available entitlements are filtered by the settings in the **Account**, **Contract**, **Product**, **Asset**, and **Channel** fields. If only one entitlement is available for this case, it is automatically added to the **Entitlement** field.
Partner	The name of the partner for this case.

3. Click **Submit**.
   If available, the following information is associated with a newly created case:
   - The name of the contact and the contact's company
   - The product and contract details
   - The SLA and entitlements

Create a customer service case of a specific type

Customer service agents can create different types of cases by making selections from the case type selector.

Before you begin

Role required: sn_customerservice_agent

About this task

The types of cases that agents can create depend on the configuration of the customer service case types and service definitions features. For more information, see the following topics:

- Configure customer service case types
- Manage customer service case types
- Configuring service definitions

In CSM Configurable Workspace, agents use the Case type selector to make selections and create cases.

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Note:
In the Core UI, use the Case interceptor to make selections and create a case.

Procedure

1. Create a case by selecting one of the following actions.

Agent action field description

Agent action	Description
Select **New**	Select this action from case lists and case type lists such as My Cases or My Complaint Cases.
Select **Create Case**	Select this action from the following records: ○ Interaction ○ Account ○ Contact ○ Consumer ○ Sold Product ○ Install Base Item

2. Make selections from the version of the case type selector that has been configured by the system administrator.

Case selector version field description

Version	Steps
Multi-select	**a.** Select a **Case Type**. **b.** If desired, select an optional category and subtype to narrow the available choices. **c.** Select **Create Case**. **Note:** If a subtype hasn't been configured for a case type, the field for the subtype is not displayed.
Single-select	**a.** Select a **Case Type**. **b.** Select **Create Case**.
Product Service Select	**a.** Enable or disable the **This case is for an owned product** check box. This check box controls the display of the **Product** field **b.** If displayed, select a **Product**. **c.** Select a **Service**. **d.** Select a **Case type**. **e.** Select **Create Case**.

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3. Fill in the fields on the Case form.
   For more information about these fields, see Create a customer service case.
4. Select **Save**.

Create an onboarding case

Create a case to onboard new customers or to onboard existing customers for new products.

Before you begin
Role required: sn_customerservice_agent

About this task
Onboarding cases appear in the Onboarding Cases module and use the ONB prefix in the case number. For example, ONB0001007.

If the case playbook for onboarding is available, you can use the playbook to guide you through the steps that need to be completed to resolve onboarding cases.

Procedure
1. Create a case.
2. Select the case type.
3. Add the customer information.
   - If the onboarding case is for an existing customer, fill in the **Account** and **Contact** or **Consumer** fields.
   - If the onboarding case is for a new customer, enable the **New customer** check box and fill in the fields in the New Customer Information form section.
4. **Optional:** Add additional members to the case from the **Additional Members** related list. Use this related list to create the users or business entities that should be included in the onboarding case. Click **New** and fill in the fields on the Related Party form.
5. Fill in the fields on the Case form.
   For more information and field descriptions, see Create a customer service case.
6. Click **Save**.
   - If the **New customer** check box is enabled, the **Account** and **Contact** or **Consumer** fields are not required to save the case.
   - If the **New customer** check box is disabled, the **Account** and **Contact** or **Consumer** fields are required to save the case.

Create a record in CSM Configurable Workspace

Create a record in CSM Configurable Workspace from the Record tab menu.

Before you begin
Role required: sn_customerservice_agent,sn_customerservice.consumer_agent

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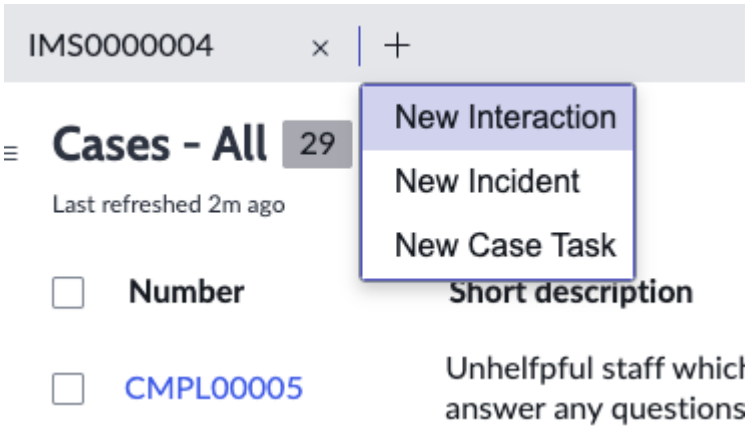
About this task

You can create records from the Add tab in CSM Configurable workspace by selecting the plus sign (**+**) icon. This displays a list of records that you can create.

Record creation from Add tab



Users with the system administrator role can configure the types of records that appear in this list. The default is an interaction record. For more information about configuring the records that can be created from the Add tab, see Configure record creation from the new tab menu in Service Operations Workspace.

Procedure

1. In CSM Configurable Workspace, select the plus sign icon (+) icon on the Add tab.
   If you can create more than one type of record, the system displays a list of the available record types. For example, **New Interaction** or **New Incident**.

   Note:
   If you can only create one type of record, the system displays a blank form of that record type.

2. Select the type of record to create.
   The system displays a blank form of that record type in the tab.
3. Fill in the fields on the record form.
4. Select **Save**.

Create a customer service case from a chat

If a customer chat results in the need to open a case, create the case directly from the conversation.

Before you begin

Role required: sn_customerservice_agent or sn_customerservice_manager

About this task

When you create a customer service case from a support conversation, the system copies the conversation history to the case activity stream as comments and work notes. Future messages are tracked in the case as well.

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Important:

Starting in Utah, Connect Support has been deprecated and is no longer supported or available for new activation. For similar capabilities, please move to Advanced Work Assignment and Agent Chat. For details, see Move from Connect Support to Advanced Work Assignment and Agent Chat.

Procedure

1. Navigate to **All** > **Connect** > **Connect Support**.
   The Connect workspace opens in a new tab.
2. Click the support tab of the Connect sidebar, indicated by a headset icon ( ).
3. Under **Cases**, open a customer service conversation.
4. At the bottom of the conversation, click the menu icon ( ) to open the Connect actions menu.
5. In the Connect actions menu, select **Create Case**.
   The system opens a new case form in a record tab and automatically fills in some fields based on conversation details.
6. Complete the form as necessary and click **Submit**.
   Any comments or work notes in the record conversation appear as comments on the incident form. Work notes do not appear in the chat for the ESS user. The chat agent can select whether a message is a Comment or Work Note in the conversation.

   a. In the record conversation, by the text entry field, click the message type icon ( ).

   b. Select **Comment** or **Work Note**.

   c. Enter a message.
   By default, record conversation messages are added as comments.

   Note:
   If you add an attachment to a record conversation, it is attached to the underlying record as well.

   The system automatically shares the record in the conversation, copies the conversation to the record activity stream, and references the record on the Chat Queue Entry [chat_queue_entry] table. Any new journal fields added to the record do not appear in the chat. The system also changes the document ID for the conversation to reference the incident number instead of the entry in the Chat Queue Entry table.

Related topics

Connect workspace

Assign a customer service case

Agents can assign cases to themselves or to other customer service agents.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

The **Assign to me** button is only visible if the current user has the customer service agent role and is not already assigned to the case.

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Procedure

1. Open a customer service case.
2. Assign the case.

Option	Description
Assign the case to yourself	Click **Assign to me**.
Assign the case to another agent	Select an agent in the **Assigned to** field.

The agent's name appears in the **Assigned to** field. If the agent also belongs to an agent group, the group name appears in the **Assignment group** field.

Create a task for a customer service case

Create a task for a customer service case for additional work that needs to be completed as part of resolving the case.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

When you create a task, the system uses information from the case to automatically fill in fields on the Case Task form. After you create and save a task, it appears in the **Tasks** related list on the Case form.

Procedure

1. Open the desired case.
2. From the **Tasks** related list, click **New**.
3. Fill in the fields on the Case Task form.

Case Task form fields

Field	Description
Number	The automatically assigned case task number.
Parent case	The number of the parent case. This can be a case from the Case [sn_customerservice_case] table or any child tables of the Case table.
Parent	The number of the parent record if the task is created from a type of record other than a case. This field is populated when a case task is created from a non-case record such as an incident, problem, change, or request. This field is a reference to the Task [task] table. **Note:** You may need to configure the case task record to display the **Parent** field. For more information about adding fields to a form, see Configuring the form layout.

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Field	Description
Contact	The contact for the parent case. This field is a reference to the Contact [customer_contact] table.
Account	The account for the parent case. This field is a reference to the Account [customer_account] table.
Consumer	The consumer for the parent case. This field is a reference to the Consumer [csm_consumer] table.
Subject	The subject of the case task.
Description	A description of the work that needs to be done in order to complete the case task.
Priority	The assigned priority of the case task: ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low (default)
State	The current state of the case task: ○ Open ○ Closed
Assigned to	The assigned user.
Service Definition	This field is a reference to the Service Definition [sn_case_type_selection] table.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list.
Work notes	Information about the case task, such as steps taken toward resolution. Internal users who have been added to the **Work notes list** receive a notification when work notes are added to a case task.
Additional comments	Customer-viewable comments. Each comment is inserted into the **Activity** field when the user selects **Post**.

4. Click **Update**.

Create a case task of a specific type for a customer service case

Customer service agents can create different types of case tasks by making selections from the case task type selector screen.

Before you begin

Role required:

- sn_customerservice_agent
- sn_customerservice.consumer_agent
- sn_customerservice_manager

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- sn_customerservice.svc_location_agent
- sn_customerservice.case_task_agent

About this task

The types of case tasks that agents can create depends on the configuration of the customer service case types and service definitions features. For more information, see the following topics:

- Configure customer service case types
- Manage customer service case types
- Configuring service definitions

In CSM Configurable Workspace, agents use the Case type selector screen to make selections and create cases.

Procedure

1. Create a case task.
   - Select **New** from a case task list.
   - Select **New** from the Tasks related list tab on a case record.
   - Select the **+** icon on the related records task list in the Dynamic Related Records component.
   - Select the Task declarative action on the activity viewer.
   - Select **Create Task** in a case playbook stage.
2. Make a selection in the case task type selector.
   - If you create the case task from a case task list, the **Service task** field on the case task type selector shows all of the related services where the target table is Case Task [sn_customerservice_task] and extensions of Case Task.
   - If you create the case task from a case record, the **Case task service** field lists the task services related to the case service. If the case has no service, the **Service task** field shows all of the related services where the target table is Case Task [sn_customerservice_task] and extensions of Case Task.
3. Select **Create task**
   The case task is created with the selected task service definition. If any default values have been defined in the case task service definition, these values are populated on the case task record.

Create a work order for a customer service case

Create a work order for a customer service case as part of the case resolution process.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

After a work order is created, it appears in the **Work Orders** related list on the Case form. The case number is also referenced on the work order.

Procedure

1. Open the desired case.
2. From the **Work Orders** related list, click **New**.

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3. Fill in the fields on the Work Order form.
   For more information, see Create a work order.
4. Click **Update**.

Related topics

Manage work orders

Create a request on behalf of a customer or consumer

Customer service agents can create requests on behalf of customers from CSM Configurable Workspace or from the platform interface.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

Customer service agents can browse the catalog and make a selection to create a request on behalf of a customer.

- From CSM Configurable Workspace, agents can create requests from case and interaction records.
- From the platform interface, agents can create requests from case records.

Procedure

1. Open a customer service case.
2. To create a request, do one of the following.
   - CSM Configurable Workspace: Click the More UI Actions icon (•••) and select **Create Request**.
   - Platform interface: Click the form context menu icon and select **Create Request**.
3. Select an item or a service from the catalog to display the item page.
4. **Optional:** Select the quantity.
5. To complete the request, do one of the following.

6. From the Case form, click the **Requests** related list to see the requests associated with the case.

Close a customer service case

Close a case at any time, except when it is in the **Resolved** state.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

After an agent proposes a solution for a case, the state changes to **Resolved** and the customer can either choose to accept or reject the solution. If accepted, the case is closed. If rejected, the state reverts to **Open**.

An agent or agent manager can close a case at any time, except when it is in the **Resolved** state, whereas only a customer can accept or reject the proposed solution. When an agent or agent manager closes a case, details must be included in the **Resolution notes** field.

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Procedure

1. Open a customer service case in CSM Configurable Workspace.
2. Select the **Details** tab.
3. In the Closure Information section, fill in the following fields.
   a. Select a code in the **Resolution code** field that indicates the resolution state of the case.
   b. Enter any information related to the closure in the **Resolution notes** field.
4. Select **Close Case**.

Customer service satisfaction surveys

Customers can complete a satisfaction survey when they accept a case solution or close a case from the Customer Service Portal.

When a customer accepts a proposed solution for a case by clicking **Accept Solution** on the case record or closes a case by clicking **Close Case**, they can access a satisfaction survey in the Customer Service Portal. Customers have the option of completing or skipping the survey.

If a customer is using the email communication channel, the system sends an email with a link to a customer satisfaction survey when an agent closes a case. The customer can click on this link to complete the survey.

Note:
One survey can be generated per case. If a survey has already been generated for a case, a second survey cannot be generated even if a case is reopened and closed again.

The Customer Service application includes a default survey that you can customize as needed. To customize the default survey, navigate to **Survey** > **View Surveys** and select **Customer Service Satisfaction Survey** from the list of assessment metric types. To edit the default survey, open the survey and click the **Survey Designer** button.

You can also design your own survey using the survey designer tool. After designing a survey, be sure to select a condition for triggering the survey.

Related topics

Assessments and Surveys

Service Manager dashboard

Create a consumer case from a chat

If a consumer chat results in the need to open a case, create the case directly from the conversation.

Before you begin

Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

About this task

When you create a case from a support conversation, the system copies the conversation history to the case activity stream as comments and work notes. Future messages are tracked in the case as well.

Procedure

1. Navigate to **All** > **Collaborate** > **Connect Support**.
   The Connect workspace opens in a new tab.

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2. Click the support tab of the Connect sidebar, indicated by a headset icon.
   The support tab displays **Queues** to which you belong. It also displays your open support conversations under **Cases**. When a consumer starts a support conversation or an agent transfers a conversation to a queue, any agent who belongs to the associated queue has the option to accept the conversation. An agent can also request to transfer a conversation directly to you.
3. Under **Cases**, open a consumer conversation.
4. At the bottom of the conversation, click the menu icon to open the Connect actions menu.
5. In the Connect actions menu, select Create Case.
   The system opens a new Case form and fills in some of the fields based on the conversation details. (For a case created from a consumer chat, the **Consumer** field is filled in and the **Short description** field displays the initial chat request from the consumer.)
6. Complete the form as necessary and click **Submit**.
   The system shares the record in the conversation, copies the conversation to the record activity stream, and references the record on the Chat Queue Entry [chat_queue_entry] table.

Create a consumer case from an anonymous chat

If an anonymous chat results in the need to create a consumer case, create the case directly from the conversation.

Before you begin

Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

About this task

When you create a case from a support conversation, the system copies the conversation history to the case activity stream as comments and work notes. Future messages are tracked in the case as well.

Procedure

1. Respond to an anonymous chat request.
2. Chat with the user to determine the issue.
3. At the bottom of the conversation, click the menu icon to open the Connect actions menu.
4. In the Connect actions menu, select **Create Case for Guest**.
   The system opens a new Case form and fills in some of the fields based on the conversation details. For a case created from a guest user chat, the **Short description** field displays the initial chat request from the user.
5. Complete the form as necessary and click **Submit**.
   The system automatically shares the record in the conversation, copies the conversation to the record activity stream, and references the record on the Chat Queue Entry [chat_queue_entry] table.

Create a consumer record

Consumer service agents and managers can create consumer records from the Customer Service Management application.

Before you begin

Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

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Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select **New**.
3. Fill in the fields on the Consumer form as necessary.
4. Fill in the fields on the Primary Address tab.
   A consumer can have multiple addresses but only one primary address. The primary address is stored in the Primary Address tab on the Consumer form and in the **Addresses** related list.
5. If desired, fill in any of the fields on the Preferences tab.
6. Select **Submit**.
   The record is added to the Consumers table (csm_consumer). The primary address is added to the **Addresses** related list and the **Primary** field is set to **true**.

Related topics

Create additional consumer addresses

Create a consumer record from an anonymous chat

If an anonymous chat results in the need to create a consumer record, create the record directly from the conversation.

Before you begin
Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

About this task

Procedure

1. Respond to an anonymous chat request.
2. Chat with the user to determine the issue.
3. At the bottom of the conversation, click the menu icon to open the Connect actions menu.
4. In the Connect actions menu, select **Create Consumer and Case for Guest**.

   The system opens a Consumer form and fills in some of the fields based on conversation details. For a consumer record created from a guest user chat, the **First name**, **Last name**, and **Email** fields display information from the initial chat request.

   Selecting this option creates a consumer record using the information provided on the record producer and then associates the case with the newly created consumer. The Case form is also populated with the information provided on the record producer.

5. Complete the form as necessary and click **Submit**.

Create additional consumer addresses

Consumers can have multiple addresses, including one primary address.

Before you begin
Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

About this task
The primary address is stored in the Primary Address tab on the Consumer form and in the **Addresses** related list. When you fill in the fields in the Primary Address tab and click **Submit**, this information is added to the **Addresses** related list as the primary address, with the **Primary**

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field set to true. Any changes made to the **Primary Address** fields are also updated in the related list. A consumer can have only one primary address.

Other addresses, such as billing or shipping addresses, can be created and stored in the **Addresses** related list. For these other addresses, the **Primary** field is set to **false**.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Click the number of the desired consumer.
3. In the **Addresses** related list, click **New**.
4. Fill in the fields on the Location form.
5. To denote this address as the primary address for the consumer, enable the **Primary** check box.
   A consumer can have multiple addresses but only one primary address.
6. Click **Submit**.

Respond to a case using an email quick message

Use predefined quick email messages to quickly draft replies to customers. Agents can select predefined quick messages to add content into the message body of emails.

Before you begin

Role required: sn_customerservice_agent

About this task

Business managers and admins can set up email quick messages and predefine the content for replying to cases. For example, you can predefine personal greetings, disclaimers, different types of additional information, and signatures.

You can incorporate icons, business logos, pictures, HTML layout, and rich text format. You can also configure quick messages so that only a certain user or a group can view them.

For more information, see the following topics:

- Composing emails with quick messages
- Define a quick message

Procedure

1. Open a customer service case.
2. Select the More Actions icon ( ) and then select **Email**.
3. Select the Quick Messages drop-down menu in the Compose Email header and select a predefined message.
   The content of the quick message is inserted in the message body at the cursor location.
4. **Optional:** Select additional quick messages.
5. Select **Send**.

Related topics

Define a quick message

Composing emails with quick messages

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Initiate a conference call from a case

As part of resolving a customer service case, you can initiate a conference call between involved users.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, admin

About this task

Customer service agents can initiate a conference call from a case and add participants, including on-call members of shift groups.

Note:

Notify must be set up before you can use Notify on task. Ensure there are Notify phone numbers (E.164 or short code) in number groups with phone call workflows. Also ensure the property **glide.notify.task.phone_number** is set to one of these Notify phone numbers.

Procedure

1. Open the desired case.
2. Click the **Start Conference Call** related link.
3. Select one or more **Recipients** to participate in the conference call.
   You can add individual participants, groups, or individual phone numbers.

Related topics

Start a conference call

Start a conference call from a task

Use the Activity Stream

Enhancements to Activity stream help reduce cluttering the Activity Stream and the agent effort to understand the case context.

Before you begin

Role required: admin

About this task

Enhancements in the Activity Stream include the following:

- Filter by post type
- Sort messages and events
- Improved email representation

Procedure

1. Open a customer service case.
   You would see the Activity Stream with the filter options.
2. Click the Filter icon ( ).
   The Filter sets are displayed. The conversation filter sets items such as emails, comments, and work notes.
3. Select the **Post types** filters from the drop-down list.
   For example, if you select **Work notes**, only the notes are displayed in the Activity Stream.

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Note:
Selecting only **Field changes** displays the fields in the Activity Stream.

4. Select the **Field changes** drop-down list to filter the fields.
   For example, if you select **State**, only the state changes are visible.
5. Click the **Flagged** tab to see only the flagged messages.

   Flagged messages are visible to everyone who has access to the case.
6. Click the Sort icon ( ) to sort the events and messages based on the timeline.
7. Click the More Options icon (•••) and select **Expand all posts** to view the post details or select **Collapse all posts** to go back to the previous state.
8. Click **Show more** in an email to view the latest email response in an expanded form.
9. Click **Show full conversation** to view the whole email thread.

Related topics

Configure Activity stream

Resolve cases with knowledge and community content

Enable agents to resolve a case more quickly by searching for information from the knowledge base and community and, if helpful, associating it to the case.

Before you begin
Role required: sn_customerservice_agent

About this task
The Case form displays contextual search results based on text entered in the **Short Description** field. These search results provide targeted knowledge articles, pinned articles, and community content to customer service agents.

Customer service agents can search for information that is related to a case when opening a case or in a case that is already open. If the search results in any related content, the agent can preview the content. If the information is relevant, the agent can mark it as helpful. Knowledge articles can be also attached to the case.

By default, search results include knowledge articles, pinned articles, and solved community questions and blogs. Depending on the configuration, search results can also include other types of information, such as open and resolved cases and problems. With the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml), you can also view similar cases and similar knowledge articles.

Customer service case managers can use the Demand Insights for Cases dashboard to identify which cases have no or insufficient knowledge coverage. For more information, see Demand Insights for Cases dashboard.

Procedure

1. Navigate to **All** > **Customer Service** > **Cases**.
2. Perform one of the following actions.
   - Open a new case and start typing in the **Short description** field.
   - Open an existing case and click **Related Search Results**.

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Any matching search results are displayed in the **Related Search Results** section. The content displayed depends on the permissions assigned to the agent in Knowledge and Communities.

3. Click one of the results to open the content in a pop-up window.
4. **Optional:** Perform any of the following steps.

5. Perform one of the following actions.
   - If you opened a case, click **Submit**.
   - If you updated an existing case, click **Update**.

Manage skills for a customer service case

Add or remove optional and mandatory skills for a customer service case.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

About this task

Agents can also change a skill between mandatory and optional.

Procedure

1. Open the desired case.
2. Click the **Task Skills** related list.
3. To create a new skill:
   a. Click **New**.
   b. Select a skill in the **Skill** field.
   c. If mandatory, click the **Mandatory** check box.
   d. Click **Save**.
4. To switch the skill type:
   a. Click the desired skill.
   b. Enable or disable the **Mandatory** check box.
   c. Click **Save**.

Using Chat Zoom Connector

Initiate a Zoom meeting directly from a chat by using the Chat Zoom Connector application.

As an agent you can initiate a Zoom meeting from a chat to understand and resolve customer issues faster through live interactions. For more information, see Initiate Zoom meetings from chats.

By default, for each interaction record for a Zoom meeting, a Notify conference call number is also generated. As an agent, you or the agent manager can access the recording URL of the Zoom meeting from the activity stream of the interaction record. For more information, see Interaction records in Agent Workspace.

As an agent manager, you can access the details of Zoom meetings initiated from a customer chat using the Zoom interaction record. The meeting recordings are available in the interaction record created for Zoom. For more information, see View details for Zoom meetings initiated from chats.

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Note:
The conference call details of a Zoom meeting are stored in the Notify Conference Calls [notify_conference_call] table.

As a user in the notify_admin or notify_view role, you can access the details of a Zoom meeting by navigating to **Notify** > **Recordings**, and selecting the corresponding conference call number. For more information, see Notify conference calls.

Chat Zoom Connector user roles

The users with the roles listed in the following table can use the Chat Zoom Connector application.

Roles required for Chat Zoom Connector

Roles	Tasks
agent_workspace_user	Initiate a Zoom meeting from a chat to understand customer issues and resolve issues faster through live interactions.
sn_customerservice_manager	View details for Zoom meetings initiated from a customer chat using the Zoom interaction record. The meeting recordings are available in the interaction record created for Zoom meetings.
notify_admin, notify_view	View details for Zoom meetings initiated from a customer chat by using Notify.

Activation information

Configure the Chat Zoom Connector application for initiating Zoom meetings from customer chats. For more information, see Configure Chat Zoom Connector.

Related topics

Chat Zoom Connector

Initiate Zoom meetings from chats

Resolve issues faster by initiating a Zoom meeting directly from a customer chat using the Chat Zoom Connector application.

Before you begin

Ensure that an administrator has installed and set up the Chat Zoom Connector application. For more information, see Configure Chat Zoom Connector.

Role required: agent_workspace_user

About this task

You can use a Zoom meeting to host a screen-sharing or video conference. You can also record the meeting and save the recordings.

Procedure

1. Navigate to **Agent Workspace**.
2. Accept and respond to a chat from your agent inbox.
3. **Optional:** Ask questions and find out more about the issue.
4. To start a Zoom session with a customer, click the quick actions icon (), and then select **/ zoom**.

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Tip:
You can also enter `/zoom` in the text field of the chat.

5. Click the send icon (➤).
   A message announcing that the Zoom meeting has started and one containing the meeting URL are posted in the chat window for both agent and customer. If the session was initiated through the Private Chat tab, the session's URL isn't shared with the customer.
6. Click the URL to host the Zoom meeting and request the customer to click the URL too.
   As a host of the meeting, you can admit participants by sharing the meeting URL with them. The number of participants you can admit depends on your Zoom account settings.

   The meeting topic is set to the number of the associated chat interaction record. The meeting description is set to the short description of the associated chat interaction record. If the short description of the associated chat interaction record is empty, the meeting description is shown as a dash (-).
7. **Optional:** Record the meeting.
   For more information, see the Zoom Help Center.

Result
An interaction record of type **Zoom** is generated for the meeting that captures the Notify conference call details for this Zoom session. A Notify administrator or agent manager can access the conference call details associated with the Zoom meeting from the interaction record.

Note:
The conference call number is a value automatically generated in the **Channel Metadata Record** field on the Interaction form. For more information, see View details for Zoom meetings initiated from chats.

The recording URL of the Zoom meeting is added to the activity stream of the interaction record. For more information, see Interaction records in Agent Workspace.

View details for Zoom meetings initiated from chats

View details for a Zoom meeting initiated from a chat by accessing the associated interaction record.

Before you begin
Role required: sn_customerservice_manager

About this task
This task provides steps for a user with the sn_customerservice_manager role to access Zoom meeting details from an interaction record. For information about how users with other Notify roles view Zoom meeting details, see Using Chat Zoom Connector.

Procedure
1. Navigate to **Interaction** > **All**.
2. In the Interactions list, click the link to an interaction record of type Zoom from the **Number** column.

Result
The recording URL of the Zoom meeting, if available, is added as a work note and displayed in the activity stream of the Interaction form.

On the Interaction form, you can view the details for a Zoom meeting.

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Note:
Your administrator might have configured the interaction record to show different application-specific field values.

Interaction form

Field	Description
Number	Unique number to identify the interaction record.
Type	Type of channel communication. For a Zoom meeting, the field is automatically set to **Zoom**.
State	Different states through which the interaction proceeds for a resolution.
Opened for	Customer contact or consumer for whom the Zoom meeting was initiated. This field is automatically set to the **Opened for** field value from the chat interaction record from which the Zoom meeting was initiated.
Assigned to	Agent the interaction record is assigned to. This field is automatically set to the **Assigned to** field value from the chat interaction record from which the Zoom meeting was initiated.
Parent	Number of the chat interaction record from which this Zoom meeting was initiated. This field is automatically set to the number of the chat interaction record. You may need to configure the form to add this field. For more information, see Configure the form layout.
Channel Metadata Record	Number of the Notify conference call. This field is automatically set to a conference call number associated with this meeting and stored in the Notify Conference Calls [notify_conference_call] table. **Note:** To view more details such as the meeting URL and participant details, click the preview this record icon (ⓘ) for this field. You may need to configure the form to add this field. For more information, see Configure the form layout.
Channel Metadata Table	Table containing a list of conference calls started using Notify. This field is automatically set to **Notify Conference Calls [notify_conference_call]**. You may need to configure the form to add this field. For more information, see Configure the form layout.

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Interaction form (continued)

Field	Description
Consumer	Consumer's account automatically set to the **Consumer** field value from the chat interaction record from which the Zoom meeting was initiated. You may need to configure the form to add this field. For more information, see Configure the form layout.
Contact	Customer contact automatically set to the **Contact** field value from the chat interaction record from which the Zoom meeting was initiated. You may need to configure the form to add this field. For more information, see Configure the form layout.
Account	User's account automatically set to the **Account** field value from the chat interaction record from which the Zoom meeting was initiated. You may need to configure the form to add this field. For more information, see Configure the form layout.
Short Description	Short description of the interaction. **Note:** The short description field is empty for a Zoom meeting.

Related topics

Initiate Zoom meetings from chats

Using CSM Configurable Workspace in Customer Service Management

Use CSM Configurable Workspace to interact with customers, create and work on cases, and resolve questions and issues.

Customer service agents can complete most tasks in CSM Configurable Workspace, while other tasks only apply to the platform interface. This information is noted at the top of each task.

The tables below describe some of the basic tasks that agents can perform in CSM Configurable Workspace as well as additional features that are available for use.

For additional task information, see Manage cases.

Agent tasks

Task	Description	Details
Use Knowledge to assist with cases	Search for knowledge articles and attach them to cases or open articles in sub-tabs for easier reading. Report a knowledge gap if you can't find relevant articles and, if permission is enabled, create articles directly from cases.	Search for knowledge articles Open a knowledge article Report a knowledge gap Create a knowledge article

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Agent tasks (continued)

Task	Description	Details
Respond to community discussions	If a case is created from a community discussion, you can respond to the discussion from the case.	Respond to a community thread from a case
Use response templates	Quickly respond to customers using different types of predefined information.	Use response templates to add information to cases and case tasks
Manage email tasks	Preview emails and compose and send responses from cases.	Compose an email from a case Compose an email from the ribbon component Send an email response from a case activity stream Preview an email from the Emails related list

Additional features

Feature	Description	Details
Create a specific type of case	Create a case for a specific type of customer issue.	Create a customer service case of a specific type
Look up a customer	Quickly look up contacts or consumers using information such as the name, phone number, or record number.	Look up and verify a contact or consumer
Use Customer Central	Look up customer information and recent activity to find out more about the customer you are assisting.	Use Customer Central
View product data	View details about customer instances, products, and components.	View install base information View sold product information
Use playbooks	Use the step-by-step guidance provided by playbooks to complete tasks and resolve cases.	Interact with playbooks
Use guided decisions	A guided decision prompts you to answer questions and provide inputs and then offers recommendations on the steps needed to resolve a case.	Use Guided Decisions in playbooks to resolve cases

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Additional features (continued)

Feature	Description	Details
		Use Guided Decisions in recommended actions to resolve cases
Use recommended actions	A recommended action is a suggested helpful action for resolving a case. A recommendation can be a guidance, guided decision, or a suggested value for a case field.	Use Recommended Actions to resolve cases
Use trending case topics	Use trending case topics to identify cases with similar issues.	View trending case topics Add trending case topics to existing major cases Create major cases for trending case topics
Use estimated time to resolve a case (ETTR)	Use machine learning to predict the estimated time to resolve a case based on case attributes such as the short description, category, priority, and assignment group.	Estimated time to resolve a case Time to resolve ribbon component
Call back a customer	Call a customer back either immediately or at the date and time requested by the customer.	Address a callback request from a customer

Open CSM Configurable Workspace

Open CSM Configurable Workspace so that you can work on customer service cases.

Before you begin

Role required: sn_customerservice_agent

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces**.
2. Select **CSM Configurable Workspace**.

   The workspace opens in a new browser tab.

Look up and verify a contact or consumer

An agent can look up contact or consumer information from a saved interaction record, review and confirm the information, and then populate the information on the interaction record.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

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About this task

Agents can search for information such as name, phone number, email address, case number, or order number.

Procedure

1. Open CSM Configurable Workspace.
2. In the contextual side panel, click the Contact Verify icon ( ) or the Consumer Verify icon ( ) to access the lookup and verify feature.
3. In the **Verify Contact** or **Verify Consumer** fields, enter information such as the first few letters of a first or last name or the first few digits of a phone or case number.
   These fields use a type-ahead search feature that displays results in a list and narrows the results as more characters are entered. Multiple display fields in the search results help to differentiate contacts. When searching for a record number, the contact or consumer associated with the record is returned in the search results.

   Note:
   Delete characters from the field to clear the search results.

4. Select the desired result from the list.
   This action displays information about the selected contact or consumer in a verification card. If the information is not correct, repeat steps 2 through 4.
5. Click **Verify** to confirm the selected contact or consumer.

   This action does the following:

   - Populates the **Account** and **Contact** or **Consumer** fields on the interaction record.
   - Enables the **Verified** check box.
6. **Optional:** You can look up and verify another contact or consumer by repeating steps 2 through 4 and entering different search information.
7. Click **Save** to save the interaction record and refresh the related lists.

Related topics

Lookup and verify

Create a contact or consumer using Lookup and verify

An agent can create a contact or consumer from the Lookup and verify feature in the Contextual side panel.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

About this task

Agents can use the Lookup and verify feature to search for contacts and consumers. After verifying a user's information, agents can populate that information on the interaction record.

If an agent can't find a contact or consumer, they can create a record for that user from within the Lookup and verify feature.

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Procedure

1. Open CSM Configurable Workspace.
2. From a saved interaction record, click one of the following icons in the Contextual side panel to access the Lookup and verify feature.
   - Verify Contact icon ( )
   - Verify Consumer icon ( )
3. Enter user information in one of the following fields: **Verify Contact** or **Verify Consumer**. This information can include the first few letters of a first or last name or the first few digits of a phone or case number.
4. If you cannot locate the contact or consumer and choose to create a record, click **Create Contact** or **Create Consumer**.

   The system displays the Create Contact or Create Consumer form in the Contextual side panel.

   If the **Account** field on the Interaction record is populated when you click **Create Contact**, the **Account** field on the Create contact form is populated with the same information.
5. Add information to the fields on the form and click **Create**.
   The system performs the following actions:
   - Saves the contact or consumer record.
   - Creates and displays the contact or consumer card.
   - Adds the information to the interaction record.

Related topics

Lookup and verify

Look up and verify a contact or consumer

View the install base in CSM Configurable Workspace

View a customer's install base in CSM Configurable Workspace to quickly identify the support they require as well as the opportunities for adoption and upsell.

Before you begin

Verify that the Customer Service Install Base Management plugin (com.snc.install_base) is activated.
Role required: sn_customerservice_agent

About this task

You can view information about a customer's purchased products and services, delivery details, and additional components that are available for the product models.

Procedure

1. Open CSM Configurable Workspace.
2. Select the account that you want to view the install base for.
3. Select the Install Base related list.
4. Scroll through the Sold Products tree view to view the details about the sold product and the list of install base items that belong to it.

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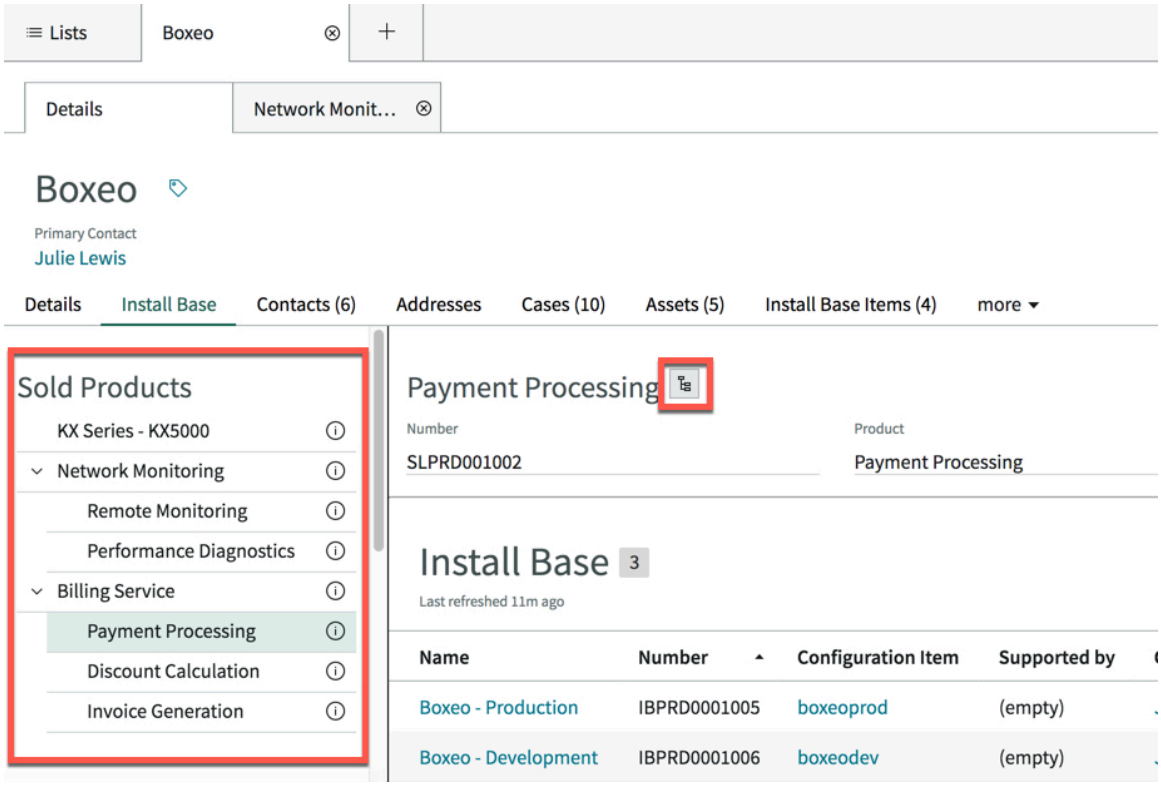
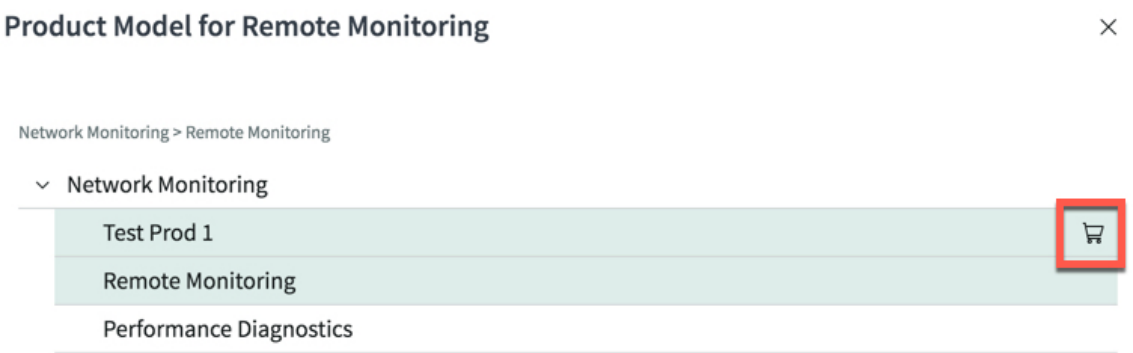


5. On the form header, select the Hierarchy icon to see the full product model that the sold product is part of.
   The product model hierarchy opens in a separate window. Unpurchased product components have a shopping cart icon next to them.



6. View the install base items and related lists in the configurable workspace by navigating to **Products** > **Install Base item**.
7. View the details of the install base item by opening an install base item.

Note:
You can also use the right navigation pane to view the install base items and related list.

View sold product information in CSM Configurable Workspace

Enable customer service agents or managers to view the sold products and the service offerings associated to the sold product for an account or consumer.

Before you begin
Role required: sn_customerservice_agent

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About this task
Customer service agents can view which service offerings are associated to the sold products affected by an issue. They can also see the service commitments and availability.

Procedure
1. Open CSM Configurable Workspace.
2. Open a customer service case.
3. Click **Sold Products** to view the sold product associated to the case and the service offering associated to it.
4. Click the service offering to view the service commitments associated to it.

Search for knowledge articles in CSM Configurable Workspace

Search for knowledge articles in Agent Assist, including similar knowledge articles.

Before you begin
Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

About this task
Agent Assist displays contextual search results based on text entered in the **Short description** field on the Case form. These search results include knowledge articles and other types of information, such as open or resolved cases and community content. You can narrow the list of results by selecting a specific type of information to view.

Note:
With the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml), you can also view Similar Knowledge Articles.

Procedure
1. Open CSM Configurable Workspace.
2. Open a customer service case.
3. Perform one of the following.
   - In the Agent Assist panel, click the search resource icon ( ) and select a search source.
     - `Knowledge Articles`
     - `Similar Knowledge Articles`
   - In the Recommended Actions - Search tab, search with a keyword and select the **Search source** as `Knowledge` to filter out KB articles.

     For more information on how to enable Recommended Actions - AI Search and disable Agent Assist, see Enable AI search in Recommended Actions.
4. Select a knowledge article.
5. Click **Attach**.
   Depending on your configuration, you can add a link or embed an article directly into the Additional comments (customer visible) portion of the activity stream.

Open a knowledge article in a sub-tab

Search for a knowledge article in Agent Assist or or Recommended Actions - AI Search and then open the article in a sub-tab.

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Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

Procedure

1. Open CSM Configurable Workspace.
2. Open a customer service case.
3. Perform one of the following actions in the Contextual side panel:
   - In the Agent Assist tab, select an article from the default search or search for something specific using the search bar and then select an article.
   - In the Recommended Actions - Search tab, search for the desired article and select the Search source as **Knowledge** to filter the knowledge articles.

     For more information on how to enable Recommended Actions - AI Search and disable Agent Assist, see Enable AI search in Recommended Actions.
4. View the article in the Contextual side panel.
   After viewing the article, you can also perform the following actions:
   - Select **Attach** to attach the article to the case. Add any additional comments in the Attach Article pop-up window and then select **Attach Article**. The article is attached to the case and added to the Attached Knowledge related list.
   - Select **Flag** to flag the article. Add a comment in the Flag Article pop-up window and then select **Save**. This action generates a feedback task for the knowledge article.
   - Select the knowledge article link below the article title to open the article in a separate tab. You can also select the More Actions menu and then select **Full View**.
   - Select the More Actions menu and then select **Helpful** to mark the article as helpful.

Create a knowledge article from a case

Reuse information from a customer service case by creating knowledge articles from customer service cases.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

About this task

Your administrator must enable creation of articles from customer service cases.

Procedure

1. Open CSM Configurable Workspace.
2. Open a customer service case.
3. Click the More UI Actions icon (•••).
4. Click **Create Knowledge Article**.
   This creates a new knowledge article in a sub-tab. By default, the new article is created from the KCS Article template. The following information is copied from the case to the knowledge article:
   - Short description
   - Source

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- Cause
- Close notes

5. In the **Knowledge base** field, enter the name of the knowledge base in which you want this article to display.
6. **Optional:** Edit the knowledge article.
7. Click **Save**.

Report a knowledge gap

If you cannot find relevant knowledge articles that could help resolve a case, you can report a knowledge gap.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager, workspace_admin, admin

About this task

You can search for and attach knowledge articles to a customer service case. If you cannot find any relevant articles, you can report a knowledge gap. If you have permission, you can also create a knowledge article.

Customer service case managers can use the Demand Insights for Cases dashboard to identify which cases have no or insufficient knowledge coverage. For more information, see Demand Insights for Cases dashboard.

Procedure

1. Open CSM Configurable Workspace.
2. Open a customer service case.
3. **Optional:** Search for existing knowledge articles or create a knowledge article to help resolve a case.
4. Click the More UI Actions icon (•••) and then click **Report Knowledge Gap**.
   In the platform interface, click the **Report Knowledge Gap** related link on the Case form and provide information in the resulting pop-up window.
   The system opens a new knowledge feedback task in a sub-tab. The short description from the case is copied to the **Description** field on the task.
5. **Optional:** Edit the knowledge feedback task description.
6. Click **Save**.
   The task is added to the **Knowledge Gaps** related list on the Case form.

Respond to a community thread from a case

For cases that are created from a community discussion, customer service agents can view and respond to the discussion in a new browser tab.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

About this task

Cases that have been created from a community discussion have the **Channel** field set to Community.

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Procedure

1. Open CSM Configurable Workspace.
2. Open a case that was created from a community discussion.
3. Click the More UI Actions icon (•••) and select **Show Community Thread**.
   This UI action is only available if the **Channel** is Community.
4. View the community discussion in a new browser window and respond as necessary.

Use response templates to add information to cases and case tasks

Customer service agents can copy content from response templates and add it to cases and case tasks.

Before you begin

Role required: sn_customerservice_agent with the sn_templated_snip.template_snippet_reader role

About this task

The contextual side panel in CSM Configurable Workspace gives you access to information that can help you resolve customer service cases. It includes a column of icons that you can click to access different types of information. Clicking the response templates icon shows reusable messages that you can copy and paste into cases and case tasks.

Procedure

1. Open CSM Configurable Workspace.
2. Open a customer service case or case task.
3. In the contextual sidebar, click the response templates icon ( ) to display a list of templates.
4. In the Response Templates side panel, search for a template.
5. Select a template and then click **Copy to clipboard**.
6. Paste the template text into the **Work notes** field or the **Additional comments** field.

Related topics

Response templates

Use Customer Central

Get a quick overview of key customer information and recent customer activity to help you find out more about the customer contacting support.

Before you begin

Role required: sn_customerservice_agent

Role required if using the Walk-up Experience for business locations: sn_customerservice.svc_location_agent, sn_customerservice.svc_location_manager, or sn_customerservice.svc_location_consumer_agent.

About this task

Use customer central to get a quick insight into key customer information and recent activity from the customer, who is contacting support. You can filter by date or facet to access the information you require.

Note:
Accounts require contact information to display account information in Customer Central.

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In CSM Configurable Workspace, you can access Customer Central from within the Interaction, Contact, Account, or Consumer records.

Procedure

1. Open CSM Configurable Workspace.
2. On the Interaction, Contact, Account, or Consumer record, select Customer Information to view key information on the customer.
3. On the Interaction, Contact, Account, or Consumer record, select Customer Activity to view recent activity from the customer or chat summary between the agent and customer.
4. Create a case or close the record.

View trending case topics

Analyze the backlog of cases and identify clusters of cases that point to similar underlying issues.

Before you begin
Role required: sn_majorissue_mgt.major_issue_manager

About this task
View a list of clusters and cluster concepts.

- Cluster concepts list the top ten most recurring words that appeared in the short description of the cases.
- Cluster size indicates the number of cases in the cluster.
- Cluster quality gives a percentage value of how similar the cases are.

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **Lists** > **Trending Case Topics** > **Last 1 week**.

What to do next
Click a **Cluster Id** to view the Cluster Summary form details, Related Cases and Related Major Cases.

You can also create a major case for trending case topics.

Add trending case topics to existing major cases

Work through cases more efficiently and resolve similar cases at once by identifying any existing major cases that the backlog of cases can be linked to.

Before you begin
Role required: sn_majorissue_mgt.major_issue_manager

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **Lists** > **Trending Case Topics** > **Last 1 week**.
3. Click a **Cluster Id**.
4. On the Related Major Cases related list, check if there are any existing related major cases.
5. On the Related Cases related list, select the cases you want to add as child cases in the existing major case.

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6. Click **Edit**.
7. In the **Parent** field, copy the number of the major case to add the child cases to.
8. Click**Update**.

Create major cases for trending case topics

Work through cases more efficiently and resolve similar cases at once by creating major cases to add the backlog of cases to.

Before you begin
Role required: sn_majorissue_mgt.major_issue_manager

About this task
If you didn't find an existing major case to add the trending case topics to and you think the cluster qualifies as a major case, you can create a major case, as applicable.

Procedure
1. Open CSM Configurable Workspace.
2. Navigate to **Lists** > **Trending Case Topics** > **Last 1 week**.
3. Click a **Cluster Id**.
4. On the Related Major Cases related list, check if there are any existing related major cases.
5. If there are no related major cases, click **Create Major Case**.
   A major case is created.

   All related child cases are linked as child cases to the major case if the **Parent** field in the case is empty and the case is in **Open** state.

What to do next
To access the major case, click the link in the confirmation message that a major case has been created.

Manage email tasks

You can compose, reply to, and preview emails directly from cases in CSM Configurable Workspace. This capability helps you save time and effort instead of having to address and send a separate email message.

You can perform the following email tasks from cases in CSM Configurable Workspace:

- Compose an email from a case
- Compose an email from the ribbon component
- Send an email response from a case activity stream
- Preview an email from the Emails related list

Compose an email from a case

As an agent, you can compose emails directly from cases within a ServiceNow instance. This capability helps you view and send emails to two different customers simultaneously which saves time and effort.

Before you begin
Role required: sn_customerservice_agent

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About this task
You can compose large emails easily in a full screen view which opens up in a new tab.

Procedure
1. Open CSM Configurable Workspace.
2. Select and open the case for which you want to compose an email.
   The case opens in a new top-level tab.
3. Click the More UI Actions ••• icon and select **Compose Email**.
   The New Email screen opens in full view in a new sub-tab below the Case tab. The **To** field is pre-filled with the customer's email id and the **Subject** field contains the original case number and issue. For more information, see Compose an email.
4. Compose your email and click **Send**.

Note:
You can also click **Save** to save the email and send it later. These drafts are available in the **Draft Emails** related list. To access the draft in the email compose tab, click the More UI Actions ••• icon and select **View Draft** to see the saved draft.

Related topics
Compose an email from the ribbon component

Compose an email from the ribbon component

As an agent you can compose emails directly from cases within CSM Configurable Workspace without having to use an external email client. This capability helps you view and send emails to two different customers simultaneously which saves time and effort instead of having to address and send a separate email message.

Before you begin
Role required: sn_customerservice_agent

About this task
You can compose large emails easily in a full screen view which opens up in a new tab.

Procedure
1. Open CSM Configurable Workspace.
2. Select and open the case for which you want to compose an email.
   The case opens up in a new tab.
3. In the ribbon component, click the contact's email address.
   The New Email screen opens in full screen in a new tab. The **To** field is pre-filled with the customer's email id and the **Subject** field contains the original case number and issue. For more information, see Compose an email.
4. Compose your email and click **Send**.

Note:
You can also click **Save** to save the email and send it later. These drafts are available in the **Draft Emails** related list.

Related topics
Compose an email from a case

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Compose an email from an email template

As an agent, you can compose emails using email templates. These templates contain default values for fields that you can easily add to email messages in the Compose panel on case records.

Before you begin
Role required: sn_customerservice_agent

About this task
Default values in email templates can include the recipients (email addresses in the To, Cc, and Bcc fields), the sender, the subject of the email, and text to include in the message body. For more information, see Email templates feature.

Procedure

1. Open CSM Configurable Workspace.
2. Open a case.
3. Select the Email tab in the Compose panel.
4. Select the Email Templates tab in the contextual side panel.
   The system displays the available email templates.
5. Select the desired template.
   The selected template card expands to show the template details.
6. Select **Apply Template**.
   The system populates the values for the configured fields in the email. If these fields already contain values, applying the selected template overwrites these values.
7. **Optional:** Add text for the body of the email in the text field.
8. Select either **Save as draft** or **Send Email**.
   The system stores draft emails in the Draft Emails tab on the case record.

Send an email response from a case activity stream

Respond to cases using options within a customer email thread. You may not require using another email client which saves time and effort.

Before you begin
Role required: sn_customerservice_agent

About this task
You can read and respond to large emails easily in a full screen which opens up in a new tab. Responding to a customer's email from within a case using the reply, reply all, or forward options, includes the content from previous conversation thread. These options are available by default. An admin can disable these options. For more information, see Disable email responses from the case activity stream.

Procedure

1. Open CSM Configurable Workspace.
2. Select and open the case from the activity stream for which you want to send or forward a response.
   The case opens up in a new tab.
3. Click **Reply** in the Activity Stream to write a response to the customer or click the ⋮ icon and select **Reply All** to reply to all the customer email ids mentioned in the original email or select **Forward** to forward the email to any other email ids not mentioned earlier.

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4. Based on the selection, the Reply Email, Reply All Emails, and Forward Email screens opens in full screen in a new tab.

   Note:

   You can click the icon to add attachments from the file system or delete attachments already associated with the existing case.

5. Compose your email and click **Send**.

Related topics

Activity formatter

Email properties

Preview an email from the Emails related list

Preview emails directly from within cases. With this capability, you can select case-related emails and read the details in full view.

Before you begin

Role required: sn_customerservice_agent

About this task

For information about adding or modifying actions on a form, see the following topics:

- Customizing your workspace with declarative actions
- Create a UXF client action for forms
- Declarative actions glossary

Procedure

1. Open CSM Configurable Workspace.
2. Select and open a case.
   The case opens up in a new tab.
3. Select the **Emails** tab.
4. Select an email to preview from the Emails list.
   The email opens in a sub tab and displays the details.

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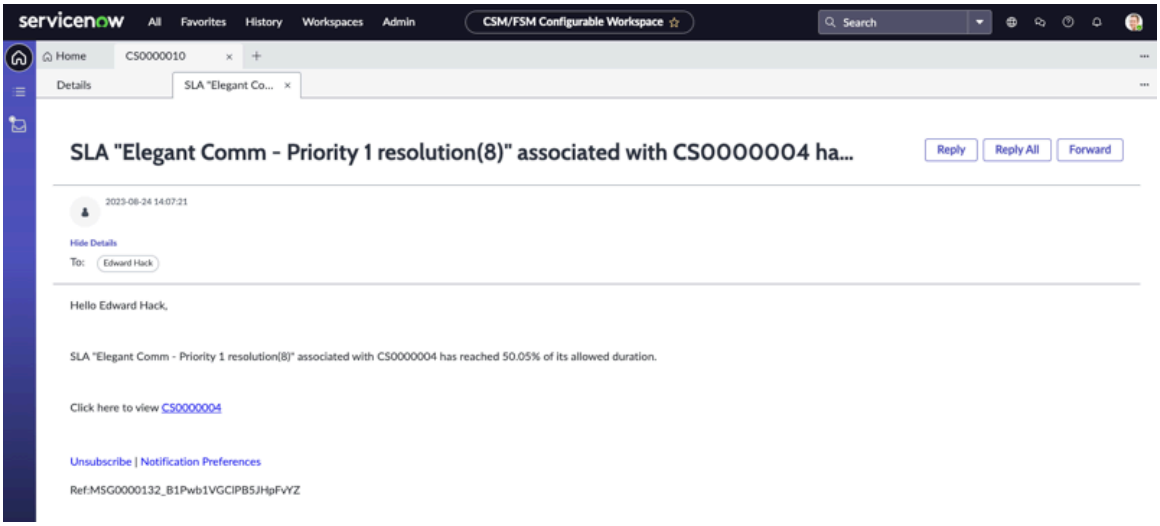

5. Select **Reply** or **Reply All** to reply to the message you're viewing or select **Forward** to forward the email.

Initiate SMS conversations from CSM Agent Workspace

Compose an SMS message from CSM Agent Workspace to interact with a customer contact or a consumer regarding customer service cases.

Before you begin

Role required: agent_workspace_user

Ensure that an administrator has configured the Conversational SMS Integration with Twilio application. For more information, see Conversational SMS Integration with Twilio.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. On the Agent Workspace Home page, navigate to **Agent Workspace** > **Lists** > **Interactions** > **My Interactions**.
3. In the My Interactions list, modify an existing interaction or create another interaction.
   - To modify an existing interaction, select the interaction number in **Number** column of the My Interactions list.
   - To create another interaction, click **New** in the My Interactions list.
4. On the Details tab of the workspace form, fill in the details for a new interaction or modify the details.
   For more information about the form, see CSM workspace form features.

   Note:
   The user profile associated with an interaction is configured by an administrator by using the `AgentInitiatedConversationUtil` extension point. By default, the `AgentInitiatedMessagingUtilExtPointImpl` script include that implements the `AgentInitiatedConversationUtil` extension point is available for the Conversational SMS Integration with Twilio application. For more information, see Associate user profiles on messaging interactions.

5. Click **Compose SMS**.
6. On the form, fill in the fields.

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Compose SMS form

Field	Description
From	Provider phone number of the SMS channel. ○ If there is only one provider phone number, the From list is automatically set to the provider phone number. ○ If there are multiple providers configured for the SMS channel, you can select a phone number in the From list.
To	Phone number of the consumer or customer contact. The phone number is in the E.164 format and automatically set to the phone number of the consumer or customer contact associated with the interaction record. By default, the user profiles for consumers and customer contacts and the format of their phone numbers are validated for the SMS channel. If you select **Other** from the To list, you can manually enter a phone number of the consumer or customer contact. Any manually entered phone number is automatically converted to the E.164 format. For more information, see Phone number fields.
Message	Message to be sent to the consumer or customer contact.
Attachment	File to be sent as an attachment. Click **Attach File** to browse and select a file. **Note:** By default, you can attach only images to the message. However, an administrator can configure the Attachment API to upload more file types. For more information, see Attachment - POST /now/attachment/upload.

7. Click **Send**.

Result

The interaction record of type messaging is created or updated based on the workflow as discussed in the following table.

Messaging interaction record workflows and results

Workflow	Results
No active interaction record available	• A new interaction record of type messaging for the SMS channel is automatically created and assigned to the agent. • The agent is added to the Live Group Profile [live_group_profile] table.

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Messaging interaction record workflows and results (continued)

Workflow	Results
An active interaction record associated with a live agent exists	• The interaction details are appended to the existing interaction record for the SMS channel. • If the message was initiated by an agent not associated with the existing interaction record, the agent is added to the Live Group Profile [live_group_profile] table. However, there's no change in assignment of the interaction.
An active interaction record associated with the virtual agent exists	• The existing interaction record with the virtual agent is closed. • A new interaction record of type messaging for the SMS channel is automatically created and assigned to the agent. • The agent is added to the Live Group Profile [live_group_profile] table.
An active interaction record associated with a different user exists	• The existing interaction record with the earlier user is closed. • A new interaction record of type messaging for the SMS channel is automatically created and assigned to the agent. • The user profile associated with the existing interaction record is deactivated. • The user profile currently associated with the new interaction record is created. • The agent is added to the Live Group Profile [live_group_profile] table.

Initiate messaging conversations from CSM Configurable Workspace

Compose an SMS message from CSM Configurable Workspace to interact with a customer contact or a consumer regarding customer service cases.

Before you begin

Ensure that an administrator has completed the following tasks:

- Configured the Agent-Initiated Messaging Interface application. For more information, see Agent-initiated messaging interface.
- Configured at least one qualifying messaging channel for the agent-initiated messages. For more information, see Determine whether messaging channels are available for agent-initiated messages.

Role required: agent_workspace_user

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Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace Home**.
2. On the CSM Configurable Workspace Home page, navigate to **Lists** > **Interactions** > **My Interactions**.
3. In the My Interactions list, select the interaction number in **Number** column of the My Interactions list.

   Note:
   Ensure that the interaction type is other than messaging and the interaction state is not closed complete or closed abandoned.

4. On the Details tab of the workspace form, fill in the details for a new interaction or modify the details.
   For more information about the form, see CSM workspace form features.

   Note:
   The user profile associated with an interaction is configured by an administrator by using the `sn_agent_initiated.AgentInitiatedMessagingUserDocument` extension point. The `AgentMessagingInteractionUserDocument` script include that implements the `sn_agent_initiated.AgentInitiatedMessagingUserDocument` extension point is available for the Agent-Initiated Messaging Interface application. For more information, see Associate user profiles with agent-initiated messages.

5. Click **Compose Message**.
6. On the form, fill in the fields.

Compose Message form

Field	Description
Channel	Messaging channel that is installed with the application available for a service channel. For example, select **SMS** to send an SMS message. The SMS messaging channel is available when an administrator has installed the Conversational SMS service channel application. An administrator can configure whether a messaging channel is available for agent-initiated messages. For more information, see Determine whether messaging channels are available for agent-initiated messages.
To	Recipient ID of the consumer or customer contact, or when both are not available the recipient ID of the user for which the interaction was opened. The recipient ID is pre-populated from the User [sys_user] table record of the consumer, customer contact, or opened for user. If the entered ID is a phone number, it must be an E.164-compliant phone number or is automatically converted to the E.164 format. For more information, see Phone number fields. An administrator can configure the format of the recipient ID based on the selected channel and associate user profiles with agent-initiated messages. For

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Field	Description
	more information, see Validate recipient IDs for agent-initiated messages and Associate user profiles with agent-initiated messages. If you select **Other** from the To list, you can manually enter a ID of the consumer or customer contact. Any manually entered phone number is automatically converted to the E.164 format. For more information, see Phone number fields. **Note:** The **Other** list value appears only when an administrator has configured the option to enter recipient ID manually for the messaging channel. For more information, see Set up agent-initiated message interface for a messaging channel.
From	Provider ID of the messaging channel. ○ If there is only one provider configured for the channel, the From list is automatically set to the provider ID. ○ If there are multiple providers configured for the channel, you can select an ID in the From list.
Message	Message to be sent to the recipient.
Attachment	File to be sent as an attachment. Click **Attach File** to browse and select a file. **Note:** By default, you can attach only images to the message.

7. Click **Send**.

Result

The interaction record of type messaging is created or updated based on the workflow as discussed in the following table.

Messaging interaction record workflows and results

Workflow	Results
No active interaction record available	• A new interaction record of type messaging for the channel is automatically created and assigned to the agent. • The agent is added to the Live Group Profile [live_group_profile] table.
An active interaction record associated with a live agent exists	• The interaction details are appended to the existing interaction record for the channel. • If the message was initiated by an agent not associated with the existing interaction record, the agent is added to the Live Group

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Messaging interaction record workflows and results (continued)

Workflow	Results
	Profile [live_group_profile] table. However, there's no change in assignment of the interaction.
An active interaction record associated with the virtual agent exists	• The existing interaction record with the virtual agent is closed. • A new interaction record of type messaging for the channel is automatically created and assigned to the agent. • The agent is added to the Live Group Profile [live_group_profile] table.
An active interaction record associated with a different user exists	• The existing interaction record with the earlier user is closed. • A new interaction record of type messaging for the channel is automatically created and assigned to the agent. • The user profile associated with the existing interaction record is deactivated. • The user profile associated with the new interaction record is created. • The agent is added to the Live Group Profile [live_group_profile] table.

Create a work plan in Customer Service Management (CSM) Configurable Workspace

Create a work plan in the Customer Service Management (CSM) Configurable Workspace so that your agents can fulfill and implement the maintenance requirements for an install base item.

Before you begin

Role required: sn_customerservice_agent and sn_fsm_planned_wm.planned_work_admin

Procedure

1. Navigate to **All** > **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, navigate to **Customer** > **Accounts**.
3. Open an account and navigate to the Install Base Items related list.
4. Open an install base item from the list.
5. On the **Planned Maintenance** tab, open **Work plans** and select **New**.
6. On the form, fill in the fields.

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Work plan form on the Customer Service Configurable workspace

Field	Description
Name	Name of the work plan.
Type	Type of trigger that determines when work should be performed. ○ **Model based:** Base the work plan on a specified model of a CI. ○ **General:** Base the work plan on a table and filter. ○ **Install base:** Base the work plan on specified models of install base items **Note:** ○ Model-based plans apply only to hardware models, specifically ones that have at least one model category defined. ○ The Install base plan type is available only if the Customer Service Install Base Management (com.snc.install_base) plugin is activated.
Model	One or more product catalog items that you can select to identify the configuration items (CIs) or install base that require maintenance. When you select a model, the associated table appears in the Table field. For example, if you select a specific PC model, the **Table** field displays **Computer [cmdb_ci_computer]**. This field appears if you selected either the **Model based** or **Install base** type. For Install base type. The **Table** field automatically fills in an appropriate table based on the selected model.

7. Select **Save**.

Result

You created a work plan in Customer Service Management (CSM) Configurable Workspace.

Using Business Location 360

Enable customer service agents to get a comprehensive, 360-degree view of the business location issues, so that they get the required contextual data to effectively resolve the reported issues within the Customer Service Management (CSM) application.

Overview of Business Location 360

By using the Service Model Foundation data model framework, your location staff members can request assistance for their operations either from the central support team or peer business locations. To handle these cases effectively, customer service agents require a complete, 360° view of the business location.

The Business Location 360 template enables agents to get a comprehensive view that includes the crucial contextual information that they need for resolving reported issues. Your administrator can customize the Business Location 360 template to add data sources, show additional information, or represent entities like stores, government agencies, healthcare organizations, automotive dealerships, or departments. For more information about configuring the Business Location 360 template, see CSM Configurable Workspace page templates.

Note:
Your administrator can activate the Business Location 360 capabilities by using the Business Location (com.snc.business_location) plugin.

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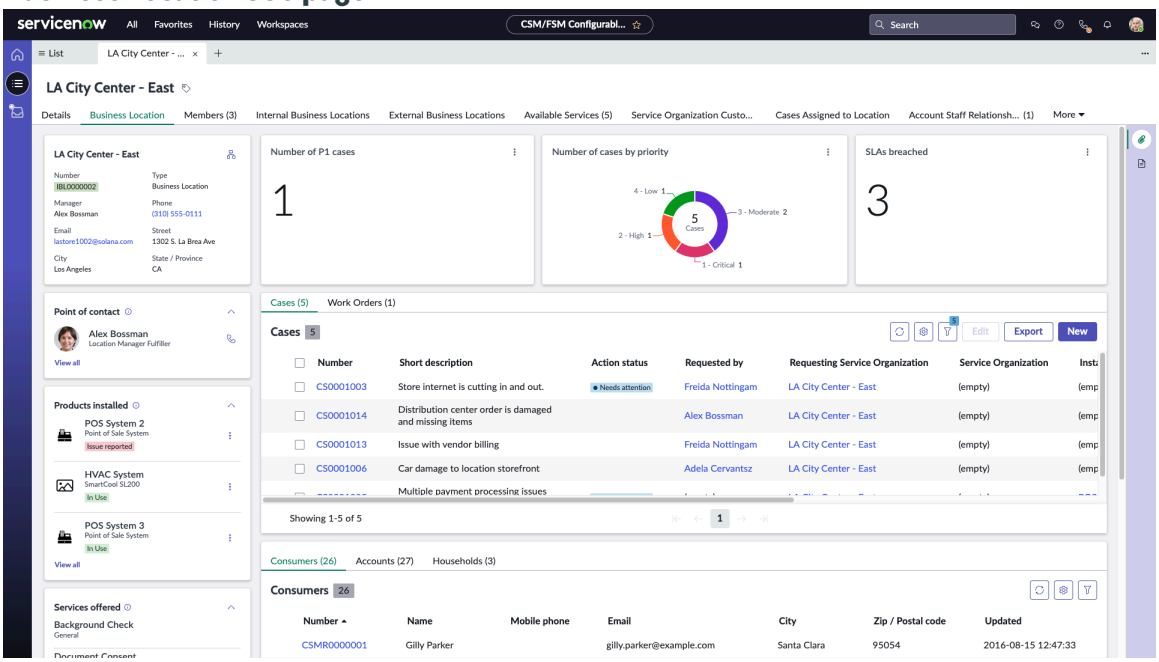
This example shows the Business Location 360 page with the 360-view of different widgets like the products installed, point of contact, services offered, and more. These components enable customer service agents to get a comprehensive, 360-degree view of the business location issues to help them effectively resolve the reported issues.

Business Location 360 page



Benefits of using Business Location 360

By using the Business Location 360, your location staff members get the following benefits:

- Contextual information about an issue. Your customer service agents can view the contextual information about an issue and then create cases about a business location all from one place.
- Visibility into issues and trends. Your customer service managers can visually identify store-specific issues and broader trends.
- Ability to configure actions and pages. Your administrators can configure additional actions and pages based on the Business Location 360 template.

Related topics

Access Business Location 360 as a customer service agent

Access Business Location 360 as a customer service manager

Business Location 360 components

Business Location 360 components

Customer service agents can resolve reported business location issues by using different components on the Business Location 360 page in the Customer Service Management (CSM) application.

Components on the Business Location 360 page

The following list of components are on the Business Location 360 page:

- Location information
- Point of contact

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- Products installed
- Services offered
- All staff
- Key performance indicators (KPIs)
  - Number of P1 cases
  - Number of cases by priority
  - Service level agreements (SLAs) breached
- Task tab
  - **Cases**
  - **Work orders**
- Customer tab
  - **Customers**
  - **Accounts**
  - **Households**

Note:
You can customize these components according to your requirements by using the Business Location 360 template. The Business Location 360 template enables agents to get a comprehensive view that includes the crucial contextual information that they need for resolving reported issues. Your administrator can customize the Business Location 360 template to add the data sources, show the additional information, or represent the entities like stores, government agencies, healthcare organizations, automotive dealerships, or departments.

Location information

The location information component displays the location information details for the record. The following example shows a location information component that displays the name and type of the location, the address, email, phone number, and the manager's name.

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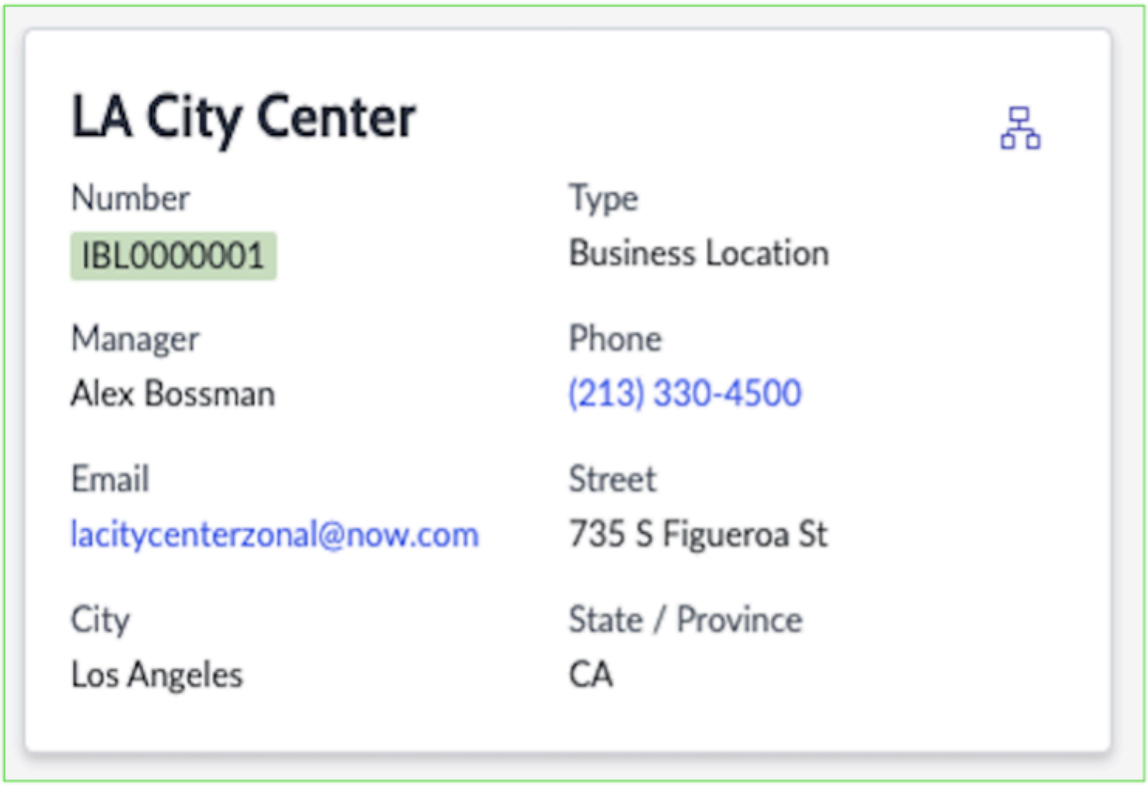
Location information component



The **Email** and **Phone** links are clickable. When you select these links, the information is copied to the clipboard.

Note:
If your administrator hasn't enabled Computer Telephony Integration (CTI), your contact numbers are copied to the clipboard instead of calling the numbers directly. For more information about integrating Computer Telephony Integration (CTI), see Computer Telephony Integration.

On the location information link, navigate to the business location hierarchy view page by selecting the view hierarchy icon .

The following example shows a business location parent-child hierarchy with multiple nodes.

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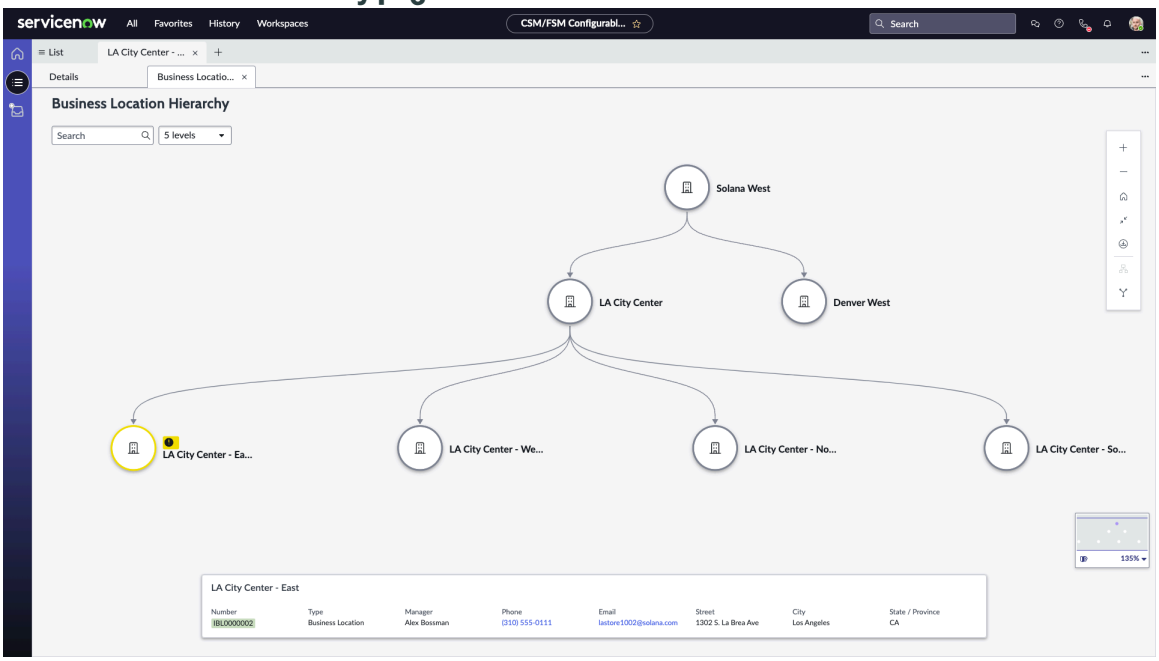
Business Location Hierarchy page



You can use this page to visualize the parent-child hierarchy structure, search for business locations, and perform different contextual actions on the nodes. You can also perform the following different contextual actions on the node:

- Set the node as a home or parent node.
- View the location details.
- Create a case from the node.

You can get the location details of the node that you select. Also, if there's a black dot on any node, it signifies a business location issue.

Note:
The business location hierarchy page displays a maximum of 250 nodes. You can use the search functionality to find the node that you're looking for.

Point of contact

The point of contact component displays the primary points of contact that are available at a business location. The following example shows that the point of contact component can display the different points of contact at a business location.

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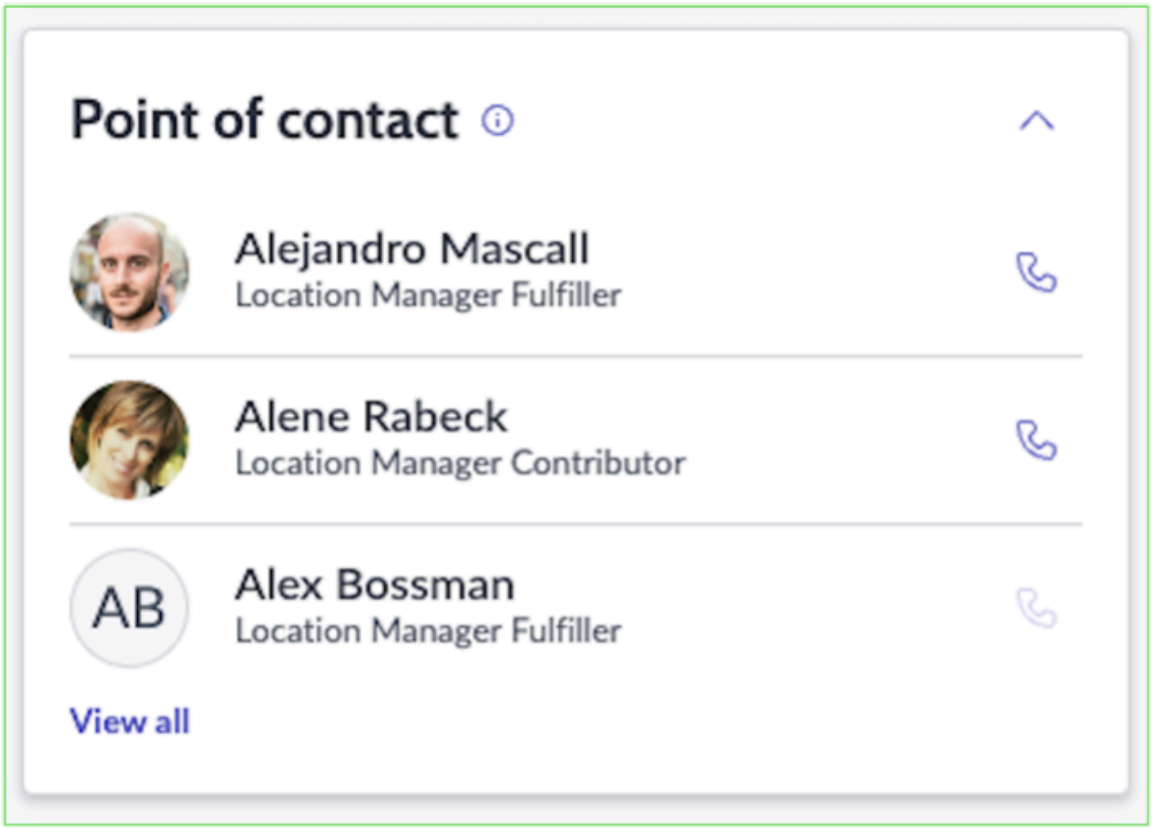
Point of contact component



Selecting **View all** takes you to the Business Location member page where you can get the details of all the points of contact at a business location.

Note:
By default, only three users are displayed.

Products installed

The products installed component displays the information about the install base items at a business location. For example, you can see the install base name, product model name, and the status on this component. The following example shows the products installed component that provides information about the listed install bases at a business location.

Note:
You can access this component only after your administrator activates the Customer Service Install Base Management plugin (com.snc.install_base).

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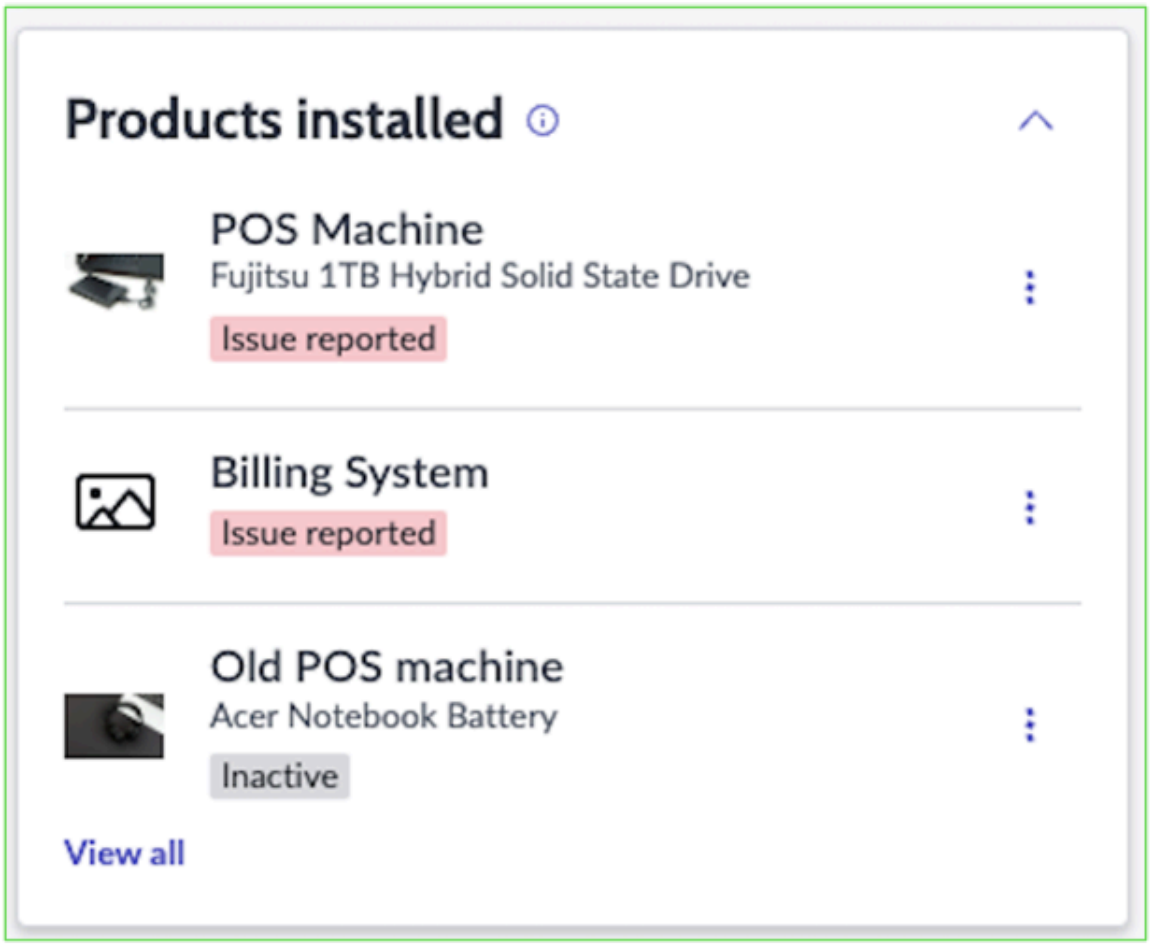
Products installed component



If the listed products display **Issue reported** in the highlighted text, it indicates that there's an active case reported for that install base item. The products within this component are sorted in the following order:

- Install base items with a recently reported case.
- Recently deployed install base items.

You can view the product details or create a case by selecting the Overflow icon ⋮.

Selecting **View all** takes you to the **Products installed** page where you can get the details of all the products installed at a business location.

Note:
By default, only three products are displayed.

Services offered

The services offered component displays the list of services that are offered at a business location. The following example shows the Services offered component that provides information about the list of all service names and the types that are available at a business location.

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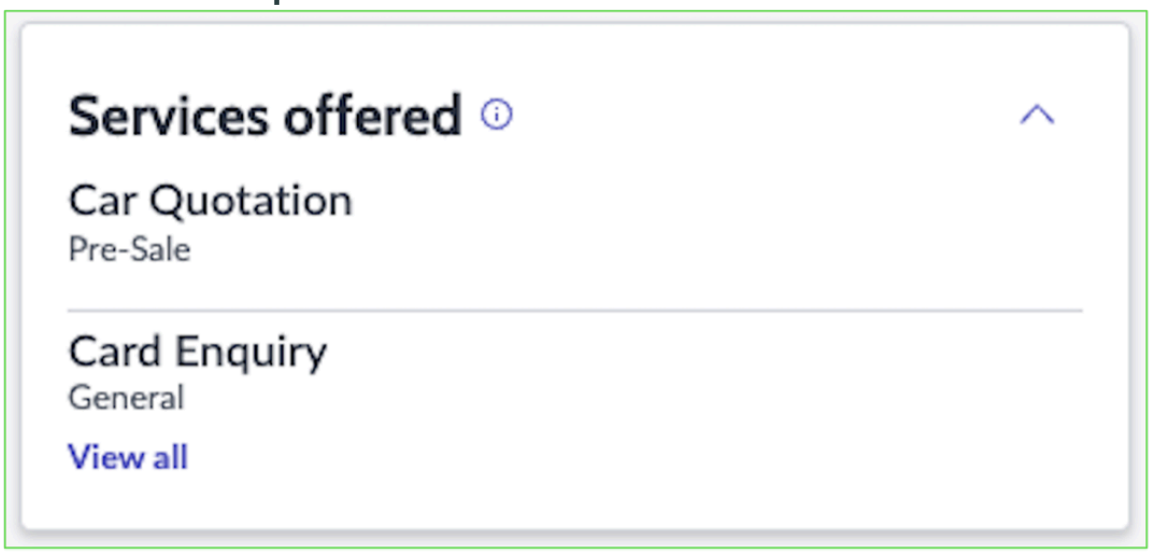
Services offered component

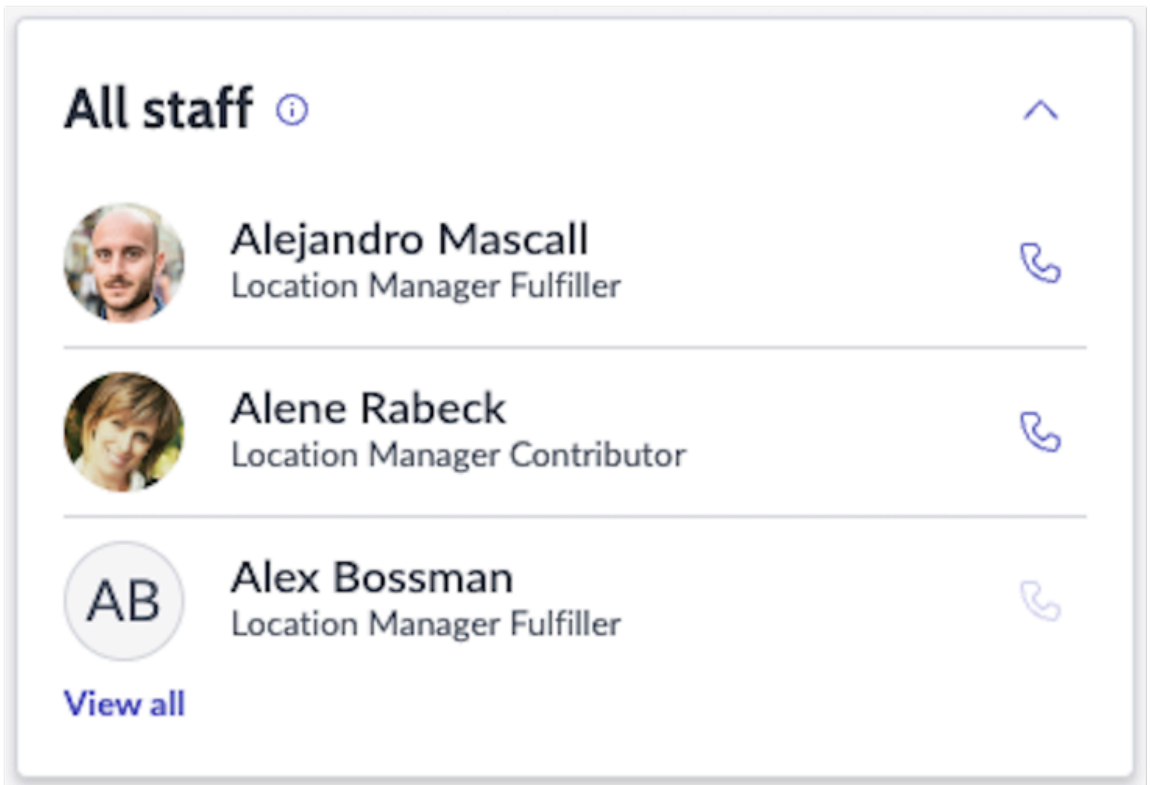


Note:
By default, only three services are displayed and these services are sorted in the ascending order.

All staff

The all staff component displays the list of the staff members who are working at a business location and includes both the internal and external staff members. The following example shows the All staff component.

All staff component



Selecting **View all** takes you to the **All staff** page where you can get the details of all the staff members that are available at a business location.

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Note:
By default, only three staff members are displayed and these services are sorted in the ascending order of user name.

KPIs

The KPI components are performance analytic indicators that display multiple types of information that are related to a case such as the following KPIs that are shipped out of the base system:

- Number of P1 cases
- Number of cases by priority
- SLAs breached

The following example shows a list of the different KPIs. The list includes the number of P1 cases, the number of cases by priority, and the SLAs that were breached.

KPIs component

These KPIs are filtered to show the current business location-related details. Your administrator can customize these KPIs according to your location's requirements by using the UI Builder.

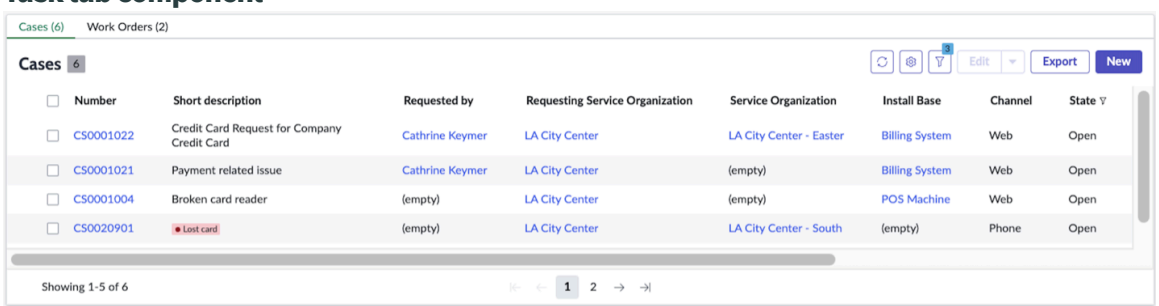
Task tab

The task tab component displays the following cases and work- order tabs where you can see the cases and work orders that are associated with a business location:

- **Cases** tab. Displays the active cases that have a requesting service organization as the current business location order by the date that the case was last updated. The account, consumer, and household fields are empty.
- **Work orders** tab. Displays the work orders that have the service organization as the current business location. For this type of work order, the household field is empty and the state field isn't completed. the state field is completed with errors, or the state field is closed.

The following example shows a list of the cases that are associated with a business location.

Task tab component



Note:
A maximum of five records are displayed per page.

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Customer tab

The customer tab component displays the list of consumers, accounts, and households that are associated with a business location:

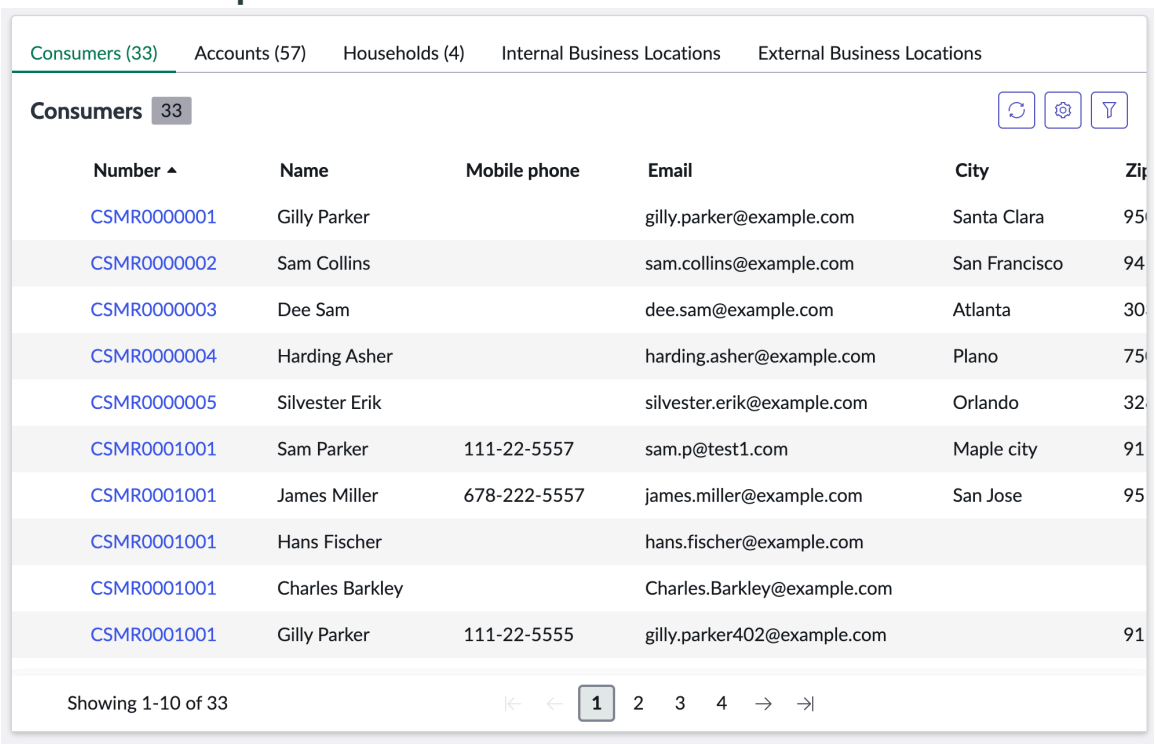
- **Consumers** tab. Displays all the consumers or a filtered list of consumers. This information is based on the supported consumers that are associated with the business location.
- **Accounts** tab. Displays all the accounts or a filtered list of accounts. This information is based on the supported accounts that are associated with the business location.
- **Households** tab. Displays all the households or a filtered list of households. This information is based on the supported households that are associated with the business location.

> **Note:**
> You can access this component only after the Customer Service Household plugin (com.snc.household) is activated.

- **Internal Business Locations** tab. Displays all the internal business locations or a filtered list of internal business locations. This information is based on the supported internal business locations that are associated with the business location.
- **External Business Locations** tab. Displays all the external business locations or a filtered list of external business locations. This information is based on the supported external business locations that are associated with the business location.

The following example shows a list of the consumers that are associated with a business location.

Customer tab component



> **Note:**
> A maximum of 10 records are displayed per page.

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Related topics

- Using Business Location 360
- Access Business Location 360 as a customer service agent
- Access Business Location 360 as a customer service manager
- Access Business Location 360 as a location service agent

Access Business Location 360 as a customer service agent

Access the business location 360 page in the Customer Service Management (CSM) application as a customer service agent. You can get a comprehensive, 360-degree view of the business location issues all in one place.

Before you begin

Role required: sn_customerservice_agent, svc_location_consumer_agent, sn_customerservice.svc_location_agent, and admin

About this task

As a customer service agent (sn_customerservice_agent), you can use the business location details to provide the case resolutions or create cases for a business location.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. On the **Lists** tab, select **Cases** > **All**.
3. In the Cases list, select a case record with a business location.
4. Access the Business Location 360 page by selecting the **Business Location** tab.

Related topics

- Business Location 360 components
- Access Business Location 360 as a customer service manager
- Access Business Location 360 as a location service agent

Access Business Location 360 as a customer service manager

Access the business location 360 page in the Customer Service Management (CSM) application as a customer service manager. You can get a comprehensive, 360-degree view of the business location issues all in one place.

Before you begin

Role required: sn_customerservice_manager, svc_location_consumer_agent, sn_customerservice.svc_location_agent, and admin

About this task

As a customer service manager (sn_customerservice_manager), you can view the issues that are reported at your individual business locations and across hierarchies.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. On the CSM/FSM Configurable Workspace **Lists** tab, select **Service Organizations** > **Internal/External Business Locations**.
3. In the Internal/External Business Locations list, select a record.
4. Access the Business Location 360 page by selecting the **Business Location** tab.

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Related topics

- Business Location 360 components
- Access Business Location 360 as a customer service agent
- Access Business Location 360 as a location service agent

Access Business Location 360 as a location service agent

Access the business location 360 page in the Customer Service Management (CSM) application as a customer service agent. You can get a comprehensive, 360-degree view of the business location issues all in one place.

Before you begin

Role required: sn_customerservice_agent, svc_location_consumer_agent, sn_customerservice.svc_location_agent, and admin

About this task

As a customer service agent (sn_customerservice_agent), you can use the business location details to provide the case resolutions or create cases for a business location. As a location service agent, you can view supported business locations based on supported business location criteria on the business location 360 page for external locations.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. On the **Lists** tab, select **Cases** > **All**.
3. In the Cases list, select a case record with a business location.
4. Access the Business Location 360 page by selecting the **Business Location** tab.

Related topics

- Business Location 360 components
- Access Business Location 360 as a customer service agent
- Access Business Location 360 as a customer service manager

Outsourced Service Provider agent tasks

Outsourced service provider agents (OSPs) extend the capabilities and reach of an organization's customer service operations by providing basic customer service to customers and consumers.

Some key functions that outsourced service provider agents can perform include the following.

Outsourced service provider agent tasks

Task	Description
Create work order	An OSP agent can create a work order so that it can be assigned to a Field Service agent.
Escalate a case	An OSP agent can escalate a case when unable to resolve or fulfill a case for various reasons such as technical limitations, knowledge gaps, or access restrictions.

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Outsourced service provider agent tasks (continued)

Task	Description
View account or consumer assets	An OSP agent can view the assets owned by an account or consumer which helps in creating or fulfilling a case.
View account contracts	As an OSP agent, you can view contracts owned by accounts or consumers in order to create or fulfill a case.
View customer or consumer data	As an OSP agent, you can view the customer or consumer data to fulfill cases.
Create a case task	An OSP agent creates a case task after a case has been assigned. As an agent, you can work on the case adding work notes and additional comments.
Assign a case	Assign a case to yourself or another Outsourced Service Provider (OSP) agent within the organization to start working on the case or to fulfill the case.
Create an appointment	As an agent, you can create an appointment for the requester of a case.
Transfer a case	The OSP agent or manager, if unable to resolve a case, transfers the case manually to an enterprise's internal agent.
View cases	As an OSP manager or agent, you can view all application modules with the list of cases for customers, consumers, and products served by your organization.
View case related emails and respond	As an OSP agent, you can view the list of emails related to a case that is assigned to you. You can respond to a case by creating a new email and sending it to the stakeholders of a case.
Report knowledge gap from a case	When an OSP agent has a knowledge gap which impacts the ability to resolve a case, the agent can report the knowledge gap.
Propose a major case	As an OSP agent, you can propose a major case from the existing customer service case assigned to you.
Close a case	Users with OSP agent role can propose a solution to a case and close the assigned cases.
Contextual search	Users with OSP agent role can search for related information to fulfill a case. The

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Outsourced service provider agent tasks (continued)

Task	Description
	search results returned are the list of entities that the agent is entitled to as per the data governance.
View list of entitlements	As an OSP manager or agent, you must view entitlements for an account or consumer to create or fulfill cases.

Create work order

An OSP agent can create a work order so that it can be assigned to a Field Service agent.

Before you begin

Role required: sn_csm_ocs.ext_agent and you must have installed Customer Service Management with Field Service Management plugin.

Procedure

1. Go to **My Cases** and open a case.
2. Click **Work Orders** related list.
3. Click **New**.
4. Click **Submit**.
5. View work order status to update the customer of the status.

Note:
You cannot create a new work order until the previous one is closed or deleted.

Escalate a case

An OSP agent can escalate a case when unable to resolve or fulfill a case for various reasons such as

Before you begin

Role required: sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Select the **Escalate Case** related link.
3. Fill in the fields on the Escalation form, as appropriate.
4. Select **Submit**.

View account or consumer assets

An OSP agent can view the assets owned by an account or consumer which helps in creating or fulfilling a case.

Before you begin

Role required: sn_csm_ocs.ext_agent

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Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases**.
2. Open a case and click the preview icon next to the **Account** or **Consumer** field.
3. Click **Open Record**.
4. Click **Assets** related list.
   The list of assets belonging to the account or consumer is visible.
5. Click on an asset to view the read-only fields.

View account contracts

As an OSP agent, you can view contracts owned by accounts or consumers in order to create or fulfill a case.

Before you begin
Role required: sn_csm_ocs.ext_manager/sn_csm_ocs.ext_agent

Procedure

1. Open the case form.
2. Click the **Preview** icon next to the **Account** or **Consumer** field.
3. Click **Contracts** related list.
4. View the list of assets belonging to an account or consumer and fulfill a case.

View customer or consumer data

As an OSP agent, you must view the customer or consumer data to fulfill cases.

Before you begin
Role required: sn_csm_ocs.ext_manager or sn_csm_ocs.ext_agent

Procedure

1. Navigate to **Outsourced Customer Service** > **Cases** > **All**.
2. Open a case and click the preview icon next to the **Account** or **Contact** field.
3. Click **Open Record**.
   The following related lists are visible for you to work on and fulfill the cases:
   - **Contacts**
   - **Addresses**
   - **Cases**
   - **Assets**
   - **Contracts**
   - **Entitlements**
   - **Account Relationships**
   - **Sold Products** and
   - **Install Base**

Create a case task

An OSP agent creates a case task after a case has been assigned. As an agent, you can work on the case adding work notes and additional comments.

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Before you begin
Role required: sn_csm_ocs.ext_agent

Procedure
1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases** and open a case.

   Note:
   The timeline of the case is displayed at the top of the case form.

2. Click **Tasks** related list.
3. Click **New** to create a new task.
   The **Edit** button allows you to add existing case tasks to a case from the **Collection** list.
4. Fill in the fields on the new record form, as appropriate.
5. Click **Submit**.

   Note:
   You can also close the case task.

Assign a case

Assign a case to yourself or another Outsourced Service Provider (OSP) agent within the organization to start working on the case or to fulfill the case.

Before you begin
Role required: sn_csm_ocs.ext_agent

Procedure
1. Navigate to **Outsourced Customer Service** > **Cases** > **All**.
2. Click and open a case from the available list.
3. Click **Assign to me**.

   Note:
   If the case is already assigned, the **Assign to me** button isn't available.

Create an appointment

As an agent, you can make an appointment with the requester of a case.

Before you begin
Role required: sn_csm_ocs.ext_manager or sn_csm_ocs.ext_agent

Procedure
1. Navigate to **All** > **Outsourced Customer Service** > **My Cases**.
2. Open a case.
3. Click **Appointments** related list.
4. Fill in the fields on the Appointment form, as appropriate.
5. Click **Submit** and the appointment appears under **Appointments** related list in **Ready** state .

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6. Edit the appointment and click **Send activity** to send the appointment to the specified email address.

Note:
You can also cancel the appointment using the **Cancel appointment** related link.

Transfer a case

The OSP agent or manager, if unable to resolve a case, transfers the case manually to an enterprise's internal agent.

Before you begin
Role required: sn_csm_ocs.ext_manager or sn_csm_ocs.ext_agent

About this task
You can transfer a case by selecting the reason for transfer, adding transfer notes, and transfer the case manually. The case is transferred based on the default assignment group setup while defining an OSP. Otherwise, the case is transferred based on AWA or assignment rules that have been previously set up.

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Open a case that you want to transfer.
3. Select **Transfer Case**.
4. Select the reason for transferring the case from the **Reason** drop-down list.
5. Enter additional information regarding the case in the **Notes** field.
6. Select **Save**.
   The case is transferred successfully to the enterprise's internal manager. When you go back to **All** cases and view the case, you can view the transfer information under the **Outsourced Case Transfer Request** related list.

View cases

OSP manager or agent, you must be able to view all application modules with the list of cases for customers, consumers, and products served by your organization.

Before you begin
Role required: sn_csm_ocs.ext_manager or sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases**.
   You must be able to see **My Cases**, **All**, **Open**, and **Unassigned** cases. Users who aren't authorized or who don't belong to this OSP won't see any case.

Note:
As an OSP manager you can view cases that are assigned to the groups you manage.

2. Select **All**, open a case, and assign the case to yourself.
   The **Assigned to** field is pre-filled with your name.

View case related emails and respond

As an OSP agent, you can view the list of emails related to a case that is assigned to you. You can respond to a case by emailing stakeholders.

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Before you begin
Role required: sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Open a case that you want to respond to.
3. Select **Emails** related list.
   The list of emails sent earlier if any, is displayed.
4. Select **New Email** to create an email.
   The recipient fields are pre-filled. You can add additional recipients if required.
5. Enter the body text in the Compose Email window.
6. Select the Attachment icon ( ) if you want to add an attachment to the email.
7. Select **Send**.

Report knowledge gap from a case

An OSP agent can report a knowledge gap for a case.

Before you begin
Role required: sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Open a case.
3. Is knowledge available for the case in the **Knowledge Gaps** related list.
4. Click **Report Knowledge Gap** related link.
5. Enter the description.
6. Click **Submit**.
   A knowledge gap is created and you can view it under the **Knowledge Gaps** related list.

   For more details, see Report a knowledge gap

Propose a major case

As an OSP agent, you can propose a major case from the existing customer service case assigned to you.

Before you begin
Role required: sn_csm_ocs.ext_agent

About this task
Cases in these states can be proposed as a major case candidate:

- New
- Open
- Awaiting Info

Cases that are Resolved, Closed, or Canceled can’t be proposed as a major case candidate.

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When proposing a case as a major case candidate, agents can specify the reason or justification for the case in the Propose Major Case pop-up window. Information provided in the **Work notes** and **Business Impact** fields are added to the Case form.

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Open a case.
3. Right-click on the case form.
4. Select **Propose Major Case**.
5. In the Propose Major Case pop-up window, enter a reason for the proposal in the **Work notes** field.
   You can also choose to enter the business impact of the selected case in the **Business Impact** field.
6. In the Propose Major Case pop-up window, enter a reason for the proposal in the **Work notes** field.
7. **Optional:** Enter the business impact of the selected case in the **Business Impact** field.
   This information is added to the Case form in the **Work notes** field and the **Business Impact** field in the Major Case Information section.
8. Select **Propose**.
   An entry is added to the **Work notes** on the Case form that the case was proposed as a major case candidate. The information entered in the Propose Major Case pop-up window is also added to the Case form.

Close a case

Users with an OSP (Outsourced Service Provider) agent role can propose a solution to a case and close the assigned cases.

Before you begin

Role required: sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Open a case.
3. Select the **Closure information** tab on the case form.
4. Select the **Resolution code** from the drop-down list.
5. Enter the cause for resolution and notes if any in the **Cause** and **Resolution notes** fields.
6. Select the **Add resolution notes to comments** check box, if desired.
7. Select **Close Case**.
   The case state changes to **Closed** state.

Contextual search

An OSP agent can search for related information to fulfill a case. The search results returned are the list of entities that the agent is entitled to according to the data governance.

Before you begin

Role required: sn_csm_ocs.ext_agent

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Procedure

1. Navigate to **Outsourced Customer Service** > **Cases** > **All**.
2. Open a case to see the related search results according to the case description.

View list of entitlements

As an OSP manager or agent, you must view entitlements for an account or consumer to create or fulfill cases.

Before you begin

Role required: sn_csm_ocs.ext_manager or sn_csm_ocs.ext_agent

Procedure

1. Navigate to **Outsourced Customer Service** > **Cases** > **All**.
2. Open a case and select the preview icon next to the **Account** field.
   The customer account page is displayed.
3. Select **Entitlements** related list.
4. Open an entitlement and view the asset details to fulfill a case.

Manage schedules and sites

Manage agent scheduling and availability, use the mobile app to perform common tasks on the go, and manage and support your customer base with install base plans and contracts.

Manage schedules and sites

Topic	Description
Managing agent calendar	Customer service agents and field service technicians can use the agent calendar to see work schedules and assignments and also add personal events such as meetings or appointments.
Using Microsoft Outlook with CSM	Integrating Microsoft Outlook with CSM helps to improve collaboration among team members. Agents can share insights, discuss complex cases, and provide updates on customer issues effortlessly, fostering a more cohesive and responsive customer service environment.
Mobile experience for Customer Service Management	Manage customer service cases from a mobile device with the Customer Service Management mobile application. Stay connected and access information in real time to complete tasks quickly.
Install base work plans	You can create an install base work plan on the Customer Service Management application to get the details that are related to an install base item. Work plans help you to create, maintain, and view the basic details of an install base item. You can also plan for the

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Manage schedules and sites (continued)

Topic	Description
	regular and timely maintenance of the install base item.
Using Customer Contracts and Entitlements	Learn how consumers, managers, agents, and administrators use the Customer Contracts and Entitlements application to generate service contracts and contract lines to work on the services.

Managing agent calendar

Customer service agents and field service technicians can use the agent calendar to see work schedules and assignments and also add personal events such as meetings or appointments.

The agent calendar provides a tool for maintaining different work schedules or shifts and assigning agents and technicians to shifts for specific time periods. The calendar has the flexibility to accommodate work schedules that are fixed or varied and shifts that rotate by week, month, or other patterns. The agent calendar administrator creates the calendar configuration, including a schedule configuration for each calendar user and the types of tasks to display on the calendar.

The schedule information stored in the agent calendar is used by other ServiceNow applications and features, such as the assignment workbench, central dispatch, and auto assignment. The assignment workbench uses agent availability, based on upcoming work schedules and personal time off, when evaluating predefined criteria and recommending agents for case assignment. Auto assignment in Service Management core applications, such as Field Service Management and Facilities Service Management, evaluate agent work schedules before assigning tasks.

The agent calendar administrator has access to the Agent Schedule menu in the application navigator. This menu includes the following modules:

- **Event Configuration**: create a configuration for each type of event or task displayed on the agent calendar.
- **Work Schedule**: create one or more work schedules for each calendar user.
- **Agent Personal Events**: create personal schedules for each agent and add events to those schedules.
- **Schedule**: create or modify schedules. For more information, see Schedules.

Viewing the calendar

Customer service agents and field service technicians with the agent_schedule_user role can access their personal calendars in the following ways:

- **Customer Service** > **My Schedule**
- **Field Service** > **Agent** > **My Schedule**

Note:
The agent calendar is supported in the mobile application and the mobile web.

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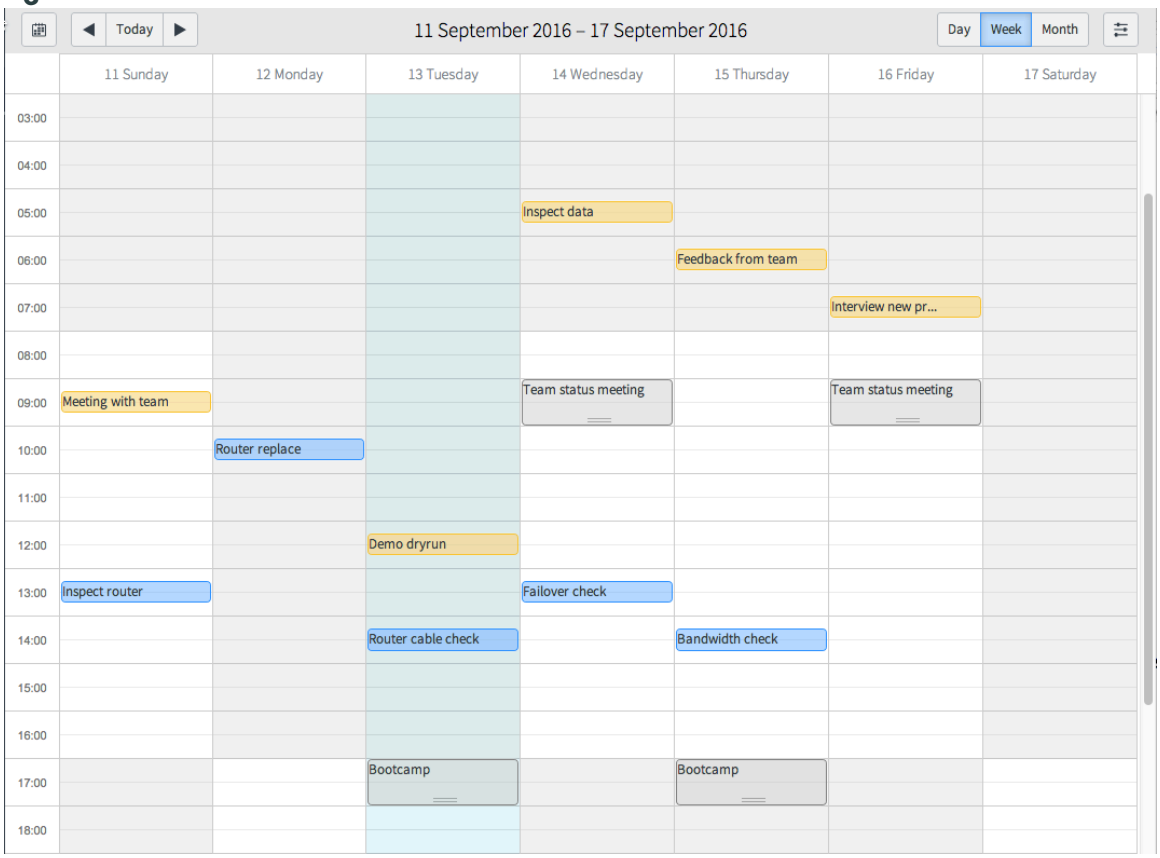
Agent Calendar



The calendar can display a single day, a week, or a month. Buttons in the calendar header allow you to switch views as well as go backward or forward in time. An agent's scheduled work hours are highlighted in gray and the current day is highlighted in blue. The agent calendar displays work or tasks assigned to the agent as well as personal events. Each type of event is displayed on the calendar using a different color.

Agents can add events to their calendars by double-clicking a specific time slot and entering the details in the New Event popup window or by clicking and dragging. Agents can also move events by dragging and dropping. Click an event to display a popup with event details and double-click an event to open the event record.

Plugins

The Agent Schedule plugin (com.snc.agent_schedule) is activated as part of the Customer Service Management and Field Service Management plugins.

Tables

The Agent Schedule plugin adds the following tables.

Tables installed with the Agent Schedule plugin

Table	Description
Agent Work Schedule [agent_work_schedule]	Stores one or more work schedules for each agent, including the date range for the schedule and the schedule type.

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Tables installed with the Agent Schedule plugin (continued)

Table	Description
Agent Personal Schedule [agent_events]	Stores personal calendar events for each agent, such as training, personal time off, or meetings.
Event Configuration [agent_schedule_task_config]	Stores a configuration for each type of task displayed on the agent calendar, such as case tasks or work order tasks.
Agent Schedule User Config [agent_schedule_user_pref]	Stores the agent's personalization data for the calendar. A user configuration is created automatically when a user with the agent_schedule_user role accesses their personal calendar.
Agent Schedule Relationship [agent_schedule_task_config_rel_user_pref]	Stores the relationships between agent configurations and event configurations. Relationship entries are created automatically based on a user's read access to the task tables selected in the event configurations.
Agent Schedule Definition Theme [agent_schedule_definition_theme]	Stores the colors used to display different types of tasks on the agent calendar.

User Roles

The following user roles are included with the Agent Schedule (com.snc.agent_schedule) plugin.

Roles included with Agent Schedule plugin

Role	Description
Agent schedule administrator [agent_schedule_admin]	Sets up the Agent Calendar configuration. Contains roles: • agent_schedule_user • schedule_admin
Agent schedule user [agent_schedule_user]	Allows customer service agents and field service technicians to access and update their personal calendars.

Related topics

Creating and using schedules

Configuring an agent calendar

Configuring an agent calendar

Users with the agent calendar administrator role can perform several calendar configuration tasks.

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Configuration overview

You can configure the following for an agent calendar:

- Create an event configuration for an agent calendar

  Create configurations for each type of entry displayed on the agent calendar. Entries could include case tasks, work order tasks, appointments, or schedule entries such as event types that you could track and manage on the team calendar.

- Create a work schedule for an agent or technician

  Create one or more work schedules for a customer service agent or a field service technician.

- Create a personal event for an agent or technician

  Create personal events that appear on an agent's personal calendar.

- Create a schedule to use with the agent calendar

  Create a schedule to use with the agent calendar.

Related topics

Managing agent calendar

Use the agent calendar

Create an event configuration for an agent calendar

Create configurations for each type of entry displayed on the agent calendar. Entries could include case tasks, work order tasks, appointments, or schedule entries such as event types that you could track and manage on the team calendar.

Before you begin

The schedule entry uses the Schedule Span [cmn_schedule_span] table to store different types of events.

The following types of schedule entries for event type configurations are available by default:

- Event — Appointment
- Event — Excluded
- Event — Meeting
- Event — Phone
- Event — Time Off
- Event — Other

These configurations are inactive by default. You can activate a configuration by navigating to **Agent Schedule** > **Event Configuration**, selecting an event type configuration, and setting the **Active** field to **true** for one or more event configuration types you would like to activate. Each configuration displays as a separate event type on the team calendar.

Role required: agent_schedule_admin

Procedure

1. Navigate to **Agent Schedule** > **Event Configuration** and perform one of the following actions.

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2. Fill in the fields on the Event Configuration form, as necessary.

Event Configuration form

Field	Description
Name	A descriptive name for this configuration.
Config Label	Name displayed for this event in the agent calendar.
Color theme	Color used to display this type of schedule on the agent calendar.
Setup	
Setup	Setup method for this configuration. ○ **Simple:** use condition builder to set up this configuration. ○ **Scripted:** use advanced scripts to set up this configuration.
Table	The table where the tasks for this type of configuration are stored.
Filter	Use condition builder to create the desired conditions for the selected task type. For example, the event configuration for Case Tasks includes a filter on the task **State** field to display only those tasks that are open.
User Field	A field from the **Table** that provides the user assigned to the task. For example, the event configuration for Case Tasks uses the **Assigned To** field from the Task table [sn_customerservice_task]. When a case task is assigned, it appears on the agent calendar for the user selected in this field.
Event type	Type of schedule entry.
Display Field	A field from the **Table** that provides the information to be displayed for this event type on the agent calendar. For example, the event configuration for Case Tasks uses the **Subject** field from the Task table [sn_customerservice_task]. When a case task is assigned, the subject of the task appears on the agent calendar.
Start Date Field	A field from **Table** that provides the start date for the task. For example, the event configuration for Case Tasks uses the **Expected start** field from the Task table [sn_customerservice_task]. When a case task is assigned, it appears on the agent calendar starting on the date and time specified in this field. The **Expected start** field must contain a value for the event to appear in Workforce. If the field is empty, the event will not be displayed.
End Date Field	A field from the **Table** that provides the end date for the task. For example, the event configuration for Case Tasks uses the **Due date** field from the Task table [sn_customerservice_task]. When a case task is assigned, it appears on the agent calendar ending on the date and time specified in this field. The **Due date** field must contain a value for the event to appear in Workforce. If the field is empty, the event will not be displayed.

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Field	Description
	Note: Because the agent schedule administrator can select any fields from the **Task Table** for the **Start Date Field** and the **End Date Field**, it is possible that the end date may be earlier than the start date. In this event, the task is displayed on the agent calendar between the two points in time.
Script	Use advanced scripts to create the event configuration. **Note:** This field is available when the **Scripted** value is selected from the **Setup** field.

3. Perform one of the following actions:
   - If you created the configuration from an existing configuration, click **Update**.
   - If you created a new configuration, click **Submit**.

Create a work schedule for agents

Users with the agent schedule administrator role can create one or more work schedules for a customer service agent or a field service technician.

Before you begin
Role required: agent_schedule_manager, agent_schedule_admin

About this task
A work schedule includes a date range and a schedule type, such as day shift or evening shift. Agents and technicians can have multiple work schedules.

Procedure
1. Navigate to **All** > **Agent Schedule** > **Work Schedule**.
2. Click **New**.
3. Fill in the fields on the Agent Work Schedule form, as necessary.

Agent Work Schedule form

Field	Description
From Date	The first day of the work schedule.
To Date	The last day of the work schedule.
User	The selected agent or technician.
Work Schedule	The selected schedule from the Schedules list.
Type	The type of work that the agent or technician is performing during this schedule: - Primary work - Other

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Field	Description
	An agent can have only one primary schedule for a specific range of dates. Primary schedules cannot overlap.

4. Click **Submit**.

Create a personal event for an agent or technician

Users with the agent schedule administrator role can create personal events that appear on an agent's personal calendar.

Before you begin
Role required: agent_schedule_admin

About this task
Agents and technicians typically add personal events to their own calendars.

Procedure
1. Navigate to **All** > **Agent Schedule** > **Agent Personal Events**.
2. Select the personal schedule for the desired agent.
3. In the **Schedule Entries** related list, select **New**.
4. Fill in the fields on the Schedule Entry form, as necessary.

Schedule Entry form

Field	Description
Name	The name of the event.
Type	The type of event: ○ Time off ○ Appointment ○ Meeting ○ Phone call ○ Excluded ○ On call ○ Time off - in approval ○ Time off - rejected
Show as	Show this event on the agent's personal calendar as one of the following: ○ Busy ○ Free ○ Tentative ○ On call Select **Busy** to exclude the block of time from agent availability calculations for the auto- assignment and the case assignment workbench.
When	The start date and time of the personal event.

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Field	Description
To	The end date and time of the personal event.
All day	Enable this check box if the event lasts all day.
Repeats	Create a repeating event by selecting the frequency. Depending on the selection, other fields are required to complete the frequency information. ○ Doesn't repeat ○ Daily ○ Every Weekday (Mon-Fri) ○ Every Weekend (Sat, Sun) ○ Every Mon, Wed, Fri ○ Every Tue, Thu ○ Weekly ○ Monthly ○ Yearly
Repeat every	Enter a number for the frequency of the repeated event.
Repeat on	For weekly events, select a day of the week.
Monthly type	For monthly events, select one of the following. These selections use the day and date in the **When** field as the basis for repetition. ○ Day of the month ○ Day of the week ○ Last day of the month ○ Last week of the month
Yearly type	For monthly events, select one of the following: ○ Day of the year: This selection uses the day and date in the **When** field as the basis for repetition. ○ Floating: For this selection, complete the **Float week**, **Float day**, and **Float month** fields.
Repeat until	Select a date for the end of the repeated event.
Float week	For a floating yearly repeating event, select the week.
Float day	For a floating yearly repeating event, select the day.
Float month	For a floating yearly repeating event, select the month.

5. Select **Submit**.

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Create a schedule to use with the agent calendar

Users with the agent calendar administrator role can create a schedule to use with the agent calendar.

Before you begin

Role required: agent_schedule_admin

About this task

Creating a schedule for the agent calendar uses the schedule feature. For more information, see Schedules.

Schedules are configured with two types of records.

- Schedule records specify a time zone and a type of schedule and use one or more schedule entries. Schedule records are saved in the Schedule [cmn_schedule] table.
- Schedule entry records specify the time periods that are included or excluded from a schedule. Schedule entries are saved in the Schedule Entry [cmn_schedule_span] table.

For more information on schedule fields, see Schedule fields.

Procedure

1. Navigate to **All** > **Agent Schedule** > **Schedule**.
2. Click **New**.
3. Complete the fields on the Schedule form.

Schedule form fields and descriptions

Field	Description
Name	Enter a unique name for the schedule.
Time Zone	Select the time zone for the schedule. If you select **Floating**, the time zone will be relative to whatever is accessing the item at any given time.
Parent	Select a parent schedule to constrain the new schedule.
Type	Enter a label that describes the purpose of the schedule. You can also use one of these system terms to determine how to process certain schedules: ○ **excluded:** excludes time periods from SLA counts. ○ **maintenance:** specifies time periods where change management activities are allowed. A schedule containing maintenance schedule entries cannot also contain blackout schedule entries. ○ **blackout:** excludes time periods from change management schedules. A schedule containing blackout schedule entries cannot also contain maintenance schedule entries.
Description	[Optional] Describe the schedule.

Note:
The Schedule form displays a warning message if there are no active entries defined for the current schedule. If your schedule is a child schedule that only contains exclusions, ignore the message because exclusions are non-active entries.

4. Right-click the header bar and click **Save**.

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Note:
If you create a schedule of type **maintenance** and save the record, a UI policy hides the **Type** field from the form. To view or change the value for the **Type** field, view the list of schedules rather than the schedule form and add the **Type** column if necessary. You can double-click the cell for the value in the **Type** column and modify from the list view.

5. Configure one or more schedule entries.
6. Click **Submit**.

Use the agent calendar

Users with the agent calendar user role can add events to their personal calendar and configure the calendar to show or hide different types of events.

Related topics

Configuring an agent calendar

Managing agent calendar

Add an event to the agent calendar

Users with the agent schedule user role can add events to their personal calendar.

Before you begin
Role required: agent_schedule_user

Procedure

1. Navigate to your calendar.
   - **Customer Service** > **My Schedule**
   - **Field Service** > **Agent** > **My Schedule**
2. Double-click a timeslot or click and drag over a timeslot on the calendar to open the New Event form.

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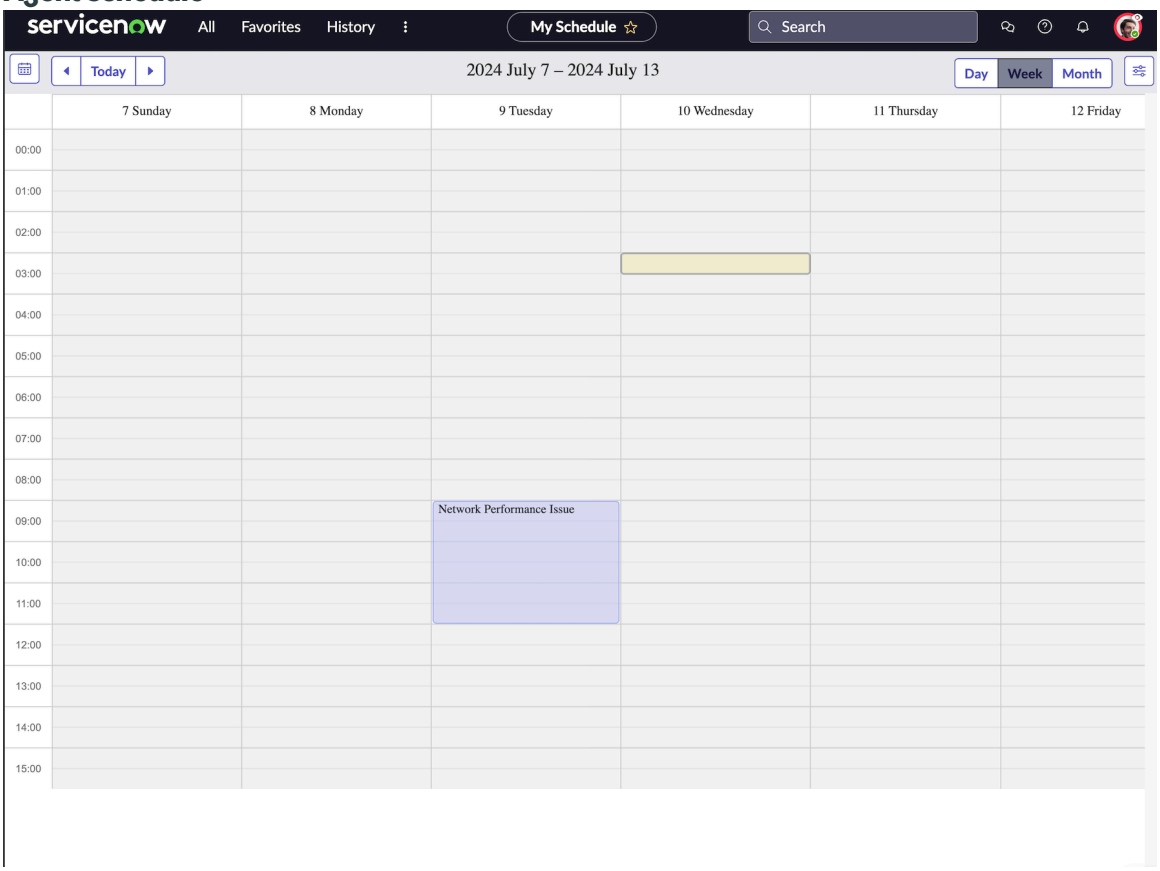
Agent schedule



3. Fill in the fields on the New Event form, as necessary.

New Event form fields and descriptions

Field	Description
Name	The name of the event.
Type	The type of event: ○ Time off ○ Appointment ○ Meeting ○ Phone call ○ Excluded ○ On call ○ Time off - in approval ○ Time off - rejected
Show as	Show this event on the agent's personal calendar as one of the following: ○ Busy ○ Free ○ Tentative ○ On call

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Field	Description
	Select **Busy** to exclude the block of time from agent availability calculations for the auto assignment and the case assignment workbench.
When	The start date and time of the personal event.
To	The end date and time of the personal event.
All day	Enable this check box if the event lasts all day.
Time zone	[Read only] If an agent has selected a specific time zone in their user profile, that time zone is displayed here and is used as the time zone for this event. Subsequent changes to the **Time zone** field in the user profile do not change the time zone designation for this event.
Repeats	Create a repeating event by selecting the frequency. Depending on the selection, other fields are required to complete the frequency information. ○ Does not repeat ○ Daily ○ Every Weekday (Mon-Fri) ○ Every Weekend (Sat, Sun) ○ Every Mon, Wed, Fri ○ Every Tue, Thu ○ Weekly ○ Monthly ○ Yearly
Repeat every	Enter a number for the frequency of the repeated event.
Repeat on	For weekly events, select a day of the week.
Monthly type	For monthly events, select one of the following. These selections use the day and date in the **When** field as the basis for repetition. ○ Day of the month ○ Day of the week ○ Last day of the month ○ Last week of the month
Yearly type	For monthly events, select one of the following: ○ Day of the year: this selection uses the day and date in the **When** field as the basis for repetition. ○ Floating: for this selection, complete the **Float week**, **Float day**, and **Float month** fields.
Repeat until	Select a date for the end of the repeated event.
Float week	For a floating yearly repeating event, select the week.

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Field	Description
Float day	For a floating yearly repeating event, select the day.
Float month	For a floating yearly repeating event, select the month.

4. Click **Submit**.
   The new event appears on the agent calendar and also in the **Schedule Entries** related list on the Agent Personal Schedule form.

Move an event on the agent calendar

Users with the agent schedule user role can move events on their personal calendar.

Before you begin

Role required: agent_schedule_user

Procedure

1. Navigate to your calendar.
   - **Customer Service** > **My Schedule**
   - **Field Service** > **Agent** > **My Schedule**
2. Use one of the following methods to move an event.

Option	Description
Click an event and drag it to a new day or time	The **When** and **To** fields in the event record are updated with the new information.
Double-click an event to open the event record	Change the date and time information in the **When** and **To** fields and click **Submit**. The event appears on the calendar in the new lo cation.

Show or hide event types on the agent calendar

Users with the agent schedule user role can personalize their calendar and show or hide different types of events.

Before you begin

Role required: agent_schedule_user

Procedure

1. Navigate to your calendar.
   - **Customer Service** > **My Schedule**
   - **Field Service** > **Agent** > **My Schedule**
2. Click the configuration icon ( ) in the calendar header to display the Schedule Configuration menu.
3. Enable or disable the switches for the different types of events.
   An option is enabled when the switch is moved to the right and appears with a green background.

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4. Click the configuration icon ( ) again to hide the Schedule Configuration menu.
   The calendar displays the enabled task types.

Using Microsoft Outlook with CSM

Integrate Customer Service Management with Microsoft Outlook to perform tasks such as managing contacts and cases from within Microsoft Outlook.

Integrating Microsoft Outlook with ServiceNow® Customer Service Management (CSM) can significantly streamline communication and enhance the efficiency of customer service operations. This integration offers several key benefits.

- Facilitates seamless communication between agents and customers by synchronizing emails, calendars, and contacts. This ensures that important information is easily accessible, reducing the risk of missed messages or appointments.
- Enhances task management by allowing agents to create, assign, and monitor tasks directly from their Microsoft Outlook interface. This means that agents can manage their workloads more effectively without needing to switch between different platforms.
- Supports automated workflows, enabling agents to respond to customer inquiries quickly and accurately. It simplifies the process of updating customer records and logging service requests, thereby improving the accuracy and reliability of customer data.
- Improve collaboration among team members. Agents can share insights, discuss complex cases, and provide updates on customer issues effortlessly, fostering a more cohesive and responsive customer service environment.

View Microsoft Outlook customer contact details in your ServiceNow instance

Once you have integrated Customer Service Management (CSM) with Microsoft Outlook, you can view customer details in an Outlook add-in panel to make communication easier.

Before you begin

Role required: sn_customerservice.contact_manager, sn_customerservice.proxy_contact

Procedure

1. In Microsoft Outlook, open an email message you received from the contact.
2. On the Microsoft Outlook Home tab, click **View in ServiceNow**.
   The Outlook add-in panel displays the contact details.

   Note:
   If the contact details are not available, the `No contact was found` message is displayed.

3. **Optional:** If you want to perform other contact tasks, access the contact information in the CSM portal page by clicking the Pop-out icon ( ).

Create a contact in Microsoft Outlook

As an account manager, you can create a contact when you receive an email from a customer whose details aren't in the Microsoft Outlook contacts list.

Before you begin

Role required: sn_customerservice.contact_manager and sn_customerservice.proxy_contact

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Procedure

1. Open an email message that you received from the contact.
2. On the Microsoft Outlook Home tab, select **View in ServiceNow**.
   The contact details aren't available and the Outlook add-in panel displays the `No contact was found` message.
3. Select the more actions icon ( ) and select **Create Contact**.
4. Fill in the contact details in the case form and select **Submit**.
5. **Optional:** If you want to perform other contact tasks, access the CSM portal by selecting the Pop-out icon ( ).

View or modify existing cases in Microsoft Outlook

As an account manager, view the five most recent cases related to a Microsoft Outlook contact to understand contact-related issues, modify any case information, and communicate more efficiently with the contact.

Before you begin

Role required: sn_customerservice.contact_manager and sn_customerservice.proxy_contact

About this task

Although you can view or modify existing cases from Microsoft Outlook, you can also access the CSM portal to work on open cases by clicking the pop-out icon ( ).

Procedure

1. Open an email message you received from the contact.
2. On the Microsoft Outlook Home tab, click **View in ServiceNow**.
3. Click **Cases** in the Outlook add-in panel.
   The add-in panel lists the five most recent cases connected to the contact that are not closed. You can load more cases.
4. Click a case to open the case details.
5. Type your message.
6. **Optional:** If you have supporting information such as a message that you want to attach to a case, click the attachment icon ( ) and select the file.
7. Click **Send**.

Result

The newly added message is available in the activity stream.

Create a new case from an email message in Microsoft Outlook

If a customer whose contact details are available sends an email stating an issue, you can easily create a customer service case.

Before you begin

Role required: sn_customerservice.contact_manager and sn_customerservice.proxy_contact

Procedure

1. Open the email message you received from a customer.
2. On the Microsoft Outlook Home tab, click **View in ServiceNow**.

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The Outlook add-in panel opens in the right pane.

3. Click the more icon ( ).
4. Select **Create Case** from the menu.
5. Fill in the case details on the case form.
6. Click **Submit**.

Mobile experience for Customer Service Management

Manage customer service cases from a mobile device with the Customer Service Management mobile application. Stay connected and access information in real time to complete tasks quickly.

Customer service agents and managers can use the Customer Service Management mobile application to review case details quickly and complete case tasks. Agents and customer service managers can perform routine actions and approvals effectively any time and anywhere.

Activate the Customer Service Mobile plugin (com.sn_csm_mobile) to use the available features. To use the change request feature, the Customer Service with Service Management (com.sn_cs_sm) plugin is required.

Note:
The Customer Service Management mobile application supports product cases.

For more information, see Activate a plugin.

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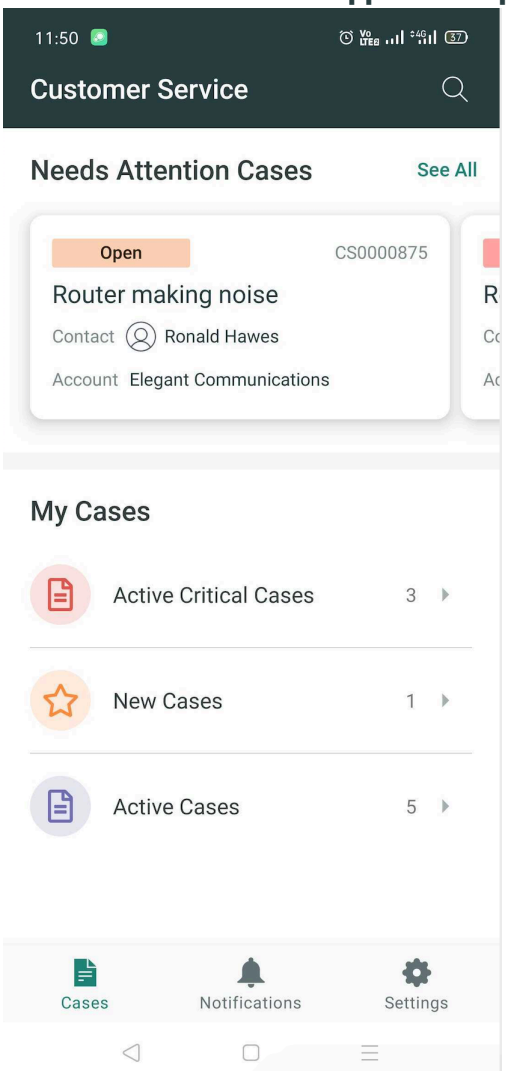
Customer Service mobile application applet launcher for agent



With the customer service agent role (sn_customerservice_agent), you can:

- Get a quick overview of your case load, including new cases, critical cases, and those that need attention.
- Accept and reassign cases.
- Add comments or work notes to cases.
- Review case details, activity stream, and related information such as SLAs, case tasks, and child cases.
- Edit case information such as priority.
- Propose major cases.
- Receive push notifications for assigned or updated cases.
- Search for cases using keywords

With the system administrator role, you can configure the Customer Service Management mobile application in the following ways:

- Configure pages to display the desired data.
- Configure the functions associated with swipe actions and top menu actions.
- Configure and create push notifications.

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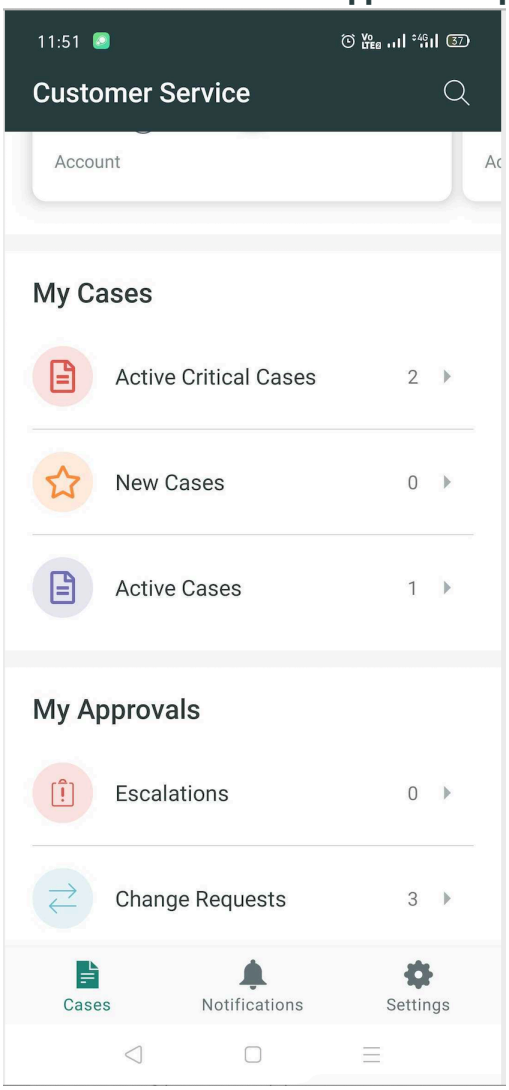
Customer Service mobile application applet launcher for manager



With the customer service manager role (sn_customerservice_manager) you can:

- Search for cases using keywords
- Review and approve change requests
- Approve escalations

Activate the Customer Service Mobile plugin

The Customer Service Management mobile application runs on the ServiceNow® mobile platform.

To use the Customer Service Management mobile application, activate the Customer Service Mobile plugin (com.sn_csm_mobile). This plugin activates the following plugins:

- Mobile Agent Native Client plugin (com.glide.sg.agent_native_client)
- Customer Service (com.sn_customerservice)
- Customer Service Case Action Status (com.sn.csm_action_status)

To provide support for major cases, you can activate the optional Major Issue Management plugin (com.sn_majorissue_mgt).

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Once the Customer Service Management mobile application is activated and configured, agents can download the ServiceNow Agent mobile app on their mobile devices and access ServiceNow instances.

Note:
You can activate the Customer Service Mobile plugin (com.sn_csm_mobile) from the Customer Service Management guided setup.

For more information, see Activate a plugin.

Related topics

Getting started with ServiceNow Agent

Customer Service mobile application overview

Customer service agents and managers can use the applet launcher and applets in the Customer Service mobile application to view notifications and manage customer service cases.

Applet launchers

Applet launchers serve as landing pages or home pages. When you log in to your instance, you see an applet launcher and the applets configured to display on that launcher. The system administrator configures the applet launcher and applets for the Customer Service Management mobile application.

Navigation bar

The navigation bar appears at the bottom of the mobile application screen. This bar includes the following tabs that you can use to access different applets and application launch pages:

- **Cases**: displays the main case page. Use this applet launcher to access case management functionality.
- **Notifications**: view a list of the notifications that have been pushed to the agent. Tap a notification in the list to see the details, then tap the details open the case.
- **Settings**: manage settings for the mobile application.

Applets and cards

Select an applet from the applet launcher screen. Each applet contains one or more screens used to display records that correspond to the applet function. The Active Cases applet, for example, displays a list of all active case records.

The cases in the list are displayed as cards, with the case status displayed at the top of the card. To use the cards:

- Swipe a card left or right to see the available actions, then tap the desired action.
- Tap a card to see the record details such as activity, related list, and escalations if any.
- In the detail view:
  - Tap the top menu to see additional actions, then tap the desired action.
  - Select the back button to return to the list.

Applets provide a filter option if there is more than one case in the list. When you tap the applet, you see a list of filters that you can use to narrow down the list of cases.

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Agent applets

Customer service agents have access to the following set of applets.

Agent applets for My Cases

Applet	Description
My Cases	
Needs Attention Cases	Cases that are waiting for the agent to take action. Includes cases in the Open, Awaiting Info, and Resolved states.
Active Cases	Cases that are assigned to the agent. Includes cases Open, Awaiting Info, and Resolved states.
New Cases	Cases in the New state.
Active Critical Cases	Priority 1 cases in the Open, Awaiting Info, and Resolved states.

Note:
Cases in these lists are sorted by the last updated date in descending order, with the most recent updated case displayed first.

Customer service card layout

In a list view, case cards display the following information:

- Case state
- Case number
- Short description
- Contact
- Account

In the major case list view, case cards display the following information:

- Major case state
- Case number
- Short description
- Account

Case form related lists

Customer service agents can access the following Case form related lists.

Related lists and their descriptions for Case form

Related list	Description
SLAs	Displays a list of SLAs for a case. View the following information for SLAs included in this list:

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Related lists and their descriptions for Case form (continued)

Related list	Description
	• Task • SLA Stage • SLA Definition • Actual Elapsed Percentage • Actual Elapsed Time **Note:** Detail view is not available from the SLA related list.
Tasks	Displays a list of case tasks. View the following information for case tasks included in this list: • State • Number • Subject • Assigned to • Priority **Note:** Detail view is not available from the Tasks related list.
Child Cases	Displays a list of child cases for a case. View the following information for child cases included in this list: • Case number • State • Short description • Account • Contact Click a child case to view additional details on the Case form.

Notifications

Agents can receive notifications in the Customer Service mobile application when cases are assigned, are commented, or need attention. The following table lists the available notifications:

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Notifications in the Customer Service mobile application

Notification	Description
Case assignment	When a case is assigned to an agent by someone else, a notification is sent to the agent selected in the **Assigned to** field. The notification includes the case number, state, priority, and short description.
Case comments	When information is added to a case in the **Additional comments** or **Work notes** fields by someone other than the assigned agent, a notification is sent to the user selected in the **Assigned to** field. The notification includes the case number, priority, and short description.
Needs attention flag is checked	When the **Needs attention** flag is checked on the Case form, a notification is sent to the agent in the **Assigned to** field. The notification includes the case number, state, priority, and short description.
Case escalation	When an escalation is raised, users who are part of the group that has permissions to approve are notified. The approvers review and approve them.
Change requests	When a change request is raised, users who are part of the group that has permissions to approve are notified. The approvers review and approve them.

Related topics

- Applet launcher
- Navigation bar
- Mobile push notifications

Get started with the Customer Service mobile application

Use the ServiceNow Agent mobile app to access the Customer Service mobile application. Then log in to an instance as an agent or manager and work on your customer service cases.

Before you begin

Role required: sn_customerservice_agent or sn_customerservice_manager

About this task

Procedure

1. Depending on your device, go to the Apple App Store or the Google Play Store and download the ServiceNow Agent mobile app.
2. Log in to an instance.
3. Tap **Customer Service** to open the application and display the applet launcher.

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4. Manage your customer service cases based on your role.
   For more information about the agent and manager tasks, see Use mobile application to perform agent and manager tasks.

Related topics

Agent mobile app

Use mobile application to perform agent and manager tasks

Customer service agents manage cases and real-time notifications help in taking immediate action. Customer service managers can approve escalations and perform tasks on major issues with a swipe.

Agents (sn_customerservice_agent) and customer service managers (sn_customerservice_manager) can perform routine actions and approvals effectively anytime and anywhere.

Agent tasks

Agent tasks	Action	Description
Accept a case	Swipe left and tap **Accept**.	Accept a case that has been assigned to you.
Add comments to a case	• Swipe right and tap **Add Comments**. • Tap the top menu and select **Add Comments**.	Add information to the case **Work Notes** or **Additional Comments** fields.
Assign a case to another agent	• Swipe left and tap **Assign**. • Tap the top menu and select **Assign**.	This action is available for unassigned cases. Select to display the **Assignment Group** and **Assigned To** fields and make the assignments.
Assign a case to yourself	• Swipe left and tap **Assign to me**. • Tap the top menu and select **Assign to me**.	Assign an unassigned case to yourself.
Close a case	Tap the top menu and select **Close Case**.	Select to display the **Resolution Code** and **Resolution Notes** fields, which are mandatory fields for completing this action. Enable the check box to add the resolution code to the **Additional Comments** field.
Edit a case	Tap the top menu and select **Edit Case**.	You can edit the following fields in the Case form: • Short description • Account

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Agent tasks (continued)

Agent tasks	Action	Description
		• Contact • Needs attention • Priority • Product • Asset • Assignment group: selecting an assignment group clears the value in the **Assigned to** field. • Assigned to: if a group is selected in the **Assignment group** field, the list of available users belong to that group.
Open a case	Tap the top menu and select **Open Case**.	Open a case and change the state from **Awaiting info** or **Resolved** to **Open**.
Propose a case as a major case	Tap the top menu and select **Propose Major Case**.	Propose a case as a major case candidate. **Note:** This action is available if the Major Issue Management plugin is activated.
Propose a solution for a case	Tap the top menu and select **Propose Solution**.	Select to display the **Resolution Code** and **Resolution Notes** fields, which are mandatory fields for completing this action. Enable the check box to add the resolution code to the **Additional Comments** field.
Reassign a case to another agent	Swipe left and tap **Reassign**.	Available for assigned cases. Select to display the **Assignment Group** and **Assigned To** fields and change the assignments.
Request more information	• Swipe left and tap **Request Info**. • Tap the top menu and select **Request Info**.	Add the request to the **Additional Comments** field.

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Agent tasks (continued)

Agent tasks	Action	Description
Search for a case using keywords (role: sn_customerservice_agent or sn_customerservice_manager	Enter search keyword in the search bar.	All cases except those in "Closed" state are listed. From the top menu, you can request for information, escalate a case, propose a solution and so on.
Escalate a case (role: sn_customerservice_agent or sn_customerservice.escalation_requester)	Tap the top menu and select **Escalate Case** and fill in the required information.	Enter the following information and click **Submit**. • **Request Source** • **Reason** • **Escalation Severity** • **Escalation Template** • **Escalation Justification**
View escalation	Click **Escalations** tab.	You can view details of the escalation such as escalation justification and the requester's name.
View change request (role: sn_customerservice_agent and sn_change_read)	Click on **Change Request** field on the case form.	The Change Request form view displays details about the schedule, planning, conflicts, and details of the change activity.

Manager tasks

Manager tasks	Action	Description
Approve escalations (role: approver_user) **Note:** Agents with the approver_user role can also approve escalations and change requests.	• Navigate to **My Approvals >Escalations**. • Tap the top menu or swipe left. • Click **Reject** or **Approve**.	• Pending approvals are displayed based on the oldest request. • Click the **Approved** tab to check the escalation you approved. **Note:** When an escalation is raised, users who are part of the group that has permissions to approve are notified. The approvers review and approve them.

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Manager tasks (continued)

Manager tasks	Action	Description
Review and approve change requests (role: approver_user) **Note:** Agents with the approver_user role can also approve escalations and change requests.	• Navigate to **My Approvals>Change Requests** on the case form. • **Approve** or **Reject** the change request that is in Assess state on the Change Requests form.	A change request requires team members or a manager to assess the change request. They evaluate the request and approve or reject. **Note:** When a change request is raised, users who are part of the group that has permissions to approve are notified. The approvers review and approve them.

Install base work plans

You can create an install base work plan on the Customer Service Management application to get the details that are related to an install base item. Work plans help you to create, maintain, and view the basic details of an install base item. You can also plan for the regular and timely maintenance of the install base item.

Overview

A work plan provides the information that you need about the regular maintenance that you must do for an install base item. You can create a work plan for a product model. All the install base items that are associated to that product model inherit the same work plan.

You assign your customer and consumer service agents with the sn_fsm_planned_wm.planned_work_read role so that they can have read access to all the planned work management tables.

You can also create a work plan in the CSM Configurable Workspace. To create a work plan in the workspace, see Create a work plan in Customer Service Management (CSM) Configurable Workspace.

Related lists for work plans

You can perform or view the maintenance operations, like device inspection and performance, for an install base item through the related lists section of the Install Base form. The following table lists the descriptions about the related lists for the work plans.

Work plans related list

Related list	Description
Work plans	Manage the maintenance requirements of an install base item. They include information on how often maintenance must be performed, what the maintenance activities are for the install base, and the order in which they must be performed. To create a work plan, see

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Work plans related list (continued)

Related list	Description
	Create a work plan with Customer Service Management (CSM).
Planned Work Schedules	Gauge the timing and regularity of implementation of a schedule for a work plan. Planned work schedules have triggers like the duration, meter, condition, and script to determine and ensure that the work plan milestones are met. To create a planned work schedule, see Configure a work schedule.
Planned Work Schedule Templates	Describe the planned maintenance activities that must be performed for an install base item and the order in which they must occur. To create a planned work schedule template, see Associate a work order template to a work schedule.
Work Orders	Create work orders for field service agents to perform scheduled maintenance activities for the install base item. To create a work order, see Create a work order. Select the related list from the install base form to create a work order for an install base item. Select the Work order related list from the planned work schedule form to create a work order for a work plan.
Work Order Tasks	Work orders and work order tasks are related and created only if there's an existing work order for the install base item. Fill in the **Parent** field on the work order task form with the name of the work order. To create a work order task, see Create a work order task.

Create a work plan with Customer Service Management (CSM)

Create a work plan so that you can plan and delegate field service agents to fulfill the planned maintenance operations for an install base item on the Customer Service Management (CSM) (CSM) application and CSM Configurable Workspace.

Before you begin

Role required: sn_fsm_planned_wm.planned_work_admin

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install base item**.
2. Open an install base item.
3. Open the Work Plans related list and select **New**.
4. On the form, fill in the fields.

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Work plan form on the Customer Service application

Field	Description
Name	Name of the work plan.
Type	Type of trigger that determines when work should be performed: ○ **Model based:** Base the work plan on a specified model of a configuration item (CI). ○ **General:** Base the work plan on a table and filter. ○ **Install base:** Base the work plan on specified models of the install base items. **Note:** ○ Model-based plans apply only to hardware models, specifically ones that have at least one model category defined. ○ The install base plan type is available only if the Customer Service Install Base Management (com.snc.install_base) plugin is activated.
Model	One or more product catalog items that you can select to identify the configuration items (CIs) or install base that requires maintenance. When you select a model, the associated table appears in the **Table** field. For example, if you select a specific PC model, the **Table** field displays **Computer [cmdb_ci_computer]**. This field appears if you selected either **Model based** or **Install base** type. For Install base type, the **Table** field automatically fills in an appropriate table that is based on the selected model.

5. Right-click the form and select **Save**.

Result
A draft of the work plan is created. Next, you can create a planned work schedule to make the work plan active and ready for an agent. To configure a planned work schedule, see Configure a work schedule.

Create a work order

Create a work order to manage your regular maintenance and service requirements for an install base item. You can do this task by using the Customer Service Management (CSM) application.

Before you begin
Role required: sn_customerservice_agent and sn_customerservice.consumer_agent

About this task
A work order is a request for off-site work. You can create a work order for a new or an existing work plan so that you can assign work order tasks to field service agents. Users with the sn_customerservice_agent and sn_customerservice.consumer_agent roles can create the work orders and provide the information that is needed for the fulfillment of the work order tasks. If the scope of an existing work order changes during the planned maintenance stage, you can create a work order for an existing work order.

Procedure
1. Navigate to **All** > **Customer Service** > **Products** > **Install base item**.
2. Select an install base item record.
3. From the related list, select **Work Orders** and then select **New**.
4. On the Work Order form, enter the short description.

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Note:
The **Install base item** field is automatically filled in because the work order is created directly through the install base form.

5. Select **Submit**.

   A work order for the install base item is created and appears in the Work Order related list on the install base form.

   All work orders that are associated with a child install base item also appear in the work orders section of the parent install base form.

Automate and optimize

Enhance the efficiency and effectiveness of your ServiceNow® Customer Service Management platform with automated workflows, AI-powered chatbots, predictive analytics, and data analytics and reporting.

Automation and optimization applications

Topic	Description
Using Virtual Agent in Customer and Consumer Service Portals	The ServiceNow Virtual Agent platform offers user assistance through an intelligent messaging interface that helps you to deliver conversational support when integrated into your Customer and Consumer Service Portals.
Using Proactive Customer Service Operations	Monitor your customers' products and services to identify issues proactively, inform the affected customers, and fix issues quickly.
Task Intelligence	Use the Task Intelligence features to create field prediction and sentiment models, review and submit values extracted by Document Intelligence, and review task intelligence analytics and prediction history.
Guided Decisions	• Use Guided Decisions in playbooks to resolve cases- As an agent, work your way through a decision tree in a playbook to help troubleshoot a case and get recommendations on the next possible steps in solving the case. • Use Guided Decisions in recommended actions to resolve cases- As an agent, work your way through a recommended action of type decision tree to help troubleshoot a case and get recommendations on the next possible steps in solving the case.
Recommended Actions for Customer Service	Using the Recommended Actions application- Through the Recommended Actions application, use the recommended actions

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Automation and optimization applications (continued)

Topic	Description
	of type guidance and guided decision tree in your workspace to resolve cases quickly. Use the field recommendation to get recommendations on the field values. Use the AI search option to search the relevant resources from various sources.
Playbooks for Customer Service Management	Using Playbooks for Customer Service Management- • Customer service agents can use playbooks to complete the tasks and activities that are needed to resolve specific types of cases. • Playbooks provide step-by-step guidance through the lifecycle of a customer service case. • Playbooks include multiple stages and each stage includes one or more activities for an agent to complete.

Using Virtual Agent in Customer and Consumer Service Portals

The ServiceNow Virtual Agent platform offers user assistance through an intelligent messaging interface that helps you to deliver conversational support when integrated into your Customer and Consumer Service Portals.

Integration of Virtual Agent

Virtual Agent is a conversational bot platform that uses a messaging interface to provide user assistance. When integrated with your portal, it helps automate customer interactions and streamline tasks on your Customer and Consumer Service Portals. It builds automated conversations with a base system that helps your users quickly obtain information, make decisions, and perform common work tasks with Virtual Agent.

With Virtual Agent, you can offer continuous support, improve response times, and ease the workload on your customer service team.

Activation

Virtual Agent activates automatically when you enable it for Customer Service Management (CSM). Once activated, by default it integrates seamlessly with your CSM and CSP portals. For more information, see Activate Virtual Agent for CSM.

Now Assist in Virtual Agent in Customer and Consumer service portal

Integrate the Now Assist in Virtual Agent in Virtual Agent with Customer and Consumer Service Portals to enable generative AI skills in your conversational experiences. It helps create a natural-language conversational experience that can improve the success of your self-service workflows.

Now Assist in Virtual Agent benefits in Customer and Consumer Service Portals

The key benefits of adopting Now Assist in Virtual Agent for your portals include:

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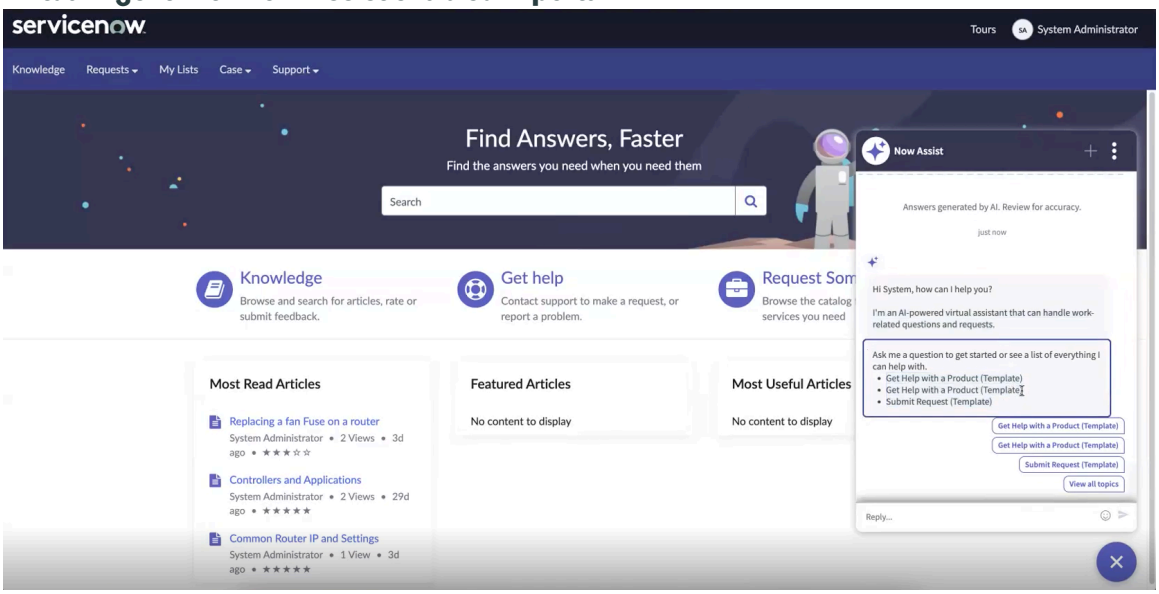
- Conversational responses: Now Assist in Virtual Agent uses large language models (LLMs) to deliver natural-language responses, making interactions more human-like and improving user satisfaction.
- Improved self-service: It helps improve productivity and efficiency by providing faster answers and recommended actions.
- Enhanced search: Enhances search capabilities by guiding users through more refined, AI-driven searches, helping them locate the information they need with greater accuracy and efficiency. Users can also search for public content in the Now Assist in Virtual Agent and get the search results. The source of the search results are available as internal or external with the links to it.
-

Virtual Agent with Now Assist enabled in portal



Getting started with Now Assist in Virtual Agent in Customer and Consumer Service portals

Understand the Now Assist in Virtual Agent in Customer and Consumer Service Portals.

- To enable Now Assist in Virtual Agent in your portals, verify that the Now Assist in Virtual Agent experience is configured by virtual_agent_admin or admin. For more information, see Configuring assistants overview.
- In the **Display experience** tab, remember to select **Customer Service for Customer Service Portal** or **Customer Support for Consumer Service Portal** from the **Portals** tab and select the Chat widget
- In the **Information Sources** tab, you can also control the specific information available to the assistant. You can create or select the **Copy existing configuration** and select the search profile CSM Portal Default Search Application for CSM or CSP Portal Default Search Application for CSP.

> **Note:**
> Each assistant comes with its own search configuration. For a smooth experience, if the assistant appears on a portal or mobile app that already has AI search configured, consider duplicating that setup to maintain consistency.

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Using Now Assist in portal case form

Guide requesters through a self-service flow to find solutions to their problems using Genius Results and reduce the number of cases created.

A guided flow enhances the user experience by assisting requester who are facing issues and are about to create a case. It helps them find solutions through genius results, thereby reducing the number of cases created and the effort required by agents to close open cases.

- As a requester, you can enter your details and receive the results as part of your case creation process.
- As a requester, you can continue with the case creation even if the results do not load and create a case.
- As a requester, you can see the results on the same page until you submit the form or cancel the flow.

Note:
This record producer is available for Customer Support portal (CSM).

Guided Flow for Case Creation

1. Enter Your Details:
   - Navigate to **Request Something** > **Support** > **Create case for a product (*Now Assist*)**.

     Note:
     Ensure that AI search in portals is activated. For more info, see Enable and configure AI Search in Service Portal

   - A single Subject field appears. Start typing your issue, and genius results, sources, related catalog items, and knowledge articles are displayed under related content.

     Note:
     You can also search for public content in the portal and get the search results from within the *Now Assist* genius result. The source of the search results are available as internal or external with the links to it.

2. Review Results:
   - If no genius results are found, related content will be shown.
   - If no results are found, a message will appear: There's not enough description for AI to find the results. Try using different keywords or another sentence.
3. Take Action:
   - If you find a solution to your query, select the **Cancel** button to return to the homepage.
   - If no results are found or you're not satisfied with the result, you can get further assistance by selecting **Ask *Now Assist*** button, that opens a contextual chat window in the Now Assist in Virtual Agent where you can get help.

     Note:

     Enable enhanced chat experience from the Now Assist in Virtual Agent guided setup for the feature to work. For details, see Display your chat assistant on a portal, channel, or mobile app.

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- If no relevant results are found, select the **Continue with case creation** button. This will enable the **Submit** button and display additional fields required to submit the case form.
- Click **Submit** to create a record case.

By following this guided flow, you can enhance your user experience, find solutions more efficiently, and reduce the number of cases created and the effort required by agents to close open cases.

Update the service portal chat configuration

Configure the Now Assist in Virtual Agent chat configuration to ensure Now Assist in Virtual Agent loads on your Customer and Consumer Service Portals when CSM chat is enabled.

Before you begin

Role required: workspace_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Agent Chat**.
2. To configure Now Assist in Virtual Agent loading on your Customer Service Portal:

   a. On the Service Portal Agent Chat Configuration page, select **Now Assist in Virtual Agent - CSM Chat Config** in the **Name** column.

   b. On the form, enter a value in the **Order** field.

   Note:
   To display Now Assist in Virtual Agent chat configuration prominently on the portals, set the **Order** value to be either lower or better compared to the old CSM chat configuration.

   c. In the script box, replace the current script with the following script.

```
(function($sp) {
 var configObj = {portal: $sp.getValue('url_suffix')},
  isVAActive =
 GlidePluginManager.isActive('com.glide.cs.chatbot');
 var CSM_PORTAL = "89275a53cb13020000f8d856634c9c51";
 var SP_POLARIS_THEME = "f548bd34845a1110f87767389929c667";

 configObj.liveagent_application = 'csm';
 configObj.live_agent_only = !isVAActive;
 configObj.liveagent_queue= $sp.getValue('sp_chat_queue');

 var cc = new GlideRecord('customer_contact');
 cc.addQuery('sys_id', gs.getUserID());
 cc.query();
 if (cc.next()) {
  configObj.liveagent_interaction_contact =
 cc.getUniqueValue();
  configObj.liveagent_interaction_account =
 cc.getValue('account');
 }
 if (gs.isLoggedIn() &&
 GlidePluginManager.isActive('com.sn_csm_b2b_consumers')) {
```

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```
  var consumer = new GlideRecord('csm_consumer');
  consumer.addQuery('user', gs.getUserID());
  consumer.query();
  if (consumer.next()) {
   var accounts = new
 sn_acct_consumer.AccountConsumerUtil().getAccountFromConsume
r(consumer.getUniqueValue());
   if(accounts.length > 0){
    if(accounts.length == 1){
     configObj.liveagent_interaction_account = accounts[0];
    }
    configObj.liveAgent_interaction_consumer =
 consumer.getUniqueValue();
   }
  }
 }
 //checking if Polaris theme is associated with CSM Portal
 var gr = new GlideRecord("sp_portal");
 if(gr.get(CSM_PORTAL) && gr.theme == SP_POLARIS_THEME)
  configObj.branding_key="polaris-light";

 return configObj;
})($sp);
```

d. Select **Update**.

3. To configure Now Assist in Virtual Agent on your Consumer Service Portal:

a. On the Service Portal Agent Chat Configuration page, select **Now Assist in Virtual Agent - CSP Chat Config** in the **Name** column.

b. On the form, enter a value in the **Order** field.

> **Note:**
> To display Now Assist in Virtual Agent chat configuration prominently on the portals, set the **Order** value to be either lower or better compared to the old CSM chat configuration.

c. In the script box, replace the current script with the following script.

```
(function($sp) {
 var configObj = {portal: $sp.getValue('url_suffix')},
  isVAActive =
 GlidePluginManager.isActive('com.glide.cs.chatbot');
 var CSM_PORTAL = "89275a53cb13020000f8d856634c9c51";
 var SP_POLARIS_THEME = "f548bd34845a1110f87767389929c667";

 configObj.liveagent_application = 'csm';
 configObj.live_agent_only = !isVAActive;
 configObj.liveagent_queue= $sp.getValue('sp_chat_queue');

 var cc = new GlideRecord('customer_contact');
 cc.addQuery('sys_id', gs.getUserID());
 cc.query();
 if (cc.next()) {
```

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```
  configObj.liveagent_interaction_contact =
 cc.getUniqueValue();
  configObj.liveagent_interaction_account =
 cc.getValue('account');
 }
 if (gs.isLoggedIn() &&
 GlidePluginManager.isActive('com.sn_csm_b2b_consumers')) {
  var consumer = new GlideRecord('csm_consumer');
  consumer.addQuery('user', gs.getUserID());
  consumer.query();
  if (consumer.next()) {
   var accounts = new
 sn_acct_consumer.AccountConsumerUtil().getAccountFromConsume
r(consumer.getUniqueValue());
   if(accounts.length > 0){
    if(accounts.length == 1){
     configObj.liveagent_interaction_account = accounts[0];
    }
    configObj.liveAgent_interaction_consumer =
 consumer.getUniqueValue();
   }
  }
 }
 //checking if Polaris theme is associated with CSM Portal
 var gr = new GlideRecord("sp_portal");
 if(gr.get(CSM_PORTAL) && gr.theme == SP_POLARIS_THEME)
  configObj.branding_key="polaris-light";

 return configObj;
})($sp);
```

d. Select **Update**.

Result

Now Assist in Virtual Agent configuration takes precedence over the standard Virtual Agent chat configuration for the portal.

Using the Now Assist in Virtual Agent enhanced chat in self-service portals

Learn about the Now Assist enhanced chat feature in the Self-service portals.

Now Assist enhanced chat is a conversational support experience within a dynamic window that also includes the ability to have multiple active conversations and superior search capabilities.

You can enable enhanced chat experience from the Now Assist in Virtual Agent guided setup. For details, see Display your chat assistant on a portal, channel, or mobile app.

Enhanced chat experience on self-service portal

Refined portal header

Dynamically displays content based on the assigned taxonomy tags.

Effortless navigation

Easily navigate to topics and their subcategories in one place, providing a seamless navigation experience.

Multiple chats

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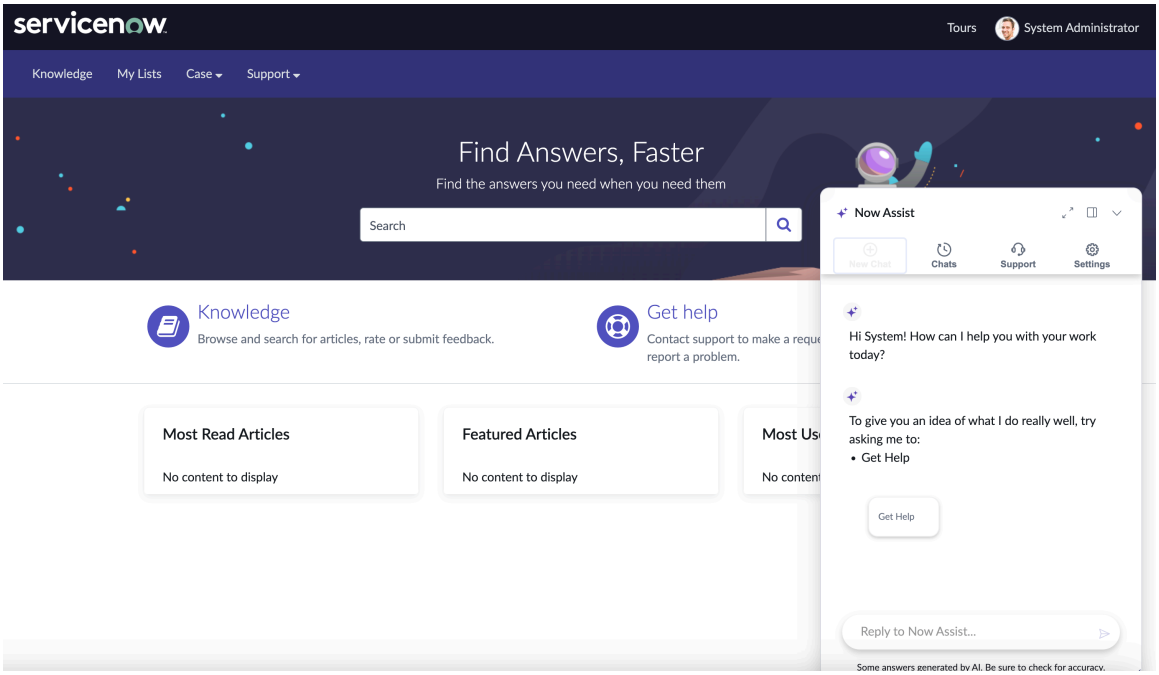
Engage in multiple chat conversations instead of the existing single active conversations in the Virtual Agent.

Redefined theme

The new theme is visually appealing, engaging, and user-friendly, with a focus on enhancing productivity.

Enhanced chat with Now Assist in Portals



Search experience

When you search for information using the Now Assist enhanced chat on your self-service portals, you receive comprehensive and detailed answers compared to the traditional AI search.

Unlike the traditional AI search page, the Now Assist enhanced chat helps you find the information you need and combines them into a synthesized comprehensive answer. It searches information from KB articles, external content, Virtual Agent topics, catalog items, and people citations.

The search results include links to the sources of information and related actions. When you select the citation, different information is displayed depending on the type of source.

Using Proactive Customer Service Operations

Monitor your customers' products and services to identify issues proactively, inform the affected customers, and fix issues quickly.

There are various different roles required for Proactive Customer Service Operations based on the tasks you perform.

Some tasks only apply if you are using Event Management integration on CSM Agent Workspace or the ServiceNow AI Platform interface. This is noted at the top of each task.

Roles required

Role	Tasks
evt_mgmt_admin, evt_mgmt_operator	Create alerts and proactive cases from alerts.

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Roles required (continued)

Role	Tasks
Note: These roles only apply if you are using the integration with Event Management.	
sn_customerservice_agent	Propose proactive cases as major case candidates, work on, and close proactive cases.
sn_customerservice_manager	Review and accept a proactive case as a major case and create child cases. Associate outages to cases or create an outage for a case. Track Key Performance Indicators (KPIs) to understand how proactive the team was in identifying and communicating issues that impact customers. For more information, see Proactive Customer Service - Advanced dashboard.
sn_majorissue_mgt.major_issue_manager	Create proactive cases. Review and accept proactive cases as major cases and create child cases. Associate outages to cases or create an outage for a case.

Related topics

- View the install base in CSM Configurable Workspace
- View install base information from the Customer Service Portal
- Create a case for install base from the Customer Service homepage
- View sold product information in CSM Configurable Workspace

Create a proactive case from an alert

Create a case for customer install base affected by an alert to anticipate customer issues and address them proactively.

Before you begin

Role required: evt_mgmt_admin, evt_mgmt_operator

About this task

Note:
This task only applies if you are using Event Management integration on CSM Agent Workspace or the ServiceNow AI Platform interface.

A proactive case is a case created on behalf of customers, whose install base is directly affected by an alert. You can open a proactive case manually or through automation. Customer service agents then work on cases. From the Alert form, you can also track the install base items affected by the alert.

If the **Create Proactive Case** rule is enabled, a case is automatically created when an incident is created from an alert and the system has determined that there are external customer install

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base items affected. For more information, see Activate an alert rule to automatically create a proactive case from an alert.

ITOM Event Management calculates the services (CIs) impacted by an alert and populates the em_impacted_ci_table with the impacted services (CIs) and alert CI on the given alert.

The Affected Install Base related list on the Alert form displays the install base items that are linked to the impacted services (CIs).

The **Refresh Affected Install Base Items** button on the Alert form recalculates the impacted services (CIs) and updates the em_impacted_ci_table and affected install base items with the latest changes. For more details, see Alert Impact Calculation.

Procedure

1. Navigate to **All** > **Agent Workspace** > **Agent Workspace Home** > **Lists** > **All Alerts**.
2. Click an alert that you want to create a case for.
3. To trace the install base items affected by the alert, click **Refresh Affected Install Base Items**. These items are listed in the Affected Install Base Items related list on the Alert form. The **Affected Install Base Items** list is not updated automatically, so refresh the install base items each time you open an alert.
4. Click **Create Case**.

   Note:
   If you don't see the **Create Case** option, click **...**.

5. Fill out the **Short Description** and other fields, as required.
6. Click **Submit**.
   A proactive case is created and the case number is added to the **Case** field on the Alert form.

   Case priority is set based on the severity of the alert. Customer service agents can then take action accordingly.

Case priority based on alert severity

Alert severity	Case priority
Critical	Critical
Major	High
Minor	Moderate
Warning	Low
Info	Low

Manage a proactive case created from an alert

Work on a proactive case and resolve the proactive case as you would other customer service cases.

Before you begin

Role required:

- sn_customerservice_agent
- evt_mgmt_admin and evt_mgmt_operator have read-only access to a case created from an alert and can add work notes, as required.

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About this task

Note:
This task only applies if you are using Event Management integration on CSM Agent Workspace or the ServiceNow AI Platform interface.

Review proactive cases created from alerts using Agent Workspace. Identify customers, their corresponding install base items affected by the issue causing the alert as well as the service health for each affected install base item. Depending on the number of customers affected, you can propose a proactive case as a major case.

Procedure

1. Navigate to **All** > **Agent Workspace** > **Agent Workspace Home** > **Lists** > **Cases**. Alternatively, accept a proactive case from your Agent Workspace inbox.
2. Click the case you want to work on.
3. You can perform the following actions from the Case form.

Case form

Action	Description
Click **Refresh Install Base Health**.	Update the health status of the affected install base items to see the real-time service status of the account's install base items. **Note:** To see this UI action, there must be an account assigned to the case and at least one install base item attached to the case or account.
Click **Affected Install Base Items**.	View accounts and their corresponding install base items affected by the alert. If you don't see this option, click **more**.
Click **Add** or **Remove**.	Add or remove an affected install base item.
Click **Details**.	View the sold product associated to the case as well as the alert that the case was created from.
Click **Propose Major Case**.	Propose a major case when multiple customers are affected. **Note:** If you don't see this option, click the More UI Actions icon (•••).

4. Resolve and close proactive cases in the same way as other customer service management cases.

Note:
If an alert is closed, a case is not automatically closed.

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Related topics

- Propose a case as a major case candidate
- Close a customer service case
- AWA for CSM

Review and accept a proactive case as a major case

Review and accept proactive cases as major cases using the major issue management process.

Before you begin

Role required: sn_majorissue_mgt.major_issue_manager or sn_customerservice_manager

Procedure

1. Open your workspace.
2. Navigate to **Major Issue Management** > **Candidates**.
3. **Optional:** Click **Major Case Information** > **Affected Customers** to view the automatically generated list of customers affected by the issue.
4. **Optional:** Click **Create Child Cases** to create a child case for each affected customer.
5. Accept or reject the proactive case as a major case.
6. Follow the major issue management process to resolve the proactive case.

> **Note:**
> If the Proactive Customer Service Operations with Event Management plugin is activated, your system administrator may have configured workflows to automate the creation of major cases depending on the number of accounts affected by an issue. If your system administrator has configured workflows, major cases are created in either **Accepted**, **Proposed**, or **Created** state depending on the settings. If **Accepted**, child cases are automatically created.

Related topics

- Major issue management overview
- Create a major case
- Create a major case candidate
- Approve or reject a major case candidate
- Create child cases for a major case

Track the service health of install base items in Agent Workspace

Track the operational status of install base items belonging to an account, to better correlate customer issues and provide faster responses.

Before you begin

Role required: sn_customerservice_agent or sn_customerservice_manager

About this task

The service health status provides you with visibility into the service health of a customer's install base items. The service health status is based on the severity of the impacted services being monitored at the Network Operations Center. Refresh the service health status on the Account and Case forms to access the real-time health status of install base items.
As a customer service agent, you can view the service health status of install base items in a case or a customer account.

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Procedure

1. Open your workspace.
2. Navigate to **Lists**.
3. Click an account or a case.
4. To refresh the health status of install base items on both the Account and Case form, click **Refresh Install Base Health**.
5. To view the health status of an install base item on the Account form, click the **Install Base Items** related list.
6. To view the health status of an affected install base item on the Case form, click the **Affected Install Base Items** related list.

Related topics

Service health status for install base

Associate an outage to a major case

Associate an outage with a major case to keep customers informed about any issues affecting their install base items.

Before you begin

Role required: sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

If there are any existing outages for services (CIs) on install base items related to the case, a message is displayed at the top of the screen. Review the outages and add them to the case to expose the information to customers and keep them up to date on any issues that might affect their install base items.

Procedure

1. Open your workspace.
2. Navigate to **Major Issue Management** > **All**.
3. Select the major case that you want to add outages to.
4. On the **Outages** related list, select **Edit**.
   A filter displays the outages. Only those outages related to at least one of the services (CIs) for the install base items in the case is displayed. In this case, a CI is typically a service being used by the customer.
5. Add the outages that you want to associate with the case.
6. Select **Save**.
   - The outage is associated with the case and the work notes are updated accordingly.
   - Customer service agents can view the outages for a case in the Outages related list.

Create an outage from a major case

Create an outage from a major case to keep customers informed about any issues affecting their install base items.

Before you begin

Role required: sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

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About this task
If no outages exist, you can also create outages directly from a major case to inform affected customers.

Procedure
1. Open your workspace.
2. Navigate to **Major Issue Management**.
3. Create a major case or select an existing major case with no outages associated with it.
4. Select **Create Outage**.

> **Note:**
> You can only create an outage from a case if there are no outages already associated with it and there is at least one affected install base item associated with the case. You can't create an outage on a child case.

5. Fill out the fields on the Outage form, as required.
6. Select **Submit**.
   All services (CIs) associated with the install base items in the case are associated with the outage as **Affected CIs**.

Track outages for install base items

View outages associated to a case to keep customers informed about any issues affecting their install base.

Before you begin
Role required: sn_customerservice_agent

About this task
Outages can be tracked using both proactive cases and customer-reported cases.

Procedure
1. Open your workspace.
2. Click **Lists**.
3. Click a proactive case.
4. Click the Outages related list to view all outage information related to the case.

> **Note:**
> If the Outages related list isn't displayed, click **more**.

Use Task Intelligence for Customer Service

Use the Task Intelligence features to create field prediction and sentiment models, review and submit values extracted by Document Intelligence, and review task intelligence analytics and prediction history.

Use the Task Intelligence Admin Console to create models and Document Intelligence use cases:

- Create a model to predict record fields
- Create a model to predict case sentiment

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- Create a model to detect case language
- Create a Document Intelligence use case

You can also use Task Intelligence features to complete the following tasks:

- Review and submit values predicted by Document Intelligence
- View Task Intelligence Analytics
- View Task Intelligence prediction history

Related information

For more information about Task Intelligence for Customer Service, see the following topics:

- Task Intelligence for Customer Service
- Configure Task Intelligence for Customer Service

Review and submit values predicted by Document Intelligence

Agents can extract, validate, and update the key values from valid attachments in the case using the Document Intelligence interface.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_csm_ml_task.ti_admin, ti_admin

About this task

The task definition includes an extraction mode that determines how the system handles the extracted values: straight through processing, auto-fill, or recommendations. Regardless of the extraction mode, agents can view valid attachments in the Document Intelligence interface and confirm or correct the values.

Procedure

1. Open a case in CSM Configurable Workspace.
2. Select **Review in DocIntel** to open the Document Intelligence workspace in a separate tab and view the attachments and extracted values.
   In this tab:
   - Attachments appear in the list of attachments on the left side of the tab.
   - An image of the selected attachment appears in the center of the tab.
   - Extracted fields appear in a list on the right side of the tab.
3. Select an attachment to view an image of that attachment in the center of the tab.
4. Review the extracted fields and confirm or correct the values.
   a. If a value for a field is correct, select in the field and press Enter to confirm.
   Confirmed values have a blue check mark.

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b. If a value for a field isn’t correct, select in the field, select the correct value from the drop-down list, and press Enter.

c. If a value for a field isn’t correct and the correct value doesn’t appear in the drop-down list, select the more actions button next to the field and select **Missing in this document**.

5. Select **Submit** to add these values to the fields on the Case form.

View Task Intelligence Analytics

View the Task Intelligence for CSM Analytics dashboard to monitor the model performance over time, track the business value, and see what predictions your agents did or didn't use.

The dashboard uses visual representations to provide you with an overview of how each model is performing. You can see the number of predictions from each model and the overall mean time that it takes to resolve the cases in your organization.

The following example shows the Get an overview and See how your trained model is doing sections within the dashboard.

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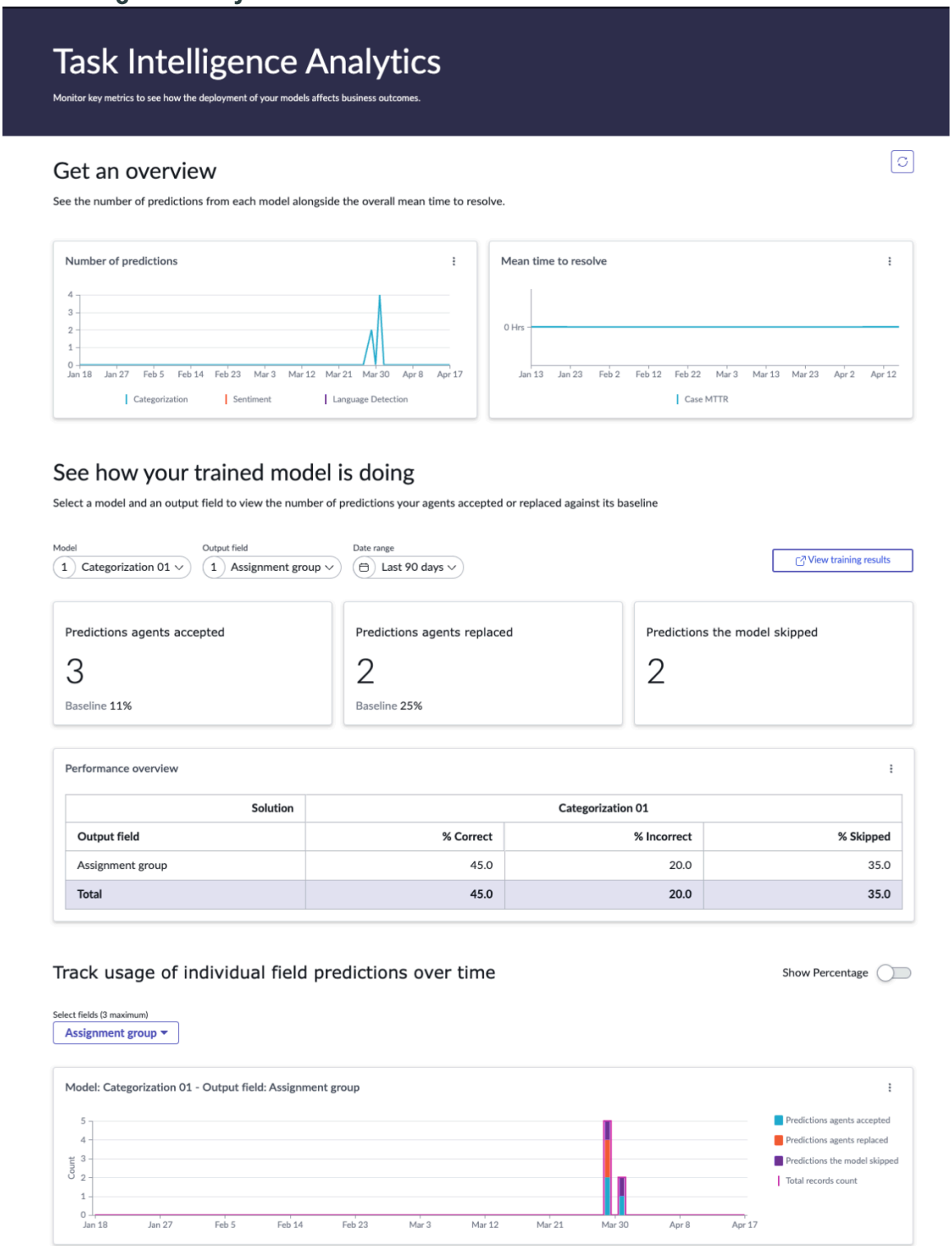
Task Intelligence Analytics dashboard



Get an overview

The dashboard contains visual representations that provide you with the business value of the model.

Number of predictions

The line graph shows the number of correct predictions that agents have accepted over time for all the categorization models combined. If the sentiment and language models are activated, the correct predictions for those models are shown as well. As

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the model continues to learn, it can increase the number of predictions that agents accept.

Mean time to resolve (MTTR)

The line graph shows the average amount of time that it takes to resolve cases over time. As the model makes more predictions, the MTTR should decrease as the predictions help your agents.

The Task Intelligence Analytics page includes the following data about the predicted fields and how they impact your business:

- The number of predicted fields.
- The number of predictions that agents used.
- The number of predictions that agents changed.

See how your trained model is doing

The dashboard uses visual representations to help you monitor the utilization of predictions by the model over time. By selecting a specific model and output field, you can view the number of predictions that were accepted or replaced by the agent and compare them to the baseline.

Predictions agents accepted

The widget shows the correct predictions that your agents used during case management over time. If this number is trending downward, you can look to retrain your model.

Predictions agents replaced

The widget shows the incorrect predictions that your agents removed during case management over time. If this number is trending upward, you can look to retrain your model.

Predictions the model skipped

The widget shows the number of predictions that were skipped by the model based on the model, output field, and date range selection.

Performance overview

The performance overview table shows the mean percentage values for correct, incorrect, and skipped data for each combination of model and output field.

Track usage of individual field predictions over time

The bar chart tracks the usage of the individual field predictions over time. Each bar in the chart shows three components, which are the predictions accepted, the predictions replaced, and the predictions that were skipped by the model. A red outline around each bar represents the total number of records for each day. To compare specific components, navigate to the legends and deselect the ones that you don't want to include so that you can have a more customized and focused comparison based on user preferences. By default, the view displays the number of predictions. However, you have the option to switch to the percentage view by toggling the **Show Percentage** option. In the percentage view, you can also access the information about the baseline that was replaced and accepted, which is derived from the training data. This option enables you to gain insights into the performance of the model with the baseline.

Track usage of model predictions over time

The bar chart monitors the usage of the model over time and is similar to the bar chart in the “Track usage of individual field predictions over time” data. The field selections enable users to compare predictions over time across a maximum of three fields.

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Note:

- When you refresh the page, the configurations, model selection, fields, usage type, and Show percentage toggle selection are retained.
- The Model and Output field options support multi-select functionality so that you can compare the average number of training records and analyze how your agents use the predictions of different models. When multiple models are selected, the Compare how agents used models' predictions section enables your agents to compare the selected models across different usage types. The chart also supports toggling between the count and percentage. It also displays the baselines for accepted and replaced predictions when you're using the percentage model.

Using Task Intelligence analytics

Navigate to **All** > **Task Intelligence for Customer Service** > **Monitoring** to access the Task Intelligence Analytics page.

You can view the analytics for all of your models or each individual model. To select a model, do the following actions:

1. Select **Model** to access analytics for an individual model.
2. Select a model from the list of models that have been created from the Task Intelligence Admin Console.
3. Select **Apply**.

To clear the selected model, select **Model** and then select **Clear**.

View Task Intelligence prediction history

View details about historical predictions in the Predictor Result [ml_predictor_results] table.

The Predictor Result table includes entries for each prediction result, including the predicted language, predicted and actual values, and prediction confidence. You can use the data in this table to monitor model performance.

Note:
Records are created in the Predictor Result table regardless of the model prediction behavior, including the Testing behavior that doesn't add prediction values to the case.

Viewing prediction data

Navigate to **All** > **Task Intelligence for Customer Service** > **History** to view the Predictor Result list.

Users with the following roles can access the **History** module:

- Task Intelligence admin [sn_csm_ml_task.ti_admin]
- Customer Service manager [sn_customerservice_manager]

Categorization feedback captures values when the status of a case changes to Closed. It captures these values if:

- Case categorization is active.
- The predicted field value is different from the case field value.

Categorization feedback works for record categorization solutions and for solutions with and without attachments. Email categorization solutions are trained using data from the

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Email [sys_email] table. Case categorization solutions are trained using data from the Case [sn_customerservice_case] table or from tables that extend the Case table. Interaction categorization solutions are trained using data from the Interaction [interaction] table.

Categorization feedback is triggered by a flow.

- When email information is used for prediction, the final input values remain empty.
- When attachment information is used for prediction, the attachment sys_ids are not included in the final input values.

Categorization feedback stores the following values in the Predictor Result table:

- Predicted Output Value Name
- Predicted Input Value Names
- Predicted Output Value
- Predicted Input Values
- Final Input Value
- Final Output Value
- Predicted Confidence (percentage)

If the values for a case have been predicted using an email categorization solution:

- The Final Input Value remains empty because it is not expected that the agent will modify the values of the email, such as subject and body.
- The final value in the Predicted Output Value is stored in the Final Output Value once the case is closed.

If the values for a case or interaction have been predicted using a record categorization solution:

- The values from the fields defined in Predicted Input Value Names are stored in Final Input Value.
- The final value in the Predicted Output Value is stored in the Final Output Value once the case is closed.

Email sentiment replies

Duplicate entries can be posted in the Predictor Result table for email sentiment replies. To help prevent these duplicate entries, deactivate the *`Predict Sentiment for Cases`* inbound email action. For more information, see Inbound email actions.

View prediction on field change

Agents can use Task Intelligence to predict values for configured fields before a case is created and after a case is created.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager or ti_admin

About this task

When you create a case or after a case is created, the Task Intelligence feature predicts values for the configured fields based on the short description or description.

Note:

- If you update the case, the values for these fields are not predicted again.
- View prediction on field change is also available for interaction records.

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Procedure

1. Create a case.
2. Enter information in the **Short description** or **description** field and then tab to the next field. Based on this information, the system predicts the values for configured fields without saving the case form.

   Note:
   If the system cannot predict values based on the short description, these fields remain blank.

3. **Optional:** Change the values in the predicted fields if needed or enter values for fields where Task Intelligence has skipped prediction.

   (Optional) The system does not overwrite user-entered values for the predicted fields.

4. Select **Save**.
   The data is saved in the record and persisted in the predictions table. A message is displayed to the agent indicating that the fields may have been modified, prompting them to save the revised predictions.

View similar case recommendations

The similar case recommendation feature allows customer service agents to quickly find similar cases that can provide helpful information about a current case. This feature can also provide recommendations about cases that may be related to major issues.

By performing a contextual search based on a case's short description, the system generates a list of similar records. This provides agents with a list of cases that are similar to the current case. These similar cases may provide helpful details or resolution information for the current case. Task Intelligence can also suggest potential major issues and major cases.

With the similar case recommendation feature, customer service agents can:

- Identify cases similar to the current case.
- Copy resolution notes from resolved cases to the current case.
- Link the current case to a similar case.
- View a list of open and resolved cases similar to the current case and submit the current case as a major case candidate. Three similar open and resolved cases are displayed in the list of results.
- View one or more similar major cases, that are displayed first in the list of results. Agents can use an available action and link the current case as a child to a major case.

When using these similarity models in the workspace, the agent can open a case record, select the **Recommendations** tab in the contextual side panel, and then select the **Suggested actions** sub tab to see the following:

- One for propose major case and one for similar major case card (if enabled).
- Up to three similar open case cards (number of cards displayed is customer configurable).
- Up to three similar resolved case cards (number of cards displayed is customer configurable).

Order of cards displayed in Suggested actions:

- Similar major case (if there is a major case)
- Propose major case

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- Similar resolved cases
- Similar open cases

Actions on cards:

- Propose major case: The current case is proposed as a major issue.
- Copy resolution notes: Copies resolution nodes from similar case to current case (does not copy resolution code).
- Link case: The current case is linked as a child of the similar case.

Any changes made to the current case and saved will trigger a refresh of the recommendations, checking for both new and obsolete recommendations.

Plugins: The configuration for the similar case recommendation feature is included with the Customer Service plugin (com.sn_customerservice). The similar case recommendation feature has a dependency on Major Issue Management – activate the Major Issue Management plugin (com.sn_majorissue_mgt).

For more info, see Similar case user actions

Use Guided Decisions in playbooks to resolve cases

As an agent, work your way through a decision tree in a playbook to help troubleshoot a case and get recommendations on the next possible steps in solving the case.

Before you begin

Role required: sn_customerservice_agent

About this task

A decision tree presents a series of questions that you can answer and provide inputs where required. The decision tree evaluates your answers and provides the next set of questions or gives you guidance on what to do next. For example, the guidance can be to attach a knowledge article or propose a solution to a customer to help resolve an issue.

Depending on the context of the case that you're working on, decision trees appear in playbooks in CSM Configurable Workspace or as a recommended action in CSM Configurable Workspace. For details on using recommended actions, see Use Guided Decisions in recommended actions to resolve cases.

Procedure

1. Open CSM Configurable Workspace.
2. Open a case that you want to work on.
3. Select **Playbook**.
4. Work your way through a decision tree by providing inputs and proceeding by going to the next or previous set of questions, or dismissing the decision tree flow.
5. **Optional:** In the View my responses tab, select the Edit icon) next to the node to modify your selection or entered value.
6. Select the action button or dismiss the final guidance.
   The Activity list is updated with the action taken.

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Use Guided Decisions in recommended actions to resolve cases

As an agent, work your way through a recommended action of type decision tree to help troubleshoot a case and get recommendations on the next possible steps in solving the case.

Before you begin

Role required: sn_customerservice_agent, admin

About this task

A decision tree presents a series of questions in the contextual side panel that you can answer and provide inputs where required. The decision tree evaluates your answers and provides the next set of questions or gives you guidance on what to do next. For example, the guidance can be to attach a knowledge article or propose a solution to a customer to help resolve an issue.

Depending on the context of the case that you're working on, a decision tree can be displayed as a Recommended Actions card in the contextual side panel of the CSM Configurable Workspace.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace**.
2. Open a customer service case that you want to work on.
3. Select the Recommended Actions icon ( ) in the contextual side panel.
   Depending on the case context, the side panel might display Recommended Actions cards for guidances and decision trees.
4. Review the Recommended Actions cards and determine whether you want to select a recommended action that has a decision tree.
   - To accept a recommendation, select the action button on the card.
   - To remove a recommendation from the contextual side panel, select **Dismiss** on the card.

     The recommendation card moves from the **Current** tab to the **History** tab.
5. Work your way through a decision tree by providing inputs and proceeding by going to the next or previous set of questions, or dismissing the decision tree flow.
6. **Optional:** In the View my responses tab, select the Edit icon) next to the node to modify your selection or entered value.
7. Select the action button to apply the resolution or take the action proposed.
8. **Optional:** Continue reviewing the Recommended Actions cards and accept or dismiss them as needed to resolve the issue.

Using the Recommended Actions application

Through the Recommended Actions application, use the recommended actions of type guidance and guided decision tree in your workspace to resolve cases quickly. Use the field recommendation to get recommendations on the field values. Use the AI search option to search the relevant resources from various sources.

Recommended actions

Recommended actions appear as cards in the contextual side panel of your workspace. Depending on the open record type, these cards contain information to help find the fastest resolution path, minimizing time spent researching and gathering information from different sources.

You can take three types of actions:

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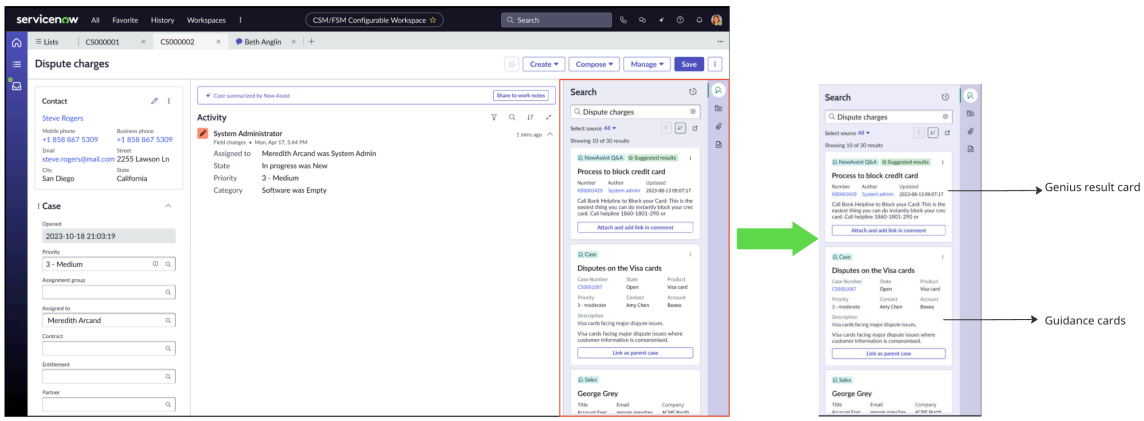
- **Guidance**: An action that can be performed or helpful information to share.
- **Decision tree**: A guided flow to follow that walks you through a series of questions that help you determine the appropriate action.
- **Field recommendations**: Recommended values to use for the fields in the record. Recommended field values are auto-filled or shown as messages underneath the fields for the new records. The recommended field values are shown as messages only underneath the fields for the existing records.

Recommended action cards in a workspace



Recommended action cards display the following information:

- Hint that briefly describes the recommendation.
- Preview that shows a short summary of the recommended action, which can include an image and links to helpful articles.
- Options to accept or dismiss the action.

When multiple cards are displayed, they're arranged according to the Order value set when they were created.

Primary and secondary actions

The recommendation that you select determines what is displayed next in the contextual side panel or subtab and how the record is updated. Some actions involve a single selection that is performed immediately such as **Acknowledge**, **Attach and add link in comment**. Other actions might have secondary actions that you can enable after selecting the primary action in the card. The following table explains a few primary and secondary actions.

Recommended Actions

Primary action	Secondary action	Guidance name
Select the **View and attach article** to open the knowledge article in the side panel for review.	Select secondary actions, such as **Dismiss** to cancel the recommendation or **Attach article** to attach it to the case or select an option from the More actions icon (⋮).	Review and attach article

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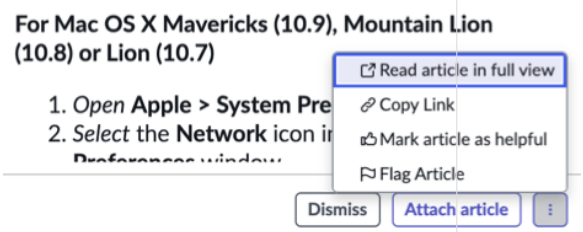
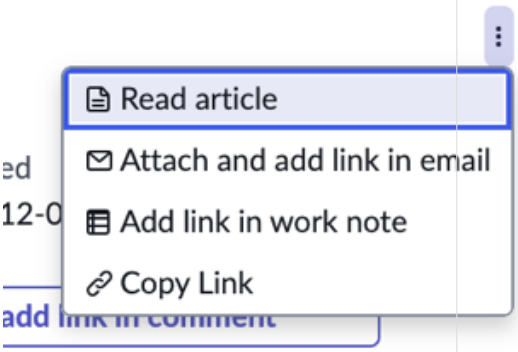
Recommended Actions (continued)

Primary action	Secondary action	Guidance name
	 Select back to go back to the recommended cards list.	
Select **Attach and add link in comment** to compose a comment and **Post comments**.	Select secondary actions from the More actions menu ( **Note:** The primary and secondary actions are configurable.	Attach and share article

Recommended Actions process

Recommended Actions

Item	Description
Single-click action	• The guidance moves to the in-progress or completed state. • A message indicates that the action was performed or completed. The system updates the record accordingly. • The selected recommendation card moves from the **Recommended actions** or **Search** tab to **Action history**. The card displays the action performed for the recommendation and any outputs, such as a credit report and credit score generated for the customer.

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Recommended Actions (continued)

Item	Description
Contextual side panel or subtab action	• When the action button is selected, the guidance doesn't move to the in-progress state. Other users can still see and act on this guidance. • When the action button is selected in the detail experience, the guidance moves to in-progress or completed state. • A message indicates that the action was performed or completed. The system updates the record accordingly. • The selected recommendation card moves from the **Recommended actions** or **Search** tab to **Action history**. **Note:** For the guided decision trees, when the preview button is selected, the guidance opens in the side panel and moves to the in-progress state.
Error handling	If an action ends up in the error state, the following occurs: • An error notification is shown. The system updates the record accordingly. • The card displays the error state for the recommendation. • When dismissed, the card moves to **action history**.

Field recommendations

Field recommendations are messages that display either under fields on a form or auto-fill a recommended value within the field. For example, a field recommendation can recommend an assignment group based on the text in a case's short description.

You can read the description of the recommendation and use the recommended value in the fields.

AI search

AI search enables you to search for the relevant resources to resolve cases or customer issues. Depending on the AI search configuration, the AI search tab displays search results, genius result answers, or both. AI search results appear in the form of guidances that you can act on. Genius result answers are the most relevant answers or the top results for the search query along with the action that you can take directly from the card.

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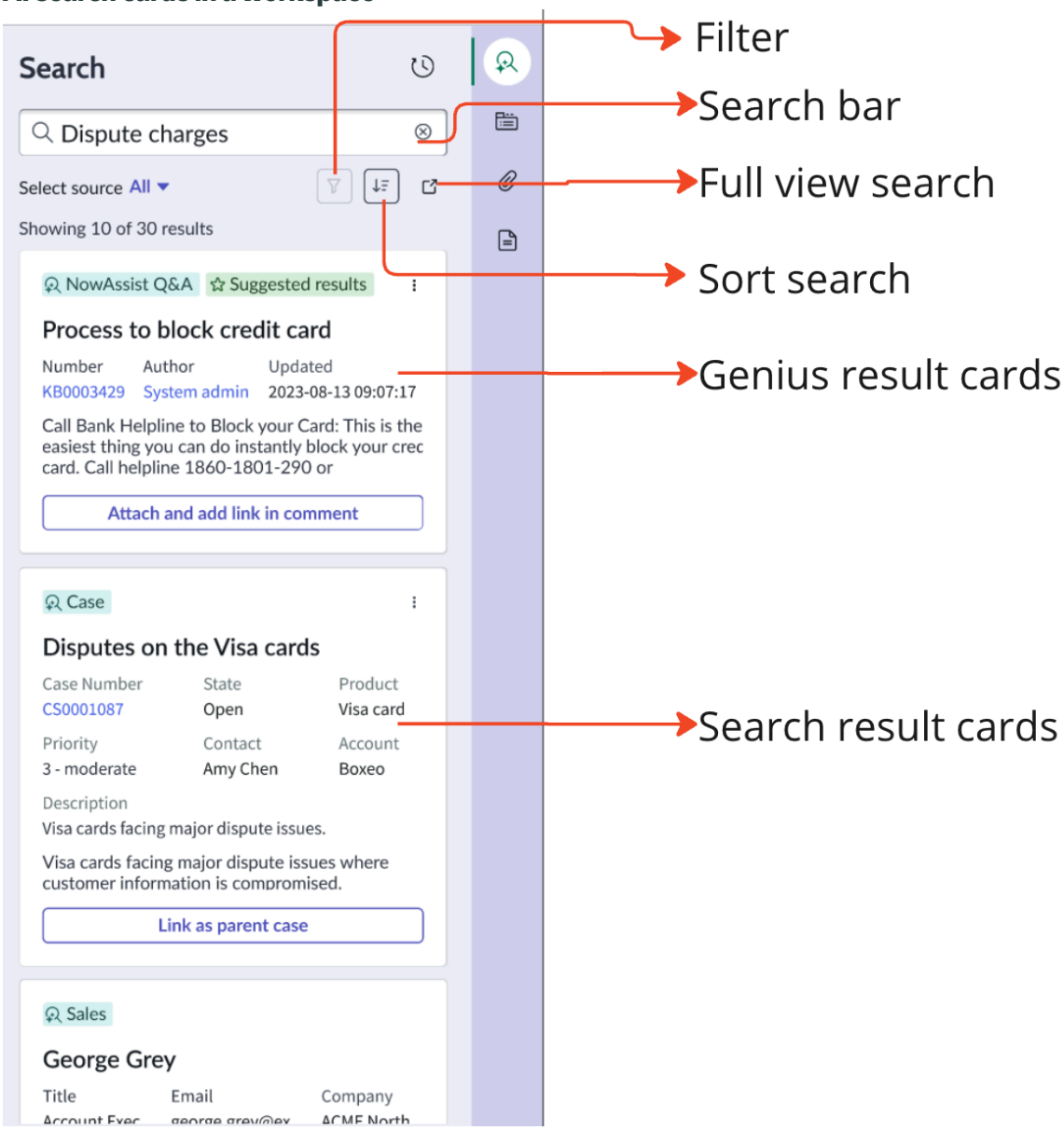
AI search cards in a workspace



Elements on the AI search cards

Element	Description
Search count	Displays counts of the total number of matching search results. The search filters show the number of matching results for each search source.

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Elements on the AI search cards (continued)

Element	Description
	Note: The Search results that are displayed and the total search count might vary due to security permissions or if the search result has already been executed. The executed guidances are moved to **Action history** and reflect in the total search count but the executed guidances won't show up in the search results.
Search bar	Accepts the search query that produces the search results. You can modify this search query and search again to view different results.
Search filters	Displays filter options for refining search results by search source.
Full view search	Displays the search results in a new subtab with an expanded view.
Sort search results	Sorts the search results based on the selected option.
Search result cards	Displays the search icon, search source, title, summary field values, and text snippet for each search result, with search query terms highlighted in title and text snippets. You can select a result to view its source record in full or select the action to act on the guidance.
Genius result cards	Displays the genius result icon, title, summary of the answer, and an action to take on the genius result card. **Note:** Genius result cards do not always show a summary of the answer.
Show more	Displays more search results.

Use Recommended Actions to resolve cases

As an agent, you can use Recommended Actions to help address customer issues and resolve cases quickly.

Before you begin

Role required: sn_nb_action.next_best_action_user

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Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace**.
2. Open a customer service record that you want to work on.
3. Select the Recommended Actions icon ( ) in the contextual side panel.
4. Select the Recommended Actions tab.
   Depending on the record context, cards for guidances, decision trees, or both are displayed.
5. Review the Recommended Actions cards and do one of the following:

   a. To accept a recommendation, select the action button on the card.
   The result depends on the type of recommendation:

Recommended action results

Selected recommendation	Description	Result
Decision tree	A guided flow presents a series of questions in the contextual side panel that you can answer to get to the appropriate guidance.	After your inputs, the system provides a guidance that you can select.
Guidance	A recommendation for handling the case, for example: ▪ View and attach a knowledge article ▪ Attach and add link in comment ▪ Read article ▪ Attach and add link in email ▪ Add link in work note ▪ Copy link ▪ Submit an external request for an item, such as a credit report or loan application. ▪ Create a work order to handle the case.	The system performs the action. For example: ▪ Knowledge article guidance: The article opens in the **Current** tab of the contextual side panel or in a subtab for review. You can then choose a secondary action for handling the case. ▪ External request guidance: A subtab opens in the record to enter more information needed for the request, such as a loan application.

   b. To remove a recommendation from the contextual side panel, select **Dismiss** on the card.
   The recommendation card moves from the **Recommended Actions** tab to the **History** tab.

6. Continue reviewing the Recommended Actions cards and accept or dismiss them as needed to resolve the issue.

Use Recommended Actions to attach knowledge articles to chat

As an agent, use chat in Recommended Actions to resolve issues of the customers by attaching knowledge articles.

Before you begin

Role required: sn_nb_action.next_best_action_user

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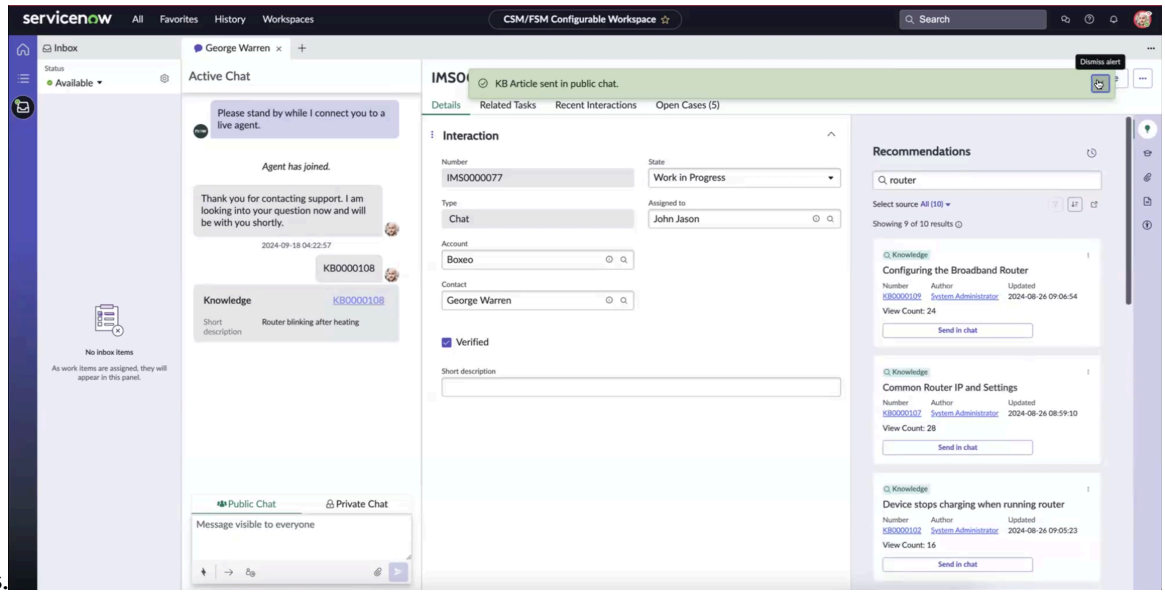
Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace** > **Inbox**.
2. Change the status from Offline to Available to see all the active chats.
3. Select **Accept** to start a chat conversation with a customer.
   The active customer chat session and corresponding chat details are displayed in a new subtab.
4. Select the Recommended Actions icon ( ) in the contextual side panel.
   Based on the issue, the Share KB in chat interactions guidance cards are displayed.
5. Review the Recommended Actions cards.
6. Select **Send in chat** from the side panel to send the respective knowledge article to the customer.
   The **Send in chat**, part of Share KB in chat interactions guidance, is disabled for the inactive or concluded chats.



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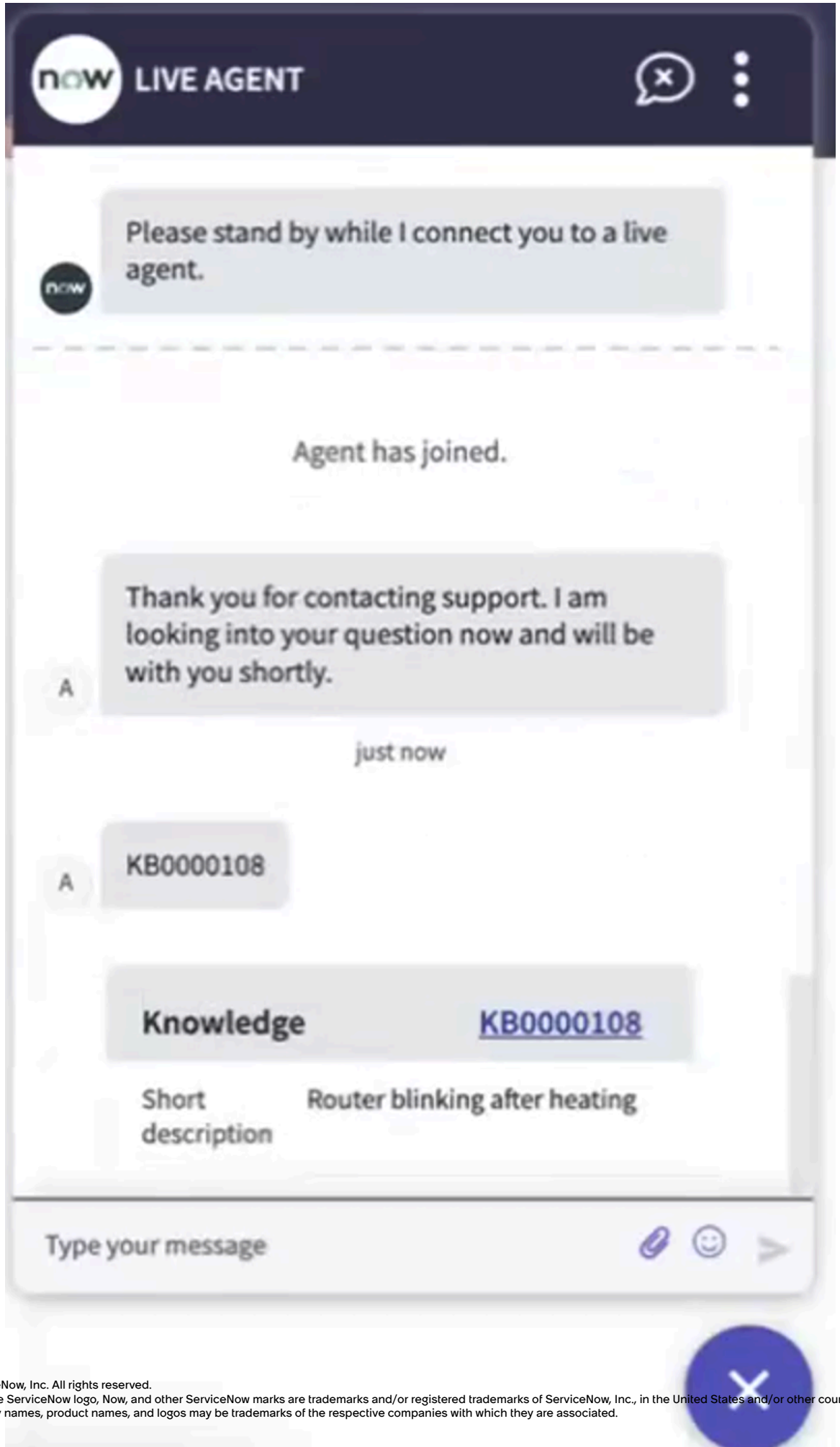

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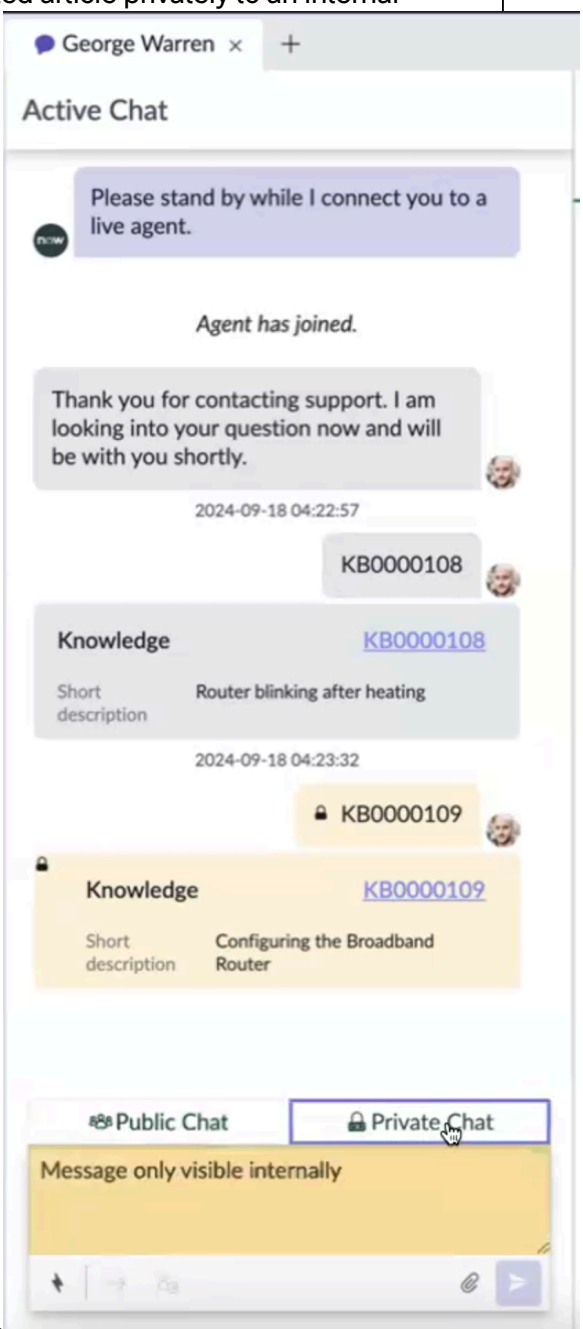
The knowledge article number and its' link is sent to the customer in the public chat, by default. Additionally, the used recommended card is moved to the history.

7. Following are the other secondary actions.

Secondary Actions

Actions	Description
Send in private chat	Select this action if the customer is restricted to the article and to share the selected article privately to an internal agent. 
Copy Link	Select this action to copy the link of the selected article.
Read article	Select this action to read the article and to select a secondary action. Here, you can also **Read article in full view**,**Mark article**

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Actions	Description
	as helpful, **Flag article**, **Send in private chat** and, **Copy link**.

8. Continue reviewing the Recommended Actions cards and accept them as required, to resolve the issues.

Related topics

Share KB in chat interactions guidance

Use AI search in Recommended Actions to resolve cases

As an agent, use AI search in Recommended Actions to help address customer issues and resolve cases quickly.

Before you begin

Role required: sn_nb_action.next_best_action_user

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace**.
2. Open the customer service record.
3. Select the Recommended Actions icon ( ) in the Contextual Side Panel.
4. Select the **Search** tab.
5. In the **Search bar** field, enter your search query.
6. Select the Search icon ( ) or press Enter.
   The AI search results or genius results or both are displayed as cards.

   The relevancy score displays on the search result recommendation cards in the Search tab for following guidances provided with the base system. The relevancy score indicates how well a search result matches the agent's query.

   - Default guidance for search results
   - Attach and share article
   - Share KB in chat interactions
   - All no-code guidances (Link incident to current case, Link problem to current case, and Link change request to current case).

   Note:
   The relevancy score displays only when the **Show relevancy score for results** check box is enabled in the Context form. For more information, see Create a context in Recommended Actions.

7. **Optional:** Select the **Filters** button, select a search source to filter the results and then select **Apply**.

   (Optional) The number of search sources selected appear on the Filter button once you apply the filters. The following table shows the actions that you can perform on the search results in the Filters section in the Search tab.

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Note:
When top N results are enabled, the **Filters** button and the Sort icon does not appear. For more information, see Create a context in Recommended Actions.

Actions in the Filters section in the Search tab

Action	Description
Filter search results corresponding to multiple sources	The list of search sources of all the search results appear in the Source section in the Filters module. You can filter the search results by selecting multiple sources at the same time. The source type appears on the search results. (Optional) When one or more sources are selected, all the facets corresponding to all these selected sources appear enabling you to select field values to refine your search results further. For more information on facet filters, see the following row.
Filter search results at facet-level	(Optional) The dynamic facet filter options enable you to refine the search results by field value. The facets that appear depends on the sources you select. To expand or collapse a facet, select the + (plus) or - (minus) symbol by its name. When a field value under a facet of a source is selected, the remaining sources are deselected automatically and their respective facets also disappear. As a result, you'll be able to refine search results at facet-level for one source type only. The field values selected appear under the Any of the following selected section and its corresponding source appears under the All of the following selected section.
Sort search results	The following options are available by default: ○ Most relevant: The most relevant records are displayed on the top. This option is selected by default. ○ Updated (oldest): The least recently updated records appear on the top. ○ Updated (newest): The recently updated records appear on the top.
Remove the filters applied	Removes all the applied filters, when you select the **Clear all** button.

8. Review the search result or genius result cards and select the applicable result by selecting the action button to address the customer issue.

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The result card moves from the **Search** tab to **Action history**.

9. **Optional:** Select the full view search icon to get a detailed view of the search results in the Search page.

Note:
When top N results are enabled, the **Filters** button and the Sort icon does not appear on the Search page. For more information, see Create a context in Recommended Actions.

The following table shows the actions that you can perform on the search results on the Search page.

Filters on the Search page

Action	Description
Filter search results corresponding to multiple sources	The list of search sources of all the search results appear in the Source section in the Filters module. You can filter the search results by selecting multiple sources at the same time. The source type appears on the search results. (Optional) When one or more sources are selected, all the facets corresponding to all these selected sources appear enabling you to select field values to refine your search results further. For more information on facet filters, see the following row.
Filter search results at facet-level	(Optional) The dynamic facet filter options enable you to refine the search results by field value. The facets that appear depends on the sources you select. To expand or collapse a facet, select the + (plus) or - (minus) symbol by its name. When a field value under a facet of a source is selected, the remaining sources are deselected automatically and their respective facets also disappear. As a result, you'll be able to refine search results at facet-level for one source type only. The field values selected appear under the Any of the following selected section and its corresponding source appears under the All of the following selected section.
Sort search results	The following options are available by default: ○ Most relevant: The most relevant records are displayed on the top. This option is selected by default. ○ Updated (oldest): The least recently updated records appear on the top. ○ Updated (newest): The recently updated records appear on the top.

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Action	Description
Remove the filters applied	Removes all the applied filters, when you select the **Clear all** button.
Hide the Filters section	Hides the filters section when you select the **Hide filters** button.
Display the Filters section	Displays the filters section when you select the **Show filters** button.

Using Playbooks for Customer Service Management

Customer service agents can use playbooks to complete the tasks and activities that are needed to resolve specific types of cases.

A playbook provides step-by-step guidance through the lifecycle of a customer service case.

A playbook includes multiple stages and each stage includes one or more activities for an agent to complete. When using a playbook, agents can:

- View the playbook stages and activities.
- Select an activity and perform the work necessary to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities necessary to resolve the case.

Several features are available to agents when using a playbook, depending on the playbook configuration.

Playbooks for CSM tasks

Create a record using a playbook	If a playbook is configured to use the record generator feature, customer service agents can create a record using a playbook activity.
Filter playbook activities	Filter the activities in playbook stages by the selected user or activity state.
Using the activity stream in the contextual side panel	Customer service agents can access the activity stream in the contextual side panel to communicate with requesters and make internal notes about the work done on a record.
Viewing dynamic related records in the contextual side panel	Customer service agents can view dynamic related records that dynamically change based on the context of the current record or playbook activity.
Viewing ribbon information in the contextual side panel	Customer service agents can view ribbon information in the contextual side panel, including the case overview and timeline, Customer 360, and SLAs.
Add an optional activity	Add optional activities to different stages in a playbook as needed. For example, a customer may want to schedule an appointment to visit a location.

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Playbooks for CSM tasks (continued)

Summarize a case	Use the Now Assist for CSM case summarization skill to summarize the case details and display this information on the case record.

Related topics

Playbooks in Customer Service Management

Configure Playbooks for Customer Service Management

Create a record using a playbook

Create a record using a playbook activity instead of a record form.

Before you begin

Role required: sn_customerservice_agent

About this task

If a playbook is configured to use the record generator feature, customer service agents can create a record using a playbook activity. Creating a record from a list or form, or from an activity in another playbook, opens the playbook and initiates the first activity. This activity guides an agent through the record creation process.

With additional configuration, you can also create a case from any of the following records that opens a playbook and initiates the first activity:

- Interaction
- Case
- Account
- Consumer

To create cases in this way, the following configuration is required:

- Enable the **Create Case** button from the Customer Service Case Types application for each of these records. This enables agents to create a specific type of case.

  See Configure customer service case types for more information about using the Customer Service guided setup and the Case Types category to configure case type UI actions.

- Configure the playbook to use the playbook record generator.

  For more information about configuring this feature, see Playbook record generator in the Workspace Playbook setup documentation.

Procedure

1. Navigate to a list or form in CSM Configurable Workspace.
   For example, navigate to the All Onboarding Cases list.
2. Select **New**.
   If you selected **New** from the All Onboarding Cases list, the Onboarding playbook opens and initiates the first activity for collecting customer information.
3. Fill in the fields on the first activity card.
4. Select **Continue**.

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The system uses the customer information to create a case. The case number is added to the tab and the first activity in the first playbook stage is marked as complete. The second activity is highlighted as the current activity.

5. Collect additional customer information, if needed, and select **Save**.
6. Continue using the playbook stages and activities to resolve the customer's issue and complete the case.

Filter playbook activities

Filter the activities in the playbook stages by the selected user or activity state.

Before you begin

Role required: sn_customerservice_agent

About this task

When an agent filters the activities in playbook stages:

- The stages containing activities that match the filter conditions are automatically expanded.
- The activities that match the filter conditions are displayed within the expanded stages.

If the current activity is included in the filtered results, it remains highlighted. If it isn't included, the first activity in the filtered results is highlighted.

Procedure

1. Open a case record that has an associated Playbook and select the **Playbook** tab.
2. Select the filter icon ( ) at the top of the playbook lifecycle to open the context menu.
3. Select one or more of the following filter choices:
   - A user in the **Assigned to** section.
   - An activity state in the **State** section.
4. Click outside the context menu to close the menu and apply the filter.
5. To clear the playbook activity filter, click the filter icon and clear the current selections in the context menu.

Related topics

Using the activity stream in the contextual side panel

Viewing dynamic related records in the contextual side panel

Viewing ribbon information in the contextual side panel

Add an optional activity

Summarize a case

Create a record using a playbook

Using the activity stream in the contextual side panel

Customer service agents can access the activity stream in the contextual side panel in CSM Configurable Workspace.

The activity stream enables agents to communicate with requesters and make internal notes about the work done on a record. The activity stream updates when the current activity in the playbook is updated.

Click the Activity stream icon ( ) in the contextual side panel to access the activity stream.

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Agents can perform the following tasks in the activity stream.

What agents can do in the activity stream

Task	Description
View posts for the case or case task	The current activity in the playbook work area determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view case or task information. Click **Case** or **Task** at the top of the activity stream to switch views.
Add work notes or comments	In the Compose section: **1.** Select the type of activity: Work notes or Comments. **2.** Add the information to the text field. **3.** Click **Post Work Notes** or **Post Comments**. The post is added to the Activity section.
Filter posts	Click the filter icon ( ) at the top of the Activity section to display the filter selections: • **Post types:** Select the types of posts to view, such as work notes or attachments. • **Field changes:** Select specific fields to view information in posts for only those fields. • **Flagged:** Enable this button to view posts that have been flagged as important. • **Filter sets**
Sort posts	Click the Sort icon ( ) to sort posts by newest to oldest or oldest to newest.
Expand and collapse posts	Click the More options icon (•••) to expand and collapse posts. • **Expand all posts**: Expands posts to view additional details. • **Collapse all posts**: Returns posts to their previous state.
Compose emails	Send emails from the Activity stream without leaving the case view. In the Compose section:

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What agents can do in the activity stream (continued)

Task	Description
	1. Select the Email tab. An email draft opens where you can send an email. 2. Compose your email and click **Send Email**.

Related topics

- Filter playbook activities
- Viewing dynamic related records in the contextual side panel
- Viewing ribbon information in the contextual side panel
- Add an optional activity
- Summarize a case
- Create a record using a playbook

Viewing dynamic related records in the contextual side panel

Customer service agents can view dynamic related records in the contextual side panel in CSM Configurable Workspace. This feature displays related records that dynamically change based on the context of the current record or playbook activity.

Agents can view, search, and sort the records in the Related Records tab in the contextual side panel. These records appear in the Related Records tab as read-only cards.

The Related Records tab displays related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the Related Records tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Depending on the related record configuration for the source record or playbook activity, agents can see the following types of related records:

- SLAs
- Emails
- Escalations for the case or customer (account and contact or consumer).
- Blocked By
- Sold Products
- Install Base Items
- Active Contracts
- Active Entitlements
- Special Handling Notes
- Tasks

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What agents can do in Related Records

Task	Steps
View related records in the contextual side panel	Select the Related Records tab ( ) to view the Related Records list. Related records appear in the list in a card format. The initial set of records displayed in the list is determined by the record type selected. The displayed records can be changed using the filter located at the top of the list.
Select the type of related record to view	Use the filter at the top of the Related Records list to select the type of related records to view. Agents can also use the filter to see the current selection. **1.** Click the Filter icon ( ). **2.** Select a record type from the drop-down menu. The drop-down menu includes the related lists that have been configured for the parent record.
Search the related records list	Use the search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. **1.** Enter the search text in the search field at the top of the Related Records list. **2.** Select the search icon. If the search field is grayed out, search is not available for the selected type of related records.
Open a related record in a subtab	Select a card in the Related Records list to open the record in a subtab under the parent record. In the subtab, the agent can view the record details and perform available actions.
Open the related record list in a list view in a subtab	Select the list view icon ( ) to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	Create a new record for the record type currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record. **1.** Select the Create record icon ( ) at the top of the Related Records list. **2.** Fill in the fields on the record form and select **Save**.

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Related topics

- Filter playbook activities
- Using the activity stream in the contextual side panel
- Viewing ribbon information in the contextual side panel
- Add an optional activity
- Summarize a case
- Create a record using a playbook

Viewing ribbon information in the contextual side panel

Customer service agents can view ribbon information in the contextual side panel in CSM Configurable Workspace.

Click the Record information icon ( ) in the contextual side panel to view ribbon information.

Agents can see the following information:

- Case overview: Displays an overview of the case details, including the case priority and state.
- Customer 360: Displays customer information such as the contact or consumer name, email address, and phone numbers.
- Timeline: Displays a chronological summary of case activities, including case state changes and interactions between the agent and the customer. It also shows how much time that the agent and customer spent on the case.
- SLAs: Displays active SLAs for the case, including time remaining, the SLA state, and any breaches.

Related topics

- Filter playbook activities
- Using the activity stream in the contextual side panel
- Viewing dynamic related records in the contextual side panel
- Add an optional activity
- Summarize a case
- Create a record using a playbook

Add an optional activity

Add optional activities to different stages in a playbook. Although customer processes follow a certain structure, optional tasks may be necessary in some instances. For example, a customer may want to schedule an appointment to visit a location.

Before you begin

This feature must be configured by an administrator. If optional activities aren't configured for a playbook, the **Add Activity** menu item isn't available. For more information, see Configure playbook stage and activity visibility.

Role required: agent

About this task

You can add some optional activities to any stage while you can add others only to a single stage. You can't insert an optional activity as the first activity in a stage or between two completed activities. An approval request optional activity is supported only for a business-to-business (B2B) use case.

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An agent or a fulfiller can insert an approval request optional activity during a playbook run in process-based page variants for complaint case type (in the triage and research stage) or onboarding case type (in the due diligence stage).

Procedure

1. Open a playbook in **CSM Configurable Workspace**.
2. Find a stage by selecting the More actions menu.
3. Select **Add Activity**.
   Add Activity isn't displayed if no optional activities are available in this stage.
4. In the location that you want to add the activity to the playbook, select **+ Add activity here**.
   In the modal that opens, you can see the placeholders where you can insert an activity.
5. Select the activity that you want to add to the playbook.
6. Select **Done**.

Summarize a case

Enable your agents to summarize the case details and to display this information on the case record by using the Now Assist for CSM case summarization skill.

Overview

The case summarization skill helps agents to come up to speed quickly on customer service cases. With this skill, agents can:

- Quickly generate the summaries of the customer service cases to understand the case context.
- Provide a summary of the actions taken and the resolution details.

Generating a case summary

Agents can use the case summarization skill to generate a case summary that includes information from the following case record fields:

- Short description
- Description
- Priority
- State

The summary also includes information from the case activity stream. Agents generate a case summary by using the Case summary by Now Assist component on the case record in CSM Configurable Workspace.

Note:
The case summary component appears below the playbook activity picker in the side panel in the process-based pages and it appears above the activity stream in the CSM default record page.

Case summary by Now Assist component

In CSM Configurable Workspace, agents use the Case summary by Now Assist component to generate a summary. The case summary component is collapsed by default. When an agent generates a case summary by selecting **Summarize**, the component expands to display the summary information, including a description of the issue, the actions taken, and the next

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steps. For longer summaries, select **View more** and use the scroll bar to view the content. After generating a summary, the agent can:

- Review the summary information and edit as needed.
- Provide feedback on the generated summary.
- Add the summary information to the case work notes.
- Copy the summary information to the clipboard.

Agent management

Manage agents effectively to deliver exceptional customer service. Recruit, train, and monitor their performance continuously. Support your customer service agents consistently. Equip and motivate them well to enhance customer satisfaction and operational efficiency.

Agent management for customer service

Time recording for Customer Service Management	Record time worked on cases and case tasks. Time worked entries automatically generate time cards and time sheets for manager approval.
Workforce Optimization for CSM Agent Workspace	Manage your profile and schedule using Agent Workspace. Use coaching to review and complete assigned training.
Assign a case from the assignment workbench	Users with the customer service manager role can assign a case to an agent from the assignment workbench.
Manage special handling notes	Managing special handling notes is a critical component of Customer Service Management. These notes provide essential information to customer service agents about the specific needs and preferences of individual customers, ensuring that personalized and attentive service is delivered consistently. By effectively managing special handling notes, organizations can enhance the customer experience, build stronger relationships, and resolve issues more efficiently.
View team members assigned to an account	View the team members for a specific account.
Add an agent to the chat support assignment group	Agents must be added to the chat support assignment group before they can receive chat requests. This assignment group is used by theCustomer Service Management chat communication channel to route chat requests.
Approve a service contract	Approve a service contract for a customer account.
Outsourced Service Provider manager tasks	Manage various tasks as an Outsourced Service Provider (OSP) Manager, including onboarding Outsourced Service Provider

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Agent management for customer service (continued)

	agents, viewing unassigned cases, and assigning cases to groups or agents under your supervision.

Time recording for Customer Service Management

Record time worked on cases and case tasks. Time worked entries automatically generate time cards and time sheets for manager approval.

Customer service agents (users with the sn_customerservice_agent role) can record time worked on case-related activities, create time cards and time sheets, and submit for approval. Managers can approve time sheets, define cost rates for different types of activities, and convert to expense lines.

The time recording feature extends the functionality of the Time Card Management application to Customer Service Management. Agents can record time worked on cases and tasks directly from the Case or Case Task form and time spent on other activities, such as meetings or training, from the Time Worked form. Time worked entries automatically create time cards for each task and selected work category. Time cards are automatically included in a weekly time sheet.

The time recording feature also extends the functionality of the Cost Management application to Customer Service Management. Customer service managers can create labor rate cards, which define different cost rates for different activities. Time sheets use labor rate cards to determine costs and to generate expense lines.

Agents can modify the hours recorded on time cards. Once a time sheet is approved and a time card is processed, the agent can still go back and modify the time worked. The time sheet reverts to the **Pending** state and new time cards are created. If an agent adds more time worked records to an approved time sheet for the same week, a new time sheet record is created for the current week.

Managers can view time worked records, time cards, and time sheets for agents in their assignment groups, as well as approve and reject time sheets. After a time sheet is approved, the system processes the time cards and uses rate cards based on the time card category to create expense lines.

Time recording plugin

The time recording feature requires the Customer Service Management plugin (com.sn_customerservice) and the Time Recording for Customer Service plugin (com.snc.csm_time_recording).

User roles

The time recording feature adds the following roles.

Time recording user roles

Role	Description
Time card user [timecard_user]	Record time worked on cases and tasks. View, modify, and delete time worked entries on time cards and submit time sheets for approval.

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Time recording user roles (continued)

Role	Description
	Users with the customer service agent (sn_customerservice_agent) role inherit the timecard_user role. This role restricts access to the time sheets, time cards, and time worked records created by the agent.
Time card administrator [timecard_admin]	Review, approve, and reject time sheets for customer service agents. Users with the customer service manager role (sn_customerservice_manager) inherit the timecard_admin, timecard_approver, and timecard_manager roles. This role restricts access to the time sheets, time cards, and time worked records created by the agents in a manager's assigned groups.

System properties

The time recording feature adds the following properties.

Time recording system properties

Property	Description
com.snc.time_card.time_worked	Enables the time recording feature for Customer Service Management. The default setting is **false**. **Note:** This property has been replaced by the **Auto fill time card with time worked entries** field on the Time Sheet Policy form. When this field is enabled, the user's time card is auto-filled with the information from their time worked entries.
com.snc.time_card.default_rate	The default hourly rate used when processing time cards if a rate from a labor rate card is not available.

Time Sheet policy

The time recording feature uses the **Default time sheet policy**.

For users with the sn_customerservice_agent role, creating time worked records automatically creates or modifies time cards regardless of the setting for the **com.snc.time_card.time_worked** system property. The time sheet policy controls this functionality. The system administrator can

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disable the auto-creation of time cards for a specific user with the sn_customerservice_agent role by creating a separate time sheet policy for that user.

Labor rate cards

The time recording feature provides one labor rate card: **CSM Rate Card (Default)**.

If needed, system administrators can create additional labor rate cards. Navigate to **Cost** > **Costs** > **Labor Rate Cards** and click **New** to create a labor rate card.

Record time worked for a case or activity

Customer service agents can record time worked on a case or case task as well as time spent on other activities.

Before you begin

Role required: sn_customerservice_agent

About this task

Agents can record time worked from a case or case task. Time worked can be recorded regardless of the case or task state. Agents can also record time worked from the Time Sheets module by navigating to **Time Sheets** > **Time Recording** > **My Time Worked.**

When an agent creates a time worked record, a time card and time sheet are automatically created for the week based on the work date. The time card is created for the task and the category type. The total hours recorded on each time card are recorded on the current time sheet in the **Time Cards** related list.

Procedure

1. To record time worked from a Case form or Case Task form.

Option	Description
Platform interface	Navigate to a case or task and select **Record Time**.
Agent Workspace	Navigate to a case or task, select the more UI actions icon (•••), and select **Record Time**.

   This action opens a Time Worked form with the **Task** and **User** fields already populated.

2. To record time worked from the Time Sheets module.

   a. Navigate to **Time Sheets** > **Time Recording** > **My Time Worked** and select **New**.
   This action opens a Time Worked form with the **User** field already populated.

   b. Select a task number in the **Task** field.

3. Select the **Work Date**.
4. Select a **Category** for the time being recorded.
5. Fill in the **Time worked**.
6. Provide any additional information in the **Comments** field.
7. Select one of the following actions.

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Option	Description
Platform interface	Select **Submit**.
Agent Workspace	Select **Save**.

The Time Worked form is saved and added to the following lists:

- The **Time Worked** related list on the Case or Case Task form.
- The **Time Cards** related list on the current Time Sheet form.
- The Time Worked list in the Time Sheets module.

If this entry is the first time worked entry for the selected category, a time card is created for that category. If a time card for the category already exists, the time worked record is added to that card.

Review time worked for a case or activity

Customer service agents can review time worked on cases and case tasks.

Before you begin

Role required: sn_customerservice_agent

About this task

The **Time Worked** related list on the Case and Case Task form displays the time worked records that have been created for the case or task. From this related list, agents can review their recorded time, add new time worked records, and also delete records.

Procedure

1. Navigate to the desired case or case task.
2. Go to the **Time Worked** related list.
3. To view a time worked record, click the **Comments** for that record.

Modify or delete time worked entries for cases or activities

Agents can modify and delete existing time worked entries and create new entries after a time sheet has been approved.

Before you begin

Role required: sn_customerservice_agent

About this task

An agent can modify or delete time worked entries for an approved time sheet. Any changes to these entries update existing time cards, creates new time cards if needed, and generates an updated time sheet.

Note:
Don’t manually edit time cards. Edit the original time worked entries, which generate updated time cards and time sheets.

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Procedure

1. To modify or delete a time worked entry:
   - Navigate to the desired case or case task, select the **Time Worked** related list, and select the desired entry.
   - Navigate to **Time Sheets** > **My Time Worked** and select the desired entry.
2. To modify the entry, change the desired fields and select **Update**.
3. To delete the entry, select **Delete**.

Review a time card

Customer service agents can review time cards created from time worked records.

Before you begin
Role required: sn_customerservice_agent

About this task
The **Time Worked** related list on the Case and Case Task form displays the time worked records that have been created for the case or task. This list also displays the time cards created from the time worked records.

Procedure

1. Navigate to the desired case or case task.
2. Go to the **Time Worked** related list.
3. To view a time card, click the **Time Card** for that record.
   The time card provides a breakdown of the time worked for this case or case task by day.

Review and submit a time sheet for a customer service agent

Agents can review and submit time sheets to managers for approval.

Before you begin
Role required: sn_customerservice_agent

About this task
The total hours worked for each category are recorded on the time card and on the time sheet. From the time sheet, you can see total hours by day and by category.

Procedure

1. Navigate to **All** > **Time Sheets** > **My Time Sheets** > **Current Time Sheet**.
2. If desired, review the time cards associated with the time sheet in the **Time Cards** related list.
3. Click **Submit Time Sheet**.
   The time sheet is submitted to the manager for approval. The state of the time sheet changes from **Pending** to **Submitted** and the form becomes read-only. The state of the associated time cards also changes to **Submitted**.

Review and approve time sheets for customer service agents

Managers can review time cards and time sheets for agents in their assignment groups.

Before you begin
Role required: sn_customerservice_manager

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About this task
When a time sheet is approved, the time cards are processed and used to create expense lines that reference the defined labor rate cards.

Procedure
1. Navigate to **All** > **Customer Service** > **Manager** > **Time Sheets - Pending Approval**.
2. Select a time sheet.
3. If necessary, review the time cards associated with this time sheet in the **Time Cards** related list.
4. Click one of the available actions.

Option	Description
Approve	The state of the time sheet and the associated time cards changes to **Processed** and these records become read-only.
Reject	The state of the time sheet and the associated time cards changes to **Rejected**. The customer service agent can modify the time sheet and submit again for approval.

Review expense lines created from time cards

Review the expense lines created from the time cards and time sheets submitted by customer service agents.

Before you begin
Role required: financial_mgmt_user

Procedure
1. Navigate to **All** > **Cost** > **Costs** > **Expense Lines**.
2. Select the desired expense from the Expense Lines list and view the details.

Workforce Optimization for CSM Agent Workspace

Manage your profile and schedule using Agent Workspace. Use coaching to review and complete assigned training.

Important:
To access the next generation of the Workforce Optimization for Customer Service application, transition to the Workforce Optimization for Customer Service application that is available from the ServiceNow Store. You can now configure Workforce Optimization for Customer Service using the UI Builder. For more information see, Workforce Optimization for Customer Service.

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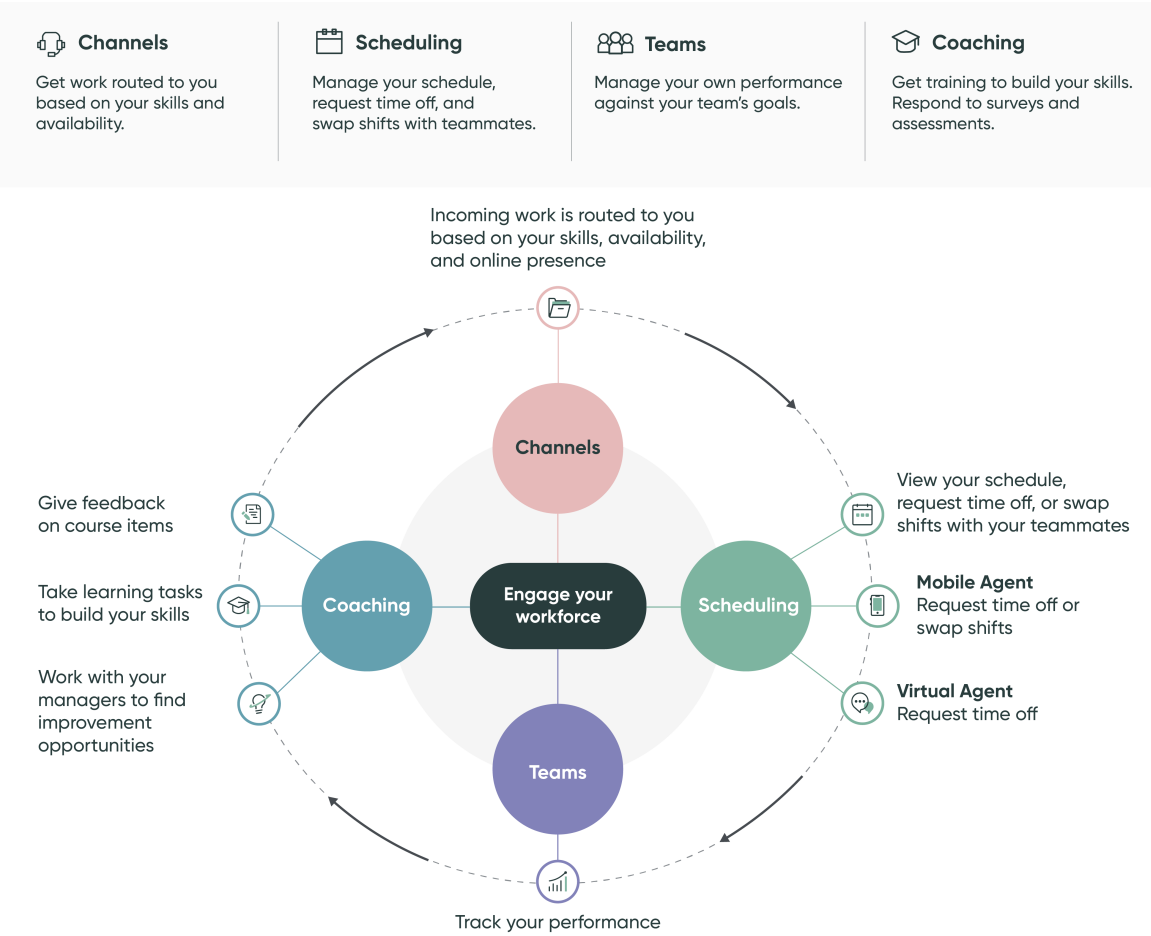
The image below displays the agent work flow between the different modules in Workforce Optimization for Customer Service.



The Workforce Optimization for Customer Service features are accessible when the administrator activates the plugin (com.snc.wfo_csm). This plugin activates related plugins that enable agents to use the Channel Management, Scheduling, Coaching, and Teams applications in Workforce Optimization for Customer Service.

Access your profile from CSM Agent Workspace

Track and monitor the real-time status of your work by accessing your profile in CSM Agent Workspace. You can track information such as how many cases and interactions you have closed and how many you are actively working on. You can also view the roles and groups to which you belong and see information about your manager and teammates.

Before you begin

Important:
To access the next generation of the Workforce Optimization for Customer Service application, transition to the Workforce Optimization for Customer Service application that is available from the ServiceNow Store. You can now configure Workforce Optimization for Customer Service using the UI Builder. For more information see, Workforce Optimization for Customer Service.

Role required: sn_wfo_csm.employee

About this task

Access your profile to analyze information such as:

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- Key performance indicators that matter most to you.
- Pending training that has been assigned to you and when they're due.
- The service channels you are assigned to and their current utilization.
- Skills and skill levels that you currently use and skill gaps that you may want to address.
- Upcoming PTO.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. Click the Lists icon.

Manage your schedule from CSM Agent Workspace

Look up your schedule, request time off, or swap your shift with your peers using the calendar in CSM Agent Workspace. If you can work during the requested shift, you can also approve your peer's request for shift swap.

Before you begin

Important:
To access the next generation of the Workforce Optimization for Customer Service application, transition to the Workforce Optimization for Customer Service application that is available from the ServiceNow Store. You can now configure Workforce Optimization for Customer Service using the UI Builder. For more information see, Workforce Optimization for Customer Service.

Role required: sn_shift_planning.agent

About this task

You can swap shifts with agents that are within your assignment group.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. Click the Calendar icon.

   You can access your schedule in the **My Calendar** tab. If you want to see a list of all agents in your assignment groups and their schedules, click the **Team Calendar** tab.

   To view your schedule or another agent's schedule, you can:

   - View your schedule by clicking the **My Calendar** tab. Then, use the list menu to select the schedule that you want to view by day, week, or month.
   - View another agent's schedule by clicking the **Team Calendar** tab. Then, click an agent's schedule to see that agent's work and break times.
3. Make a request.

   You can communicate with other agents by using Connect Chat or the activity stream on the record to make sure that they would like to swap the requested shift with you.

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Connect Chat and activity stream request options

To	Do this
Request a shift swap	**a.** Click **Request shift swap**. **b.** From the Shift menu for your shift, select the shift that you want to swap with another agent. **c.** In the**Agent** field for the requested shift, select the agent that you want to swap with. **d.** From the Shift menu for the requested shift, select the agent's shift that you want to swap with. **e.** Click **Submit**.
Request a time off	**a.** Click **Request time off**. **b.** From the **Start time** field, enter the time that you want your time off to start. **c.** From the **End time** field, enter the time that you want your time off to end. **d.** Click **Submit**.

- The shift-swap request moves to the approval queue of the agent that you have requested to swap with.
- The time-off request moves to your direct manager's approval queue.

Clock-in and clock-out your work shift

Clock in and clock out your work shifts using CSM Agent Workspace. You can track your details, such as time attendance and time worked summary, to know how close you are adhering to your schedules.

Before you begin

Important:
To access the next generation of the Workforce Optimization for Customer Service application, transition to the Workforce Optimization for Customer Service application that is available from the ServiceNow Store. You can now configure Workforce Optimization for Customer Service using the UI Builder. For more information see, Workforce Optimization for Customer Service.

Role required: sn_shift_planning.agent

About this task

The clock-in event is generated when you either login or set your status as **Available** in CSM Agent Workspace. The clock-out event is generated when you either logout from CSM Agent Workspace or set your status as **Offline** or **Break**.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. Click the Inbox icon.
   - To clock-in your shift, set your status to **Available**.
   - To clock-out from your shift, set your status to **Offline** or **Break**.

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Result

You can view your time attendance and adherence in **Lists** > **Schedule Adherence** > **Time Attendance** and **Time Worked Summary** lists.

Approve or reject a shift-swap from CSM Agent Workspace

You can approve a shift swap requested by your peer if you are available to work for that time period. You can reject it if you are unable to work then.

Before you begin

Important:
To access the next generation of the Workforce Optimization for Customer Service application, transition to the Workforce Optimization for Customer Service application that is available from the ServiceNow Store. You can now configure Workforce Optimization for Customer Service using the UI Builder. For more information see, Workforce Optimization for Customer Service.

Role required: sn_shift_planning.agent

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. Click the Lists icon.
3. Go to **Approvals** > **My Approvals**.
4. Select the request you want to approve or reject.
5. Review the details of the shift swap request and do one of the following:
   - To approve the request, click **Approve**.
   - To reject the request, click **Reject**.

   If you approve a shift swap, the application moves the request to your manager's approval queue. For more information, refer to Scheduling in Workforce Optimization for Customer Service.

Assign a case from the assignment workbench

Users with the customer service manager role can assign a case to an agent from the assignment workbench.

Before you begin

Role required: sn_customerservice_manager

About this task

Note:
The Find Agents feature is available only in the classic environment.

Procedure

1. Open a customer service case.
2. Select the Find Agents icon ( ) next to the **Assigned to** field to open the assignment workbench.
   If the case has an **Assignment group**, the agents from that group are listed on the workbench.
   If the case doesn't have an assigned group, no agents are displayed.

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Note:
The state of the current record determines the availability of the Find Agents icon. The icon is available for records in the **Open**, **Awaiting**, and **Cancelled** states, and if the user has write access for the **Assigned to** field. The icon isn't available for records in the **New** or **Closed** states or when the **Assigned to** field is read only for the current user.

3. **Optional:** Select an assignment group from the **Group** list.
   The list of agents updates based on the selected group.
4. **Optional:** Add or remove skills from the **Skills** list.
   The selected skills appear in a list below this field. The **Matching Skills** column updates to reflect the selected skills.

Note:
Mandatory skills can't be changed.

5. **Optional:** Sort the agents by selecting the column header for the desired matching criteria.
6. Select an agent by enabling the check box by the agent's name and then select **Assign**.
   The assignment workbench closes and the name of the selected agent appears in the **Assigned to** field on the Case form.
7. Select **Update** to save the agent assignment.

Related topics

Assignment workbench overview

Manage special handling notes

Get critical information about specific customers and empower agents in delivering personalized and efficient service with special handling notes.

Use the Special Handling Notes application to generate notes that highlight crucial information about individual records, like case or account records, ensuring users are well informed. For more info, see Special handling notes

Manage special handling notes

Create a special handling note	Create a special handling note for a record, such as a customer service case.
Update a special handling note	Update a special handling note for a record.
Delete a special handling note	Delete a special handling note for a record.
Delete a special handling note from a form	Delete a special handling note for a record from the Special Handling Notes list on the form.

Create a special handling note

Create a special handling note for a record, such as a customer service case.

Before you begin

Role required: sn_shn.admin or sn_customerservice_manager

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About this task

Use special handling notes to highlight important information about individual records, such as a case or account record.

You can create special handling notes from the Special Handling Notes module in the application navigator or from a record that has been configured to use special handling notes.

Important:
While this feature provides the flexibility to create complex conditions, it is recommended that you keep the configuration simple and use dot walking sparingly. Creating complex conditions for special handling notes can affect the load time.

Procedure

1. Perform one of the following actions.
   - **CSM Configurable Workspace**: Navigate to the desired form, select the More actions menu in the record header and then select **Special Handling Notes**.
   - **Core UI**: Navigate to the desired form and select the **Create Special Handling Notes** related link. You can find these links in the Related Links section at the bottom of the form.
   - Navigate to **All** > **Special Handling Notes** > **Special Handling Notes** and select **New** in the Special Handling Notes list form header.
2. Fill in the fields, as necessary.

Special Handling Notes form fields

Field	Description
Short Description	A brief description of the note which is displayed in the Special Handling Notes list.
Message	The detailed content of the note.
Display as pop-up alert	Displays this note in the Special Handling Notes pop-up window.
Type	The type of special handling note: ○ **Standard**: Create a note for a specific record, which you select in the **Related record** field. ○ **Conditional**: Create a note for multiple records which meet certain conditions. Select a **Table name** and then create **Conditions**.
Priority	The priority of the note: ○ 1-Critical ○ 2-High ○ 3-Moderate ○ 4-Low
Status	The status of the special handling note: ○ **1-Active**: The note is active and appears in the Notes list or pop-up window. ○ **2-Inactive**: The note is inactive and does not appear in the Notes list or pop-up window.

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Field	Description
	Inactive notes are removed from the Notes list but can be seen by navigating to **Special Handling Notes** > **Special Handling Notes**. ○ **3-Expired**: The note has reached its expiration date.
Effective immediately	Check box to make the special notes effective immediately. The status is set to **1 -Active**. Deselect this check box to display the **Effective on** field.
Effective on	The date on which the special notes become effective. Enter a date for the special notes to become effective and click **Update**. The status is set to **2 - Inactive** until the date is reached.
Expires on	The date on which the note expires. Select a date from the calendar and click **Save**. The **Deactivate Special Handling notes** scheduled job runs daily at midnight and checks all active alerts. If the notes have reached their expiration date, it sets the status to **Expired**. The **Deactivate Special Handling notes** scheduled job also checks the **Effective on** field. If the status is active or inactive and the expiry date has been reached, it sets the status to **Expired**. If the status is inactive and the effective on date has been reached, it sets the status to **Active**.
Related record	The record for which this note is created. This field appears when you select **Standard** in the **Type** field. If you access this form from the **Create Special Handling Notes** related link, the record number is automatically filled in. To select a record, select a **Table name** and a **Document** from the pop-up window. The tables available for selection have been configured to use special handling notes.
Table name	The table that stores the entity for which the note is being created. This field appears when you select **Conditional** in the **Type** field. The default is the first table which has been configured to use special handling notes. After you select a table, a link is displayed with the number of matching records. This link is updated after you select one or more conditions. Click the link to display these records in a list.
Conditions	This field appears when you select **Conditional** in the **Type** field. Use the buttons in this field to build one or more conditions on the selected table. A condition is made up of a selected field, an operator, and a value. Add conditions using the **AND** and **OR** buttons. Delete conditions by clicking the **Delete** button to the right of a condition.

3. Click **Submit**.

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Related topics

Special handling notes

Update a special handling note

Update a special handling note for a record.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, sn_shn.editor, or sn_shn.admin

About this task

Users with the sn_customerservice_manager role can update a special handling note for a record if they can update a record for the underlying table.

Procedure

1. Navigate to **All** > **Special Handling Notes** > **Special Handling Notes**.
   You can also update a note from the Special Handling Notes list on a form.
2. In the Special Handling Notes list, click the note to be updated.
3. Make any necessary changes to the fields on the Special Handling Notes form.
4. Click **Update**.

Delete a special handling note

Delete a special handling note for a record.

Before you begin

Role required: sn_customerservice_manager or sn_shn.admin

About this task

Users with the sn_customerservice_manager role can delete a special handling note if they can delete a record for the underlying table.

Procedure

1. Navigate to **All** > **Special Handling Notes** > **Special Handling Notes**.
   You can also delete a note from the Special Handling Notes list on a form.
2. In the Special Handling Notes list, click the note to be deleted.
3. Click **Delete**.

Related topics

Special handling notes

Delete a special handling note from a form

Delete a special handling note from a form

Delete a special handling note for a record from the Special Handling Notes list on the form.

Before you begin

Role required: sn_customerservice_manager or sn_shn.admin

About this task

Users with the sn_customerservice_manager role can delete a special handling note if they can delete a record for the underlying table.

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Procedure

1. Navigate to an entity form.
2. In the Special Handling Notes list, click the red **X** to the left of the desired note.
   Initially, the note remains in the Special Handling Notes list and the text of the note is crossed out. The note is removed from the list after the form is saved.
3. Click **Update**.

Related topics

Special handling notes

Delete a special handling note

View team members assigned to an account

View the team members for a specific account.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** or **Partners**.
2. Select an account.
3. Select the **Account Team Members** related list.
   This list displays the employees who have been assigned to the team as well as their responsibilities.

Add an agent to the chat support assignment group

Agents must be added to the chat support assignment group before they can receive chat requests. This assignment group is used by the Customer Service Management chat communication channel to route chat requests.

Before you begin

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **Customer Service Support**.
3. In the **Group Members** related list, click **Edit**.
4. Select the agents that you want to receive chat requests, and move them to the **Customer Service Support** group members list.
5. Click **Save**.

Related topics

Connect Support

Approve a service contract

Approve a service contract for a customer account.

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Before you begin
Role required: sn_customerservice_manager or admin

Procedure
1. Navigate to **All** > **Self-Service** > **My Approvals**.
2. Select a contract for review from the Approvals list that has a state of **Requested**.
3. Review the contract details in the summary at the bottom of the approval form.
4. Add review comments to the **Comments** field.
5. Click one of the following options.

Option	Description
Approve	The review state changes to **Approved** on the Approvals list.
Reject	The review state changes to **Rejected** on the Approvals list. If you reject a contract, you must enter a rejection reason in the **Com ments** field.

Outsourced Service Provider manager tasks

Manage various tasks as an Outsourced Service Provider (OSP) Manager, including onboarding Outsourced Service Provider agents, viewing unassigned cases, and assigning cases to groups or agents under your supervision.

Some key functions that outsourced service provider managers can perform include the following.

Outsourced service provider manager tasks

Onboard Outsourced Service Provider agent	An OSP manager can onboard OSP agents to manage and fulfill cases.
Assign a case to an agent	As an Outsourced Customer Service external manager you can assign a case to an agent under your group.

Onboard Outsourced Service Provider agent

An OSP manager can onboard OSP agents to manage and fulfill cases.

Before you begin
Role required: sn_csm_ocs.ext_manager

Procedure
1. Navigate to **All** > **Outsourced Customer Service** > **Onboard Agent**.
2. Fill in the fields on the Onboard Outsourced Service Provider agent or manager form, as appropriate.

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3. Click **Submit**.

Note:
Once onboarding is complete, a password reset email is sent to the agent's email address.

Assign a case to an agent

As an Outsourced Customer Service external manager you can assign a case to an agent under your group.

Before you begin

Note:
The outsourced customer service external managers [sn_csm_ocs.ext_manager] can perform their designated tasks using UI16 interfaces, as workspaces are not supported at the moment.

Role required: sn_csm_ocs.ext_manager

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **Unassigned**.
2. Open a case.
3. Enter the name of the agent in the **Assigned to** field and select the agent from the list displayed.

   You can also click the Lookup using list icon ( ) and select the agent.

   Note:
   The **Assignment group** field is pre-populated with the group name. The list of agents belonging to that group is displayed when you lookup.

4. Click **Update**.

Customer management

Enhance customer engagement and satisfaction by managing all interactions to ensure a seamless and efficient service experience. Simplify processes, improve communication, and provide personalized service.

Customer management

Using customer access management	Learn how customers, contributor users, and customer service agents use customer access management.
Using Customer Contracts and Entitlements	Learn how consumers, managers, agents, and administrators use the Customer Contracts and Entitlements application to generate service contracts and contract lines to work on the services.
Create a social media profile	Users with the customer service manager role can create a social media profile for an account, contact, or consumer.

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Customer management (continued)

Create a social media log entry	Users with the customer service manager role can create a social media log entry for a case.
Using Customer Data Models for B2B2C	With the B2B2C model, organizations across industries can easily configure multi-level customer relationships and support business customers who, in turn, support their end consumers.

Using customer access management

Learn how customers, contributor users, and customer service agents use customer access management.

Overview of customer access management

Customer access management enables you to support multiple contacts and consumers on cases and sold products, providing them with varying levels of access to the case. You can also add additional internal users to a case.

Related topics

- Restrict contact access
- Add related parties to a case
- Adding related parties to a sold product

Add related parties to a case

Add related parties to a case to help provide the access level to the related parties, such as contacts or consumers on a case.

Before you begin

Role required: sn_customerservice_agent

About this task

Related parties and their assigned responsibilities are part of the Customer Access Management feature. Customer access management enables you to support multiple contacts and consumers on cases and sold products, providing them with varying levels of access to the case. For more information, see Configuring Customer Access Management.

Related parties that are added to cases must also be assigned the sn_customerservice.case_authorized_contributor role.

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** > **All**.
2. Select the case where you want to add related parties.
3. From the Related Parties related list, select **New**.
4. On the form, fill in the fields.

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Related Party record form

Field	Description
Type	Related party type. The related party type can be a contact, consumer, or a contributor user. You can select from the list of related party configurations for the cases that are provided with the base system. ○ Authorized Contact ○ Authorized Consumer ○ Authorized Contributor ○ Listed Contact ○ Listed Consumer
Case	Case number.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   Related parties are added to the case.
6. Ensure that the contact or consumer selected in step 4 is assigned the sn_customerservice.case_authorized_contributor role.

Result

Once related parties are added to the case with a proper functional role having Authorized Representative responsibility, they can perform the following actions.

- Close a case.
- Update customer-visible case tasks.
- Add additional comments and attachments.
- Accept or reject a solution.
- Receive notifications on case updates. To ensure related parties receive email notifications, add them to the email notification configuration.
  1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
  2. Select a notification.
  3. In the Who will receive related list, select the lock icon next to **Users/Groups in fields**.
  4. In the Available column, select **Related Party Users** and/or **Related Party Consumers** and move them to the Selected column.
  5. Select the lock icon again and update the record.
  6. Repeat these steps for each of the desired notifications.

Related topics

Case update notifications

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Case update notifications

Contacts, consumers, and contributor users added to a case with the authorized representative responsibility can receive all email notifications that are also received by the primary contact of the case.

Contacts added as additional contacts to the sold product with the Authorized Representative responsibility can receive all email notifications that are received by the primary contact of the case.

Consumers added as an additional consumer to the sold product with the Authorized Representative responsibility can receive all email notifications that are received by the primary consumer of the case.

Internal users added as related parties to the case with the Authorized Representative responsibility can receive all email notifications that are received by the primary contact or consumer of the case.

For case resolved emails, related parties with the Authorized Representative responsibility can accept or reject the proposed solution. The responses of emails from related parties are treated similarly to the primary contact or consumer on the case. For more information, see Create an email notification.

Enable case update notification

To receive notifications when a customer replies to a case, related parties added to cases must be assigned a Customer Access Management (CAM) role, such as the sn_customerservice.case_authorized_contributor role. For more information, see Roles installed with Customer Access Management.

Configure notifications for related parties

Related parties added to cases can receive email notifications on case updates. To enable the configuration, add related parties to the email notification configuration.

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Select a notification.
3. In the Who will receive related list, select the lock icon next to **Users/Groups in fields**.
4. In the Available column, select **Related Party Users** and/or **Related Party Consumers** and move them to the Selected column.
5. Select the lock icon again and update the record.
6. Repeat these steps for each of the desired notifications.

Adding related parties to a sold product

Add related parties to a sold product to help provide the access level to the related parties, such as contacts, consumers, or accounts.

For example, products purchased by a customer can have multiple departments tracking the product, like the finance team tracking the renewals of the product or the operations team tracking the maintenance of the product.

With Customer access management, you can add multiple related parties and provide them with varying levels of access to the sold product. While adding related parties, you can select the related party type and responsibility.

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Task	Description
Add additional consumers for the sold product	Add additional consumers for sold product and the related entities by defining the type and responsibility of additional consumers.
Add additional contacts for the sold product	Add additional contacts for sold product and the related entities by defining the type and responsibility of additional contacts.
Add additional accounts for the sold product	Add additional contacts for sold product and the related entities by defining the type and responsibility of additional accounts or contacts.

Add additional consumers for the sold product

Add additional consumers for your business-to-consumer (B2C) or business-to-business-to-consumer (B2B2C) sold products by defining the type and responsibility of additional consumers. After you add this information, additional consumers can have the same access to the consumer associated to the sold product and the related entities.

Before you begin

Role required: admin and sn_customerservice_manager

About this task

The responsibility assigned to the additional consumer that is associated to a sold product gets access to the sold product and the related entities, which include installed products, install base items, and cases associated to sold products.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select the desired record where you want to add additional consumers.
3. From the Additional Consumers related list, select **New**.
   Starting with the Utah release, the Additional Consumers related list has been deprecated for new customers. For upgrade customers, the Additional Consumers related list continue to be supported along with the Sold Product Related Parties related list.
4. On the form, fill in the fields.

Consumer Sold Product record form

Field	Description
Sold Product	Products and components sold to a consumer.
Type	Related party type. **Note:** By selecting the related party type, the default responsibility mentioned in the type is added in the related party responsibility.
Consumer	Contact responsible for the sold product.
Responsibility	Access level to sold product and related information. Additional consumer with Authorized Representative responsibility requires the sn_install_base.sold_product_authorized_consumer role to get access to

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Field	Description
	associated sold product and related entities. For details, see Roles installed with customer access management. **Note:** If the **Responsibility** field is left empty, consumers cannot access the sold product and associated case.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   Additional consumers are added to the consumer sold product.

Result

Once additional consumers are added to the sold product with a proper functional role having Authorized Representative responsibility, they can perform the following actions.

- View the list of sold products and associated install base items.
- Create cases by selecting sold products or install bases.
- View the list of cases related to the sold products or affected install bases.
- View the list of installed products.
- Access cases associated to the sold product.
- Manage service catalog requests from the sold product.

Note:

- While creating a case for a sold product, you can only see authorized consumers on the consumer sold product.
- If you choose someone as a consumer, you can only associate the sold products they have full access to on the case.

Add additional contacts for the sold product

Add additional contacts for the B2B (accounts or contacts) or B2B2C sold product by defining the type and responsibility. Once added, additional contacts have the same access to the contact associated to the sold product and the related entities.

Before you begin

Note:
Additional contacts can be enabled using the **Restrict Contact Access** field. For details, see Restrict contact access.

Role required: admin and sn_customerservice_manager

About this task

The responsibility assigned to the additional contact that is associated to a sold product gets access to the sold product and the related entities, which include installed products, install base items, and cases associated to sold products.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select the desired record where you want to add additional contacts.

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3. From the Additional Contacts related list, select **New**.
   Starting with the Utah release, the Additional Contacts related list has been deprecated for new customers. For upgrade customers, the Additional Contacts related list continue to be supported along with the Sold Product Related Parties related list.
4. On the form, fill in the fields.

Contact Sold Product record form

Field	Description
Sold Product	Products and components sold to an account.
Type	Related party type. **Note:** By selecting the related party type, the default responsibility mentioned in the type is added in the related party responsibility.
Contact	Contact responsible for the sold product.
Responsibility	Access level to the sold product and related information. Additional contact with Authorized Representative responsibility requires the sn_install_base.sold_product_authorized_contact role to get access to associated sold product and related entities. For details, see Roles installed with customer access management. **Note:** If the **Responsibility** field is left empty, contacts will not have any access to the sold product and associated case.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   Additional contacts can be added to the B2B sold product.

Note:
Added contacts can be from the same account, partner account, or from contact relationships.

Result
Once additional contacts are added to the sold product with a proper functional role having Authorized Representative responsibility, they can perform the following actions.

- View the list of sold products and associated install base items.
- Create cases by selecting sold products or install bases.
- View the list of cases related to the sold products or affected install bases.
- View the list of installed products.
- Access cases associated to the sold product.
- Manage service catalog requests from the sold product.

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Note:

- While creating a case for a sold product, you can only see authorized contacts.
- If you choose someone as a contact, you can only associate the sold products they have full access to on the case.

Add additional accounts for the sold product

Add additional accounts or contacts for your business-to-business (B2B) or business-to-business-to-consumer (B2B2C) sold products by defining the type and responsibility of additional accounts or contacts. Once you add accounts as related parties, all contacts associated with the related party account can access the sold product.

Before you begin

Role required: admin and sn_customerservice_manager

About this task

The responsibility assigned to the additional accounts that is associated to a sold product gets access to the sold product and the related entities, which include installed products, install base items, and cases associated to sold products.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select the record that you want to add the additional account to.
3. From the Sold Product Related Parties related list, select **New**.
4. On the form, fill in the fields.

Sold Product Related Party record form

Field	Description
Sold Product	Products and components that are sold to an account.
Type	Related party type. **Note:** By selecting the related party type, the default responsibility that is mentioned in the type is added in the related party responsibility.
Account	Contacts of the account responsible for the sold product.
Responsibility	Access level to the sold product and related information. Additional account with the Authorized Account responsibility requires the sn_install_base.sold_product_authorized_contact role to get access to the associated sold product and related entities. For details, see Roles installed with customer access management. **Note:** If the **Responsibility** field is left empty, the accounts don't have any access to the sold product and associated case.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

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5. Select **Submit**.
   You can add additional accounts to the B2B sold product.

> **Note:**
> Added accounts can be from the same account, partner account, or from contact relationships.

Result

After additional accounts are added to the sold product with Authorized Account responsibility, the contacts of those accounts having required functional role can perform the following actions:

- View the list of sold products and associated install base items.
- Create cases by selecting sold products or install bases.
- View the list of cases that are related to the sold products or affected install bases.
- View the list of installed products.
- Access cases that are associated to the sold product.

> **Note:**
> - While creating a case for a sold product, you can only see the authorized accounts on the account's sold product.
> - If you choose an account, you can only associate a sold product that you have full access to on the case.

Add related parties to an install base item

Add related parties to an install base item in the Customer Service Management application so that you can enable another party to have access to an install base.

Before you begin

Role required: admin and sn_customerservice_manager

About this task

An install base-related party is a list of contacts, consumers, contributors, service organization members, accounts, or service organizations. You add a related party to enable access to another party that isn't the owner of the install base. The related parties that you associate with an install base can access the install base and related entities, including the installed products, sold products, and cases that are associated with the install base.

> **Note:**
> You can enable additional contacts by using the **Restrict Contact Access** field. For details, see Restrict contact access.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**.
2. Open an install base item from the list.
3. Select **Install Base Related Parties**, and select **New**.
4. From the **Type** drop-down, select the type of related party that you want to add to the install base item.
   Based on the selection that you chose, you can assign one of the combinations in the following table:

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Related Type list

Type	Functional Role	Entity
Authorized Account	Install Base Authorized Contact (sn_install_base.install_base_authorized_contact)	Account
Authorized Contact	Install Base Authorized Contact (sn_install_base.install_base_authorized_contact)	Contact
Authorized Consumer	Install Base Authorized Consumer (sn_install_base.install_base_authorized_consumer)	Consumer
Authorized Contributor	Install Base Authorized Contributor (sn_install_base.install_base_authorized_contributor)	User
Authorized Member	Install Base Authorized Member (sn_install_base.install_base_authorized_member)	Service Organization
Authorized Service Organization	Install Base Authorized Member (sn_install_base.install_base_authorized_member)	Service Organization
Listed Account		Not applicable
Listed Contact		Not applicable
Listed Consumer		Not applicable
Listed Contributor		Not applicable
Listed Member		Not applicable
Listed Service Organization		Not applicable

Note:
The **Responsibility** field on the Install Base-Related Parties form is automatically populated based on the type of related party that is selected. For information on the type of related parties, see Create related party configurations.

5. To Use the **Order** field to specify the sequence in which records are displayed, organized according to business preferences.
6. Select **Submit**.

Result
The contact is assigned as a related party to the Install base item. The contact gets access to all the corresponding items, such as the child install base items and the cases on the install base item form.

Restrict contact access

Restrict contact access to sold products and install bases by limiting the access for associated contacts and their access levels for customer access management.

Before you begin
Role required: sn_customerservice_manager and sn_customerservice.customer_admin

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About this task

By restricting contact access, you can limit access to entities that are based on the contacts that are assigned to the sold products and install bases. You can't create duplicate account access records with the same account.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Manage Account Access**.
2. Select **New**.
3. On the form, fill in the fields.

Account Access record form

Field	Description
Account	Accounts that have restrictions for access to the sold products and install bases that are based on the associated contacts and the access level.
Restrict Contact Access	Access that is restricted to entities based on associated contacts. If the value of the field is **False**, the contacts that are associated with the account can read the sold products and install bases that are associated with the account. If the value of the field is **True**, the contacts that are associated with the accounts don't get access to the sold products and install bases, unless they're added as a contact on the record or as a related party. The following contacts get access to the sold products and install bases: ○ Contacts that are associated with the sold product and install base records. ○ Contacts that are added as related parties with an Authorized Representative responsibility. ○ Contacts belonging to accounts that are added as related parties with an Authorized Account responsibility.

4. Select **Submit**.

Related topics

Add additional contacts for the sold product

Using Customer Contracts and Entitlements

Learn how consumers, managers, agents, and administrators use the Customer Contracts and Entitlements application to generate service contracts and contract lines to work on the services.

Service contracts, service contract lines, and entitlements can be created in the following ways:

- Via workflows: You can create service contracts, service contract lines, and entitlements by using the contracts and entitlements workflow. For more information, see Contracts and Entitlement Workflows.

Note:
When a service contract line or entitlement is created via the Sales Customer Relationship Management workflow, the account/consumer/household details are copied from the sold product and it inherits the state of the sold product. Further, when the state of the contract line changes, the same state is synced back to the parent sold product.

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- Via API integrations:
  - Service Contract API
  - Entitlement API

Using Contracts and Entitlements Workflows

Learn how contracts and entitlements using workflows enable you to create and manage service contracts, service contract lines, and entitlements.

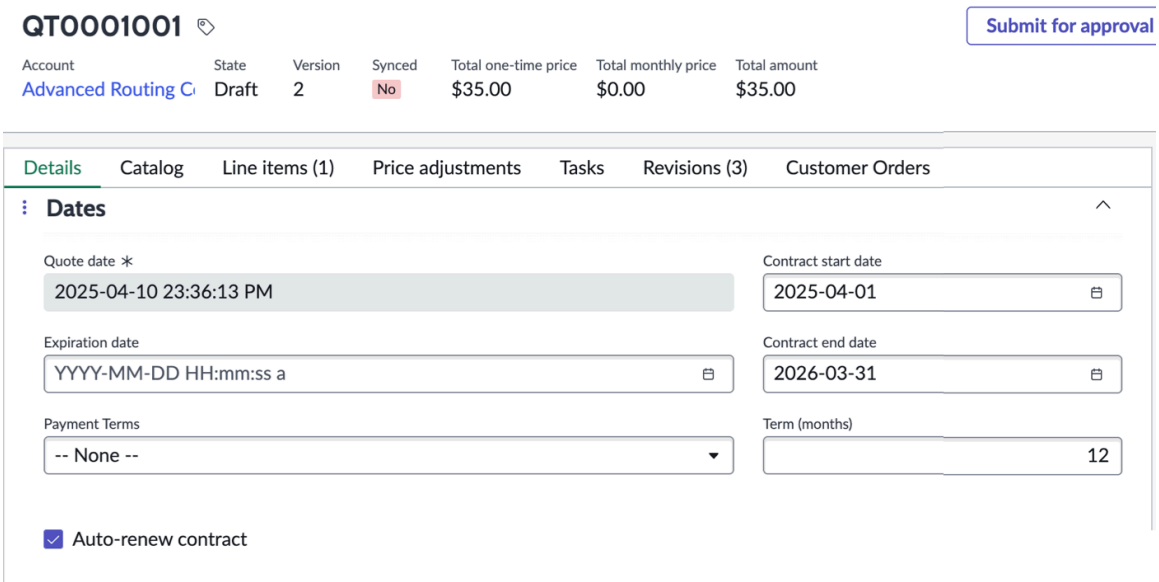
You can manage the life cycle of customer service contracts and entitlements from offer creation to contract generation using contracts and entitlements workflows. Using workflows you can suspend, resume, cancel, and renew multiple entities at once. You can also perform the following functions using workflows:

- Create, suspend, resume, cancel, and renew service contracts.
- Create, modify, suspend, resume, cancel, and renew service contract lines, and entitlements.

Automatic renewal of service contracts

While creating new service contracts from quote or orders, you can select the **Auto-renew contract** option on a quote or order to automatically renew the contracts. You can configure the auto-renewal date of the contract in the Customer Life Cycle Workflows Policy decision table. By default, you can choose to initiate the auto-renewal 90, 60, or 30 days before the contract end date, or on the contract creation date. For more info, see Creating contracts and entitlements using workflows.

Automatic renewal for service contracts on quotes



In the Renewal adjustment basis field, you can select **List price** or **Contracted price**. Selecting List price renews the contract at the market price of the contract at the time of the renewal date.

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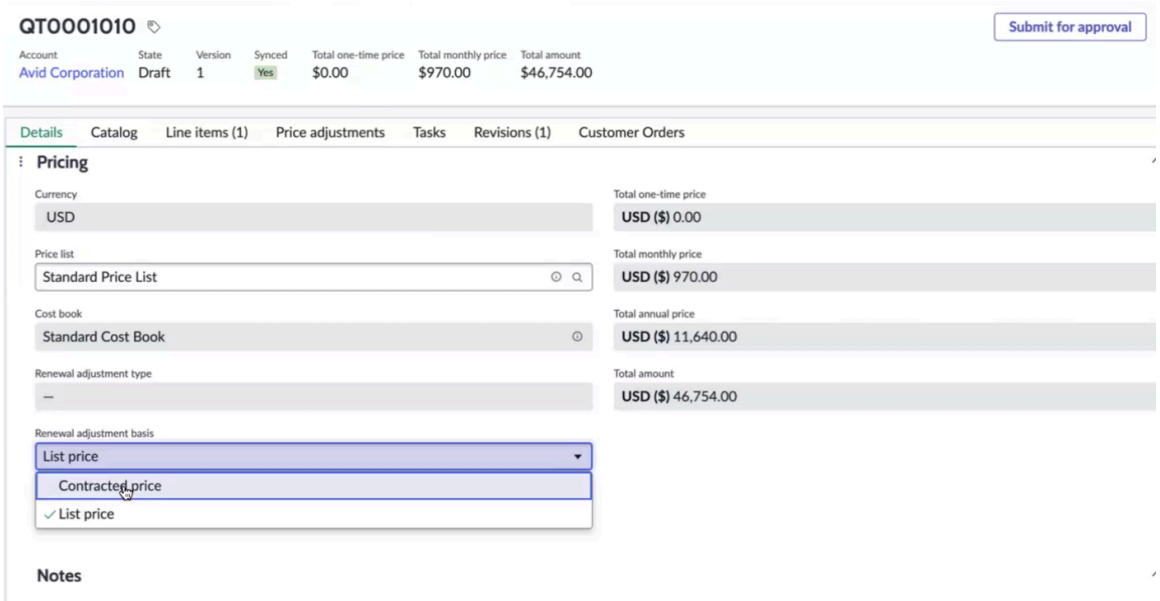
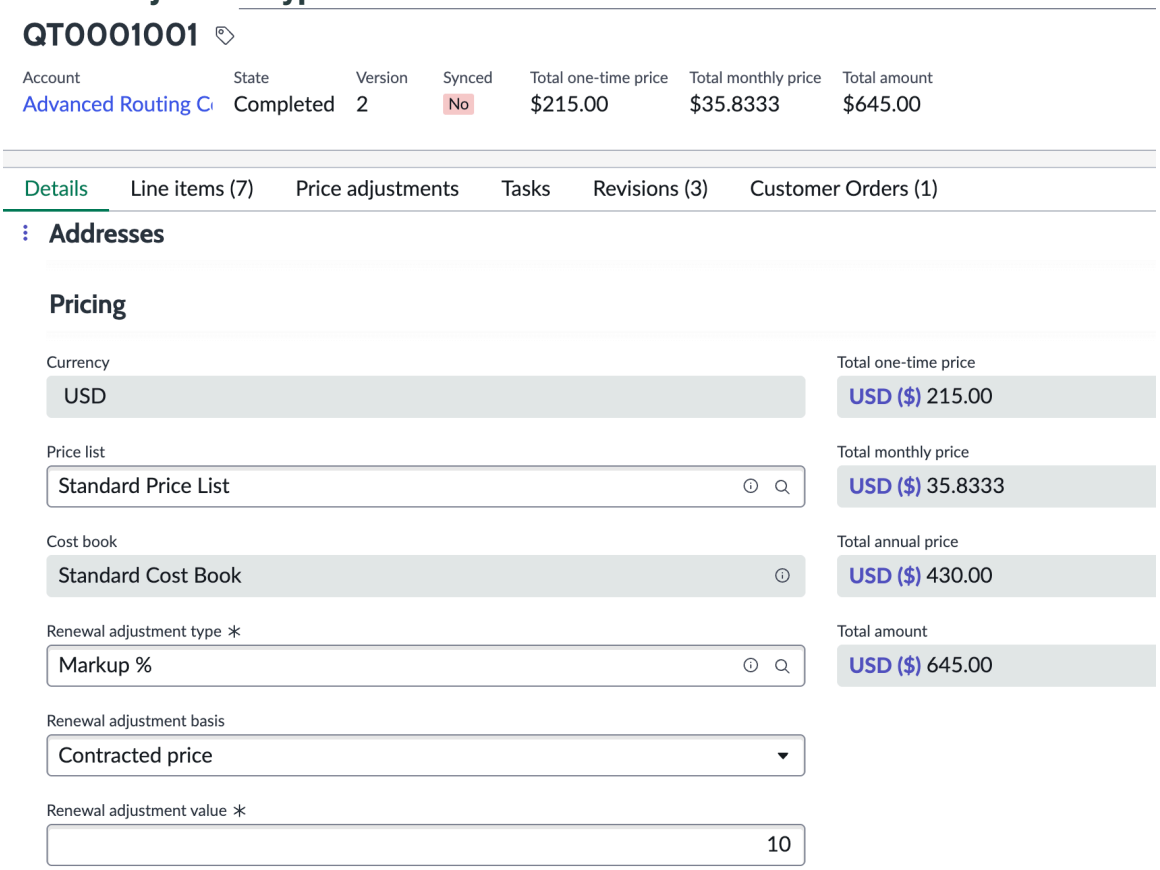
Renewal adjustment basis



Selecting Contracted price gives you the option to renew the contract at Markdown % or Markup % of the current contract price. For example, if you select **Markup %** field and you enter 10 in **Renewal adjustment value**, the service contract will be renewed at 10% above the current contract price.

Renewal adjustment type



That exact renewal date and the renewal adjustments for that service contract will be visible on the service contract form in the **Auto renewal date** field.

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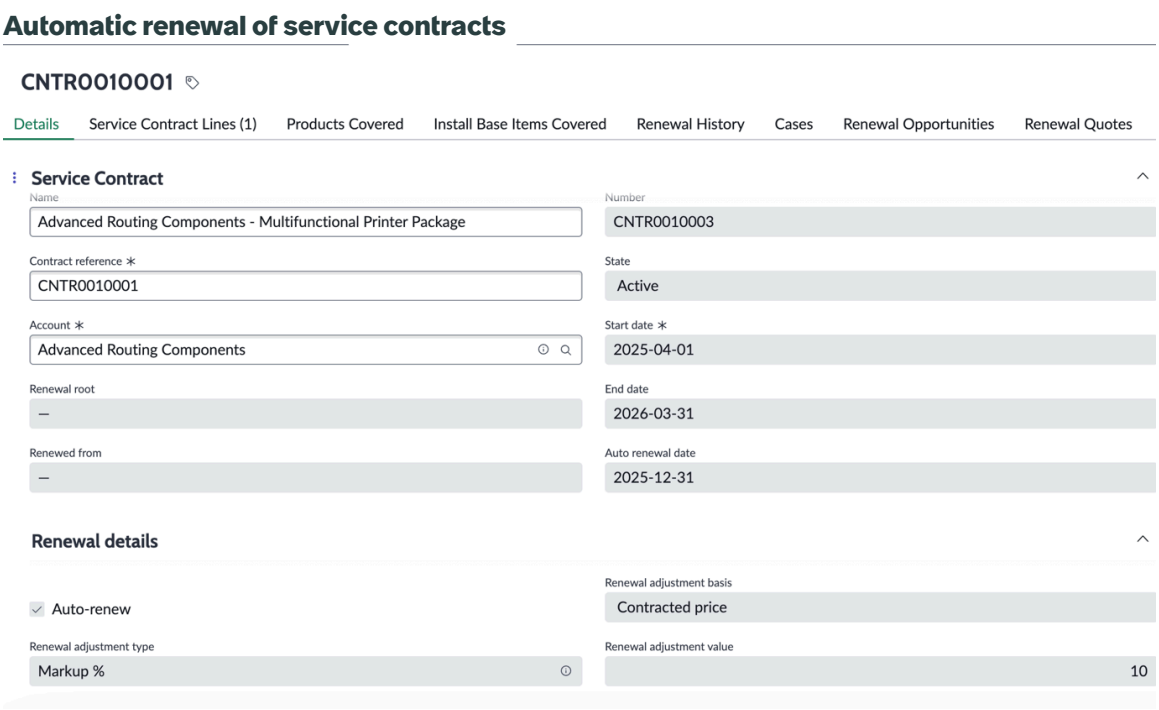
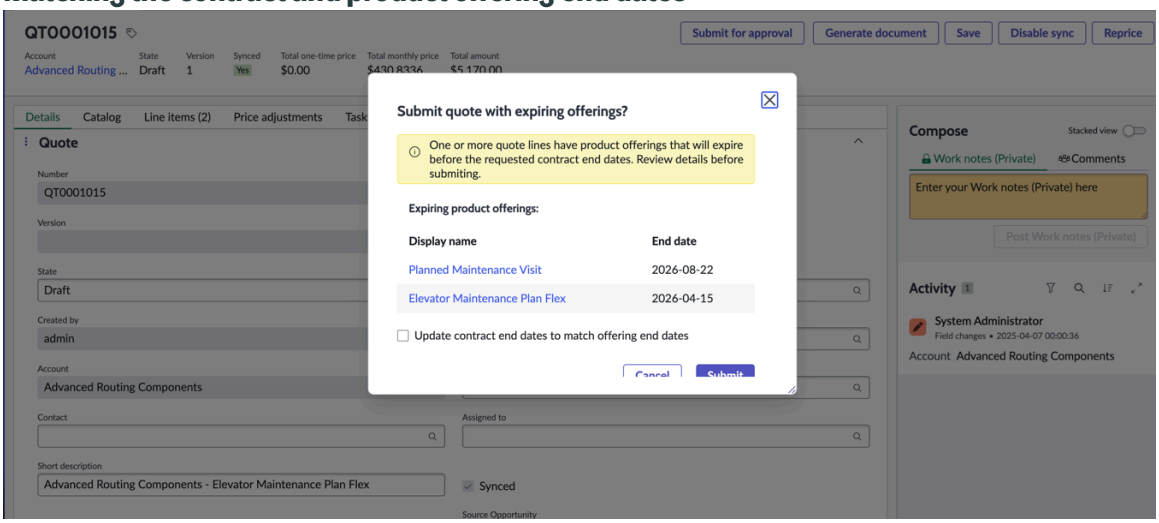


You cannot modify the renewal adjustment fields on the service contract. You can only modify the renewal adjustment values on the quote and orders.

Updating contract end date

During quote processing, the system alerts you when the contract end date is exceeding the product offering end date. When you submit quotes for approval, a dialog box appears alerting you. You can select the option **update contract end dates to match offering end dates** to match the contract end date to the product offering end date.

Matching the contract and product offering end dates



If you do not select this option and approve the quote, the contract end date remains the same.

Co-terminate quote lines

You can assign the same start and end dates to multiple quote lines while creating or renewing a quote. On the **Line items** tab on the quote details page, select multiple quote lines and then select **Co-terminate**. All the selected quote lines have the same start and end date.

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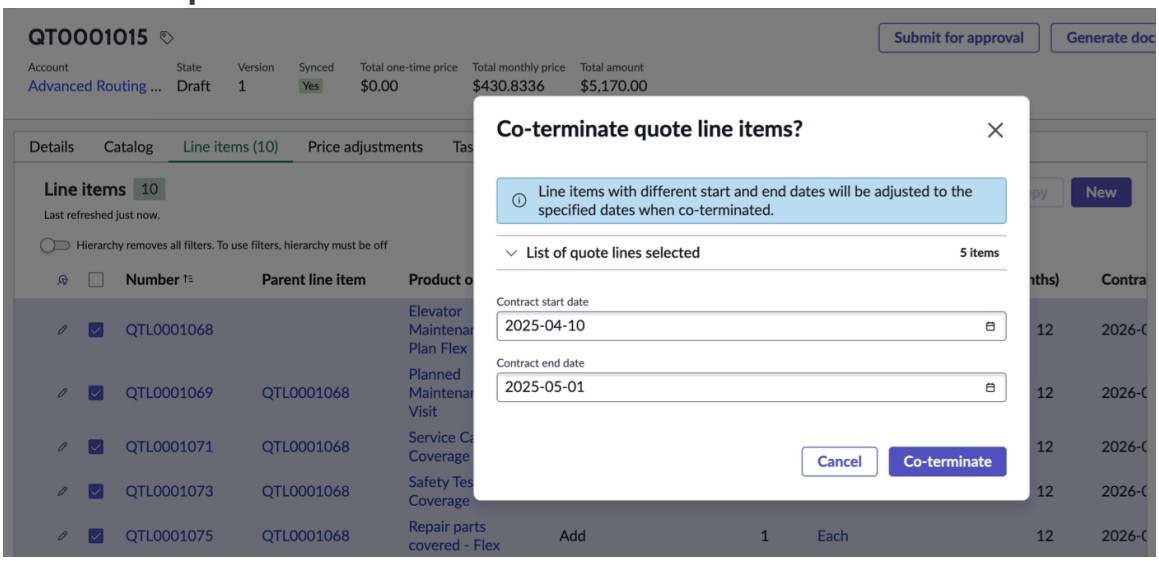
Co-terminate quote lines



Suspend a service contract

Suspend a service contract and its child service contract lines by creating an order on the CSM Configurable Workspace. Suspending a service contract suspends or disables the services specified in that service contract.

Before you begin

You can suspend a service contract when at least one of the associated root sold products is in Active state. For product inventory records, you can suspend a service contract when the associated product inventory record is in Active state.

Note:
If you don't create a resume order, the service contract is indefinitely suspended.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Service Contracts**.
3. In the Contracts and Entitlements - Service Contracts list, select the service contract.
4. Select **Suspend**.
5. In the Suspend service contract window, enter the period of suspension for the service contract in the **Start date and time** and **End date and time** fields.

   Note:
   If you do not enter a value in the **End date and time** field, the service contract is suspended indefinitely. You can resume the service contract manually. For more info, see Resume a service contract.

6. Add a reason for a suspension in the **Reason for suspension** field.
7. Select **Suspend**.
   An order with the suspend action is created for that service contract.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the service contract.

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Result

With the service contract, all the associated service contract lines and entitlements are also suspended. However, the service contract will stays e current state. If you specify an end date and time, a resume order line item item eated as a part of the same order. After this period of suspension, the service contract and all its associated child service contract lines and entitlement will be in Active or Draft state again. After the end of the ervice contract, the suspended service contract and all its associated child service contract lines and entitlement move to Expired state.

Modify a service contract

Modify a service contract so that you can update its existing configurations.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Service Contracts**.
3. In the Contracts and Entitlements - Service Contracts list, select the service contract.
4. Select **Modify all lines** to modify the service contract.
5. On the Configurator UI, modify the existing configurations for the service contract line.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.

   Note:
   The Configurator UI is displayed only if the service contract has a single service contract line. For multiple service contract lines, a quote or an order will be created with contract lines in Draft or Active state.

6. Select **Update**.
   An order or a quote will be created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to modify the service contract is created. You can select the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
   - If the selected target entity is an order, an order to modify the service contract is created. You can click the order number from the confirmation message to view the modified order line items.
7. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the service contract.

Resume a service contract

Resume a service contract and its child service contract lines by creating an order on the CSM Configurable Workspace. By resuming a service contract, you are restarting the services specified in that service contract.

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Before you begin

You can resume a service contract when at least one of the associated root sold product is in Inactive, Canceled, or Suspended state. For product inventory records, you can resume a service contract when the associated product inventory record is in Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the Contracts and Entitlements list, select **Service Contracts**.
3. In the Contracts and Entitlements - Service Contracts list, select the service contract.
4. Select **Resume**.
5. In the Resume service contract window, in the **Start date and time** field, enter when you want to resume the service contract.
6. Add a reason for a resuming the service contract in the **Reason for resumption** field.
7. Select **Resume**.
   An order for resuming the service contract is created.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the service contract.

Result

The service contract and all its associated child contract lines and entitlements are back in Active or Draft state, depending on the start date of the respective entity.

Renew a service contract

Renew a service contract on the CSM Configurable Workspace before the service contract expires.

Before you begin

You cannot renew a service contract when it is in Canceled state or it does not have an end date. The order processing for product inventory based contracts are executed according to the fulfillment flow defined by the customer for these offerings being renewed.

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote or opportunity, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Service Contracts**.
3. In the Contracts and Entitlements - Service Contracts list, select the service contract.
4. Select **Renew**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.

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- If the selected target entity is a quote, a quote to renew the service contract is created. You can select the quote number from the confirmation message to review the renewal quote. After the quote is approved and the status is updated to **Complete**, an order is created for further processing.
- If the selected target entity is an order, an order to renew the service contract is created. You can select the order number from the confirmation message to review the renewal order.
- If the selected target entity is an opportunity, an opportunity to renew the service contract is created. You can select the opportunity number from the confirmation message to review the renewal opportunity.
- If the selected target entity is an opportunity and a quote, both opportunity and quote to renew the service contract are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.

5. After the order line items are fulfilled, set the status to **Completed**.
   A new service contract is created.

Result

A new service contract is created in the Draft state. You can view more details in the Renewal History related list.

Cancel a service contract

Create an order to cancel a service contract and its child service contract lines on the CSM Configurable Workspace. By canceling a service contract, you are terminating the services specified in that service contract.

Before you begin

You can cancel a service contract when at least one of the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel a service contract when the associated product inventory record is in Active or Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Service Contracts**.
3. In the Contracts and Entitlements - Service Contracts list, select the service contract.
4. Select **Cancel**.
   All the associated service contract lines and entitlements will also be cancelled and will be set to the Cancelled state.
5. In the Cancel service contract window, in the **Start date and time** field, enter the date when the service contract will be cancelled.
6. Add a reason for a cancellation in the **Reason for cancellation** field.
7. Select **Cancel**.
   An order with the cancel action is created for that service contract.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the service contract.

Result

With the service contract, all the associated service contract lines and entitlements are also cancelled and will be in **Cancelled** state.

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Upsell or Downsell a service contract line

Upsell or downsell a service contract line on the CSM Configurable Workspace. You can reduce or increase the quantities of the products specified in the service contract line.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the list view, navigate to **Contracts and Entitlements** > **Service Contracts**.
3. In the service contract lists, select the service contract that you want to update.
4. In the service contract lines related list, select one or more service contract lines that you want to update.
5. Select **Upsell or downsell**.
6. In the Upsell or downsell dialog box, increase or reduce the value in the **Quantity** field.
7. Select the start date of the new service contract line from the **Effective from** field.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to upsell or downsell the service contract line is created. You can select the quote number from the confirmation message to view the quote line items. The quote is approved and the status changes to **Complete** to create an order.
   - If the selected target entity is an order, an order to upsell or downsell the service contract line is created. You can select the order number from the confirmation message to view the order line items.
8. In the Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   A new service contract line with the increased or reduced quantities is created with the Start date as the **Effective from** date you selected.

> **Note:**
> For upsell, the Start date and End date of the original service contract line unchanged. For downsell, the End date of the original service contract line is updated to n-1 date of Start date of the new service contract line.

Modify a service contract line

Modify a service contract line so that you can update its existing configurations.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

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Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Service Contracts**.
3. In the Contracts and Entitlements - Service Contracts list, select the service contract.
4. In the service contract lines related list, select the service contract line that you want to modify the characteristics and line items for.
5. Select **Modify**.
6. On the Configurator UI, modify the existing configurations for the service contract line.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.
   An order or a quote will be created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to modify the service contract line is created. You can click the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
   - If the selected target entity is an order, an order to modify the service contract line is created. You can click the order number from the confirmation message to view the modified order line items.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the service contract line.

Suspend a service contract line

Suspend a service contract line and its child service contract lines by creating an order on the CSM Configurable Workspace. By suspending a service contract line, you are suspending or disabling the services and characteristics associated with that service contract line.

About this task

Before you begin

You can suspend a service contract line when the associated root sold product is in Active state. For product inventory records, you can suspend a service contract line when the associated product inventory record is in Active state.

Note:
If you don't create a resume order, the service contract line is indefinitely suspended.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Service Contracts**.
3. In the Contracts and Entitlements - Service Contracts list, select the service contract.
4. Select the service contract line from the service contract lines related list, that you want to suspend.
5. Select **Suspend**.

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6. In the Suspend service contract line window, enter the period of suspension for the service contract line in the **Start date and time** and the **End date and time** field.

   Note:
   If you do not enter a value in the **End date and time**, the service contract line will be suspended. You can manually resume the service contract by using the resume option. For more info, see Resume a service contract line

7. Add a reason for a suspension in the **Reason for suspension** field.
8. Select **Suspend**.
   An order with the suspend action is created for that service contract line.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the service contract line.

Result

With the service contract line, all the associated entities in the hierarchy are also suspended. If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the service contract line will be in Active state again. After the end date of the service contract, the suspended service contract line and all its associated child service contract lines and entitlement move to Expired state.

Resume a service contract line

Create an order to resume a service contract line and its child service contract lines on the CSM Configurable Workspace. By resuming a service contract line, you are restarting the services specified in that service contract line.

Before you begin

You can resume a service contract line when the associated root sold product is in Inactive, Cancelled, or Suspended state. For product inventory records, you can resume a service contract line when the associated product inventory record is in Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the Contracts and Entitlements list, select **Service Contracts**.
3. In the Contracts and Entitlements - Service Contracts list, select the service contract.
4. In the service contract lines related list, select the service contract line that you want to resume.
5. Select **Resume**.
6. In the Resume service contract line window, in the **Start date and time** field, enter when you want to resume the service contract line.
7. Add a reason for a resuming the service contract line in the **Reason for resumption** field.
8. Select **Resume**.
   An order for resuming the service contract line is created.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the service contract line.

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Result
With the service contract line, all the associated entities in the hierarchy are also back in Active or Draft state, depending on the start date of the respective entity.

Renew a service contract line

Renew a service contract line on the CSM Configurable Workspace. You can renew the services specified in the service contract line and its associated child service contract lines and entitlements.

About this task
You cannot renew a service contract line when it is in Canceled state or it does not have an end date.
The order processing for product inventory based contract lines are executed according to the fulfillment flow defined by the customer for these offerings being renewed.

Before you begin
Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote or opportunity, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the list view, navigate to **Contracts and Entitlements** > **Service Contracts**.
3. In the service contract lists, select the service contract that you want to renew.
4. In the service contract lines related list, select the service contract line that you want to resume.
5. Select **Renew**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to renew the service contract line is created. You can select the quote number from the confirmation message to review the renewal quote. After the quote is approved and the status is updated to **Complete**, an order is created for further processing.
   - If the selected target entity is an order, an order to renew the service contract line is created. You can select the order number from the confirmation message to review the renewal order.
   - If the selected target entity is an opportunity, an opportunity to renew the service contract is created. You can select the opportunity number from the confirmation message to review the renewal opportunity.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to renew the service contract are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.
6. After the order line items are fulfilled, set the status to **Completed**.
   A new service contract line is created.

Result
The new service contract line is created with the renewed contract line in the Draft state. You can see more details in the Renewal History related list.

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Cancel a service contract line

Create an order to cancel a service contract line and its child service contract lines on the CSM Configurable Workspace. By canceling a service contract line, you are canceling or disabling the services and characteristics associated with that service contract line.

Before you begin

You can cancel a service contract line when the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel a service contract line when the associated product inventory record is in Active or Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Service Contracts**.
3. In the Contracts and Entitlements - Service Contracts list, select the service contract.
4. In the service contract, select the service contract line from the service contract lines related list, that you want to cancel.
5. Select **Cancel**.
6. In the Cancel service contract line window, in the **Start date and time** field, enter the date when the service contract line will be disabled.
7. Add a reason for a cancellation in the **Reason for cancellation** field.
8. Select **Cancel**.
   An order with the cancel action is created for that service contract line.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the service contract line.

Result

With the service contract line, all the associated entities in the hierarchy are also cancelled and move to Cancelled state.

Modify an entitlement

Modify an entitlement associated to an account so that you can update its existing configurations.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to modify the characteristics for.
5. Select **Modify**.

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Note:
You can only modify entitlements associated with an account. You cannot modify entitlements associated to service contract lines.

6. On the Configurator UI, modify the existing configurations for the selected entitlement.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.
   An order or a quote will be created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to modify the entitlement is created. You can click the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
   - If the selected target entity is an order, an order to modify the entitlement is created. You can click the order number from the confirmation message to view the modified order line items.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Suspend an entitlement

Suspend an entitlement by creating an order on the CSM Configurable Workspace. By suspending an entitlement, you are suspending or disabling the services and characteristics associated with that entitlement.

Before you begin

You can suspend an entitlement when the associated root sold product is in Active state. For product inventory records, you can suspend an entitlement when the associated product inventory record is in Active state.

Note:
You can only suspend entitlements associated with an account. You cannot suspend entitlements associated to service contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to suspend.
5. Select **Suspend**.
6. In the Suspend entitlement window, enter the period of suspension for the entitlement in the **Start date and time** and the **End date and time** field.

Note:
If you do not enter a value in the **End date and time**, the entitlement will be suspended You can resume the entitlement manually by using the resume option. For more info, see Resume an entitlement.

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7. Add a reason for a suspension in the **Reason for suspension** field.
8. Select **Suspend**.
   An order with the suspend action is created for that entitlement.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Result

If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the entitlement will be in Active state again. After the end date of the entitlement, the suspended entitlement will move to Expired state.

Resume an entitlement

Resume an entitlement by creating an order on the CSM Configurable Workspace. By resuming an entitlement, you are restarting the services and the characteristics specified in that entitlement.

Before you begin

You can resume an entitlement when the associated root sold product is in Inactive, Cancelled, or Suspended state. For product inventory records, you can resume an entitlement when the associated product inventory record is in Suspended state.

Note:
You can only resume entitlements associated with an account. You cannot resume entitlements associated to service contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to resume.
5. Select **Resume**.
6. In the Resume entitlement window, in the **Start date and time** field, enter when you want to resume the entitlement.
7. Add a reason for a resuming the entitlement in the **Reason for resumption** field.
8. Select **Resume**.
   An order for resuming the entitlement is created.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Result

The entitlement is back in Active or Draft state, based on the start date of the entitlement.

Renew an entitlement

Renew an entitlement on the CSM Configurable Workspace.

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Before you begin

You cannot renew an entitlement when it is in Canceled state or it does not have an end date. For more info, see .

The order processing for product inventory based entitlements are executed according to the fulfillment flow defined by the customer for these offerings being renewed.

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote or opportunity, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to renew.
5. Select **Renew**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to renew the entitlement is created. You can select the quote number from the confirmation message to review the renewal quote. After the quote is approved and the status is updated to **Complete**, an order is created for further processing.
   - If the selected target entity is an order, an order to renew the entitlement is created. You can select the order number from the confirmation message to review the renewal order.
   - If the selected target entity is an opportunity, an opportunity to renew the service contract is created. You can select the opportunity number from the confirmation message to review the renewal opportunity.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to renew the service contract are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.
6. After the order line items are fulfilled, set the status to **Completed**.
   A new entitlement is created.

Result

The new entitlement is created in the Draft state. You can see more details in the Renewal History related list.

Cancel an entitlement

Cancel an entitlement by creating an order on the CSM Configurable Workspace. By canceling an entitlement, you are canceling or disabling the services and characteristics associated with that entitlement.

Before you begin

You can cancel an entitlement when the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel an entitlement when the associated product inventory record is in Active or Suspended state.

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Note:
You can only cancel entitlements associated with an account. You cannot cancel entitlements associated to service contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to cancel.
5. Select **Cancel**.
6. In the Cancel entitlement window, in the **Start date and time** field, enter the date when the entitlement will be disabled.
7. Add a reason for a cancellation in the **Reason for cancellation** field.
8. Select **Cancel**.
   An order with the cancel action is created for that entitlement.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Result
The entitlement is permanently cancelled and will move to Cancelled state.

Add contract lines to a service contract

Add one or more contract lines to a service contract on the CSM Configurable Workspace.

Before you begin
Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the Contracts and Entitlements list, select **Service Contracts**.
3. In the Contracts and Entitlements - Service Contracts list, select the service contract to add more contract lines.
4. On the Service Contract form, select **Add Contract Line**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to create new service contract line is created.
   - If the selected target entity is an order, an order to create new service contract line is created.

   The Existing contract field will refer the current service contract. All the other fields like Contract start date, Contract end date, and contract renewal fields will be auto-populated with the current contract details.

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5. In the Catalog tab, add products to the new quote or order that is created.
   For more info, see Add products to a quote.
6. Select **Submit for approval**.
7. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   On the Service Contract Line related list, a new service contract line is created and added.

Add Covered Products using Contracts and Entitlement Workflow

Covered products refers to specific products or order line items that are included in a service contract. These items are linked to the contract to define what is covered for service or maintenance. Covered products can be directly tracked through the contract records, facilitating changes and visibility of what is covered.

Agents in Order management can select the products to be covered by a contract when the order is captured for the contract offering. To manually associate a covered product with a contract line, see the Add covered products to order line items

You can also modify the covered products added to a contract line. You can add new covered products to that contract line or entitlement and remove the existing covered products.

Add a sold product or install base item to a service contract

Add the sold products or the install base items covered to service contracts, contract lines, or entitlements.

Before you begin

Role required: sn_customerservice_manager

About this task

Sold products are products and components that have been sold to an account or a consumer and can have multiple contracts. An install base item is an instance of sold product that has been provisioned for an account or consumer.

Associating sold products or install base items to a Customer Contracts and Entitlements entity helps keep a track of the products or install base items that are serviced to a customer under that entity.

A sold product or an install base item can be added to a Customer Contracts and Entitlements entity in the Draft, Active, or Suspended states.

Note:
If an entity is deleted, the related sold product or install base item covered is also deleted.

Procedure

1. Navigate to the ServiceNow AI Platform interface or the CSM Configurable Workspace.
2. Add the sold product or install base item covered to service contracts, contract lines, or entitlements.

Note:

- You can either add a sold product or an install base item to the Customer Contracts and Entitlements entity.
- The state of the entity shouldn't be Expired or Cancelled.

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3. On the Sold Product Covered form, fill in the fields.
   For a description of the field values, see Sold product form.
4. Select **Submit**.

Record the usage on the entitlement

Record the consumption or usages made out of the total characteristic quantities allotted for an entitlement.

Before you begin
Role required: sn_customerservice_manager, sn_customerservice_agent and sn_customerservice.consumer_agent

About this task
When an entitlement moves to the Active state, usage records are created. You can update the usage records on the basis of units or quantities used as and when the customer uses the services. For example, if a characteristic includes 50 visits to the customer, then the Total units field displays 50 and the Used units field is updated after each visit. Managers can create and update usage records for an entitlement but agents can only update the Used units field.

Procedure
1. Navigate to the ServiceNow AI Platform interface or the CSM Configurable Workspace.
2. Record the usage on an entitlement.
3. On the Entitlement Usage form, fill in the **Used units** field.
4. Select **Update**.
5. On the Entitlement page, select **Update** to save the entitlement.
   If you have used the Service Contracts menu to record the usage, then select **Update** to save the contract line and then the service contract.

Create a social media profile

Users with the customer service manager role can create a social media profile for an account, contact, or consumer.

Before you begin
Role required: sn_customerservice_manager or admin

Procedure
1. Navigate to an Account, Contact, or Consumer record.
   - **Customer Service** > **Customer** > **Accounts**
   - **Customer Service** > **Customer** > **Contacts**
   - **Customer Service** > **Customer** > **Consumers**
2. In the **Social Profiles** related list on the selected record, click **New**.
3. Fill in the fields on the Social Profile form, as appropriate.

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Social Profile form fields and definitions

Field	Definition
Channel	The social media channel for this profile. For example, Twitter or Facebook. **Note:** This field is a reference to the Social Channels [sn_app_cs_social_social_channel] table.
Social ID	The user's name or handle for the selected social media channel.
Contact	If created from the Contact form, this field displays the name of the contact.
Consumer	If created from the Consumer form, this field displays the name of the consumer.
Account	If created from the Account form, this field displays the name of the account.
Profile URL	The link to the user's social media account.

4. Click **Submit**.

Related topics

Social media integration

Create a social media log entry

Users with the customer service manager role can create a social media log entry for a case.

Before you begin

Role required: sn_customerservice_manager or admin

About this task

If necessary, a customer service manager or administrator can create an entry on the **Social Logs** related list. The entries on this list are typically populated by the social integration tool.

Procedure

1. Navigate to the desired Case form.
2. From the **Social Logs** related list, click **New**.
3. Fill in the fields on the Social Log form, as appropriate.

Social Log form fields and definitions

Field	Definition
Social Profile	The social profile for the customer contact or consumer.
Agent	The agent participating in the conversation.
Social URL	The URL for the social conversation. Clicking this URL opens the conversation in a new tab.
Document	The related case number.

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Field	Definition
Message	The details of the conversation.

4. Click **Submit**.

Using Customer Data Models for B2B2C

With the B2B2C model, organizations across industries can easily configure multi-level customer relationships and support business customers who, in turn, support their end consumers.

Understanding B2B2C in ServiceNow CSM

The B2B2C model involves interactions where a business sells products or services to another business, which then provides these products or services to the end consumer. ServiceNow's CSM platform supports this multi-layered relationship by capturing and organizing relevant data across both business entities and end consumers.

Benefits of B2B2C Data Models in ServiceNow CSM

- Improved Data Accuracy: By structuring data methodically, it ensures that information is accurate and up-to-date, reducing errors and enhancing decision-making capabilities.
- Enhanced Customer Insights: The data models provide a holistic view of both business customers and end consumers, enabling better understanding of customer needs and preferences.
- Operational Efficiency: Streamlined data management processes lead to faster service delivery and issue resolution, improving overall operational efficiency.
- Scalability: As businesses grow, the data models can be scaled to accommodate more customers and complex relationships without compromising on data integrity.
- Personalized Service: With detailed customer data, businesses can offer tailored services and solutions, leading to higher customer satisfaction and loyalty.

More information about customer data models for B2B2C

Topic	Description
Associate an account with consumers	Enable customer service managers to identify the end consumers who are using products or services and keep track of customer information.
Associate sold products with account consumers	Enable customer service managers to track sold products or services by associating sold products or services with account consumers.
Associate install base items with account consumers	Enable customer service managers to track the instances provisioned by associating install base items with account consumers.

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More information about customer data models for B2B2C (continued)

Topic	Description
View install base information as an account consumer	Track the instances provisioned for your account and which products or services run on them by viewing a list of install base items.
View sold products information as an account consumer	Track the products or services sold to your account by viewing the list of sold products from the Customer Service Portal.

Associate an account with consumers

Enable customer service managers to identify the end consumers who are using products or services and keep track of customer information.

Before you begin

Role required: sn_customerservice_manager

Procedure

1. Navigate to **All** > **Customer Service** > **Accounts**.
2. Select an account.
3. Click the **Consumers** related list.
4. Click **New** to add an existing or new consumer.

Options and procedure

Option	Procedure
Add an existing consumer	**a.** In the **Consumer** field, click the Lookup using list icon ( ). **b.** Select a consumer from the list.
Add a new consumer	**a.** In the **Consumer** field, click the Lookup using list icon ( ). **b.** Click **New**. **c.** On the Consumer form, fill in the fields. **d.** Click **Submit**.

5. Click **Submit**.

Result

The selected consumer is associated with the account.

Associate sold products with account consumers

Enable customer service managers to track sold products or services by associating sold products or services with account consumers.

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Before you begin
Role required: sn_customerservice_manager

Procedure
1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select a product that doesn't have a consumer associated with it.
3. Either add an existing consumer or a new one.

Options and procedure

Option	Procedure
Add an existing consumer	**a.** In the **Consumer** field, click the Lookup using list icon ( ). **b.** Select a consumer from the list.
Add a new consumer	**a.** In the **Consumer** field, click the Lookup using list icon ( ). **b.** Click **New**. **c.** On the Consumer form, fill in the fields. **d.** Click **Submit**.

4. Click **Update**.

Result
The product is associated with the consumer.

Associate install base items with account consumers

Enable customer service managers to track the instances provisioned by associating install base items with account consumers.

Before you begin
Role required: sn_customerservice_manager

Procedure
1. Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**.
2. Select an item that doesn’t have a consumer associated with it yet.
3. Either add an existing consumer or a new one.

Actions and procedure

Action	Procedure
Add an existing consumer	**a.** In the **Consumer** field, select the Lookup using list icon ( ). **b.** Select a consumer from the list.

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Action	Procedure
Add a new consumer	**a.** In the **Consumer** field, select the Lookup using list icon ( ). **b.** Select **New**. **c.** On the Consumer form, fill in the fields. **d.** Select **Submit**.

4. Select **Update** to save your changes.

View install base information as an account consumer

Track the instances provisioned for your account and which products or services run on them by viewing a list of install base items.

Before you begin
Role required: sn_acct_consumer.consumer

About this task
View the list of install base items information from the Customer Service Portal.

Note:
The **Entitlements** widget and the **Contracts** widget are not visible for account consumers.

Procedure

1. Navigate to the Customer Service Portal.
2. Click **Support** > **Install Base**.
   The system displays a list of install base items that belong to your account.
3. Select an install base to view its details.

Note:
The default view is the form view. If you switch to the list view, the **Account** and **Consumer** fields are not displayed. See Configure the Install Base items and Sold Products lists for details.

View sold products information as an account consumer

Track the products or services sold to your account by viewing the list of sold products from the Customer Service Portal.

Before you begin
Role required: sn_acct_consumer.consumer

About this task
View a list of sold products to track the products or services sold to your account.

Note:
The **Entitlements** widget and the **Contracts** widget are not visible for account consumers.

Procedure

1. Navigate to the Customer Service Portal.
2. Click **Support** > **Products**.
   The system displays a list of products that belong to your account.

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3. Select a product to view its details.

Note:
The default view is the form view. If you switch to the list view, the **Account** and **Consumer** fields are not displayed. See Configure the Install Base items and Sold Products lists for details.

Customer communication

Prioritize clear, timely, and meaningful customer interactions to ensure satisfaction and loyalty. Leverage comprehensive suite of tools to facilitate robust customer communication and enhance service management practices.

Different ways of customer communication

Using Playbooks for Portals	Whether you're a customer service agent or a customer, you can use Customer Service Management (CSM) playbooks on service portals to complete the tasks and activities that you need to resolve your cases.
Using Walk-up Experience	Use the Walk-up Experience feature to check-in at a walk-up location, book appointments from the customer service portal, and monitor queues.
Using Auto-Responder for case deflections	Deflect cases by automatically sending relevant content through the Auto-Responder feature after a customer contact or consumer creates a case.
Using Omnichannel Callback for Customer Service Management	The ServiceNow Omnichannel Callback for Customer Service Management app enables a callback option for customers when there's a long wait time for a live agent.
Using the Customer Service Portal	Search for information about a question or an issue, or request assistance from a customer service agent.
Using the Consumer Service Portal	The Consumer Service Portal is a web interface that your company can use to provide information and support to consumers.
Using Conversational Appointment Booking	Customers can initiate an appointment booking conversation in a chat on your support portal using a Virtual Agent, and Agents can use Autopilot to display Virtual Agent topics during conversations.
Using the Business Location Service Portal	Use the Business Location Service Portal (BLSP) available with the Customer Service Management (CSM) application as a one-stop shop to manage the internal and external business locations.

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Using Playbooks for Portals

Whether you're a customer service agent or a customer, you can use Customer Service Management (CSM) playbooks on service portals to complete the tasks and activities that you need to resolve your cases.

With Playbooks for Portals, you get a guided interface where you can take prompt actions on the pending tasks and activities that are related to your cases. You get the following key benefits by using Playbooks for Portals:

- Enhanced experience. Follow the step-by-step process that has features, such as save and resume, where you can initiate work on a case and then resume it later.
- Decreased case resolution time. Track and complete the requested tasks promptly and accurately. You can get a faster case resolution with Playbooks for Portals.
- Increased visibility. Get visibility into the status of the case and get insights into the expected resolution time.

The playbook includes multiple stages. Each stage has one or more activities to complete. You can see the activity stream against the case playbook, the task on the playbook, and the related information for the case as available. When using a playbook, you can do the following actions:

- View the stages and activities outlined in the playbook.
- Select an activity and carry out the required tasks to complete it.
- See the status indicators that display the current state of each activity or step.
- See the check boxes and counters that indicate where you are in the workflow.
- Mark an activity as complete and proceed to the next activity or stage.
- Continue completing the stages and activities necessary to submit the case.

Related topics

Creating an onboarding case with Playbooks for Portals

Creating a guided onboarding case from CSM Configurable Workspace

Create an onboarding request from the service catalog

Creating an onboarding case with Playbooks for Portals

Whether you're a contact or a consumer, you can create an onboarding case with a case type that is based on the issue or request in either the Customer Service Portal or Consumer Service Portal.

Overview

With Playbooks for Portals, you get a clear roadmap where you can see your progress in the submission process and in the remaining steps that you have left to complete. If needed, you can easily navigate back to a previous step. To expedite the process, you’re presented with the options and input controls so that you can quickly and accurately input your information. Additionally, you can save an application or form that is not yet ready for submission so that you can resume work on it later. After saving the case, you can access the playbook through the case lists and find your saved drafts in the case list view on the **My Draft Cases** tab.

These playbooks are designed to guide you through the steps of the intake process. Within the playbooks, you can locate the tasks that are assigned to the case, view all ongoing activities with

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the associated actions, and do the actions on the assigned tasks. The activity stream for the case playbook enables you to track your progress. If it's available, you can also see the related information about the case.

Navigating the catalog to create an onboarding request

You can navigate the catalog to create a new onboarding request from the Customer or Consumer Service Portals. For detailed steps, see Create an onboarding request from the service catalog.

Workflow steps

Let's see how a customer creates an onboarding case from Playbooks for Portals. The customer does the following actions:

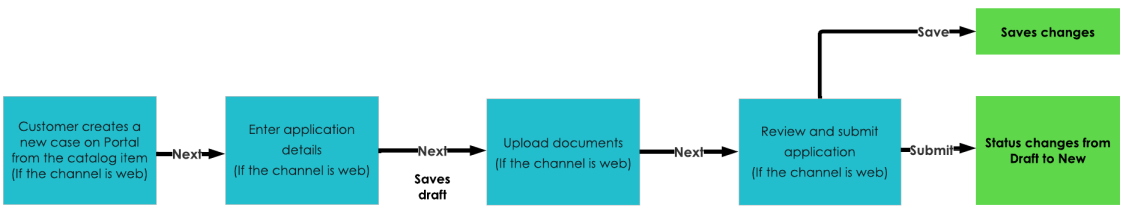
1. Enters the basic information about themselves in a catalog item on one of the portals to open a new case.
2. Adds the details about their application.
3. Uploads the required documents that are needed to process their application.
4. Reviews and edits all the data before submitting the application.
5. Saves all changes and submits the case.

When the customer submits the case, the status of the case changes from Draft to New.

Note:
After an application is submitted, the customer can find and view the case updates in the portal by navigating to **My Lists** > **My Draft Cases**.

The following diagram shows how a customer creates a case.

Customer creates a case



Related topics

Creating a guided onboarding case from CSM Configurable Workspace

Create an onboarding request from the service catalog

Creating a guided onboarding case from CSM Configurable Workspace

An agent can create a case for a contact or a consumer when the contact or consumer reaches out through a phone call, email, or chat from the CSM Configurable Workspace.

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Overview

If you're a customer accessing a playbook, you can track your progress in the submission process and see the step you're on and the number of remaining steps that you have to do. Additionally, you can navigate back to a previous step, if needed. To expedite the process, you're presented with some options and inputs that enable you to enter the correct information.

Creating a case

Let's see how an agent creates a case from Playbooks for Portals. The agent does the following actions:

1. Creates a case on behalf of the customer.
2. Collects the basic information about the customer to start the case.
3. Adds additional contacts to the application on behalf of the customer.
4. Uploads the documents that the customer may have sent.
5. Reviews and edits all the data for accuracy before submitting the application.

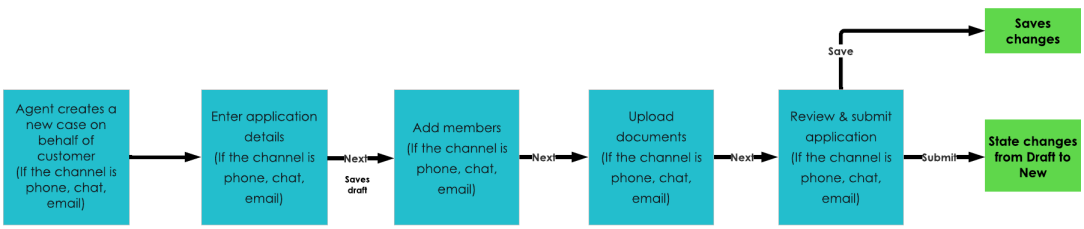
Note:

- The case status changes from Draft to New when it's submitted. The agent must review and choose whether to assign the case to themselves. If the case is assigned to another agent, the new agent must review the context of the case before assigning or accepting the case. The case status changes from New to Open when the case is assigned to an agent.

- If a case is created by an agent, a customer can later find and view the case from the portal for updates by navigating to **My Lists** > **My Draft Cases**.

The following diagram shows how an agent creates a case.

Agent creates a case



Processing a case

Let's see how an agent processes a case from Playbooks for Portals. The agent does the following actions:

1. Initiates the processing for a case by adding members, uploading documents, reviewing and submitting paperwork, and reviewing the case.
2. Pre-approves the case by checking the approval status, customer information, and customer record.

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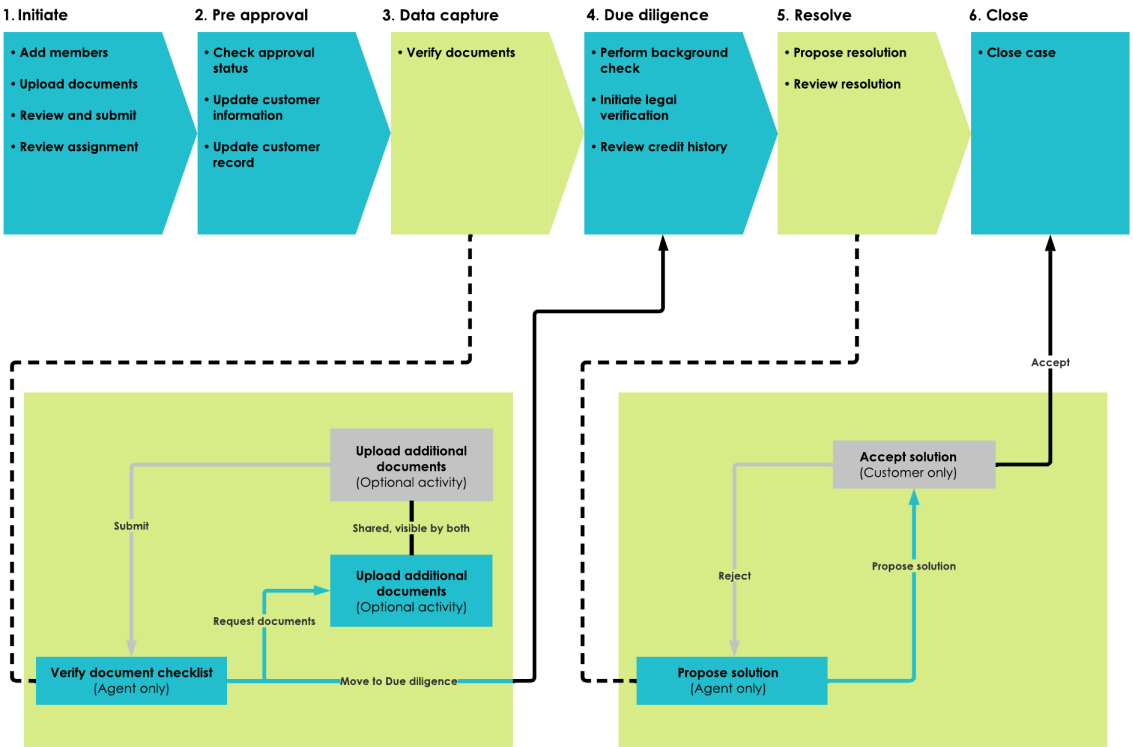
3. Checks the document checklist against the uploaded documents and then sends an email to the customer if there's a missing or invalid document.
4. Performs background checks, initiates legal verifications, and reviews the credit history.
5. Proposes a solution. The customer can accept the solution and then the agent closes the case. If the customer isn't satisfied with the proposed solution and rejects it, the case goes back to the **Open** state and the customer is notified of the status. The agent then needs to provide a new solution based on the customer input.

The following diagram shows how an agent processes a case.

Agent processes a case



Related topics

Create an onboarding request from the service catalog

Creating an onboarding case with Playbooks for Portals

Create an onboarding request from the service catalog

Create a new onboarding request from the Customer or Consumer Service Portals by navigating the service catalog.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer, sn_customerservice.proxy_contact, admin

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Procedure

1. Create a request by going to either the portal landing page or the portal menu header and then doing one of the following actions.

Option	Description
Request Something	On the portal landing page, select the **Request Something** link.
Requests	In the portal menu header, navigate to **Requests** > **Request Something**.

2. Browse the service catalog and select **Support** > **New Guided Onboarding Request**. You can also use the category filters to filter the available items or search the catalog.
3. In the case intake draft page, fill in the information that is related to the request.
4. Select **Submit**.

Result

The system processes the request, creates the request and any other related records, and displays the details in the Related Records widget on the case view page.

Related topics

Creating an onboarding case with Playbooks for Portals

Creating a guided onboarding case from CSM Configurable Workspace

Create an onboarding request from the service catalog

Using Walk-up Experience

Customers can use the Walk-up Experience feature to check in at a walk-up location and schedule or modify appointments from the Customer Service Portal. Walk-up Experience managers can access the CSM Walk-up Experience dashboard to monitor the performance of agents and service locations.

Customers can use the Walk-up Experience feature to complete the following tasks:

- Check in at a walk-up location and join a requester queue.
- Schedule an appointment or join a requester queue from the Customer Service Portal.
- Schedule an appointment as a guest user.
- Modify or cancel a walk-up appointment as a guest user.
- Monitor requester queues.

Walk-up experience technicians and managers can view and manage walk-up interactions and queues and view the CSM Walk-up Experience dashboard.

- CSM Walk-up Experience dashboard
- Manage queues and interactions

Check in at a walk-up location

As a store representative, you can enable customers to check in on arrival at your service location. The user is added to the requester queue after filling in some details and a reason for the visit.

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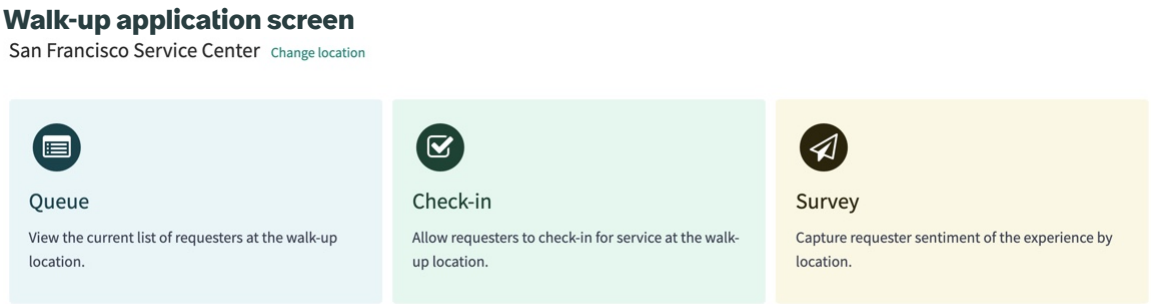
Before you begin

Role required: sn_walkup.walkup_login

About this task

A device at the store location runs the Walk-up application. The application welcome screen includes selections to check in for a service, view the list of requesters currently in the queue, and complete a survey. Both guest users and registered users can access the selections on the welcome screen.



Procedure

1. Select **Check-in** from the Walk-up application screen.
2. Add details in the Check-in screen.

   If the system already has a contact or a consumer with the same details, it associates the interaction with that particular contact or consumer in the system.

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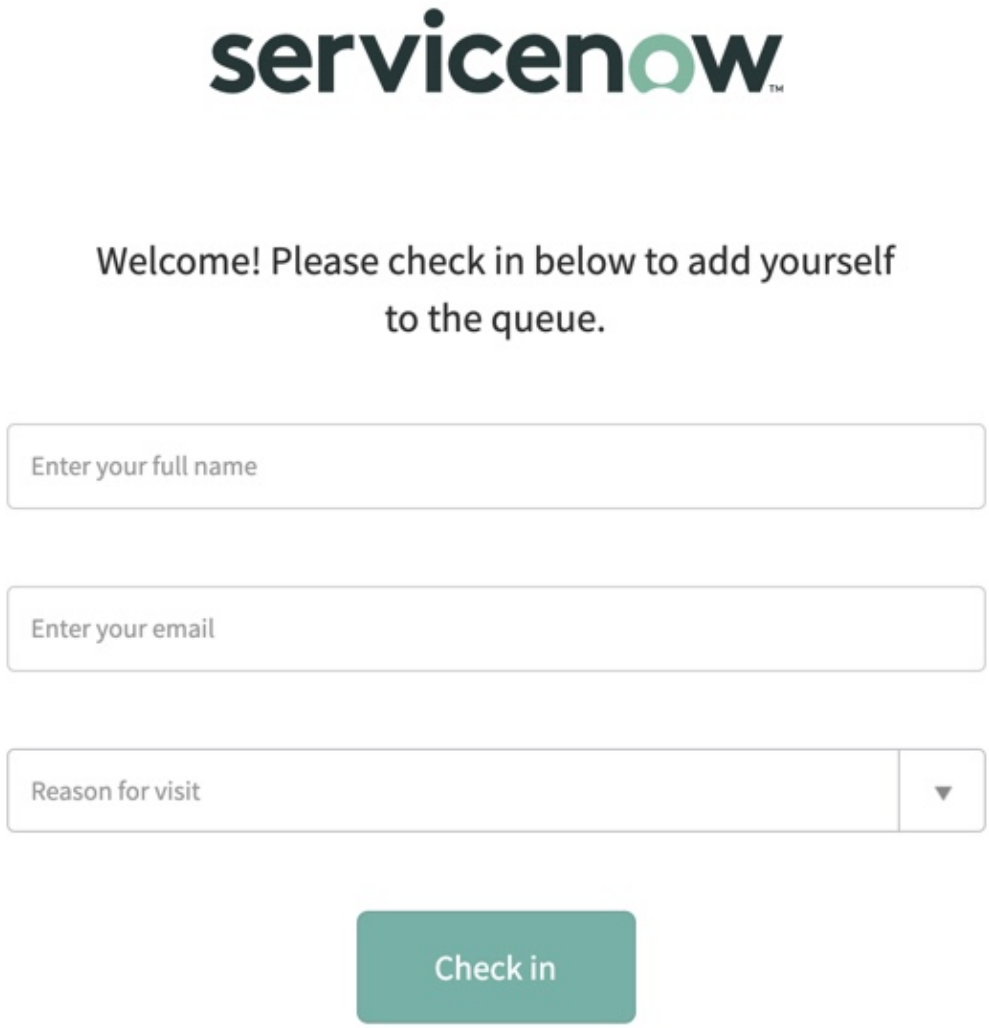
Check-in screen



3. Following check-in, you can view the queue status by selecting **Queue** from the Walk-up application screen.

   The **Queue** widget enables you to view the list of requesters at the walk-up location. For more information, see Monitor Walk-up Experience queues.

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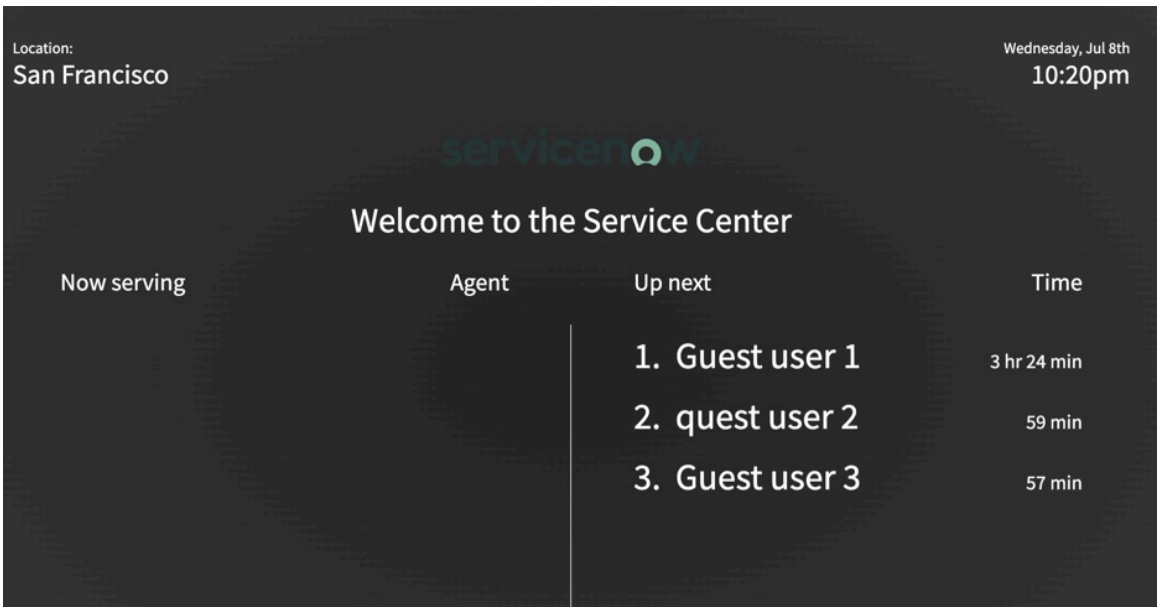
Queue status screen



The **Survey** widget allows you to request the requester for feedback about the experience at the location. For more information, see CSM Walk-up Experience customer satisfaction surveys.

Schedule appointments or join a queue from the Customer Service Management portal

Customers must invest time in coming to a physical location for service. Ability to book appointments at a specific time helps plan visits to the service location. A slot is pre-assigned based on the appointment booking.

Before you begin

Role required: sn_walkup.walkup_login

Procedure

1. Log in to the customer portal.
2. Navigate to **Support**>**Walk-up Check In** from the portal header.
   The application searches for your nearest service center.
3. Select **Change location** and select the location you prefer from the drop-down list if you want to change the default location.

   The default location is set to the nearest service center based on your location information, once you allow the browser to access your location. You can pick the location manually if do now want to allow browser to detect your location.
4. Go to the **Schedule an appointment** tab to book an appointment.
5. Select a reason for your visit from the drop-down list.
   Related content that may help with your issue is listed at the bottom of the screen.
6. Select a reason for your visit from the drop-down list.
7. Select the Calendar icon ( ) and select the date and time of the appointment.
8. Select **Schedule Appointment**.

   You'll receive the following notifications by email when you perform the following actions:

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- Appointment confirmation, reminder, and cancellation.
- Survey email.

Note:
You can come back to the portal to reschedule or cancel the appointment if the appointment date hasn't passed.

Schedule a walk-up appointment as a guest user

Schedule walk-up appointments as a guest user from either the Customer Service Portal or Consumer Service Portal.

Before you begin
Role required: none

Procedure

1. Go to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.
2. Select **Walk-up Check-in**.
3. Select **Allow** to use your current location or select the location you prefer from the **Select the location** drop-down list.
   The Welcome to Walk-up Check-in screen is displayed.

   Note:
   A user with login credentials can also log in through the guest Walk-up Check-in link to book an appointment.

4. Select the **I'm not a robot** check box and verify that you aren't a robot.
5. Fill in the fields.

Guest user appointment fields

Field	Description
Enter your name	Your first name and last name.
Enter your email address	Your email address.
Enter your phone number (optional)	Your phone number. **Note:** This field doesn't accept alphabetical characters.
What is the reason for your visit?	The reason for your visit.
When do you want to visit?	The date you want to visit. Click the calendar icon, select the desired date and time for the appointment, and click **Select**.

The default location name, description, hours of operation, and **Get Directions** link are displayed on the right.

Note:
If you have chosen to select a location, the **View on map** link appears instead.

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6. **Optional:** Change the location manually.
   a. Click **Change Location**.
   b. Select a location from the drop-down list.
7. Click **Schedule appointment**.
   You'll receive a verification email.

   Note:
   You can also select **Cancel appointment** on the same Welcome to Walk-up Check-in screen. Confirm the cancellation in the dialog box that appears and cancel the appointment.

8. Select **Verify** or select the link to confirm your appointment from the email you receive.
   The appointment is confirmed and the details are displayed on the confirmation screen. If you want to verify your appointment once this screen Is no longer displayed, you can select the link in the appointment confirmation email to display it again.

Modify or cancel a walk-up appointment as a guest user

Modify or cancel walk-up appointments that you have scheduled.

Before you begin

Role required: none

Procedure

1. Open the appointment confirmation email that you received.
2. Click the link in the email to modify or cancel your appointment.
   A One-time Passcode Verification tab opens in the browser and an email containing a one-time passcode (OTP) and a link to verify your appointment is sent.
3. Enter the OTP in the verification tab and click **Continue** or click **Verify your Appointment** in the email.
   The OTP option is useful when you are handling multiple devices to check emails and book appointments. For example, you can view the email with the OTP on your mobile and enter the OTP while booking an appointment on your desktop.

   Note:
   The link expires after a certain time.

   The Your Appointment details screen opens.
4. Either cancel the appointment or modify it.
   - To cancel the appointment, click **Cancel appointment**. You will receive an email to confirm that your appointment is canceled.
   - To modify the appointment, modify the details and click **Update**.

Monitor Walk-up Experience queues

Once you check in at a location, you are notified of the wait time and your position in the queue. You can view the issues being serviced and the queue.

Before you begin

Role required: Customers

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Procedure

1. Log in to the customer service portal.
2. Select your location.
3. Click the **Queue** widget.
4. You can view the following information:
   - queue of everyone waiting for service
   - names of people who are ahead of you
   - status of people currently served and waiting in the queue
   - respective agents who are serving the customers

CSM Walk-up Experience dashboard

As a service manager you can see key metric reports for walk-up interactions which helps in monitoring the performance of agents and service locations.

Access the dashboard by navigating to **All** > **Platform Analytics** > **Library** > **Dashboards**. To view detailed information, hover over any report graphic. You can save graphs as PNG or JPEG files and attach them to emails or include in reporting presentations. All graphs can be refreshed for the latest data. The following screen is an example of how the dashboard appears.

Walk-up Experience for CSM dashboard

End user and goal	Required role
Customer service administrator: Can edit the dashboard and manage users, groups, and roles for the dashboard.	admin
Walk-up Experience administrator: Can view the dashboard and manage users, groups, and roles for the dashboard.	sn_csm_walkup.walkup_admin
Walk-up Experience manager: Can track the number of walk-ups, walk-up interactions with	sn_csm_walkup.walkup_manager

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End user and goal	Required role
cases, average service and wait time and so on.	

Data visualizations

Title	Type	Description
Completed Walk-ups for the Quarter		Total number of records created during the fiscal business quarter. Volume shown as a single score.
Exit Survey CSAT for this Year		Speedometer showing the average customer satisfaction sentiment (1 to 3) during the exit survey for the current calendar year.
Overall CSAT within Last Year		Speedometer showing the average customer satisfaction sentiment (1 to 5) captured by the email survey within the last year (364 days from current date).
Walk-ups by Location within Last Year		Total number of walk-up interactions, by location within the last year (364 days from current date). Volume shown as a spline distributed by month.
Walk-up Interactions with Cases by Location within Last Year		Total number of walk-up cases, by location within the last year (364 days from current date). Volume shown as a spline distributed by month.
Walk-up Reasons by Location within Last Year		Reasons for visiting the walk-up queue, by location within the last year (364 days from current date). Data shown as a bar chart.
Walk-ups by Day of the Week		Total number of walk-up interactions per day during the course of a week, by location. Data shown as a bar chart.
Walk-ups by Hour		Total number of walk-up interactions, by hour and by location. Data shown as a bar chart.

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Title	Type	Description
Average Service Time by Location		Average time it takes to close an interaction, by location. Time average shown as a spline by month.
Average Wait Time by Location		Average time a walk-up guest waits for service, by location. Data shown as a bar chart.

Walk-up Experience queue and interaction management

Walk-up Experience managers and technicians can efficiently manage all aspects of a walk-up location queue and interaction demand. Technicians can view assigned walk-up locations and interactions for walk-up fulfillment.

Walk-up Experience provides technicians with inclusive fulfiller resources to organize and manage a walk-up queue.

As a Technician you can access CSM Configurable Workspace to manage a walk-up interaction. Using CSM Configurable Workspace you can:

- Access a personal inbox to view work assigned from multiple service channels, including the Walk-up Service Channel.
- Get assignments automatically pushed to your inbox from the walk-up interaction queue.
- Work on concurrent or multiple interactions at the same time.
- Promote interactions to cases.
- Work with any requester in the queue at any time by pulling from anywhere in the queue list, as well as from the top of the list.
- Create cases for interactions
- Manually pick an interaction specific to a requestor
- Use Agent Assist to expedite fulfillment.

As a technician you can typically fulfill interactions on a first-come-first-served basis as interactions are pushed to individual walk-up inbox. Interactions are distributed to the walk-up agent inbox based on assignment rule configurations in the Advanced Work Assignment feature.

Technicians can directly open cases in CSM Configurable Workspace when an issue is not resolved at the walk-up location.

Walk-up Experience also includes a **Technician** module in the application navigator where agents supporting a walk-up queue can perform the following actions:

- Access the personal walk-up inbox linking directly to Agent Workspace.
- View assigned walk-up interactions.
- Reassign and modify walk-up interactions when necessary.
- View all scheduled and upcoming appointments.
- View walk-up queue locations.
- Transfer walk-up interactions to other technicians or queue locations when necessary.

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The following applications are included in the platform **Technician** module of the CSM Walk-up Experience navigation bar as well as viewed in the CSM Configurable Workspace under Walk-up:

CSM Walk-up Experience technician applications

UI view and application	Description
Platform: **My Walk-up Inbox** CSM Configurable Workspace: **Inbox**	View walk-up interactions assigned to you in your personal inbox in CSM Configurable Workspace. Advanced Work Assignment pushes interactions to your inbox according to assignment rule configurations.
Platform: **My Walk-up Locations** CSM Configurable Workspace: **Walk-up Locations**	View walk-up queue locations that you are assigned to support by physical address.
Platform and CSM Configurable Workspace: **My Assigned Walk-ups**	View walk-up interactions you are assigned to resolve or fulfill. These interactions have a **Work in Progress** state. You can also see your assigned interactions in your personal inbox on Agent Workspace.
Platform and CSM Configurable Workspace: **Open - Unassigned**	View all open and unassigned walk-up interactions for your queue locations. These interactions have either a **New**, **Queued**, or **Work in Progress** state.
Platform and CSM Configurable Workspace: **Closed Walk-ups**	View all closed walk-up interactions. Closed interactions have either a **Closed Complete** or **Closed Abandoned** state.
Platform: **Scheduled Appointments** CSM Configurable Workspace: **Appointments**	View all upcoming appointments scheduled for your walk-up queue.

View assigned Walk-up Experience location

Walk-up Experience technicians can view a list of the walk-up queues they're assigned to support. Location queues reveal all the information that a technician must know to operate the queue efficiently.

Before you begin

Role required: sn_csm_walkup.walkup_technician

About this task

There are two ways technicians can view the walk-up location queues they're assigned to support. Technicians primarily access CSM Configurable Workspace for all CSM Walk-up Experience related information, including locations. However technicians can also access CSM

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Walk-up Experience in the application navigator, or side navigation bar, to view assigned queue locations.

Procedure

1. To view walk-up locations, open CSM Configurable Workspace.
2. Select **List** in the left navigation bar.
3. Under **Walk-up**, select **Walk-up Locations**.
   Walk-up locations you're assigned to support are listed.
4. Select a queue name to view details about the location, such as, interactions, appointments, reasons for visits, and more.
5. Alternatively, to view walk-up locations via the application navigator, navigate to **CSM Walk-up Experience** > **Technician** > **My Walk-up Locations**.
6. Select a queue name to see details about the location, such as, interactions, appointments, reasons for visits, and more.
   If interactions are leftover from a previous day or are still queued in the end with no associated guests at the queue, you can select **Abandon All** to cancel these interactions.

View Walk-up Experience inbox

View a personal inbox of automatically assigned Walk-up Experience interactions using the CSM Configurable Workspace feature interface.

Before you begin
Role required: sn_csm_walkup.walkup_technician

About this task
There are two ways technicians can view the walk-up inbox. Technicians primarily access CSM Configurable Workspace for all Walk-up Experience related information, including the inbox. However technicians can also access CSM Walk-up Experience in the application navigator, or navigation bar, to link to and view the inbox in CSM Configurable Workspace.

Procedure

1. To view the walk-up inbox, open CSM Configurable Workspace.
2. Select **Inbox** in the navigation bar of the interface.
   Automatically pushed interaction assignments appear in the inbox based on agent schedules and assignment rule configurations in the Advanced Work Assignment feature. Technicians can set an inbox status of **Available**, **Away**, and **Offline**.
3. Alternatively, to view the walk-up inbox via the application navigator, navigate to **CSM Walk-up Experience** > **Technician** > **My Walk-up Inbox**.
   You're linked directly to your personal inbox in CSM Configurable Workspace. Automatically pushed interaction assignments appear in the inbox based on agent schedules and assignment rule configurations in the Advanced Work Assignment feature.

Manage automatically assigned Walk-up Experience interactions

Technicians supporting CSM Walk-up Experience locations can view and manage interactions automatically pushed to the CSM Configurable Workspace inbox.

Before you begin
Role required: sn_csm_walkup.walkup_technician

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About this task

Walk-up Experience interactions can be automatically pushed to a personal inbox in CSM Configurable Workspace based on agent schedules and assignment rule configurations in the Advanced Work Assignment feature. Technicians fulfill interactions on a first-come-first-served basis as they appear in the inbox.

To manually assign and manage interactions using the CSM Walk-up Experience Technician modules found in the application navigator, refer to Manage Walk-up Experience interactions manually.

Technicians set a status in the CSM Configurable Workspace inbox to indicate readiness to accept interactions. Status choices are **Available**, **Away**, and **Offline**.

Even though interactions are automatically pushed to the walk-up inbox, agents can work with anyone in the walk-up queue at any time.

View walk-up queue interactions assigned to you automatically in your walk-up inbox or in your **My Assigned Walk-ups** list. You can also view all **Open - Unassigned** interactions for the queue you support.

With CSM Configurable Workspace you can view lists of all your related walk-up interactions and appointments, your cases, customer accounts and contacts, incidents, requests, and more using one convenient interface. The Walk-up Experience related interaction list includes the following items:

Walk-up Experience related interaction list

List item	Description
My Assigned Walk-ups	Interactions you assign to yourself when you accept an active interaction or that are assigned to you. Agents assign interactions to themselves when they accept a queued interaction. Managers can assign interactions to specific agents. These interactions are in a Work in Progress state. Once assigned, an agent can transfer the interaction to another agent or queue to complete the work, if necessary.
Open — Unassigned	All open but unassigned interactions associated with your specific walk-up queue location. When a guest checks into a walk-up queue, an interaction is created. The interaction is Queued until an agent accepts it or is assigned the interaction. At that point, the state changes to Work in Progress.
Closed Walk-ups	All Closed Complete and Closed Abandoned interactions assigned to a specific walk-up location queue. Agents can abandon an interaction when a guest leaves the queue before receiving support.

Procedure

1. To begin supporting a walk-up queue guest, open CSM Configurable Workspace.
2. Select **Inbox** and ensure your status is set to **Available**.
   You can view interactions in your inbox that are automatically assigned to you.
3. Select the interaction at the top of the list and begin resolving the issue or fulfilling the request.

   When you create an associated case, a **New Case** tab opens next to the **Details** tab of the original interaction. Fill out the new case form. Select **Save** to save the new case.

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If an interaction requires an unusual amount of time to resolve or fulfill, you can place the interaction on hold. The requester does not lose position in the queue and you can help another requester simultaneously. Placing an interaction on hold does not affect your capacity for new interactions.

a. To put an interaction on hold, select **Put on Hold**.

b. You can associate the interaction with another record by selecting **Associate Record** from the more UI actions icon (•••) in the interaction header.

c. If you cannot resolve an issue, select **Create Case** in the interaction header.

When you create an associated case, a **New Case** tab opens next to the **Details** tab of the original interaction. Fill out the new case form. Select **Save** to save the new case.

4. When you finish resolving the interaction, select **Close** in the interaction header.
Closing an interaction affects your capacity and can result in new interactions being pushed to your inbox.

Manage Walk-up Experience interactions manually

Technicians supporting walk-up locations can manually manage queue requests with several CSM Walk-up Experience interaction-related modules.

Before you begin

Role required: sn_csm_walkup.walkup_technician

About this task

Manage interactions manually using the CSM Walk-up Experience Technician modules found in the application navigator. To manage automatically assigned interactions from the CSM Configurable Workspace inbox, refer to Manage automatically assigned Walk-up Experience interactions.

Walk-up queues support guests in the order that they check into the queue — first come, first served. Technicians supporting the queue can decide who will work the first interaction. As new guests enter the queue and submit interactions, technicians share the workload, assigning queued interactions to themselves.

View walk-up queue interactions using several Walk-up Experience modules:

Walk-up Experience interaction modules

Module	Description
My Assigned Walk-ups	Interactions you assign to yourself when you accept an active interaction or that are assigned to you. Agents assign interactions to themselves when they accept a queued interaction. Managers can assign interactions to specific agents. These interactions are in a Work in Progress state. Once assigned, an agent can transfer the interaction to another agent or queue to complete the work, if necessary.
Open — Unassigned	All open but unassigned interactions associated with your specific walk-up queue location. When a guest checks into a walk-up queue, an interaction is created.

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Walk-up Experience interaction modules (continued)

Module	Description
	The interaction is Queued until an agent accepts it or is assigned the interaction. At that point, the state changes to Work in Progress.
Closed Walk-ups	All Closed Complete and Closed Abandoned interactions assigned to a specific walk-up location queue. Agents can abandon an interaction when a guest leaves the queue before receiving support.

Procedure

1. To begin supporting a walk-up queue guest, navigate to > **CSM Walk-up Experience** > > **Technician** > **Opened - Unassigned**.
   The Interactions list opens.
2. Find the guest name under the **Opened for** column of the Interactions list.
3. Click the interaction **Number** associated with the guest.
4. Enter your name in the **Assigned to** field on the form, change the **State** to **Work in Progress**, and click **Update**.
   a. To close an interaction if the guest has left the queue, click **Abandon** in the form header or choose **Closed Abandoned** from the **State** form field and click **Update**
   b. Alternatively, you can associate the interaction with another record by clicking the **Associate Record** button in the interaction header.
5. To resolve the interaction, navigate to **Walk-up Experience** > **Technician** > **My Assigned Walk-ups**.
6. Click the interaction number from the list to open the Walk-up Interaction form.
7. Resolve the issue or fulfill the request.
   a. Change the interaction status to **On Hold** if the requester is not present for an appointment or if the interaction entails a lengthy process, for example, an OS upgrade.
   b. If you cannot resolve the issue or fulfill the request, click the **Create Case** related link to create a case.

   When you create a case, the associated related lists on the form populate. Related lists include the following details:
   - Cases for Interaction: Cases associated with the interaction
   - Cases by Same Caller: Cases created for a walk-up guest

   When you finish resolving the interaction, change the interaction **State** to **Closed Complete** and click **Update** to update the interaction. Alternatively, you can click **Close** to complete the interaction.
8. When you finish resolving the interaction, change the interaction **State** to **Closed Complete** and click **Update** to update the interaction.
   You can also click **Close** to complete the interaction.

View and manage Walk-up Experience appointments in Agent Workspace

Viewing upcoming scheduled CSM Walk-up Experience appointments provides technicians with an estimate of future queue demand and workload. Managers can view future appointments and adjust staffing at walk-up queue locations to best support demand.

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Before you begin
Role required: sn_csm_walkup.walkup_technician

About this task
Technicians and managers primarily use CSM Configurable Workspace for all Walk-up Experience related information, including viewing and managing scheduled appointments.

Note:
You can also view and manage scheduled appointments from the CSM Walk-up Experience in the application navigator, or left navigation bar.

Appointments are automatically routed to your CSM Configurable Workspace inbox based on availability. You can also view a list of scheduled appointments and choose which one to accept.

Upcoming appointments also display with a small calendar icon next to the user name on the onsite walk-up location queue wall monitor. The user with an appointment appears on the monitor a short time before the appointment is scheduled to begin.

Note:
Upcoming appointments are also displayed on the online check-in screen with the same calendar icon next to the user name.

Procedure
1. Open CSM Configurable Workspace.
2. Select **List** in the left navigation bar.
3. Under **Walk-up**, select **Appointments**.
   Walk-up appointments assigned to your queue are listed.
4. Select an appointment number to view details, such as the requester name, the interaction number and description, and the appointment time.

   a. To open the associated interaction to view details, select the Open record icon next to the interaction number.

   b. Select **Accept appointment** to begin working on the interaction.

      If necessary, you can assign the appointment to another agent and add work notes.

      If a significant amount of time has passed and the requester doesn't show up for the appointment, you can delete the appointment by selecting the More UI actions icon in the interaction header and choosing **Delete**.

   c. Select **Save** to save any changes you make to the appointment interaction.

View and manage Walk-up Experience appointments from the application navigator

Viewing upcoming scheduled Walk-up Experience appointments provides technicians with an estimate of future queue demand and workload. Managers can view future appointments and adjust staffing at walk-up queue locations to best support demand.

Before you begin
Role required: sn_csm_walkup.walkup_technician

About this task
Technicians and managers can view and manage scheduled walk-up appointments from Walk-up Experience in the application navigator, or left navigation bar.

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Note:
Primary access is through CSM Configurable Workspace for all Walk-up Experience related information, including scheduled appointments.

Upcoming appointments also display with a small calendar icon next to the user name on the onsite walk-up location queue wall monitor. The user with an appointment appears on the monitor a short time before the appointment is scheduled to begin.

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Technician** > **Scheduled Appointments**.
   All walk-up appointments scheduled for the upcoming 14 days display.
2. Click an appointment number to view details, such as the requester name, the interaction number and description, and the appointment time.

   a. If desired, to preview the associated interaction details, click the preview record icon next to the appointment number.

   b. To begin working on the interaction, click **Accept appointment** on the **Walk-up Appointment** form.

      If necessary, you can assign the appointment to an agent and add work notes.

      If a significant amount of time has passed and the requester does not show up for the appointment, you can delete the appointment by clicking **delete**.

   c. Click **Update** to save any changes you make to the interaction form.

Using Auto-Responder for case deflections

Deflect cases by automatically sending relevant content through the Auto-Responder feature after a customer contact or consumer creates a case.

Whenever a case is created, the Auto-Responder feature sends an email notification containing a list of relevant knowledge articles. The email notifications are sent to the case submitter and watchlist users associated with the case.

By default, the feature sends the email notification for customer service cases logged using emails by users with the snc_external role. Your administrator can also configure the feature for customer service cases logged using other communication channels such as web, phone, chat, social, community, alert, and virtual agent.

The knowledge articles in an Auto-Responder email notification are included based on contextual search results of the short description of the case. By default, the articles that a case submitter viewed in the last 30 days aren't included. Your administrator can configure the duration of last viewed content by using a scripted extension point. For more information, see Include advanced contextual search results in Auto-Responder notifications.

As a case submitter or watchlist user, you can determine whether you receive any Auto-Responder notifications by setting notification preferences. For more information, see Set Auto-Responder notification preferences.

Activation information

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml) and enable the **Enable auto-responder recommendations** property

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(*sn_customerservice.case.autoresponder.enable*). For more information, see Configure Auto-Responder notifications.

Close a case from a knowledge article recommended in an Auto-Responder notification

View knowledge articles included in the email notification sent by the Auto-Responder feature for a customer service case and close the case from within a helpful knowledge article.

Before you begin

Role required: snc_external role or watchlist users associated with the customer service case

Log in to your portal containing the case.

About this task

By default, the Auto-Responder feature sends knowledge articles as helpful content to solve a customer service case submitted using an email.

Procedure

1. Open the knowledge article link from the email notification sent by Auto-Responder.
2. Read the knowledge article to see whether it resolves a case.
3. If the knowledge article provides a solution, in the Related Case section of the article, click **Close Case**.
4. In the message window that appears, click **Close Case**.

Result

An information message about the case being closed appears. If any case was closed by using a knowledge article link accessed from an Auto-Responder email notification, a **View Case** button appears in that article. Click the button to view the details of the case that was closed.

Set Auto-Responder notification preferences

Set notification preferences for receiving Auto-Responder recommendations on customer service cases you submitted or for which you are on the watchlist.

Before you begin

Role required: snc_external role or watchlist users associated with the customer service case

Ensure that an administrator has configured the Auto-Responder feature. For more information, see Configure Auto-Responder notifications.

Procedure

1. Navigate to your portal page.
2. Click your username or photo in the portal header, and then click **Profile**.
3. On the User Profile page, scroll down to the Actions section, and click **Notification Preferences**.
4. On the Notification Preference window, select or clear the **Case auto-responder recommendations** check box to turn the Auto-Responder notifications on or off for you.

Using Omnichannel Callback for Customer Service Management

The ServiceNow® Omnichannel Callback for Customer Service Management app enables a callback option for customers when there's a long wait time for a live agent.

For more information, see Omnichannel Callback.

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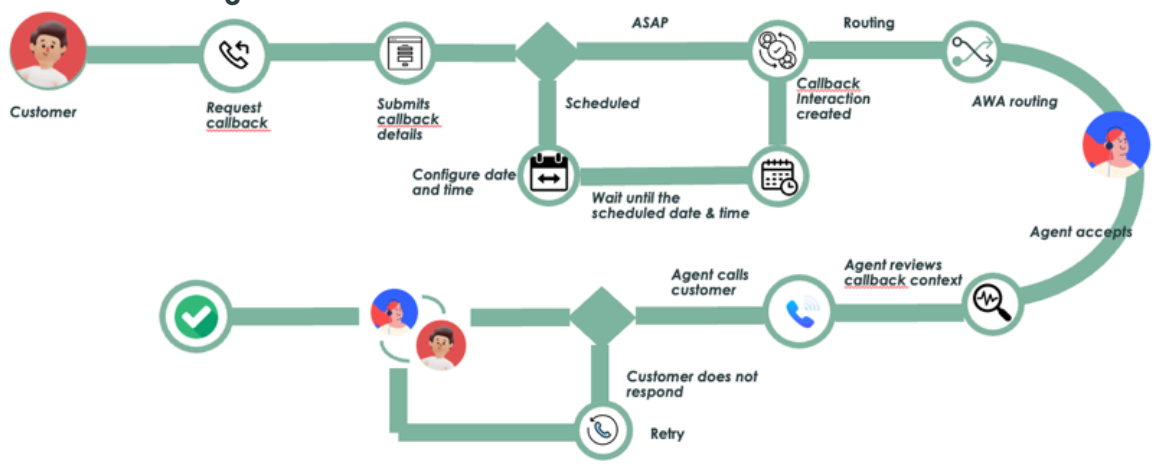
Callback flow

The callback workflow proceeds as follows:

1. Customers are presented with an option to request a callback when the estimated wait time to reach an agent is too long or when agents are unavailable.
2. The customer enters callback details such as name, contact details, and the reason for the callback.
3. Customers request a callback as soon as possible or at a specified date and time.
4. A callback interaction is created immediately for an immediate callback request or a minute before the selected time for a scheduled callback request.
5. The ServiceNow® Advanced Work Assignment (AWA) application determines the availability of agents and creates a callback work item for an available agent. AWA adds the callback task to the callback queue. The agent then receives a Callback notification in the workspace inbox.
6. The agent can choose to review the callback context such as knowledge base article views, searches, and Virtual Agent conversation before calling the customer.
7. The agent calls the customer.
   - If the customer accepts the call, the interaction is marked as complete when the call ends.
   - If the customer doesn't accept the call, the agent can retry the callback later.
8. The agent can decide to close the interaction or queue the callback again manually from the workspace.

Callback flow diagram



Callback requests

Immediate callback request

Customers can request a callback immediately. The customers are shown the average time that the agent will take to call back. This request prevents them from having to wait in the queue to connect with an agent.

Scheduling a callback request

Customers can request a callback by selecting the preferred date and time. The customer will receive a confirmation of the scheduled callback request via email.

Rescheduling a callback request

Customers can reschedule the callback request by choosing from a list of upcoming dates and times for callback requests.

Cancelling a callback request

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Customers can cancel scheduled callbacks from the self-service channel they requested the callback from.

Callback channels

Customers can request a callback during a chat on Virtual Agent or Engagement Messenger, or from Customer Service Portal. They can request either a phone callback or a video callback on Zoom. Video callbacks must be scheduled but phone callbacks can be requested immediately or scheduled.

Working with callback requests from an agent

Customers can request a callback from an agent when the wait time to reach an agent is too long or agents are unavailable.

Callback requests by customers

Customers can request a callback either as soon as possible or at a preferred date and time from one of the following channels:

- Virtual Agent
- Customer Service Portal
- Engagement Messenger

Customers can request an immediate callback on a voice channel such as phone or schedule a video callback over Zoom.

Callback requests for agents

The agents can perform the following actions:

- Review the context of the interaction such as knowledge base article views, search history, and the Virtual Agent conversation before calling the customer to become familiar with the context.
- Use the **Click-to-call** button to make a voice call to a customer either as soon as possible or at a scheduled date and time.
- Use the Zoom meeting URL to make a video call to a customer at a scheduled date and time.
- Retry the callback if the customer does not accept the call.
- Reroute the callback request to a different agent.

Working with callback requests using Virtual Agent

As a customer, you can request a callback from a customer service agent through a Virtual Agent conversation. You can request an immediate voice callback or schedule a voice or video callback that you can reschedule or cancel.

For more information about setting up Omnichannel Callback, refer to Configuring Omnichannel Callback

Request a callback from a Virtual Agent chat

Request an immediate voice callback or schedule a voice or video callback from a Virtual Agent chat on the ServiceNow portal.

Before you begin
Role required: none

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About this task
You can request an immediate callback only for a voice channel. Use the **Schedule for later** option to request a video call.

Procedure
1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`
2. Select the Chat icon ( ) to open the chat window and begin a Virtual Agent chat.
3. Select **Show me everything**.
4. Select **Request a callback**.
5. Enter your phone number and a reason for requesting the callback.
6. Select whether to receive an immediate voice callback from an agent or schedule a voice or video callback for later.

Result
- A callback request is created.
- The chat shows the details of the callback time, either the estimated time until the agent phones back or the scheduled date and time set for the phone or video call.
- A confirmation email is sent.

Reschedule a callback from a Virtual Agent chat

Reschedule a callback from a Virtual Agent chat on the ServiceNow portal.

Before you begin
Role required: none

About this task
Only logged-in users can reschedule callbacks.

Procedure
1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`
2. Select the chat icon ( ) to open the chat window and begin a Virtual Agent chat.
3. Select **Show me everything**.
4. Select **Reschedule a callback**.
5. Reschedule the upcoming callback request or a different request.
   - To reschedule the upcoming callback request, select **Yes**.
   - To reschedule a different request, select it from the list of requests.
6. Choose a date and time from the calendar and click **Schedule**.
   The date and time slots indicate the agent's availability.

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Result
The request is rescheduled.

A confirmation message is displayed in the chat.

A confirmation email is sent.

Cancel a callback from a Virtual Agent chat

Cancel a callback from a Virtual Agent chat on the ServiceNow portal.

Before you begin
Role required: none

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`

2. Select the chat icon ( ) to open the chat window and begin a Virtual Agent chat.
3. Select **Show me everything**.
4. Select **Cancel a callback**.
5. Cancel the upcoming callback request or a different request.
   - To cancel the upcoming callback request, select **Yes**.
   - To cancel a different request, select it from the list of requests.
6. Confirm the cancellation in the confirmation message.

Result

- The callback request is canceled.
- The chat shows the details of the canceled callback request.
- A confirmation email is sent.

Working with callback requests using the Customer Service Portal

As a customer, you can request a callback from a customer service agent using the Customer Service Portal. You can request an immediate callback or schedule a voice or video callback that you can reschedule or cancel.

Request a callback using the Customer Service or Consumer Service Portal

Request an immediate voice callback or schedule a voice or video callback from an agent using the Customer or Consumer Service Portal.

Before you begin
Role required: sn_customerservice.customer, sn_customerservice.consumer

About this task
You can request an immediate callback only for a voice channel. Use the **Call me later** option to request a video call.

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Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`
2. Select **My Lists** in the portal header and then select **My cases**.
3. Select the case for which you need support.
4. In the **Actions** section, select **Request callback**.
5. In the Request a callback pop-up window, enter your name, phone number, issue type, and description.
6. Select whether to receive an immediate voice callback from an agent or schedule a voice or video callback for later.
7. Select **Submit**.

Result

- A callback request is created.
- The details of the callback request are available in the Callback tab.
- A confirmation email is sent.

Reschedule a callback using the Customer Service or Consumer Service Portal

Reschedule a callback from an agent using the Customer or Consumer Service Portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

About this task

You can reschedule a callback request to receive a phone or video call from an agent.

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`
2. Select **My Lists** in the portal header and then select **My cases**.
3. Select the case for which you need support.
4. In the **Callbacks** tab, select the callback request that you want to reschedule.
5. Select **Reschedule**.
6. Choose a date and time from the calendar.
   The date and time slots indicate the agent's availability.
7. Select **Submit**.

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Result

- The callback request is rescheduled.
- The pop-up window shows the details of the rescheduled callback.
- A confirmation email is sent.

Cancel a callback using the Customer Service or Consumer Service Portal

Cancel a callback from an agent using the Customer or Consumer Service Portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`
2. Select **My Lists** in the portal header and then select **My cases**.
3. Select the case for which you need support.
4. In the **Callbacks** tab, select the callback request that you want to cancel.
5. Select **Cancel**.
6. Confirm the cancellation in the confirmation message.

Result

- The callback request is canceled.
- The details of the canceled callback request are available in the **Callbacks** tab.
- A confirmation email is sent.

Working with callback requests using Engagement Messenger

As a customer, you can request a callback from a customer service agent using Engagement Messenger. You can request an immediate callback or schedule a voice or video callback that you can reschedule or cancel.

Request a callback using Engagement Messenger

Request an immediate voice callback or schedule a voice or video callback from an agent using Engagement Messenger.

Before you begin

Role required: none

About this task

You can request an immediate callback only over a voice channel. Use the **Call me later** option to request a video call.

Procedure

1. In Engagement Messenger, select the **Request a callback** card.
2. In the Callback requests page, select **Request a callback**.
3. Enter your name, phone number, issue type, and description.

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4. Select whether to receive an immediate voice callback from an agent or schedule a voice or video callback for later.

5. Select **Submit**.

Result

- A callback request is created.
- A confirmation email is sent.

Reschedule a callback using Engagement Messenger

Reschedule a callback from an agent using Engagement Messenger.

Before you begin

Role required: none

Procedure

1. In Engagement Messenger, select the **Request a callback** card.
2. In the Callback requests page, select the callback request that you want to reschedule.
3. Select **Reschedule**.
4. Choose a date and time from the calendar.
   The date and time slots indicate the agent's availability.
5. Select **Submit**.

Result

- The callback request is rescheduled.
- A confirmation email is sent.

Cancel a callback using Engagement Messenger

Cancel a callback from an agent using Engagement Messenger.

Before you begin

Role required: none

Procedure

1. In Engagement Messenger, select the **Request a callback** card.
2. In the Callback requests page, select the callback request that you want to cancel.
3. Select **Cancel** .
4. Confirm the cancellation in the confirmation message.

Result

- A callback request is canceled.
- A confirmation email is sent.

Address a callback request from a customer

As a customer service agent, call a customer back either immediately or at the date and time requested by the customer.

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Before you begin
Role required: sn_customerservice_agent

About this task
Depending on the type of request, you can call the customer on the phone or over Zoom.

If the callback is requested from the Customer Service or Customer Service Portal, you can look into the customer's issue by going through the chat, related cases, knowledge base searches, and history to become familiar with the context before making the call.

Procedure
1. Open your workspace.
2. When an interaction request comes in, accept it from your inbox.
   The interaction card shows the following information:
   - The type of callback and interaction number
   - The name of the customer
   - The type of issue
3. Call the customer back on the requested channel.
   If the customer doesn't accept the call:
   - Retry the callback later by clicking **Re-attempt Callback**.

     The number of retry attempts is updated.
   - If necessary, assign the callback task to another agent by selecting **Requeue Callback** from the **More actions** menu.
4. End the call.
   - The state of interaction changes to **Close complete**.
   - If you have the notify_view role, you can see the video meeting participants in the **Video participants** tab.
   - The meeting recording and transcript are attached to the interaction. The inserted transcripts are not sentiment analyzed.
5. If the issue is resolved, close the callback task by selecting **Close Callback**.

Using Email Interaction for Customer Service Management

Email Interaction for CSM application enables agents to create interactions from customer emails, helping them resolve simple customer queries through these interactions. They can create a case from an interaction when further investigation is needed for resolving the customer query. This process provides clarity of the effort needed for customer query intake and actual investigation needed for query resolution.

The Email Interaction for CSM application offers several key benefits:

- Streamlines operations by helping to prevent the creation of duplicate or unnecessary cases.
- Consistent experience for agents across channels by modeling emails also as an interaction, such as voice, chat, and messaging channels.
- Clarity of effort needed for customer problem intake, represented by interactions.
- Clarity of effort needed for investigation and resolution, represented by cases.

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Routing and assigning an email interaction to agents

Route and assign email interactions to the appropriate agents based on predefined rules and criteria.

When agents accept email interactions routed by Advanced Work Assignment (AWA), the interaction state changes from New to Work in progress and it's assigned to the agent.

For information on the configuration required to route and assign email interactions, see Configure Advanced Work Assignment route email interactions.

Alternatively, agents can assign the email interactions manually.

Assign an interaction manually

Manually assign an interaction that is in the New state to yourself or another agent.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or sn_customerservice.consumer_agent

About this task

The **Assign to me** button is only visible if the interaction is in the New state and the **Assigned to** field is empty.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. From the Interactions section, select **My Interactions**.
4. Open an interaction.
5. Assign the interaction in one of the following ways.

Using the email interaction page

The email interaction page enables agents to view incoming and outgoing emails, attachments, work notes, and other related information in one location. Agents can review and respond to emails efficiently, helping resolve customer inquiries in a timely manner.

The email interaction page consists of various sections.

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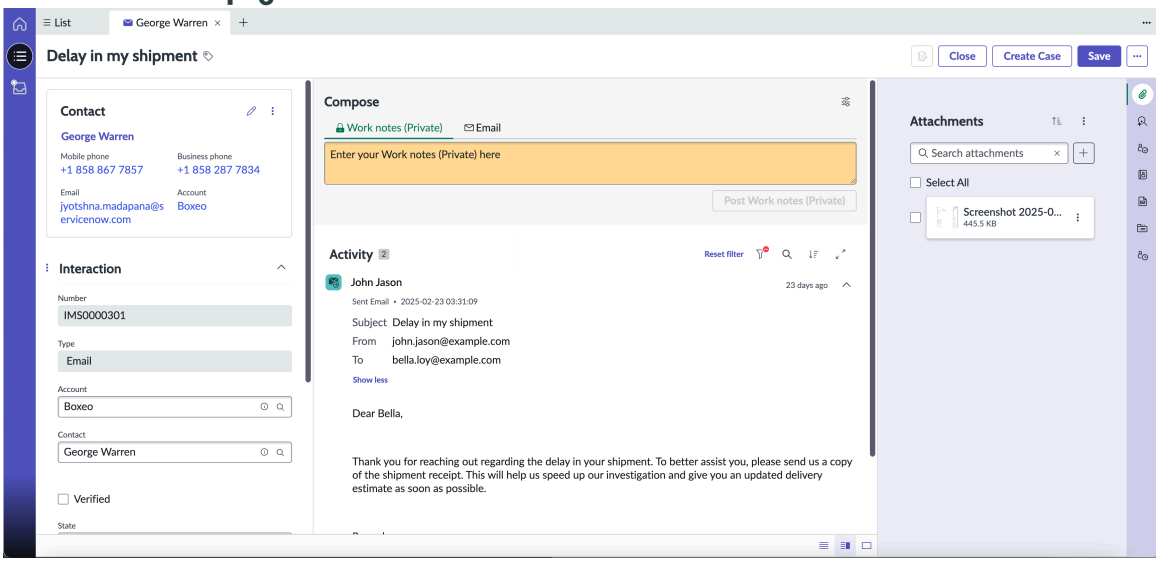
Email interaction page



Key features of the email interaction page:

- Manage and send email responses to customers from a single location.
- Simplified filters to keep the focus on email communication.
- View the email conversation between the customer and the agent in the Activity stream that provides complete context.

The email interaction page consists of sections such as Contact, Interaction form, Compose and Activity stream, and the contextual side panel. For more information, see Email interaction sections.

Note:
Agents can use the Contact component to do the following:

- Search for a contact.
- Add a contact.
- Edit and save a linked contact record.
- View a contact.

Engaging with the customer using email interaction

Engaging with customers through email interaction involves verifying customer details as well as creating and updating consumer or contact records. It also includes viewing past emails in the **Activity** stream. Agents can compose email responses using email and response templates, add internal work notes, and track activity history for better context.

Agents are notified of email responses received from customers in the **Ongoing** tab ( ) on the agent workspace. This feature enables agents to view and respond to customer inquiries.

For more information, see View notifications on email response.

Verify a contact, consumer, or guest user

Look up users and manage their information. As an agent, you can find the consumer and contact information from an interaction record, review and verify the information, and then update the interaction record. If the customer is a guest user without an existing consumer or contact record, you can create a record by capturing necessary information.

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Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, or admin

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. In the contextual side panel, select the Consumer Verify icon ( ) or the Contact Verify icon ( ).

   Note:
   For more information, see Lookup and verify.

6. Search for a consumer or contact by entering the person's name, phone number, email address, or record number.
7. Select the desired result from the list.
   This action displays information about the selected consumer or contact in a verification card.
8. Confirm the selected consumer or contact by selecting **Verify**.
   When you perform this action, the following occurs:
   - The **Account** and either **Consumer** or **Contact** fields are populated on the interaction record.
   - The **Verified** check box is enabled.
9. Select **Save** to save the interaction record and refresh the related lists.

Create a consumer or contact record

Create a consumer or contact from the Lookup and Verify feature in the contextual side panel.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, or admin

About this task

As an agent, you can use the Lookup and Verify feature to search for consumers and contacts. After verifying a customer's information, you can populate that information on the interaction record.

If you can't find a consumer or contact or if the customer is a guest, you can create a record for that customer using the feature.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.

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5. In the contextual side panel, select the Consumer Verify icon ( ) or the Contact Verify icon ( ).
6. Enter name, phone number, email address, or record number to search for a consumer or contact.
7. If you can't locate the consumer or contact and choose to create a record, select **Create Consumer** or **Create Contact**.
   The system displays the Create Consumer or Create Contact form in the contextual side panel.
8. Add information to the fields on the form and select#**Create**.

Result

The system performs these actions:

- Saves the consumer or contact record.
- Creates and displays the consumer or contact card.
- Adds the information to the interaction record.

Create a customer contact

Use the Contact card on the email interaction page to create a customer contact and add the customer contact into the interaction record.

Before you begin

Role required: sn_customerservice_agent, workspace_admin, or admin

About this task

Agents can use the contact lookup component to search for contacts. If an agent can't find a contact or if the customer is a guest, the agent can create a record for that customer from the contact lookup component.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. On the Lists section, in the Interactions section, select **My Interactions**.
4. In the My Interactions page, select an email interaction.
5. In the Contact card section, select the Create new icon ( ).
6. On the Contact form, fill in the fields.
   For a description of the field values, see Contact form for Email Interaction for CSM.
7. Select **Save**.

Result

The system performs these actions:

- Saves the contact record.
- Creates and displays the contact card.
- Adds the information to the interaction record.

Using Activity stream in an email interaction

View an email conversation between an agent and a customer in the Activity stream of the email interaction. The Activity stream enables agents to communicate with customers and make

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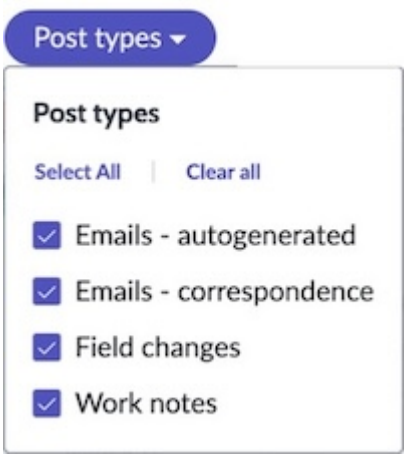
internal notes about the work done on an interaction. The Activity stream updates when an email is sent or received, or when a work note is posted.

Agents can perform the email interaction related tasks in the Activity stream.

Role required: sn_customerservice_agent or sn_customerservice.consumer_agent.

Actions agents can perform in the Activity stream

Task	Description
View emails, work notes, and field changes associated with the email interaction	The activity in the interaction shows emails and work notes by default.
Add work notes	In the Compose section: **1.** Select Work notes. **2.** Add the information to the text field. **3.** Select **Post Work Notes**. The post is added to the Activity stream.
Compose emails	Send emails from the Activity stream without leaving the interaction view. In the Compose section: **1.** Select the **Email** tab. An email draft opens. **2.** Compose your email. **3.** Select#**Send Email**. The email is added to the Activity section.
Filter posts	Select the filter icon ( ) at the top of the Activity section to display the filter options: • Post types: Select the types of posts to view, such as emails, work notes, or field changes. 

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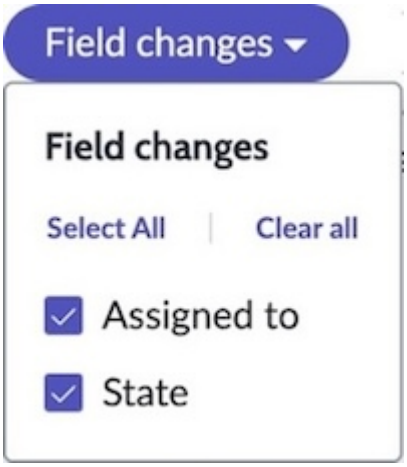
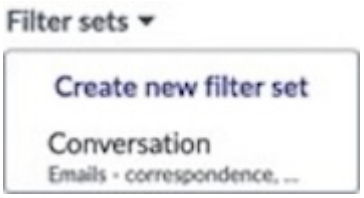
Actions agents can perform in the Activity stream (continued)

Task	Description
	• Field changes: Select specific fields to view information in posts for only those fields.  • Flagged: View posts that have been flagged as important. • Filter sets: Select a filter set to filter the items based on the defined criteria or select **Create Filter** to create a filter. 
Search	Select the search icon ( ) to search for a message.
Sort posts	Select the Sort icon ( ) to sort posts from newest to oldest or oldest to newest.
Expand and collapse posts	Select the Expand all activity post icon ( ) to view additional details in posts or select the Collapse all activity post icon ( ) to go back to the previous state.

Compose an email or a work note

Use the Compose section in the email interaction to draft emails, create internal work notes, or draft email responses using response templates.

Compose an email response

Use the compose section to draft an email response to customers, addressing their inquiry or providing the necessary information.

Before you begin

Role required: sn_customerservice_agent

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Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. In the Compose section, select **Email**.
   The **To** and **Subject** fields are auto-populated with the relevant details.
6. Enter the email content.

> **Note:**
>
> Selecting the More Actions icon ( ) in the Email section displays the email activity history, enabling you to view past emails related to the email interaction. Additionally, you can share links to public articles in the email message.

7. Select **Send Email**.

Result

As an agent, you have successfully drafted a suitable email response to the customer.

Use a response template to compose an email or a work note

Use response templates to access predefined messages and compose emails. Agents can copy content from a template and add it to an email to save time.

Before you begin

Role required: sn_customerservice_agent with the sn_templated_snip.template_snippet_reader role

About this task

The contextual side panel provides access to response templates that can help you efficiently compose an email response. Selecting the Response Template icon ( ) shows reusable messages that you can copy and paste into emails.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. In the contextual side panel, select the Response Template icon ( ).
6. In the Response Templates side panel, search for a template.
7. Select a template and then select **Copy to clipboard**.
8. Paste the template text into the **Work notes** field or the **Email** field.

Compose a work note for internal use

Compose a work note to document important information for internal reference. The information should be clear, concise, and relevant. This work note isn't shared with customers.

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Before you begin
Role required: sn_customerservice_agent

About this task
The work note is visible exclusively to the agent and remains private from the customer.

Procedure
1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. In the Compose section, select **Work notes**.
6. Enter the relevant content.
7. Select **Post Work notes**.

Result
The work note is posted on the **Activity** stream of the email interaction.

View notifications on email response

View notifications on email responses that are received from the customer in the ongoing email conversation.

Before you begin
Role required: sn_customerservice_agent, or sn_customerservice_manager

Procedure
1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the ongoing tab icon ( ).
   A list of ongoing email interactions is displayed.
3. Select the relevant email interaction.

Result
The interaction record displays the latest email responses.

Close an email interaction

Close the email interaction after the customer accepts the resolution. The email interaction also automatically closes due to customer inactivity.

Close an email interaction after the customer accepts a resolution

Close an email interaction after receiving the customer's confirmation of the resolution.

Before you begin
Role required: sn_customerservice_agent, or sn_customerservice_manager

Procedure
1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.

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4. Open an email interaction.
5. Select **Close**.

Result
The email interaction is closed and marked as Closed Complete.

Closing an email interaction due to customer inactivity

An email interaction gets closed automatically when there's no response from the customer within a certain period. By default, the period of inactivity is set to a value of five days.

If a consumer, contact, or guest user doesn't respond within five days, the email interaction automatically closes. Any subsequent email from the customer creates an email interaction. For more information on configuring the inactivity period property, see System properties for configuring Email Interaction.

When a customer replies on top of a closed email interaction, a new email interaction is created and linked to the closed interaction.

Creating a case from an email interaction

Create a case from an inbound email interaction when the customer query requires further investigation. The case and interaction are linked to each other. All communication and case details are easily accessible for more efficient resolutions.

After a case is created from an email interaction, the email interaction is automatically closed.

When a case is created, sending an email to the customer creates an outbound interaction. This outbound email interaction is for reporting purposes only, and no emails are linked to it.

Closing the case also closes the outbound interaction.

Create a case

Create a case from an inbound email interaction to make sure that issues are addressed and routed for resolution.

Before you begin
Role required: sn_customerservice.consumer_agent, or sn_customerservice_manager

About this task
When you create a case from an inbound interaction, the system links the interaction to the case. All future communication related to the case is stored within the case.

Procedure
1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. Select **Create case**.
   The system opens a new case form, automatically filling the Contact or Consumer field and setting the channel to Email. The system then populates the Short Description with the email subject.
6. Enter the case details.
7. Select **Save**.

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Result
The process generates a case from an email, linking them for future communication. For more information, see Accessing associated cases and interaction emails.

Associate an existing case with an email interaction

Avoid duplicate case creation by associating an existing case with an email interaction.

Before you begin
Role required: sn_customerservice_agent or sn_customerservice_manager

Procedure
1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. From the top section, select the More Actions icon ( ).
6. Select **Associate Record**.
   The **Create New Interaction Related Record** tab is displayed.
7. Select the case number from the Task drop-down list.
   You can select the search icon ( ) to view additional information about the task.
8. Select **Save**.

Result
The email interaction has been linked to an existing case and displays in the Related Tasks section.

Accessing associated cases and interaction emails

Access the associated case from the email interaction and vice versa. From the email interaction, agents can view the linked case for additional context. While from the case, they can access all related email interactions. This smooth navigation helps agents manage customer issues more effectively.

Access a case from an email interaction

View the linked case to get additional context on the email interaction.

Before you begin
Role required: sn_customerservice_agent or sn_customerservice_manager

Procedure
1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. From the contextual side panel, select **Related Lists**.
6. From the Related lists section, select **Related Tasks**.

Result
All cases associated with an email interaction and their details are displayed.

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Access an email interaction from a case

View the linked email interaction to access all information related to the case.

Before you begin
Role required: sn_customerservice_agent or sn_customerservice_manager

Procedure
1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. From the Cases section, select **My Cases**.
4. Open a case.
5. Select the **Interactions** tab.

Result
All email interactions associated with the case and their details are shown.

Using the Customer Service Portal

Search for information about a question or an issue, or request assistance from a customer service agent.

Your Customer Service Management Service Portal activity usually begins on the homepage. Organizations usually customize their landing pages, and logged-in users often see different information than users who are not logged in.

Note:
If any active outages exist for your install base, they are displayed on the homepage.

Note:
A new customer service portal experience is available on the business portal. For details, see Using the Business Portal.

From the Customer Service Portal homepage, you can access and use the following features:

Customer Service Portal homepage for logged-in users

UI component	Description
Knowledge	Clicking **Knowledge** on the header or the main page takes you to the Knowledge homepage. You can search the knowledge base or view a list of top-rated or most viewed knowledge base articles.
Requests	Displays all your requests. You can also request items and services from the catalog.
My Lists	Lists all your cases.
Case	Provides access to all cases and quick links to create a product or order case.
Support	Navigate to appointments, contacts, work orders, install base, and other quick links. The list view of the Install Base items provide details related to customers like account and contact.

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Customer Service Portal homepage for logged-in users (continued)

UI component	Description
Notification	Displays notifications sent for resolved cases, cases awaiting information, publications, and approvals.
Tours	View a tour for additional guidance on how the Customer Service Management application works. Your administrator determines whether tours appear on pages.
Live Chat	Click **Live Chat** to chat with a virtual agent or a customer service agent.
Callback request	Request a callback when the wait time to reach agents is long or agents are unavailable.
Profile menu	Click your profile photo to either view your profile or log out.
Search	Enables you to search. Either enter a keyword to use the type-ahead search or enter one or more words to view all search results.
Ask the Community	Provides access to the Community homepage where you can ask questions and get answers fast, connect with people who share similar expertise, and join forums and participate in discussions.
Get help	Click **Get help** to make a request or report a problem by opening a case.
Request something	Request items and services from the catalog.
Most viewed articles	View a list of the most viewed articles.
Featured articles	View featured Community content.
Most useful articles	View the most useful knowledge articles based on the usage count of the articles.
The following components are available if you have installed the Communities application:	
Recent solved discussion	View a list of recently solved discussions.
Recent community blog	View a list of recently published community blogs.
Community featured content	View a list of featured community content.

Note:
You can view the metadata for each entry in the widgets, such as the number of views, number of days from the time the article or feature was published, and rating for the article.

Manage contacts from the customer portal

Create and update customer contacts, assign roles to contacts, and enable or disable contact logins from the customer portal.

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Create a customer contact

Use the **Create Contact** catalog item to create a contact from the customer portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

About this task

By selecting the **Create Contact** catalog item, you can add the details for a contact and create the contact record. After saving the record, you can perform the following actions depending on your role.

- Users with the sn_customerservice.customer_admin or sn_customerservice.partner_admin can update the contact's user ID and enable or disable notifications.
- Users with the admin role can set a password for the contact and require the contact to reset their password.

Note:
These actions are available while you are creating the contact record.

Procedure

1. Click **Requests** > **Request Something** in the portal header.
2. In the Categories list, click **Services** and then click the **Create Contact** catalog item to display the Create Contact form.
3. Fill in the fields on the Create Contact form.

Contact form

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The customer's job title.
Language	The customer's preferred language.
Account	The customer's account.
Email	The customer's email address.
Business phone	The customer's business phone.
Mobile phone	The customer's mobile phone.

4. Click **Submit**.
   The system creates the contact and updates the Contact form.
5. **Optional:** Update the information in the following fields.

Additional Contact fields

Field	Description
Notification	Enable or disable notifications for this customer.

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Field	Description
User ID	A unique identifier for this user. The user ID should follow this format: *firstname.lastname*

6. **Optional:** With the admin role, you can update password information for the contact.

Contact password information

Field	Description
Password	Set a password for the contact.
Password needs reset	Requires the contact to reset their password when they log in to the portal.

7. Click **Save** to update the record.

Update contact information for a user

Update the contact information for a user from the customer portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

Procedure

1. Click **Support** > **Contacts** in the portal header.
2. Select a contact from the Contacts list.
3. Make the desired changes to the fields on the Contact form.

Contact form

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The customer's job title.
Language	The customer's preferred language.
Time zone	The time zone for this customer's location.
Account	The customer's account.
Email	The customer's email address
Business phone	The customer's business phone.
Mobile phone	The customer's mobile phone.
Notification	Enable or disable notifications for this customer.

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Field	Description
User ID	A unique identifier for this user. The user ID should follow the format *`firstname.lastname`*.

4. Click **Save**.

Enable or disable the login for a contact

Enable or disable the login for a contact from the customer portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

Procedure

1. Select **Support** > **Contacts** in the portal header.
2. Select a contact from the Contacts list.
3. In the Actions list, select one of the following links.

Assign a user role to a contact

Assign one or more user roles to a contact from the customer portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

About this task

Use the Edit Role pop-up window to manage the roles for a contact. Contacts must have at least one assigned user role. If there are no roles in the **Selected** column on the pop-up window, you cannot update the record.

Note:
The roles available in the Edit Role pop-up window are configured using the **sn_customerservice.contact_role_assignment** property.

Procedure

1. Click **Support** > **Contacts** in the portal header.
2. Select a contact from the Contacts list.
3. In the Actions list, click the **Edit Roles** link.
4. In the Edit Role pop-up window, select a role in the **Available** column and move it to the **Selected** column.
5. Click **Update** on the Edit Role pop-up window.

   Note:
   If there are no roles in the **Selected** column, the system displays an error message and the column resets to display the originally assigned roles.

6. Click **Save** on the Contact form.

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Manage customer registration requests

Users with the customer administrator role can approve or reject registration requests that customers submit from the Customer Service Portal.

Approve a registration request with a valid registration code

Approve a registration request from a user that was submitted from the Customer Service Portal with a valid registration code.

Before you begin

Role required: sn_customerservice.customer_admin

Procedure

1. Navigate to the customer portal.
2. Click **Approvals**.
   The Approvals list displays registration requests with these states: **Requested** and **No Longer Required**.
3. Click a request in the Approvals list with a state of **Requested**.
4. If desired, add any **Comments** to this request.
5. Click **Approve**.
   A user account is created and an email is sent to the contact's email address with a user ID and temporary password. The user is also assigned these roles: sn_esm_user and snc_external.

Approve a registration request with an invalid registration code

Approve a registration request from a user that was submitted from the Customer Service Portal with an invalid registration code.

Before you begin

Role required: sn_customerservice.customer_admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Pending Registration Requests**.
2. Select a registration request with a state of **Pending**.
3. Select an **Account** for the requester.
4. Click **Update**.
   The registration request is sent to the customer administrator of the assigned account.

Reject a registration request

Reject a registration request from a user that was submitted from the Customer Service Portal.

Before you begin

Role required: sn_customerservice.customer_admin

Procedure

1. Navigate to the customer portal.
2. Click **My Approvals**.
3. Click a request in the Approvals list with a state of **Requested**.

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4. Click **Reject**.
   An email regarding the rejection is sent to the requestor's email address.

Assign a contact to an asset from the customer portal

Users with the customer administrator role can assign contacts to an asset from the customer portal.

Before you begin
Role required: sn_customerservice.customer_admin

Procedure

1. Log in to the customer portal.
2. Select **Support** > **Assets** from the portal header menu.
3. Select the desired asset.
4. Select **New** in the **Asset Contacts** related list.
   A new Asset Contact form displays. The **Asset** field displays the selected asset and is read-only.
5. Select a **Contact**.
   The contacts available for selection are the contacts from the asset's account.
6. Select **Submit**.
   The contact is added to the **Asset Contacts** related list.

Search for information using the customer portal

Use the search feature on the customer portal to find information about a question or an issue.

Before you begin
Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task
The portal has a search feature that you can use to search for information across several repositories. Enter a search term in the **Search** field and then click **Search** to display a list of related articles.

Procedure

1. Enter a search term into the **Search** field.
2. Click **Search**.
   A list of articles related to the search term is displayed.
3. Click a link to view an article.

Search the knowledge base

Use the customer portal to search the knowledge base or view a list of popular knowledge base articles.

Before you begin
Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

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About this task

The customer service portal includes a link to the knowledge base that you can use to search for information, read and rate articles, and submit feedback. Under this link, the portal displays a list of popular knowledge base articles. If the information that you need is not included in this list, you can search the knowledge base for the desired information.

Procedure

1. Navigate to the customer service portal.
2. Click **Knowledge**.
   The knowledge page displays a separate category for each of the products purchased by this customer. It also displays lists of articles by:
   - Featured content
   - Most useful
   - Most viewed
3. Do one of the following,

Option	Description
Click a product to display more specific in formation	Displays a list of categories on the left and arti cles on the right. Click a category to drill down even further.
Click a link from one of the lists	Displays the article.
Type a topic in the Search field and press the Enter key	Displays a list of related articles. Click a link to display the desired article.

Search the customer service community

Use the customer service portal to search the community site or view a list of recent discussion topics.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

Procedure

1. Navigate to the customer service portal.
2. Click **Ask the Community**.
   This brings up the Ask a Question page.
3. Enter a question in the **Title** field.
4. Select a knowledge base in the **Knowledge Base** field.
5. If desired, select a category in the **Category** field.
6. If desired, add one or more tags to your question in the **Tags** field.
7. Click **Post Question**.
   The question appears on the search results page under the **Questions** category.

Deflect cases with knowledge and community content

Enable customers to search for information from the knowledge base and community and find solutions to their issues.

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Before you begin
Role required: sn_customerservice_customer or sn_customerservice_consumer

About this task
The Service Portal Case form displays contextual search results based on text entered in the Subject field. These search results provide targeted solutions to customers. Customers can search for information that is related to a case when opening a case. If the search results in any related content, the customer can preview the content.

Note:
By default, search results include knowledge articles, solved community questions and blogs, and pinned articles.

Procedure
1. Navigate to the Customer Service Management Service Portal and then **All** > **Support** > **New Cases**.
2. Click **Product Case** or **Order Case**.
3. Start typing in the **Subject** field.

   If there are any search results that match, they are displayed in the **Related Search Results** widget.

   Note:
   If embedded search has been enabled, the results are displayed inline in the Case form in a **Knowledge results** section and are read-only.

4. Perform one of the following actions.
   - Click one of the content links in the **Related Search Results** widget to enter the content directly.
   - Click one of the content links in the embedded **Knowledge results** section to open the content inline as read-only.
5. **Optional:** Click **This helped** to mark the content as helpful for resolving the associated case.
6. Click **Submit**.

View asset information from the Customer Service Portal

View a list of assets for the current user's account.

Before you begin
Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

Procedure
1. Click **Support** > **Assets** in the portal header.
   This displays a list of assets that belong to the current user's account, including the name and serial number of the asset and the product model category and account to which it belongs.
2. Click one of the following to view more information.

Option	Description
Display name	Displays the asset information.
Account	Displays the account information.

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Option	Description
Model category	Displays the product model information for this asset.

3. Click the Back button to return to the list of assets.

View or update customer contact information

View or update your contact information from the customer portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

Procedure

1. Navigate to the customer portal.
2. Select **support** > **Contact**.
3. Select the required contact.
4. Make any desired changes to the fields on the Contact form.

Contact form

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The customer's job title.
Language	The customer's preferred language.
Time zone	The time zone for this customer's location.
Account	The customer's account.
Email	The customer's email address
Business phone	The customer's business phone.
Mobile phone	The customer's mobile phone.
Notification	Enable or disable notifications for this customer.
User ID	A unique identifier for this user. The user ID should follow the format *`firstname.lastname`*.

5. Select **Save**.

Customer notification preferences

Customers can set preferences for email notifications.

Email notification preferences are set to control email notifications that are sent to the customer when an agent performs one of the following case activities:

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- Opens a case for a customer
- Comments on a customer's case
- Provides a resolution for a customer's case
- Closes a customer's case

Set email notification preferences

Customers can set preferences for email notifications that are sent when customer service agents perform different actions on cases.

Before you begin

Ensure that you have received at least one email for the case to set the email notification preferences.

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

Procedure

1. Navigate to the customer service portal.
2. Click your user name or photo in the portal header to display your user profile information.
3. Click the **Notification Preferences** related link to display the Notification Preferences form.

   Note:
   The **Notification Preferences** link is available only after receiving the first email for the case.

4. Enable or disable the following email notifications for your primary email address.
   The notifications are available based on the actions performed by customer service agents on the case.
   - Case closed for customer
   - Case commented for customer
   - Case escalated for customer
   - Case assigned to a new group
   - Case opened for customer
   - Case resolved for customer

Change your password directly from the Customer Service Portal

Change your password directly from the Customer Service Portal. Users with the required roles can change their passwords from the Customer Service Portal.

Before you begin

Role required: none

About this task

Users with the required roles can change their passwords from the Customer Service Portal.

Procedure

1. Go to the Customer Service Portal page by accessing your instance URL and adding a /csm suffix.
   For example, https://example.com/csm.

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2. Click your user name in the portal header.
3. Click **Profile** to display the user profile information.
4. Click **Change Password** under **Security**.
5. On the form, fill in the fields.

Change Password form

Field	Description
Current Password	The current password. This field is automatically filled in.
New Password	The new password, which must meet the following requirements: ○ Be a minimum of eight characters long ○ Include at least one uppercase and one lowercase letter ○ Include at least one number
Confirm Password	The new password.

6. Click **Change**.

Customer contact self-registration

The self-registration feature enables new customer contacts to submit registration requests through the customer portal.

A customer contact can submit a registration request using a valid registration code. The request is then sent to the customer administrator of that account for approval. For details, see Approve a change request, or registration request.

If an account has multiple customer administrators, they all receive the registration request, but only one approval is necessary.

The request is either accepted or rejected. If accepted, a new account is created, and the customer contact gets an email with a user ID and a temporary password. When logging in to the portal for the first time, the customer contact needs to change the temporary password. If rejected, the customer contact gets an email notification.

Note:
If a request is submitted with an incorrect registration code, a notification message appears `Invalid Registration Code`.

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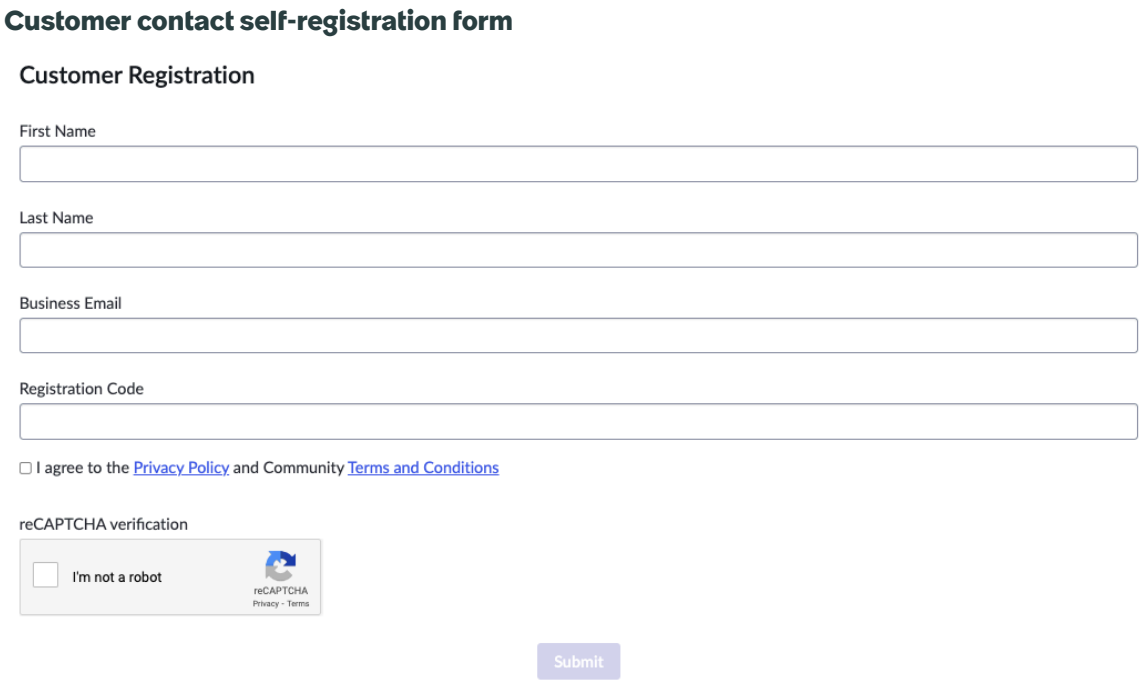

The administrator creates a unique registration code for each account and stores it in the **Registration Code** field on the Account form. After the code is created, customer administrators can distribute the code to customers as needed.

Related topics

Example: The default self-service Password Reset process

Submit a self-registration request

Submit a registration request from the Customer Service Portal.

Before you begin

Role required: none

Procedure

1. Navigate to the customer portal login page.
2. Request a login by selecting **Register** from the portal header.
3. Fill in your **First Name**, **Last Name**, **Business Email**, and **Registration Code**.
4. Enable the check box to agree to the privacy policy and to the community terms and conditions.
   Select the links to access more information about these policies.
5. Enable the Security Code check box, complete the CAPTCHA validation, and select **Verify**.
   The Customer Service application uses the Google re-CAPTCHA service.
6. Select **Submit**.
   You're returned to the portal login page.

   If you entered a valid registration code, you see this message: "Your request has been submitted and is pending review. You receive an email when your request is processed".

   If the code was incorrect, you see this message: "Incorrect Registration Code".

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Request a password reset

If you forget your password, you can request a new password from the customer portal login screen.

Before you begin
Role required: none

Procedure

1. Navigate to the customer portal login page.
2. Click the **reset your password here** link.
3. Enter your **User name** and **Email address**.
4. Click **Reset Password**.
5. Create a new password before continuing.
6. Enter the new password in the **Password** field.
7. Enter the new password again in the **Validate Password** field.
8. Click **Submit**.

Log in to the Customer Service Portal for the first time

After a registration request is approved, the customer contact receives an email with a user ID and temporary password. When logging in for the first time, the contact is asked to change the password.

Before you begin
Role required: none

Procedure

1. Navigate to the Customer Service Portal login page.
2. Enter your user ID in the **User name**.
3. Enter your temporary password in the **Password** field.
4. Select **Login**.
   You're prompted to change your password.
5. Enter your temporary password in the **Current Password** field.
6. Enter your new password in the **New Password** field.
7. Reenter your new password in the **Confirm New Password** field.
8. Select **Submit**.

View product information from the Customer Service Portal

View a list of products to track the products or services sold to your account and manage your services using service catalogs.

Before you begin
Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task
You can view a list of products or services that have been sold to your account. You can also view any cases created on the product and all active contracts and entitlements for the product.

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Note:
When the Customer Data Models for B2B2C plugin installed, contacts are able to access the list of sold products belonging to account consumers.

An entitlement is active if:

- Its end date is not in the past or it has no end date.
- The contract it is linked to is also active.

A contract is active if:

- Its state is set to active
- It is linked to a product with an active entitlement.

You can modify the **Active Entitlements** widget to define your own filters for active entitlements.

If product catalog items have been set up in your instance, you can use the **Service Catalogs** widget to view context-sensitive service catalogs based on the services you are subscribed to. Extend your services using service catalogs and request additional items on the services you have subscribed to.

Procedure

1. Navigate to the Customer Service homepage.
2. Click **Support** > **Products** in the header menu.
   The system displays a list of products or services sold to your account.
3. Click a product to view the details and any cases created on the product in the last 30 days.
4. View all active contracts and entitlements for the sold product.
5. **Optional:** You can also create a case directly from the product details.
6. **Optional:** View all catalog items associated to sold products and request additional services, as required.

Create a product case from the Customer Service Portal

Create a case about a question or issue on a product from the Customer Service Portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.partner, sn_customerservice.customer_admin, or sn_customerservice.partner_admin, sn_acct_consumer.consumer

Procedure

1. Go to the Customer Service Portal by accessing your instance URL and adding a /csm suffix.
2. Right-click in the form header and choose **Case** > **Create Product Case**.
3. On the form, fill in the fields.

Note:
Depending on your role, you might not see the **Account** and **Contact** fields.

Create Case form

Field	Description
Account	The account for which the case is being created.

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Field	Description
Contact	The name of the customer contact for this case.
Consumer	The name of the consumer for this case. **Note:** This field is active only when the Customer Data Models for B2B2C plugin is installed. Once Account is selected, only consumers belonging to the account are displayed.
Asset	The asset tag number or the serial number of the asset associated with this case.
Product	The product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro). If you select an asset in the **Asset** field, this field is auto-populated if the associated product information is available in the asset record. A product may be associated with multiple assets.
Priority	The available assigned priorities are: ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low (default)
Subject	A brief description of the customer question, issue, or problem. **Note:** When you start entering the subject, the application searches for relevant content in the knowledge bases configured for the portal. the results are displayed in the **Related Content** list.
Description	A detailed description of the customer question, issue, or problem.

Note: Currently, the **Save as Draft** option is not optimized for Customer Service Management portals and, it is inactive by default.

4. Select **Submit**.

Result

The case is created, assigned a case number, and added to the creator's case list. To view this list, select the **My Lists** tab on the Customer Service Portal header and select **All Cases** in the left pane.

Chat with an agent from the Customer Service Portal

Chat with a virtual agent or a customer service agent from the Customer Service Portal to resolve issues quickly.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.partner_admin

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Procedure

1. Select the Chat icon ( ) in the Customer Service Portal to start a conversation.
   A virtual agent or a customer service agent responds.
2. **Optional:** To talk to a person instead of a virtual agent, select and then **Contact Support**.
3. When you're finished with the chat, select **End Conversation**.

What to do next

If the agent creates a new case or links the discussion to an existing case, you can view these cases from the customer portal by selecting **My Cases** and displaying the case list.

Get help using virtual agent conversations

Predefined Customer Service Virtual Agent chatbot conversations help your customers complete common self-service tasks, such as getting help with a product or checking the status of a case. Use predefined NLU with your virtual agent chatbot topics to enable the chatbot to assess user intent and provide the best response based on the conversation's context.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

If you're an anonymous user not logged in to the application, you can get help by entering keywords for an issue and choose to get transferred to a live agent.

A user with a proxy_contact role can also check the case status for a customer.

About this task

The information exchanged during the conversation flow (user inputs and bot responses) enables the chatbot to fulfill a user request or assist a user in completing a task. If you have a question or an issue with an existing product or order, the virtual agent searches the keyword and displays relevant knowledge articles that can help resolve the issue. If there are no relevant articles, it creates a case.
ServiceNow NLU enables discovery of the chatbot topics based on either the keywords entered in the chat or the user-intent and matches an entity with the user input. If there's a match, it also makes the entity available to the topic.

Procedure

1. Navigate to the Customer Service Management portal.
2. Select **Chat**.
   You can select **Show Me Everything** to display all available topics or enter keywords to narrow down the results to relevant topics.
3. If you're a logged-in user, enter keywords to get help on a case, an issue, or an order.
   - If an NLU is enabled, it guides you through the right topic based on the utterance.
   - If an NLU isn't enabled, it displays topics based on the match for the entered keywords. You can make a selection from all available topics displayed.

   Note:
   Contact your administrator to determine whether the topics are NLU-enabled.
4. Use
5. To exit a chat conversation, select **I'm done**.

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Related topics

Customer Service Virtual Agent conversations

Maximizing code reuse with topic blocks

View or modify a case from the Customer Service Portal

View or modify the information in a selected customer service case.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.partner_admin

About this task

Depending on the role of the current user, the Case list displays:

- Cases created by the current user (sn_customerservice.customer)
- Cases related to the current user's account (sn_customerservice.customer_admin)
- Cases related to the current user's account as well as partner accounts (sn_customerservice.partner, sn_customerservice.partner_admin)

Procedure

1. Click **Case** > **All Cases** in the portal header.
   Cases are ordered in the list with the most recently updated at the top.
2. Click the desired case number to open the Case form.
3. Make any necessary changes to the **Additional comments** field.
   All other fields on the form are read-only.
4. Click **Update**.

View a publication on the Customer Service Portal

View the details of a publication on the Customer Service Portal and download any attachments.

Before you begin

Role required: sn_customerservice.customer

About this task

The **Publications** link on the customer service portal displays a list of current publications that is sorted by publication number.

Note:
After a publication reaches its expiration date, it is automatically removed from the Publications list.

Procedure

1. Navigate to the customer service portal.
2. Click **Support** > **Publications** in the portal header.
   This displays a list of current publications. The information displayed for each publication includes the title, publish date, expiration date, and a brief description.
3. If desired, search the Publications list by entering the search term in the search field at the top of the list.
4. Click a publication name to open.

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5. If the publication has attachments, select the attachments to download from the pop-up window.
6. Close the pop-up window.
7. Click the return arrow at the top of the publication to return to the Publications list.

Complete a customer service satisfaction survey

After accepting a proposed solution for a case, complete a customer service satisfaction survey.

Before you begin

Role required: none

When a customer accepts a proposed solution for a case by clicking **Accept Solution** on the case form, a satisfaction survey is displayed in the portal. The customer has the option of completing or skipping the survey. Either choice returns the customer to the list of cases on the self-service portal.

To complete the survey:

Procedure

1. Answer each of the survey questions.
2. Click **Submit**.

Request an item or service from the Customer Service Portal

Browse the catalog and create a request from the Customer or Consumer Service Portals.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.customer_case_manager, sn_customerservice.customer, sn_customerservice.consumer, sn_customerservice.proxy_contact

About this task

Customers and consumers can make requests from the Customer and Consumer Service Portals. Customer administrators, partners, and case managers can also make requests.

Note:
Creating a request from the Customer and Consumer Service Portals requires activation of the Customer Service with Request Management plugin (com.sn_cs_sm_request). It also requires that the system administrator provide external customers with access to request records.

Procedure

1. Do one of the following to create a request:
   - Click the **Request Something** link on the portal landing page.
   - Click **Requests** > **Request Something** in the portal menu header.
2. Browse the service catalog and select the desired item or service.
   You can also use the Category filters to filter the available items.
3. Fill in any necessary information related to the request.
4. Click **Submit**.
   The system processes the request, creates the request and any other related records, and displays the details in the Related Records widget on the case view page.

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View case records from the Customer and Consumer Service Portals

View case records such as requests, changes, or problems, from the Customer or Consumer Service Portals.

Before you begin
Role required: sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.customer_case_manager, sn_customerservice.customer, sn_customerservice.consumer

About this task
If a case has one or more related records, a Related Records widget is displayed on the case view page that lists those records.

Procedure
1. Navigate to the Customer or Consumer Service Portal.
2. Click **My Lists** in the portal header and then select a case.
   You can use the **My Lists** filter to narrow the list of records before selecting a case.
3. In the Related Records widget, click a record to view its details.
4. **Optional:** For request records, expand the **Stage** field to display more details about the request process.
5. Click the **X** in the upper corner to close the details window.

Close a case from the Customer Service Portal

Customers and consumers can close cases from the Customer and Consumer Service Portals.

Before you begin
Role required: sn_customerservice.customer, sn_customerservice.consumer

About this task
This feature is available for the Customer Service Portal (B2B) for product and order cases and for the Consumer Service Portal (B2C).
The **Close Case** button is not available for cases in the **Resolved** or **Closed** states.

Procedure
1. Click **Cases** in the portal header to open the Case list.
2. Open the desired case.
3. In the Actions section, click **Close Case**.
4. In the confirmation pop-up window, click **Close Case**.
   When a case is closed from the portal:
   - The case status in the Case details section is updated to **Closed**.

     Note:
     You cannot add comments after the case is closed. You can only view the previous comments in the activity stream.

   - The case additional comments and resolution notes are updated with **Closed by customer**.
   - The case resolution code is set to **Solved by customer**
   - A message at the top of the portal confirms that the case has been closed.
   - The system displays a customer satisfaction survey.

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5. Complete the customer satisfaction survey.
   You can also choose to skip the survey. Either choice returns you to the case list on the portal.

View install base information from the Customer Service Portal

View a list of install base to track the instances provisioned for your account and which products or services run on them.

Before you begin
Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task
You can view all cases and the service status from the last 30 days as well as all active, past, and planned outages. You can also view any active entitlements for the install base. An entitlement is active when its end date isn't in the past or it has no end date. If it's linked to a contract, the contract must also be active.

Note:
When the Customer Data Models for B2B2C plugin installed, contacts are able to access the list of install base items belonging to account consumers.

Note:
You can modify the **Active Entitlements** widget to define your own filters for active entitlements.

Procedure
1. Navigate to the Customer Service Portal.
2. Click **Support** > **Install Base** in the header menu.
   The system displays a list of install base items that belong to your account.
3. Select an install base to view the details, including cases created on the install base in the last 30 days, active entitlements, as well as service status and outage history.
4. **Optional:** You can also create a case directly from the install base details.

Create a case for install base from the Customer Service homepage

Create a case regarding a question or issue on your install base from the Customer Service homepage.

Before you begin
Role required: sn_customerservice.customer, sn_customerservice.partner, sn_customerservice.customer_admin, or sn_customerservice.partner_admin

About this task
Install base enables you to track which instances have been provisioned for your account and the products and services that run on them.

Procedure
1. Navigate to the Customer Service homepage.
2. Select **Create Case for Install Base**.
3. Fill out the fields on the form, as required.

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Create Case form

Field	Description
Product	The sold product you have a question on or issue with.
Install Base	The install base item that you have a question on or issue with.
Priority	The assigned priority: ○ 1 — Critical ○ 2 — High ○ 3 — Moderate ○ 4 — Low (default)
Subject	A brief description of the question, issue, or problem.
Description	A more detailed description of the customer question, issue, or problem.

Note:
Currently, the **Save as Draft** option is not optimized for Customer Service Management portals and it is inactive by default.

4. Select **Submit**.
   The case is created, assigned a case number, and added to the user's case list. Select **My Cases** at the top of the customer portal to view the Cases list.

Approve a change request, or registration request

Users with the snc_external role can view and approve registration requests and change requests from the Customer Service Portal.

Before you begin
Role required: snc_external

About this task
A registration request or a change request may require approval from another employee within the same organization. For details on registration request, see Customer contact self-registration.

Procedure

1. In the Customer Service Portal header, click **Notification** > **View all notifications**.
2. Click a record in the Approvals section of the Notifications page.
   The system displays a read-only view of the record approval form. For requests that include one or more items, these items appear in a collapsible list at the bottom of the Request form.
3. **Optional:** Click a requested item at the bottom of the Request form to view the details in a pop-up window.
4. Click **Approve**.
   The system makes the following updates:
   - The record status is set to **Approved**.
   - The record status is displayed after the record number in the Related Records widget on the Case form.
   - The record status is added to the Case form.

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- If the record is approved by the customer administrator or if the customer self-approves the request, the change in status is added to the **Additional comments** field.
- For other approvers, the change in status is added to the **Work notes** field.

- The approval record is updated in the Approval table.

View the status of a request, change request, or registration request

Users with the snc_external role can view the status of requests and change requests from the Customer Service Portal.

Before you begin

Role required: snc_external

Procedure

1. In the Customer Service Portal header, click **My Lists**.
2. In the My Lists filter, click **My Cases**.
3. Click a case in the Cases list.
4. View the record status after the record number in the Related Records widget.

Customer Portal Usage dashboard

The Customer Portal Usage dashboard enables you to understand the user usage of portals by presenting an aggregate count of sessions created every month.

These sessions don't represent individual users. For example, if you access the portal on two different days, it counts as two separate sessions. For more information about how an aggregate session is counted, see Portal usage calculation.

You can access the dashboard by navigating to **All** > **Self Service** > **Dashboards**. On the dashboard page, search and select `Customer Portal Usage`.

To access more detailed information, place your mouse device over any of the graphical reports. These graphs can be saved as PNG or JPEG files, enabling you to add them to emails or include them in your presentations. Additionally, all graphs can be updated to display the current data. An example of the dashboard layout is shown in the following image.

Note:
The Customer Portal usage tab is available when the Customer Service (com.sn_customerservice) plugin is activated.

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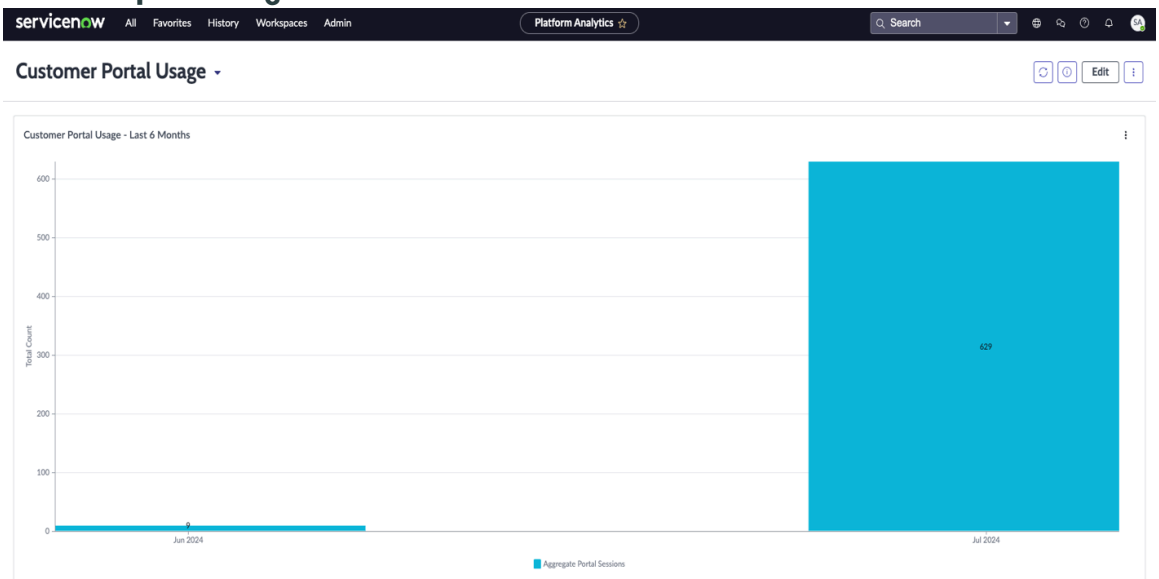
Customer portal usage dashboard



End user and roles

End user and goal	Required role
Administrator: • Can edit the data • Can view the dashboard	admin

Required definitions for Customer Portal Usage dashboard

Definitions	Description
DEFN1003689	Get all the guest portal session counts for yesterday. **Note:** Login pages are excluded from guest usage calculations. Frequency: Daily
DEFN1003690	Get all the bot portal session counts for yesterday. Frequency: Daily
DEFN1003691	Get all the external user portal session counts for yesterday. Frequency: Daily
DEFN1003724	Get aggregated chargeable external portal sessions for last month. Frequency: Monthly

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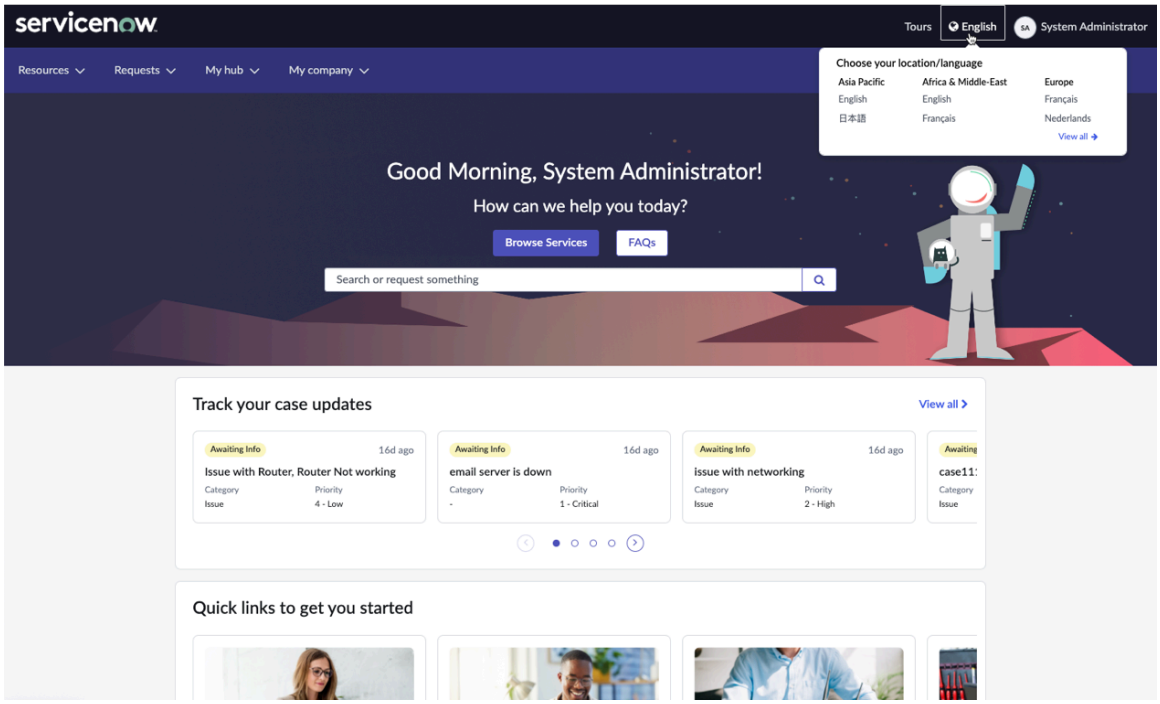
Enable language selection for guest users

The language selector widget enables guest users and unauthenticated users to select, view, and update content in their preferred language.

When a user selects a preferred language, the portal content reloads into the selected language. The widget is enabled by default on the Knowledge portal, the Customer Service Management portal, and the Consumer Service portal. Users can map their languages with regions to view all available languages in the form of a pop-up on the same screen. The widget appears only if a language other than English is active on the instance.

Language selector widget



If languages aren't grouped, users can view all available languages as a full-screen experience.

Note:
The full screen mode is available in the mobile view.

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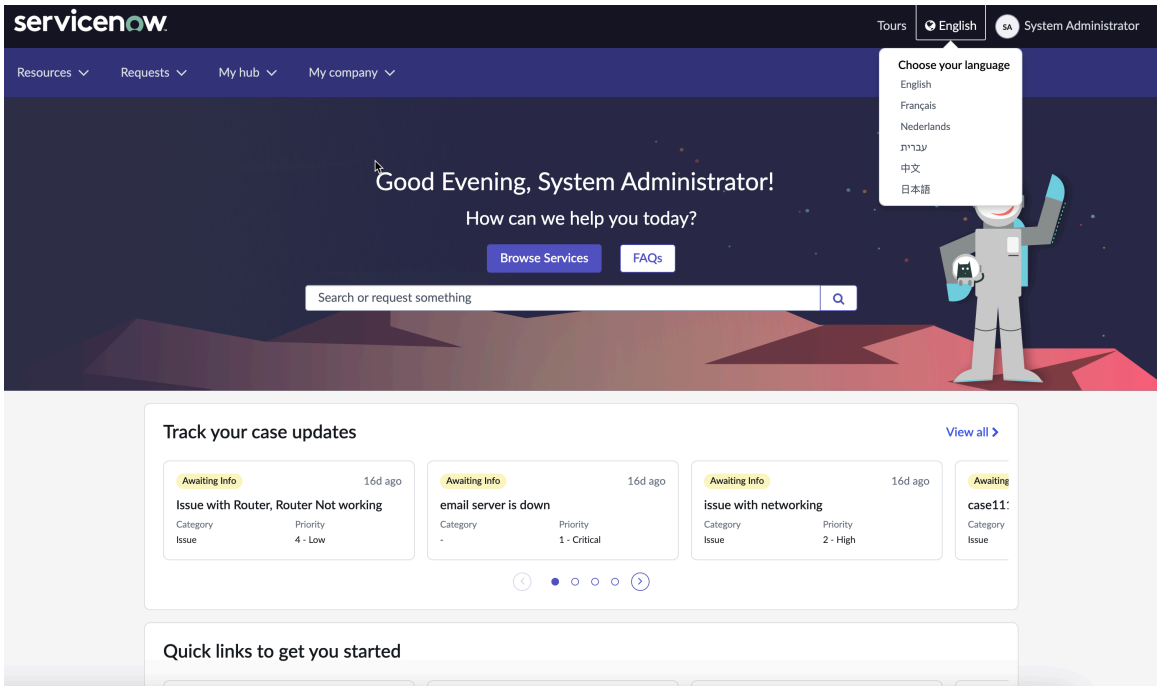
Language selection experience without region grouping



Related topics

- Enable language selector widget
- Service Portal properties
- Create regions for language selection in portals

Using the Business Portal

Search for information about a question or an issue, or request assistance from a customer service agent.

Your Business Portal activity usually begins on the home page. It has configurable widgets to display information.

From the Business Portal home page, you can access and use the following features:

Business Portal home page for logged-in users

UI component	Description
Browse services	Browse through topics and request services.
Frequently asked questions	Get quick answers to common questions.
Resources	Navigate to the Knowledge, Publications, or FAQs pages.
Requests	Submit a request or View submitted requests.
My hub	Manage products and install base items.
My company	Create or manage contacts.

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Business Portal home page for logged-in users (continued)

UI component	Description
Notification	Displays notifications sent for resolved cases, cases awaiting information, publications, and approvals.
Tours	View a tour for additional guidance on how the Customer Service Management application works. Your administrator determines whether tours appear on pages or not.
Live Chat	Chat with a virtual agent or a customer service agent.
Callback request	Request a callback when the wait time to reach agents is long or agents are unavailable.
Profile menu	View your profile or log out.
Search	Enables you to search. Either enter a keyword to use the type-ahead search or enter one or more words to view all search results.
Track your case updates	View updates on your case.
Browse topics	Navigate through topics to explore our services and resources.
Quick links to get you started	View links to knowledge articles,catalogs, and external links.
Most trending articles	View a list of the most viewed articles.
Most popular services	Request items and services from the catalog.
Footer	Contains important links, contact information, and legal details for easy access.

Manage contacts from Business Portal

Create and update customer contacts, assign roles to contacts, and enable or disable contact login from the business portal.

Create a customer contact

Use the **Create Contact** catalog item to create a customer contact from the business portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

About this task

By selecting the **Create Contact** catalog item, you can add the details for a contact and create the contact record. After saving the record, you can perform the following actions depending on your role.

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- Users with the sn_customerservice.customer_admin or sn_customerservice.partner_admin can update the contact's user ID and enable or disable notifications.
- Users with the admin role can set a password for the contact and require the contact to reset their password.

Note:
These actions are available while you're creating the contact record.

Procedure

1. Navigate to the business portal.
2. Select **My company** > **Create a contact** in the portal header.
3. Fill in the fields on the Create Contact form.

Contact form

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The customer's job title.
Language	The customer's preferred language.
Account	The customer's account.
Email	The customer's email address.
Business phone	The customer's business phone.
Mobile phone	The customer's mobile phone.

4. Select **Submit**.
   The system creates the contact and updates the Contact form.
5. **Optional:** Update the information in the following fields.

Additional Contact fields

Field	Description
Notification	Enable or disable notifications for this customer.
User ID	A unique identifier for this user. The user ID should follow this format: *`firstname.lastname`*

6. **Optional:** With the admin role, you can update the password information for the contact.

Contact password information

Field	Description
Password	Set a password for the contact.

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Field	Description
Password needs reset	Requires the contacts to reset their password when they log in to the portal.

7. Select **Save** to update the record.

Update contact information for a user

Update the contact information for a user from the business portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

Procedure

1. Navigate to the business portal.
2. Select **My company** > **Manage contacts**.
3. Select the desired contact from the Contacts list.
4. Select **Edit details**.
5. Make the desired changes on the Contact form.

Contact form

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The customer's job title.
Language	The customer's preferred language.
Time zone	The time zone for this customer's location.
Account	The customer's account.
Email	The customer's email address
Business phone	The customer's business phone.
Mobile phone	The customer's mobile phone.
Notification	Enable or disable notifications for this customer.
User ID	A unique identifier for this user. The user ID should follow the format *`firstname.lastname`*.

6. Select **Save**.

Enable or disable the login for a contact

Enable or disable the login for a contact from the business portal to control user access to the portal.

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Before you begin
Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

Procedure
1. Navigate to the business portal.
2. Select **My company** > **Manage contacts** in the portal header.
3. Select a contact from the Contacts list.
4. In the Actions list, select one of the following links, as required.

Assign user roles to a contact

Assign one or more user roles to a contact from the business portal.

Before you begin
Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

About this task
Use the Edit Role pop-up window to manage the roles for a contact. Contacts must have at least one assigned user role. If there are no roles in the **Selected** column on the pop-up window, you can't update the record.

Note:
The roles available in the Edit Role pop-up window are configured using the **sn_customerservice.contact_role_assignment** property.

Procedure
1. Navigate to the business portal.
2. Select **My company** > **Manage contacts** in the portal header.
3. Select a contact from the Contacts list.
4. In the Actions list, select the **Edit Roles** link.
5. In the Edit Role pop-up window, select a role in the **Available** column and move it to the **Selected** column.
6. Select **Update** on the Edit Role pop-up window.

Note:
If there are no roles in the **Selected** column, the system displays an error message and the column resets to display the originally assigned roles.

Manage customer registration requests from Business Portal

Users with the customer administrator role can approve or reject registration requests that customers submit from the business portal.

Approve a registration request with a valid registration code on Business Portal

Approve a registration request from a user that was submitted from the business portal with a valid registration code.

Before you begin
Role required: sn_customerservice.customer_admin

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Procedure

1. Navigate to the business portal.
2. Select **Notifications** > **View all notifications**.
   The Approvals card displays registration requests.
3. Select the desired request from the Approvals card.
4. Select **Approve**.
   A user account is created and an email is sent to the contact's email address with a user ID and temporary password. The user is also assigned these roles: sn_esm_user and snc_external.

Reject a registration request

Reject a registration request from a user that was submitted from Business Portal.

Before you begin

Role required: sn_customerservice.customer_admin

Procedure

1. Navigate to the business portal.
2. Select **Notifications** > **View all notifications**.
   The Approvals card displays registration requests.
3. Select the desired request from the Approvals card.
4. Select **Reject**.
   A rejection email is sent to the requester's email address.

Customer contact self-registration on Business Portal

The self-registration feature enables new customer contacts to submit registration requests through the business portal.

A customer contact can submit a registration request using a valid registration code. The request is then sent to the customer administrator of that account for approval. If an account has multiple customer administrators, they all receive the registration request, but only one approval is necessary.

After the request is submitted, it goes through an approval process and is either accepted or rejected. If accepted, a new account is created, and the customer contact gets an email with a user ID and a temporary password. When logging in to the portal for the first time, the customer contact is asked to change the temporary password. If rejected, the customer contact gets an email notification.

Note:
If a request is submitted with an incorrect registration code, a notification message appears `Invalid Registration Code`.

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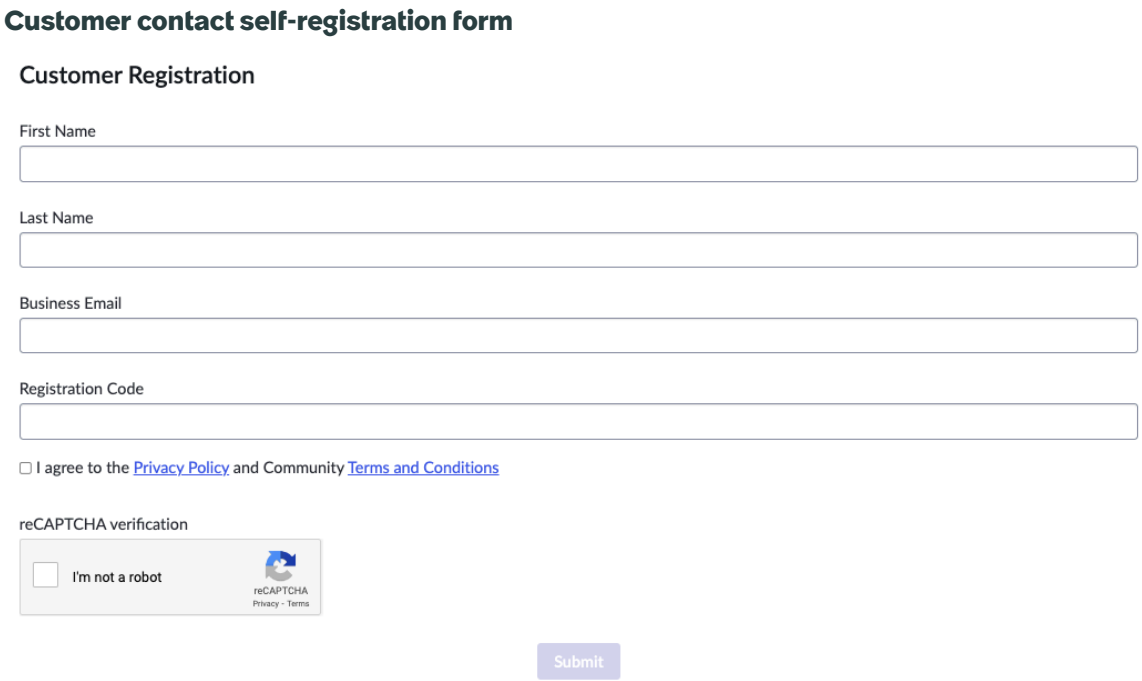

The administrator creates a unique registration code for each account and stores it in the **Registration Code** field on the Account form. After the code is created, customer administrators can distribute the code to customers as needed.

Related topics

Example: The default self-service Password Reset process

Submit a self-registration request

Submit a registration request from the business portal.

Before you begin

Role required: none

Procedure

1. Navigate to the business portal.
2. Request a login by selecting **Sign up** from the portal header.
3. On the Customer Registration form, fill in your **First Name**, **Last Name**, **Business Email**, and **Registration Code**.
4. Enable the check box to agree to the privacy policy and to the community terms and conditions.
   Select the links to access more information about these policies.
5. Select the reCAPTCHA verification check box.
   The Customer Service application uses the Google re-CAPTCHA service.
6. Select **Submit**.
   The page redirects you to the portal login page.
   - If you entered a valid registration code, you see the message: “Your request has been submitted and is pending review. You’ll receive an email when your request is processed".
   - If you entered an invalid registration code, you see the message: “Incorrect Registration Code".

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Log in to the Business Portal for the first time

Use your user ID and temporary password to login to the business portal for the first time.

Before you begin
Role required: none

About this task
After a registration request is approved, the customer contact receives an email with a user ID and temporary password. When logging in for the first time, the contact is asked to change the password.

Procedure

1. Navigate to the business portal login page.
2. Enter your user ID in the **User name**.
3. Enter your temporary password in the **Password** field.
4. Select **Login**.
   You're prompted to change your password.
5. Enter your temporary password in the **Current Password** field.
6. Enter your new password in the **New Password** field.
7. Reenter your new password in the **Confirm New Password** field.
8. Select **Submit**.

Request a password reset

If you forget your password, request a new one from the business portal login screen.

Before you begin
Role required: none

Procedure

1. Request reset password email.
   a. Navigate to the business portal.
   b. Select **Log in** in the portal header.
   c. Select the **Forgot Password?** link.
   d. Enter `Username` and complete CAPTCHA verification.
   e. Select **Next**.
   f. Enter your registered email id.
   g. Select **Next**.
   You will receive an email instructions to reset your password.
2. Reset your new password.
   a. Select the **Click here to reset your password** link in the email
   b. On the Reset Password page, enter a new password in the **New Password** and **Retype Password** fields.
   c. Select **Reset Password**.

Result
Your new password is set.

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Change password on Business Portal

Change your password directly from the business portal to secure your account.

Before you begin
Role required: none

About this task
Users with the required roles can change their passwords from the business portal.

Procedure
1. Navigate to the business portal.
2. Select your user name in the portal header.
3. Select **Profile** to display the user profile information.
4. Select **Change Password** under Security.
5. On the Change Password pop-up, fill in the fields.

Change Password form

Field	Description
Current Password	The existing password.
New Password	The new password, which must meet the following requirements: ○ Be a minimum of eight characters long ○ Include at least one uppercase and one lowercase letter ○ Include at least one number
Confirm Password	The new password.

6. Select **Change**.

Customer notification preferences

Customers can set preferences for email notifications.

Email notification preferences are set to control email notifications that are sent to the customer when an agent performs one of the following case activities:

- Opens a case for a customer
- Comments on a customer's case
- Provides a resolution for a customer's case
- Closes a customer's case

Set email notification preferences

Customize email notifications to stay informed about specific actions taken by customer service agents on cases, based on your preferences.

Before you begin
Make sure that you have received an email for the case to set the email notification preferences.

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

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Procedure

1. Navigate to the business portal.
2. Select your user name or photo in the portal header and select **Profile** to display your user profile information.
3. Select the **Notification Preferences** link under Actions to display the Notification Preferences pop up.

   Note:
   The **Notification Preferences** link is available only after receiving the first email for the case.

4. Enable or disable the following email notifications for your primary email address.
   The notifications are available based on the actions performed by customer service agents on the case.
   - Case closed for customer
   - Case commented for customer
   - Case escalated for customer
   - Case assigned to a new group
   - Case opened for customer
   - Case resolved for customer

Approve a request, change request, or registration request from Business Portal

Users with the snc_external role can view and approve requests and change requests from the business portal.

Before you begin
Role required: snc_external

About this task
A request or change request may require approval from another employee within the same organization.

Procedure

1. Navigate to the business portal header,
2. Select **Notification** > **View all notifications**.
3. Select a record in the Approvals section of the Notifications page.
   The system displays a read-only view of the record approval form. For requests that include one or more items, these items appear in a collapsible list at the bottom of the Request form.
4. **Optional:** Click a requested item at the bottom of the Request form to view the details in a pop-up window.
5. Select **Approve**.
   The system makes the following updates:
   - The record status is set to **Approved**.
   - The record status is displayed after the record number in the Related Records widget on the Case form.
   - The record status is added to the Case form.

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- If the record is approved by the customer administrator or if the customer self-approves the request, the change in status is added to the **Additional comments** field.
- For other approvers, the change in status is added to the **Work notes** field.

- The approval record is updated in the Approval table.

Search for information using Business Portal

Use the search feature on the business portal header and home page to find information about a question or an issue.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task

The portal has a search feature that you can use to search for information across several repositories. You can use the search feature on the home page or on the business portal header.

Procedure

1. Navigate to the business portal.
2. Enter a search term into the **Search** field.
3. Select the search icon.
   A list of articles related to the search term is displayed.
4. Select a link to view an article.

Search the knowledge base on Business Portal

Use the business portal to search the knowledge base or view a list of popular knowledge base articles.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task

The business portal includes a link to the knowledge base that you can use to search for information, read and rate articles, and submit feedback. Under this link, the portal displays a list of popular knowledge base articles. If the information that you need isn't included in this list, you can search the knowledge base for the desired information.

Procedure

1. Navigate to the business portal.
2. Select **Resources** > **Knowledge**.
   The knowledge page displays a separate category for each of the products purchased by this customer. It also displays lists of articles by:
   - Featured content
   - Most useful
   - Most viewed
3. Do one of the following,

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Option	Description
Click a product to display more specific in formation	Displays a list of categories on the left and ar ticles on the right. Select a category to drill down even further.
Click a link from one of the lists	Displays the article.
Type a topic in the Search field and press the Enter key	Displays a list of related articles. Select a link to display the desired article.

Chat with an agent from the Business Portal

Chat with a virtual agent or a customer service agent from the business portal to resolve issues quickly.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.partner_admin

Procedure

1. Select the Chat icon in the business portal to start a conversation.
   A virtual agent or a customer service agent responds.
2. **Optional:** To talk to a person instead of a virtual agent, select the kebab menu ( ) then select **Call Support (Daily 5AM - 11PM)**.
3. To end the chat, select End Conversation icon ( ).

What to do next

If the agent creates a case or links the discussion to an existing case, you can view these cases from the business portal. To display the case list, select **Requests** > **View submitted requests** > **View cases & tasks**.

Get help using virtual agent conversations from Business Portal

Predefined Customer Service Virtual Agent chatbot conversations help your customers complete common self-service tasks, such as getting help with a product or checking the status of a case. Use predefined NLU with your virtual agent chatbot topics to assess the intent of the user input and provide the best response based on the context of the conversation.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

If you're anonymous (not logged in to the application), get help by entering keywords for an issue and choose to get transferred to a live agent.

Install the plugin Customer Service Virtual Agent Conversations (ID: com.sn_csm.virtualagent) to view the chatbot topics.

A user with a proxy_contact role can also check the case status for a customer.

About this task

The information exchanged during the conversation flow (user inputs and bot responses) enables the chatbot to fulfill a user request or assist a user in completing a task. If the user has a question or an issue with an existing product or order, the virtual agent searches the keyword

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and displays relevant knowledge articles that can help resolve the issue. If there are no relevant articles, it creates a case.
ServiceNow NLU enables discovery of the chatbot topics based on either the keywords entered in the chat or the user-intent and matches an entity with the user input. It also makes the entity available to the topic if there's a match.

Procedure

1. Navigate to the business portal.
2. Select **Chat**.
   You can select **Show Me Everything** to display all available topics or enter keywords to narrow down the results to relevant topics.
3. If you're a logged-in user, enter keywords to get help on a case, an issue, or an order.
   - If NLU is enabled, it guides you through the right topic based on the utterance.
   - If NLU isn't enabled, it displays topics based on the match for the entered keywords. You can make a selection from all available topics displayed.

   Note:
   Contact your administrator to determine whether the topics are NLU-enabled.
4. Use
5. To exit a chat conversation, select **I'm done**.

Related topics

Customer Service Virtual Agent conversations

Maximizing code reuse with topic blocks

View a publication on Business Portal

View the details of a publication on the business portal and download any attachments.

Before you begin
Role required: sn_customerservice.customer

About this task
The **Publications** link on the business portal displays a list of current publications that is sorted by publication number.

Note:
After a publication reaches its expiration date, it is automatically removed from the Publications list.

Procedure

1. Navigate to the business portal.
2. Select **Resources** > **Publications** in the header.
   This displays a list of current publications. The information displayed for each publication includes the title, publish date, expiration date, and a brief description.
3. If desired, search the Publications list by entering the search term in the search field at the top of the list.
4. Select a publication name to open.

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5. If the publication has attachments, select the attachments to download from the pop-up window.
6. Close the pop-up window.
7. Select the return arrow at the top of the publication to return to the Publications list.

Request an item or service from the Business Portal

Browse the catalog and create a request for an item or a service from the business portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.customer_case_manager, sn_customerservice.customer, sn_customerservice.consumer, sn_customerservice.proxy_contact

About this task

Users can make requests for a product or service from the business portal. Customer administrators, partners, and case managers can also make requests.

Note:
Creating a request from the business Portal portal requires activation of the Customer Service with Request Management plugin (com.sn_cs_sm_request). It also requires that the administrator to provide external customers with access to request records.

Procedure

1. Navigate to the business portal.
2. Select **Requests** > **Submit a request** > **Submit any request**
3. Browse the service catalog and select the desired item or service.
   Select topics from the navigation menu to view related articles and catalog items.
4. On the form, fill in any necessary information related to the request.
5. Select **Submit**.
   The system processes the request, creates it along with related records, and shows the details on the record view page.

View cases and case tasks from the Business Portal

View the list of cases and case task from the business portal to view its details.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.customer_case_manager, sn_customerservice.customer, sn_customerservice.consumer

About this task

If a case has one or more related records, a Related Records widget is displayed on the case view page that lists those records.

Procedure

1. Navigate to the business portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks** in the portal header.
   You can select the case type from Categories and filter the list of records before selecting a case.
3. Select a case to view its details.

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4. **Optional:** For My requests, expand the **Stage** field to display more details about the request process.
5. Select the **X** in the upper corner to close the details window.

View or modify a case from the Business Portal

View or modify the information in a customer service case.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.partner_admin

About this task

Depending on the role of the current user, the Case list displays:

- Cases created by the current user (sn_customerservice.customer)
- Cases related to the current user's account (sn_customerservice.customer_admin)
- Cases related to the current user's account as well as partner accounts (sn_customerservice.partner, sn_customerservice.partner_admin)

Procedure

1. Select **Requests** > **View submitted requests** > **View cases & tasks** in the portal header.
2. Select the desired case number to open the case view page.
3. Post required comment on the Activity tab or upload attachment on the Attachments tab. All other fields on the form are read-only.
4. Select **Send**.

Close a case from the Business Portal

Close completed or resolved cases from the business portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

About this task

This feature is available for the business portal (B2B) for product.
The **Close Case** button is not available for cases in the **Resolved** or **Closed** states.

Procedure

1. Navigate to the business portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks** in the portal header.
3. Open the desired case.
4. Select **Actions** > **Close Case**.
5. In the confirmation pop-up window, select **Close Case**.
   When a case is closed from the portal:
   - The case status in the Case details section is updated to **Closed**.

> **Note:**
> You cannot add comments after the case is closed. You can only view the previous comments in the activity stream.

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- The case additional comments and resolution notes are updated with **Closed by customer**.
- The case resolution code is set to **Solved by customer**
- A message at the top of the portal confirms that the case has been closed.
- The system displays a customer satisfaction survey.

6. Complete the customer satisfaction survey.
   You can also choose to skip the survey. Either choice returns you to the case list on the portal.

Complete a customer service satisfaction survey

After accepting a solution for a case, complete a customer service satisfaction survey to provide your feedback.

Before you begin

Role required: none

When a customer accepts a proposed solution for a case by clicking **Accept Solution** on the case form, a satisfaction survey is displayed in the portal. The customer has the option of completing or skipping the survey. Either choice returns the customer to the list of cases on the self-service portal.

To complete the survey:

Procedure

1. Answer each of the survey questions.
2. Select **Submit**.

Deflect cases with knowledge content

Enable customers to search for information from the knowledge base and and find solutions to their issues.

Before you begin

Role required: sn_customerservice_customer

About this task

The business portal Case form displays contextual search results based on text entered in the Subject field. These search results provide targeted solutions to customers. Customers can search for information that is related to a case when opening a case. If the search results in any related content, the customer can preview the content.

Note:
By default, search results include knowledge articles, solved questions, and pinned articles.

Procedure

1. Navigate to the business portal.
2. Select **Request** > **Submit a request** > **Submit a case** > **Submit a product case**.
3. Start entering in the **Subject** field.

   If there are any search results that match, they're displayed in the **Related Search Results** widget.

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Note:
If embedded search has been enabled, the results are displayed inline in the Case form in a **Knowledge results** section and are read only.

4. Perform one of the following actions.
   - Select one of the content links in the **Related Search Results** widget to enter the content directly.
   - Select one of the content links in the embedded **Knowledge results** section to open the content inline as read only.
5. **Optional:** Select **This helped** to mark the content as helpful for resolving the associated case.
6. Select **Submit**.

Configure the standard ticket page for cases

Configure the standard ticket page for cases from where users can view the details of a case in the Business portal.

Before you begin
Role required: admin or sp_admin

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
2. Select sn_customerservice_case, or sn_customerservice_task which is available by default.

Note:
You can add your own case types and add new configurations for the required tables. For more information, see Configure the standard ticket page.

3. Select **here** to edit the record.
4. Edit the fields on the Ticket Configuration form as required.
   For example, you can add tabs to the existing **Activity** and **Attachments** tabs in the **Info fields** field under the Info Region tab.
5. Select **Update**.

Related topics

Configure the standard ticket page

View install base information from the Business Portal

View a list of install base to track the instances provisioned for your account and see which products or services run on them.

Before you begin
Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task
You can view all cases and the service status from the last 30 days as well as all active, past, and planned outages. You can also view any active entitlements for the install base. An entitlement is active when its end date is not in the past or it has no end date. If it is linked to a contract, the contract must also be active.

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Note:
You can modify the **Active Entitlements** widget to define your own filters for active entitlements.

Procedure

1. Navigate to the business portal.
2. Select **My hub** > **Manage install base items** in the header menu.
   The system displays a list of install base items that belong to your account.
3. Select an install base to view the details including cases created on the install base in the last 30 days, active entitlements, as well as service status and outage history.
4. **Optional:** To create a case directly from the install base details, select **Create Case**.

View product information from Business Portal

View a list of products to track the products or services sold to your account and manage your services using service catalogs.

Before you begin
Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task
You can view a list of products or services that have been sold to your account. You can also view any cases created on the product and all active contracts and entitlements for the product.
An entitlement is active if:

- Its end date isn't in the past or it has no end date.
- The contract it's linked to is also active.

A contract is active if:

- Its state is set to active
- It's linked to a product with an active entitlement.

You can modify the **Active Entitlements** widget to define your own filters for active entitlements.

If product catalog items have been set up in your instance, you can use the **Service Catalogs** widget to view context-sensitive service catalogs based on the services you're subscribed to. Extend your services using service catalogs and request additional items on the services that you have subscribed to.

Procedure

1. Navigate to the business portal.
2. Select **My hub** > **Manage sold products** in the header menu.
   The system displays a list of products or services sold to your account.

   You can only view sold products and all extensions of sold products that are not product inventories.
3. On the form, fill in the fields.

Sold product form

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List of sold product fields and their descriptions.

Field	Description
Number	Unique number of the sold product.
Name	Name of the sold product.
Parent sold product	Parent of the sold product, if applicable.
Product Location	Location associated to the sold product.
Unit net price	Net price of a single unit of a sold product.
Product offering	Product offering that is associated with a sold product.
Product specification	The product specification associated with a sold product. **Note:** The **Product specification** field is available only if you have the Product Catalog Management Core (com.sn_prd_pm) plugin and is not available on the form by default.
Monthly recurring price	Price to be paid on a monthly basis for the usage of a product or service.
One time price	One-time price to be paid for the usage of a product or service.
Quantity	Quantity of a product that is sold to a customer.

4. Select a sold product to view the details associated to it.

Record view of the sold product

List of fields on the record view of the sold product along with their descriptions.

Field	Description
Number	Unique number of the sold product.
Product	Reference to the product model from the CMDB table.
Name	Name of the sold product.
Account	Account associated with the sold product.
Contact	Contact associated with the sold product.
Product offering	Product offering that is associated to the sold product.
Product specification	Product specification associated to the sold product.
Product location	Location associated to the sold product.

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Field	Description
State	State of the sold product.
Unit Net Price	Net price of a single unit of sold product.
Quantity	Quantity of a product or service sold to a customer.
Model categories	Reference to the model category table.
Product model's short description	Brief description of the product model.
Product model's description	Detailed description of the product model.

5. View the cases and characteristics associated to the sold product in the related list.

Related list descriptions
Related lists and their descriptions.

Related list	Description
Cases	View all cases associated to the sold product.
Characteristics	View the characteristics associated to a particular sold product like the characteristic value and the option.
Child sold products	View the child sold products associated to the sold product.
Product information	View the pricing related information of the sold product.

6. Perform one of the desired actions on the sold product.

   Install the Customer Life Cycle Management Self service plugin (sn_clm_selfservice) to perform the **Modify**, **Suspend**, **Resume**, and **Disconnect** actions. The flows can be performed only by the customer personas and only on the sold products where the **Contact** field is the same as the logged in user.

   - Modify a sold product. To learn how to modify a sold product, see Modify a sold product and hierarchy
   - Suspend a sold product. To learn how to suspend a sold product, see Suspending sold products.
   - Resume a sold product. To learn how to resume a sold product, see Resuming sold products.
   - Disconnect a sold product. To learn how to disconnect a sold product, see Disconnecting sold products

Related topics

Activate Customer Life Cycle Management Self-Service

View Product Inventory information on Business Portal

View Product Inventory information on Business Portal

Enable customers to view and track the list of product inventories associated to their account.

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Before you begin
Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.partner_admin

About this task
Install the Customer Life Cycle Self Service plugin (com.snc.customer_lifecycle_mgmt_self_service) to perform the **Modify**, **Suspend**, **Resume**, and **Disconnect** actions on product inventories.

To learn how to install the Customer Life Cycle Self Service plugin (com.snc.customer_lifecycle_mgmt_self_service), see Activate Customer Life Cycle Management Self-Service.

Procedure
1. Navigate to the business portal.
2. Select **My Hub** and then **Manage product inventories** from the header menu.
   The system displays a list of product inventories associated to your account.
3. On the product inventories form, fill in the fields.

Product inventories form

List of product inventory fields and their descriptions.

Field	Descriptions
Name	Unique name of the product inventory.
Number	Number of the product inventory.
Parent product	Parent of the product inventory, if applicable.
State	State of the product inventory, whether active or inactive.
Location	Location associated to the product inventory.
Unit net price	Net price of a single unit of product inventory.
Product offering	Product offering associated to the product inventory.
Product specification	The product specification associated with a product inventory. **Note:** The **Product specification** field is available only if you have the Product Catalog Management Core (com.sn_prd_pm) plugin and is not available on the form by default.
Monthly recurring price	Price to be paid on a monthly basis for the usage of a product or service.
One-time price	One-time price to be paid for the usage of a product or service.
Quantity	Quantity of a product that is sold to a customer.

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4. Select a product inventory to view the record details.

Record view of product inventories

List of product inventories on the record view and their descriptions.

Field	Descriptions
Number	Unique number of the product inventory.
Product	Reference to the product model from the CMDB table.
Name	Name of the product inventory.
Account	Account associated to the product inventory.
Contact	Contact associated to the product inventory.
Product offering	Product offering associated to a product inventory.
Product specification	Product specification associated with a product inventory.
Location	Location of the product inventory.
State	State of the product inventory. **Note:** If the state is **Active**, you can't perform the **Resume** action on the product inventory.
Unit net price	Net price of a single unit of a product inventory.

5. View the cases and characteristics associated to the product inventory in the related list.

Related list descriptions

Related lists for product inventories and their descriptions.

Related list	Description
Cases	View all cases associated to the product inventory.
Characteristics	View the characteristics associated to a particular sold product like the characteristic value and the option.
Child sold products	View the child sold products associated to the sold product.
Product information	View the pricing related information of the sold product.

6. Perform one of the desired actions on the product inventory.

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Install the Customer Life Cycle Management Self service plugin (sn_clm_selfservice) to perform the **Modify**, **Suspend**, **Resume**, and **Disconnect** actions. The flows can be performed only by the customer personas and only on the sold products where the **Contact** field is the same as the logged in user.

- Modify a product inventory. To learn how to modify a product inventory, see Modify product inventory records
- Suspend a product inventory. To learn how to suspend a product inventory, see Suspend product inventory records.
- Resume a product inventory. To learn how to resume a sold product, see Resume product inventory records.
- Disconnect a product inventory. To learn how to disconnect a sold product, see Disconnect product inventory records

Related topics

Activate Customer Life Cycle Management Self-Service

View product information from Business Portal

Create a case for install base from the Business Portal

Create a case about a question or issue on your install base from the business portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.partner, sn_customerservice.customer_admin, or sn_customerservice.partner_admin

About this task

Install base enables you to track which instances have been provisioned for your account and the products and services that run on them.

Procedure

1. Navigate to the business portal.
2. Select **Requests** > **Submit a request** > **Submit a case** > **Submit an install base case**.
3. Fill out the fields on the form, as required.

Create Case form

Field	Description
Product	The sold product you have a question on or issue with.
Install Base	The install base item you have a question on or issue with.
Priority	The assigned priority: ○ 1 — Critical ○ 2 — High ○ 3 — Moderate ○ 4 — Low (default)
Subject	A brief description of the question, issue, or problem.
Description	A more detailed description of the customer question, issue, or problem.

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Note:
Currently, the **Save as Draft** option is not optimized for Customer Service Management portals and, it is inactive by default.

4. Select **Submit**.
   The case is created, assigned a case number, and added to the user's case list. Select **My Cases** at the top of the customer portal to view the Cases list.

Create a product case from Business Portal

Create a case about a question or issue on a product from the business portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.partner, sn_customerservice.customer_admin, or sn_customerservice.partner_admin, sn_acct_consumer.consumer

Procedure

1. Navigate to the business portal.
2. Select **Request** > **Submit a request** > **Submit a case** > **Submit a product case**.
3. On the form, fill in the fields.

Note:
Depending on your role, you might not see the **Account** and **Contact** fields.

Create Case form

Field	Description
Account	The account for which you're creating the case.
Contact	The name of the customer contact for this case.
Consumer	The name of the consumer for this case. **Note:** This field is active only when the Customer Data Models for B2B2C plugin is installed. Once Account is selected, only consumers belonging to the account are displayed.
Asset	The asset tag number or the serial number of the asset associated with this case.
Product	The product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro). If you select an asset in the **Asset** field, this field is auto-populated if the associated product information is available in the asset record. A product may be associated with multiple assets.
Priority	The available assigned priorities are: ○ 1 - Critical ○ 2 - High

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Field	Description
	○ 3 - Moderate ○ 4 - Low (default)
Subject	A brief description of the customer question, issue, or problem. **Note:** When you start entering the subject, the application searches for relevant content in the knowledge bases configured for the portal. the results are displayed in the **Related Content** list.
Description	A detailed description of the customer question, issue, or problem.

Note: Currently, the **Save as Draft** option isn't optimized for Customer Service Management portals and, it's inactive by default.

4. Select **Submit**.

Result

The case is created, assigned a case number, and added to the creator's case list. To view this list, navigate to **Requests** > **View Submitted requests** > **View Cases and tasks** tab on the business portal header and select **All Cases** in the left pane.

Guest users experience on Business Portal

Guest users can view the header, footer, knowledge articles cards, and resources menu on the home page.

Guest users landing on the Business Portal can access the home page and several public elements, including the header, menu, footer, and banner widgets, which feature the **Browse Services** and **FAQs** buttons.

They can also view taxonomy topic cards showcasing public content, such as articles and catalog items, and the Knowledge quick link widget displaying public articles.

However, on selecting any card, button or menu items, the guest users are redirected to the login page.

Enable language selection for guest users

The language selector widget enables guest users and unauthenticated users to select, view, and update content in their preferred language.

When a user selects a preferred language, the portal content reloads into the selected language. The widget is enabled by default on the Knowledge portal, the Customer Service Management portal, and the Consumer Service portal. Users can map their languages with regions to view all available languages in the form of a pop-up on the same screen.

To enable the language selector on the business portal, see Enable a language selector in portal headers.

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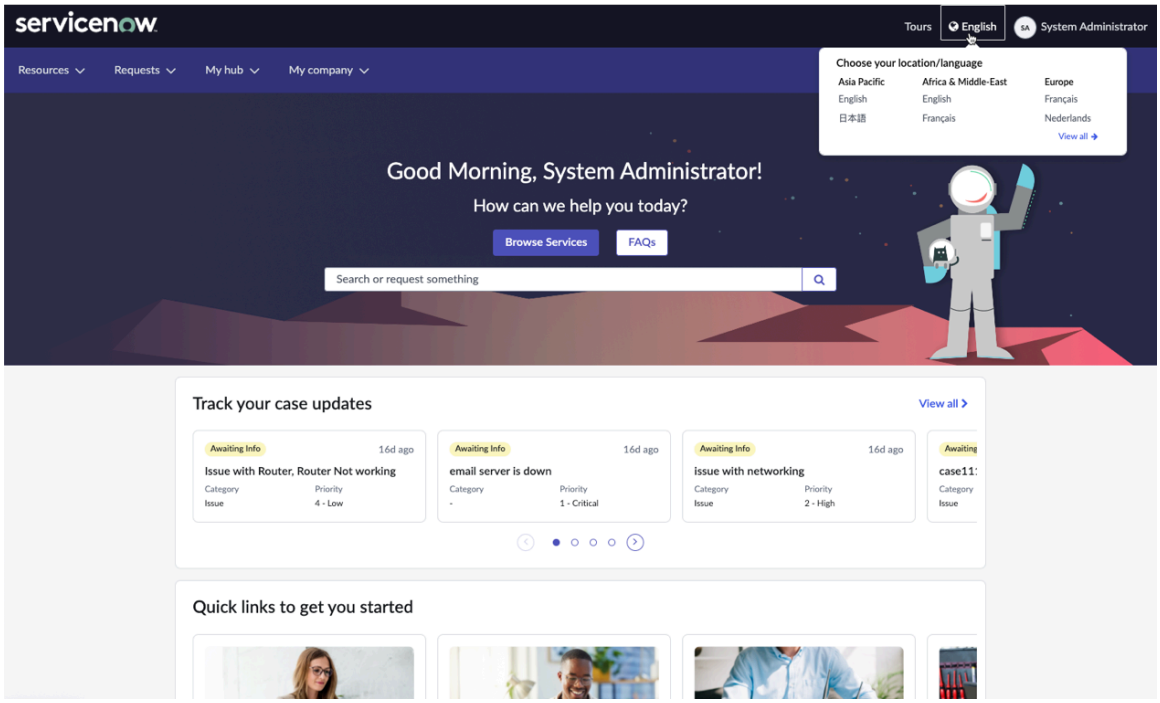
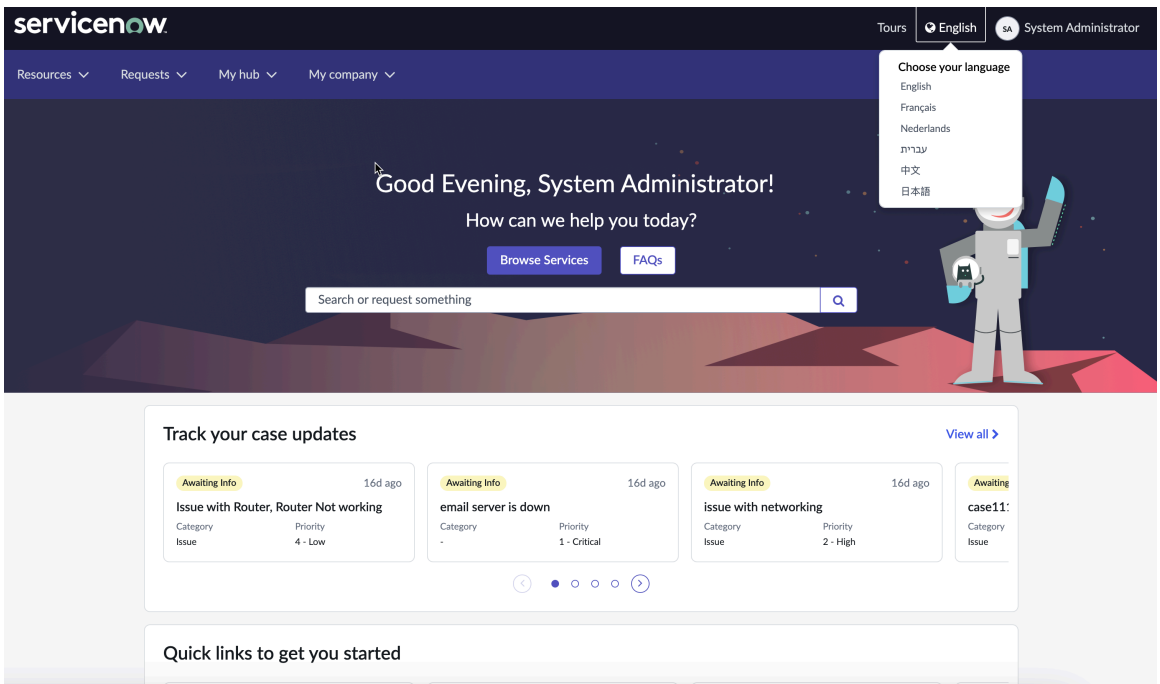
Language selector widget



If languages aren't grouped, users can view all available languages as a full-screen experience.

Note:
The full screen mode is available in the mobile view.

Language selection experience without region grouping



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Related topics

- Enable language selector widget
- Service Portal properties
- Create regions for language selection in portals

View common questions (FAQs) on Business Portal

View a list of frequently asked questions on the Business Portal to find answers for some common questions.

You can access the frequently asked questions page by navigating to **Resources** > **FAQs**. The system displays a list of 10 frequently asked questions as a default view.

Related topics

- Portal FAQ widget

Using the Consumer Service Portal

The Consumer Service Portal is a web interface that your company can use to provide information and support to consumers.

The Consumer Service Portal is based on the ServiceNow Service Portal application. Consumers can use the portal to search for information, get their questions answered by other registered members, or request assistance from a customer service agent.

From the Consumer Service Portal, consumers can:

- Search for information, browse knowledge articles, and engage with the community.
- Start a chat session with a customer service agent
- Register, create a login, and create a user profile.

After registering and logging in to the Consumer Service Portal, consumers can:

- Edit user profile information and change passwords.
- Register new products and view a list of currently registered products.
- Contact a consumer service agent about a question or issue.
- Create cases and view a list of current cases.
- Accept or reject proposed case solutions.

Your consumer service portal activity usually begins on the consumer service portal homepage. If you are a logged in user, you see different information than non-logged in users. Your organization can customize the homepage.

Consumer Service Portal homepage for logged in users

UI component	Description
Knowledge	**Knowledge** on the header and the main page takes you to the kb_home page. The knowledge home page allows you to search the knowledge base or view a list of top-rated or most viewed knowledge base articles.

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Consumer Service Portal homepage for logged in users (continued)

UI component	Description
Requests	Displays all your requests and you can also request from the catalog for items and services.
My lists	Lists all your cases.
Get help menu	Click **Get Help** to open a product or order case.
Support menu	Navigate to cases, orders, my products, and other quick links.
Tours	View a tour for additional guidance on how the Customer Service Management application works. Tours appear when your administrator creates them on certain pages.
Chat	Click **Chat** to chat with a virtual agent or a customer service agent.
Callback request	Request a callback when the wait time to reach agents is long or agents are unavailable.
Profile menu	Click your profile photo to either view your profile or logout.
Search	Enter a search term and click **Search** to view the search results.
Ask the Community	Click **Ask the Community** to access the Community homepage.
Get help	Click **Get help** to make a request or report a problem by opening a case.
Most viewed articles	View a list of most viewed articles.
Featured articles	View featured community content.
Most useful articles	View most useful articles based on the usage count of the articles.
The following components are available if you have installed communities.	
Recent solved discussion	View a list of recently solved discussions.
Recent community blog	View a list of recently published community blogs.
Community featured content	View a list of featured community content.

Note:
Metadata for each entry in the widgets such as the number of views, number of days from the time the article or feature was published, and rating for the article is displayed.

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Customizing the Consumer Service Portal

To customize this portal, navigate to **Service Portal** > **Portals** and click **Customer Service**. See Service Portal for more information about creating a custom interface.

Related topics

Portal usage calculation

Pre-chat from the Consumer Service Portal

As a user on the consumer service portal, you can initiate a conversation with support by answering the Pre-chat survey. The survey questions vary based on the session type such as logged-in or anonymous.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Click the **Open chat window** icon on the portal page or use Facebook messenger if you are a Facebook user.
2. Answer the questions that help set the context for an agent to resolve your issue. You will be routed to an agent queue.

Related topics

Pre-chat surveys

Portal usage calculation

Portal usage enables you to track how your customers and employees are using the portal. The Customer Portal Usage dashboard provides information about portal visits resulting in session counts.

To view the Customer Portal Usage dashboard, navigate to **All** > **Customer Service** > **Administration** > **Portal Usage**.

Note:
You can ignore the bot session usage that is captured as part of this dashboard.

Note:
This definition tracks usage for customer service portals based on the user roles and ignores usage for non CSM portals or roles. Sessions are tracked for the following roles:

- External roles: sn_esm_user, sn_customerservice.requester, sn_communities.community_user
- Internal roles: sn_customerservice.self_contributor

A user session is a period of activity on the Customer or Consumer Service Portal by any of the following session types:

- Guest session: Session where the user isn't logged in
- Bot session: Separate count of sessions generated due to bots and crawlers
- External session: Session where the user is an external user, typically a customer, or consumer who is logged in

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The aggregate session count is based on the following

calculations:

A user session times out after a specific period of inactivity.

User access to the self-service portals is tracked as follows: per session, per day, and per portal. If the same user logs in from multiple browsers or devices, each login is counted as a separate visit. Each first call of a portal page starts a session and, the usage metrics are calculated for the 24 hours window.

The default session timeout is 30 minutes. This setting can be adjusted using a system property. For more information about modifying the session timeout setting, see Manage user sessions.

Site visit calculation examples

A user logs in, logs out, and then logs in again.

Example of a site visit calculation for a user who logs in, logs out, and then logs in again

Step	User activity	Billable count incremented
1	User visits the portal as an anonymous or guest user	Yes
2	User logs in	No
3	User logs out	No
4	User logs in immediately after logging out	Yes

A user logs in and continues the session past midnight:

Example of a site visit calculation for a user who logs in and continues the session past midnight

Step	User activity	Billable count incremented
1	User visits the portal as an anonymous or guest user	Yes
2	User logs in	No
3	User session continues past midnight	**Yes**
4	User logs out	No

Register for the Consumer Service Portal

Register for the Consumer Service Portal to gain access and create a consumer profile.

Before you begin
Role required: none

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Ask your admin to install the External User Registration plugin (ID: com.sn_external_user_register) to view the register link on the Consumer service portal header.

Procedure

1. Go to the Consumer Service Portal page by accessing your instance URL and adding a /csp suffix.
   For example, https://example.com/csp.
2. Select **Register** in the portal header.
3. Fill in the fields on the registration form.
   Your email address must be unique. If you enter an address that is already in the system, you receive an error message. Try again with a different email address.
4. Select the **Security Code** check box, complete the CAPTCHA validation, and click **Verify**.
5. Select the check box to agree to the privacy policy and to the community terms and conditions.
6. Select **Sign Up**.
   A verification email is sent to the email address you provided.
7. Click the link in the email to verify your email address.

Result

Your registration is complete. You can now log in to the Consumer Service Portal.

Log in to the Consumer Service Portal

Use the name and password that you created during the registration process to log in to the Consumer Service Portal.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Navigate to the Consumer Service Portal.
2. Click **Log in** in the portal header.
3. Fill in the fields on the Log in pop-up window.
4. Click **Log in**.
   You are logged in to the Consumer Service Portal and your name and profile picture appears in the portal header.

Change your password from the Consumer Service Portal

Change your password from the consumer portal.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Click your user name in the portal header to display the user profile information.
2. Click **Change Password**.
3. Fill in the fields on the Change Password form, as appropriate.

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Change Password form fields

Field	Description
Current Password	The current password. This field is automatically filled in.
New Password	The new password. This password must: ○ Be a minimum of eight characters in length ○ Include at least one uppercase and one lowercase letter ○ Include at least one number
Confirm Password	Retype the new password.

4. Click **Change**.

View or edit a consumer profile

Registered users with the consumer role can view their consumer profiles, edit the information as needed, and change passwords.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Log in to the Consumer Service Portal.
2. Select your user name in the portal header and then select **Profile**.
3. To add a picture to your profile, select **Upload Picture** and select the desired image.
4. To update the personal information in your profile, including name, contact information, and address:
   a. Select the desired field.
   b. Enter the new information in the pop-up window.
   c. Select **Save**.
5. To change your password, select **Change Password**.
   The **Change Password** link appears on the consumer profile when the Self-Service Password Reset plugin (com.snc.password_reset) is activated.
6. Fill in the fields on the Change Password pop-up window and select **Update**.

Register a product from the Consumer Service Portal

Users with the consumer role can register their products from the Consumer Service Portal.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Log in to the Consumer Service Portal.
2. Click **Support** in the portal header and then click **Register Product**.
3. Type a search term in the search field and press Enter to display a list of products.
4. Click the **Select** button on the card for the desired product.

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5. Enter the **Serial Number** and the **Purchase Date** for the selected product.
6. Click **Register**.
   After the product is successfully registered, it appears in the My Products list, which includes the products registered to the current user.

View a list of products from the Consumer Service Portal

Users with the consumer role can view a list of their registered products from the Consumer Service Portal.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Log in to the Consumer Service Portal.
2. Click **Support** > **My Products** in the portal header.
   This displays a list of products registered to the current user.
3. If desired, click a product to display more information about the product.

Access your list of install base items from the Consumer Service Portal

Access your list of install base items from the Consumer Service Portal so that you can get the detailed information about an install base item. For example, with this list, you can see how many items are registered to you.

Before you begin

Role required: sn_customerservice.consumer, sn_customerservice.consumer_contributor, and sn_customerservice.relationship_contributor

Procedure

1. Log in to the Consumer Service Portal.
2. Navigate to **Support** > **Install Base**.
   In the header on the Consumer Service Portal, you can access a list of the install base items that are registered to you.

   In the list layout for an install base item, the details that are related to consumers in the **Household** and **Consumer** fields are visible. Only consumers with the appropriate roles can see the install base option in the support menu.
3. From the list, open an install base record to see all the details and cases for that install base item.

Create a case from the Consumer Service Portal

As a user with the consumer role, you can create cases from the Consumer Service Portal.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Log in to the Consumer Service Portal.
2. Select **Get Help** in the portal header.
3. Choose between **Get Product Help** and **Get Order Help**.

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4. Enter or search for a customer.
5. Enter a product or an order depending on what you selected above.
6. Enter a brief description in the **Subject** field.

> **Note:**
> When you start entering the subject, the application searches for the relevant content in the knowledge bases configured for the portal and is displayed in the **Related Content** list.

7. Add a description in the **Description** field and add any attachment.

> **Note:**
> Currently, the **Save as Draft** option isn't optimized for Customer Service Management, and it's inactive by default.

8. Select **Submit**.

Result
The new case is created and added to the Cases list. To view the case, select the link in the case creation message or select **Cases** in the portal header, and then select the case number.

View a case from the Consumer Service Portal

Users with the consumer role can view a list of cases from the Consumer Service Portal and select individual cases to see more detail.

Before you begin
Role required: sn_customerservice.consumer

About this task
Selecting a case opens a form with the following sections:

- A conversation that displays the interaction between the consumer and the customer service agent.
- The action that needs to be taken on the consumer's part, such as accepting or rejecting a solution.
- The case details, including the case number and current status.
- Any attached files.

Procedure

1. Log in to the Consumer Service Portal.
2. Click **Support** > **Cases** in the portal header to view a list of cases related to the current user.
3. Click the case number to view more information about the case.
4. If desired, type a message to the agent and click **Send**.
   Your message becomes part of the case conversation. All responses from the agent are also included in the conversation.

Accept or reject a case solution from the Consumer Service Portal

Users with the consumer role can accept or reject the proposed solution for a case from the Consumer Service Portal.

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Before you begin
Role required: sn_customerservice.consumer

About this task
When an agent proposes a solution to a consumer's case, buttons for accepting or rejecting the solution appear in the section of the form that shows the consumer actions.

Procedure
1. Log in to the Consumer Service Portal.
2. Select **My Lists** in the portal header to view a list of cases.
3. Select **Action Needed**.
4. Select the required case number to view more information about the case.
5. Select one of the following from **Actions**.

Option	Description
Accept Solution	Accepts the solution proposed by the agent and changes the case state to **Closed**.
Reject Solution	Rejects the solution proposed by the agent af ter entering the reason for rejecting the solu tion. The case state changes to **Open** state.

Chat with an agent from the Consumer Service Portal

Chat with a virtual agent or a customer service agent from the Consumer Service Portal to resolve issues quickly.

Before you begin
Role required: sn_customerservice.consumer

Procedure
1. Select the Chat icon ( ) in the Consumer Service Portal to start a conversation.
2. Select an option from the pre chat survey.
   A virtual agent or a customer service agent responds.
3. Enter your query to continue conversation.
4. **Optional:** To talk to a person instead of a virtual agent, select and then **Contact Support**.
5. When you're finished with the chat, select **End Conversation**.

What to do next
If the agent creates a case or links the discussion to an existing case, you can view these cases from the Consumer Service Portal by selecting **Cases** and displaying the case list.

Chat anonymously with an agent from the Consumer Service Portal

Users that are not logged in can chat anonymously with an agent from the Consumer Service Portal to resolve issues more quickly.

Before you begin
Role required: none

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Procedure

1. Click the Chat icon ( ) in the Consumer Service Portal to start a conversation.
2. Fill in the information and click **Submit**.
   A virtual agent or a customer service agent responds.
3. **Optional:** To talk to a person instead of a virtual agent, click and then **Contact Support**.
4. When you are finished with the chat, click **End Conversation**.

View a publication on the Consumer Service Portal

View the details of a publication on the Consumer Service Portal and download any attachments.

Before you begin
Role required: sn_customerservice.consumer

About this task
The **Support** > **Publications** link on the Consumer Service Portal displays a list of current publications. You can filter the publications on this list by category and you can further filter the list to show all publications or only those that are unread. You can sort the list by publish date or expiration date. You can also search for a specific term.

After a publication reaches its **Expiry Date**, it is automatically removed from the Publications list.

Procedure

1. Navigate to the Consumer Service Portal.
2. Click **Publications** in the portal header.
   This displays a list of current publications. The information displayed for each publication includes the title, publish date, expiration date, and a brief description.
3. If desired, filter or sort the Publications list.
   - Select a category in the upper-left corner or select **All Categories**.
   - Select either **All Publications** or **Unread Publications** in the upper-right corner.
   - Select either **Publish Date** or **Expiry Date** in the Sort by field.
4. If desired, search the Publications list by entering the search term in the **Search Publications** field.
5. Click a publication name to open.
6. If the publication has attachments, click **Attachments** in the upper-right corner.
7. Select the attachments to download from the pop-up window.
8. Close the pop-up window.
9. Click the return arrow at the top of the publication to return to the Publications list.

Using Conversational Appointment Booking

Customers can initiate an appointment booking conversation in a chat on your support portal using a Virtual Agent, and Agents can use Autopilot to display Virtual Agent topics during conversations.

Conversational Appointment Booking for Customers

Customers can complete the following tasks with a Virtual Agent:

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- Book a new appointment in CSM
- Reschedule an appointment in CSM
- Cancel an appointment in CSM

Conversational Appointment Booking for Agents

Agents can use Autopilot to display Virtual Agent topics during Agent Chat conversations. For more information, see Conversation Autopilot.

Schedule an appointment with Conversational Appointment Booking

As a customer or consumer, schedule an appointment from the Virtual Agent chat window on the service portal.

Before you begin

Role required: customer, consumer

About this task

You can only schedule one appointment per location. Only logged-in users can schedule appointments.

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example

   For example: `https://yourportalurl.com/csm`

2. Select the chat icon ( ) to open the chat window and begin a Virtual Agent chat.
3. Enter `schedule appointment`.

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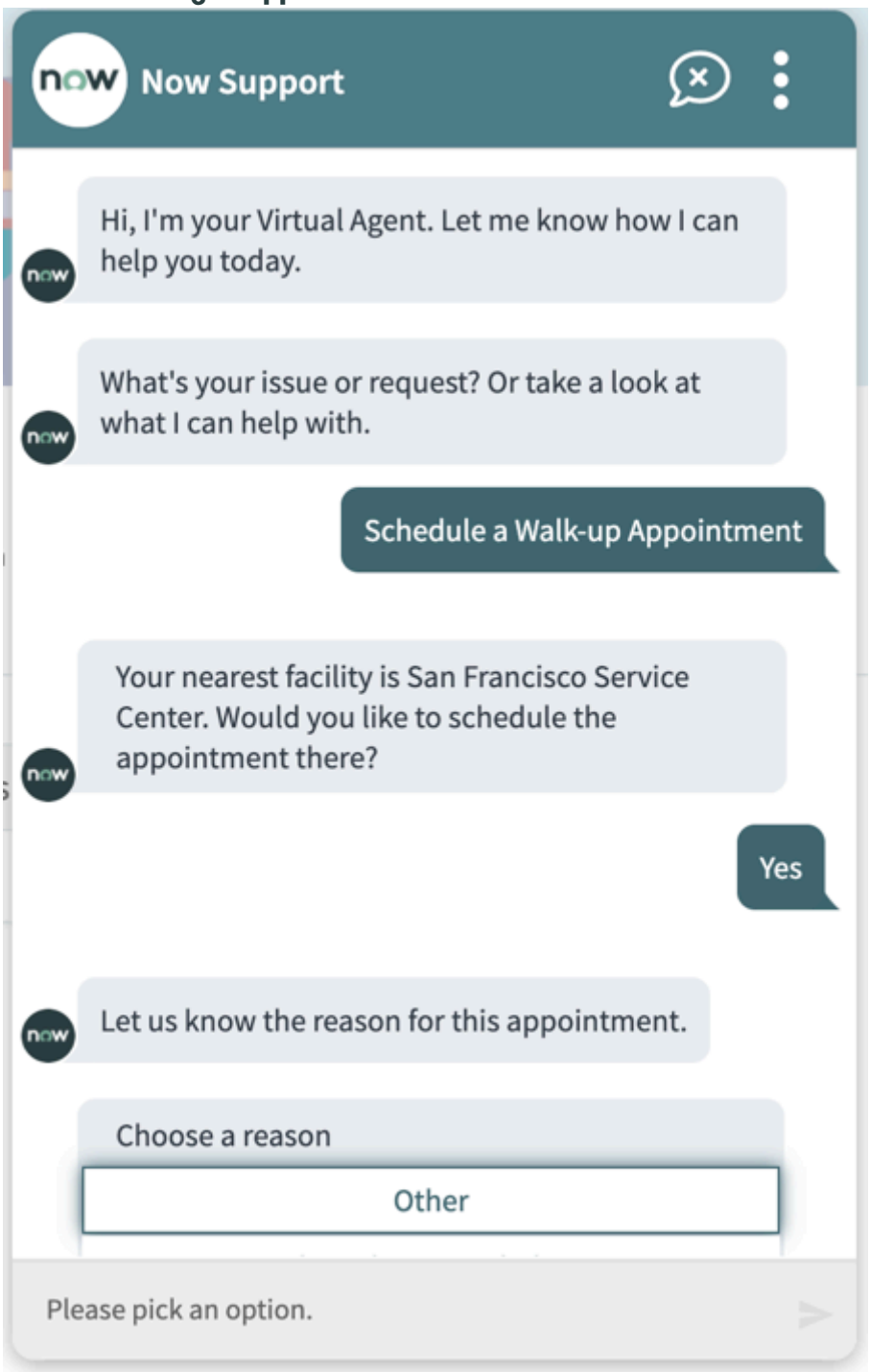
Start scheduling an appointment



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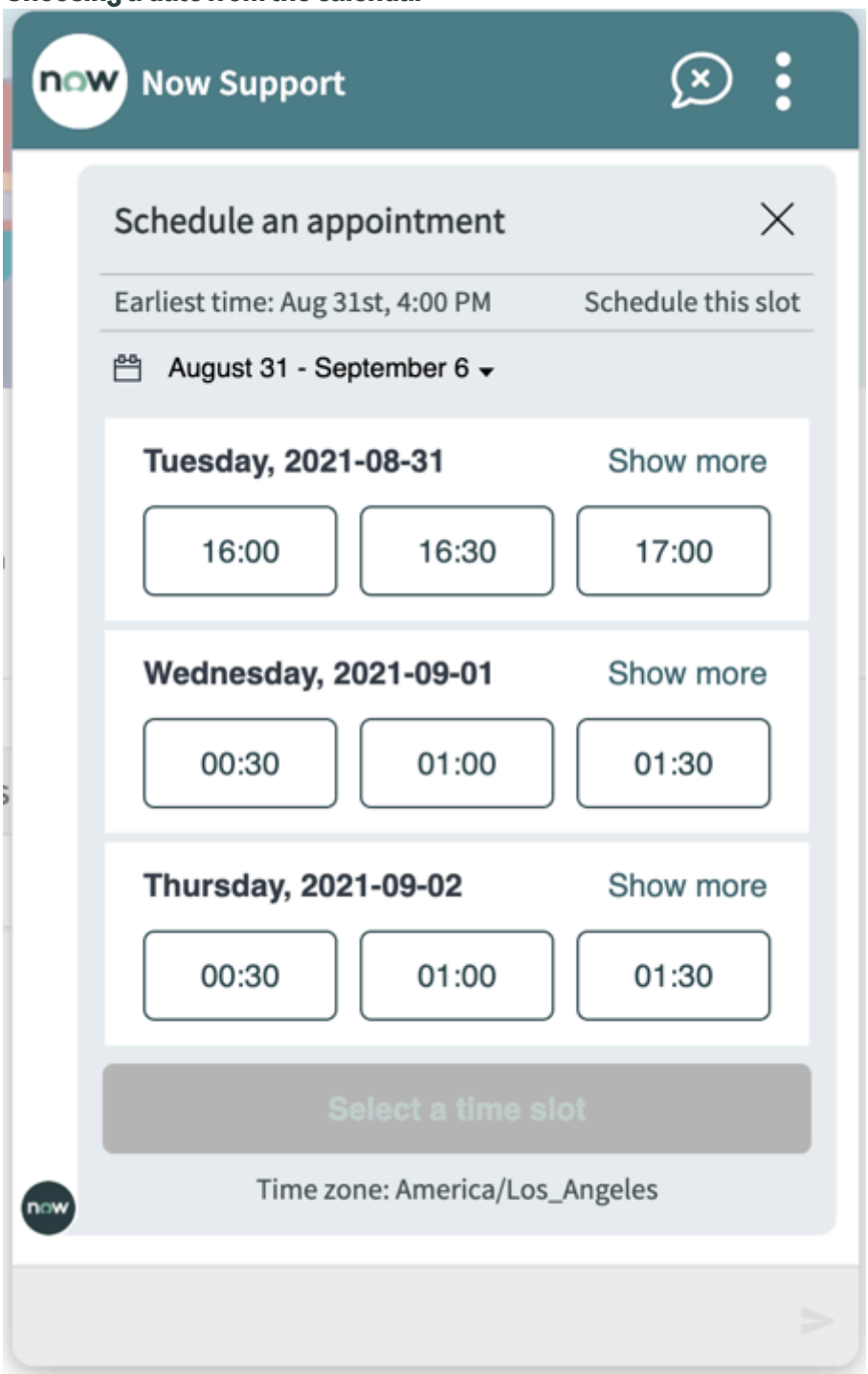
4. Choose a date from the calendar.

Choosing a date from the calendar



Result
The appointment is scheduled and the chat is complete.

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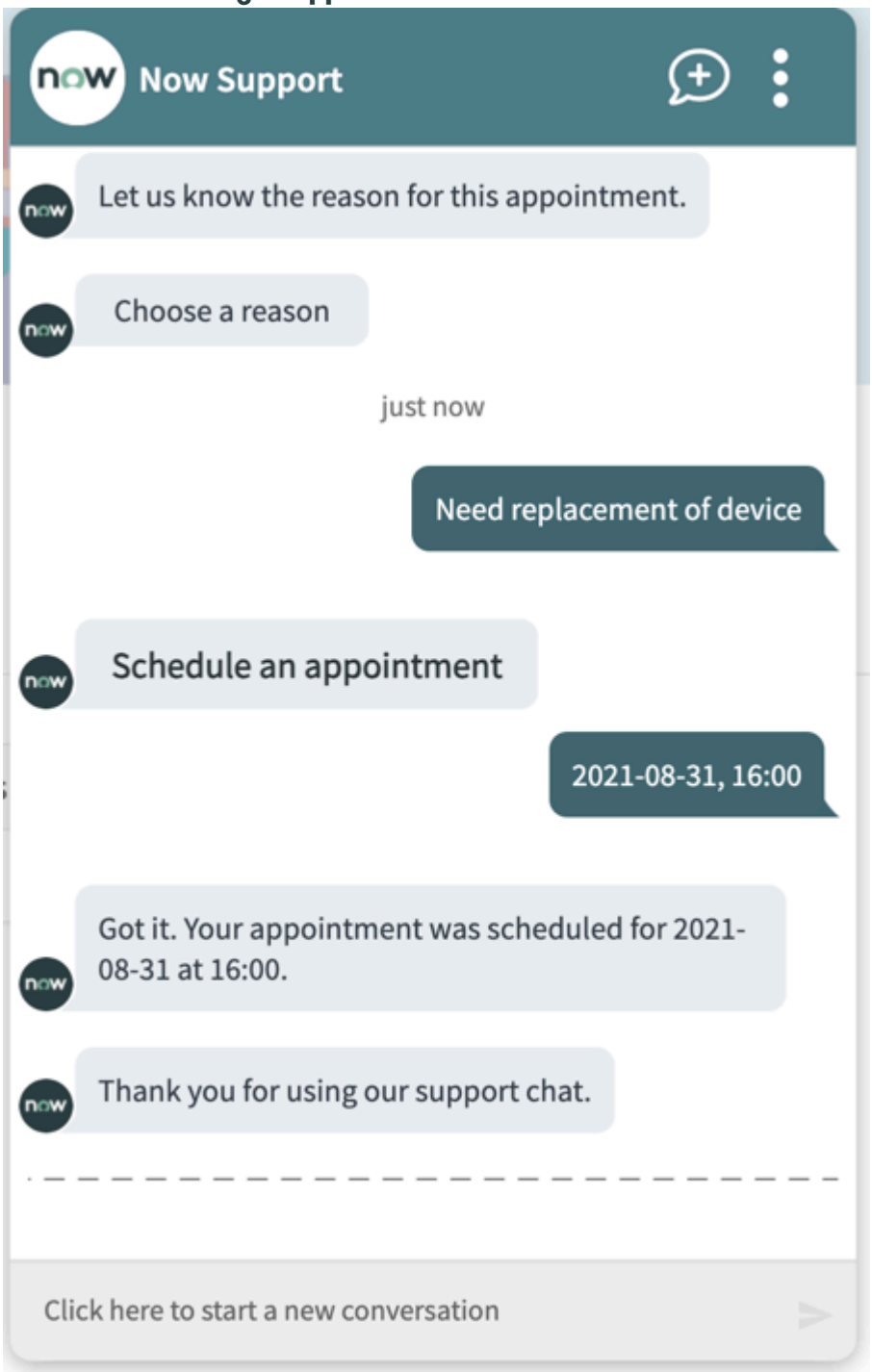
Finished scheduling an appointment



Related topics

- Reschedule an appointment
- Cancel an appointment

Reschedule an appointment with Conversational Appointment Booking

As a customer or consumer, reschedule an appointment from the Virtual Agent chat window on the service portal.

Before you begin

Role required: customer, consumer

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About this task

You can only schedule one appointment per location. Only logged-in users can schedule appointments.

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example

   For example: `https://yourportalurl.com/csm`

2. Click the chat icon ( ) to open the chat window and begin a Virtual Agent chat.
3. In the chat window, enter `reschedule appointment`.
4. Choose the appointment that you want to reschedule.

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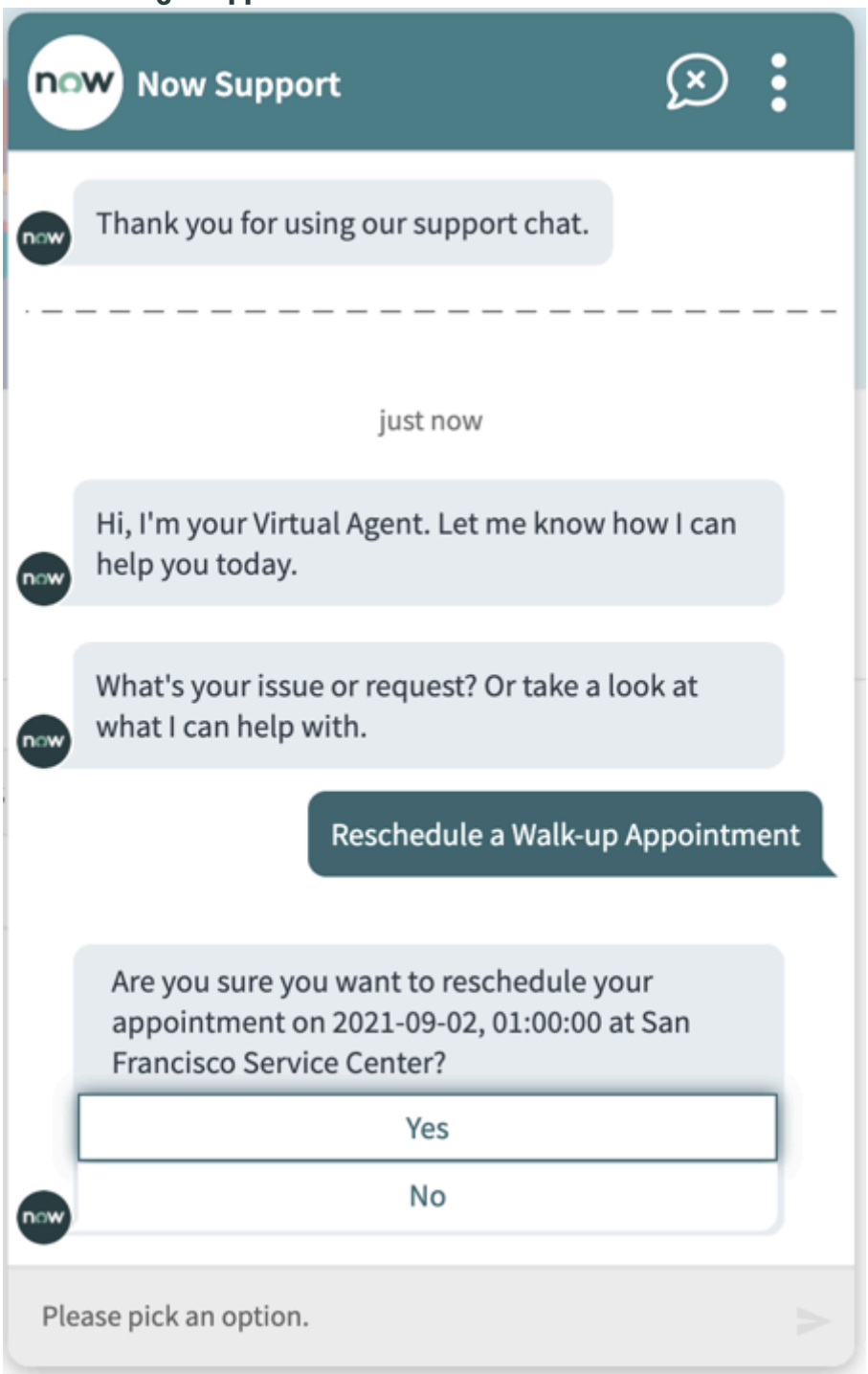
Rescheduling an appointment



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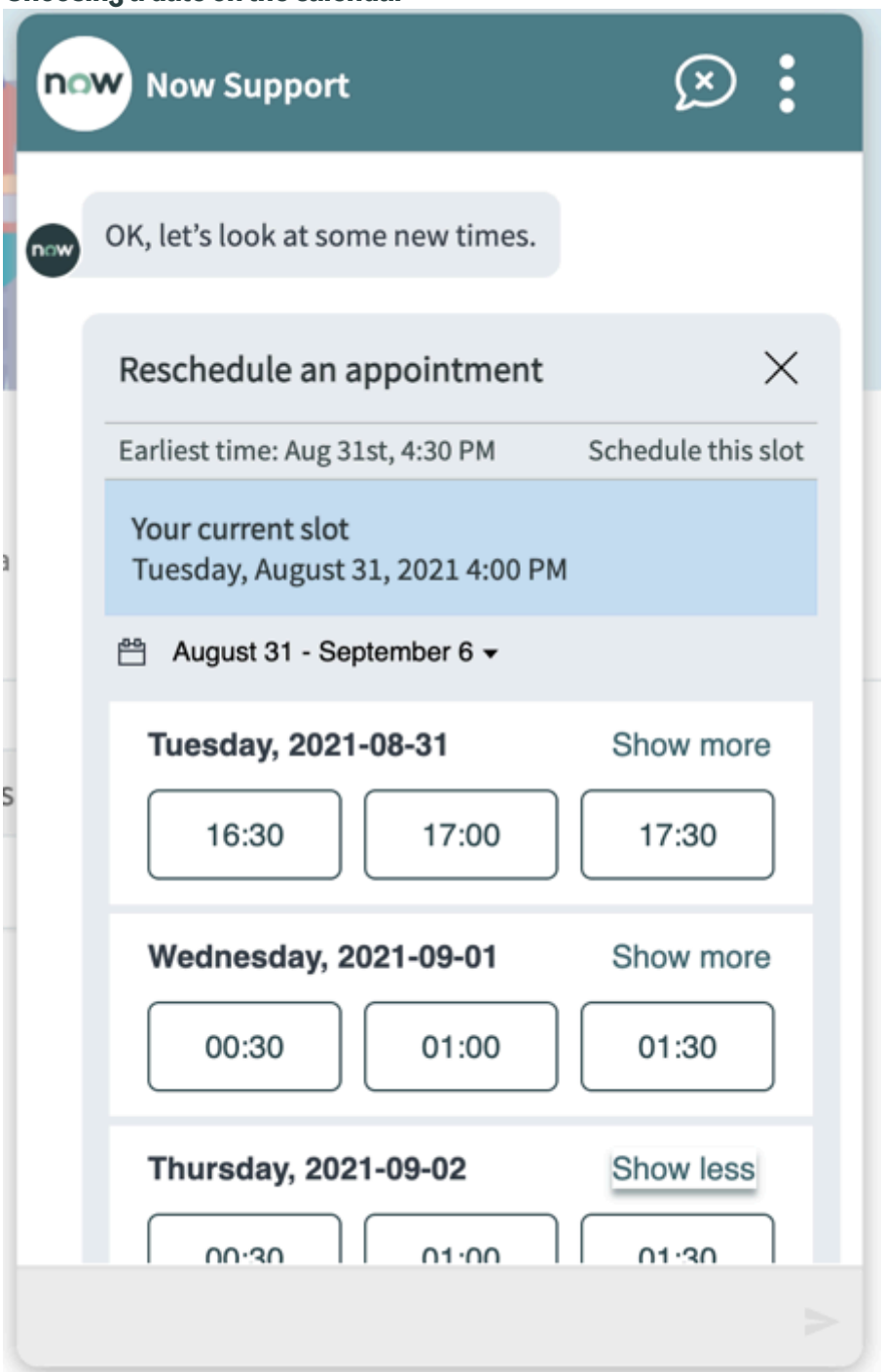
5. Choose a date from the calendar for the new appointment time.

Choosing a date on the calendar



Result
The appointment is rescheduled.

Related topics

Schedule an appointment

Cancel an appointment

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Cancel an appointment with Conversational Appointment Booking

As a customer or consumer, cancel an appointment from the Virtual Agent chat window on the service portal.

Before you begin

Role required: customer, consumer

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example

   For example: `https://yourportalurl.com/csm`

2. Click the chat icon ( ).
3. In the chat window, enter `cancel appointment`.
   The Virtual Agent shows the available appointments.

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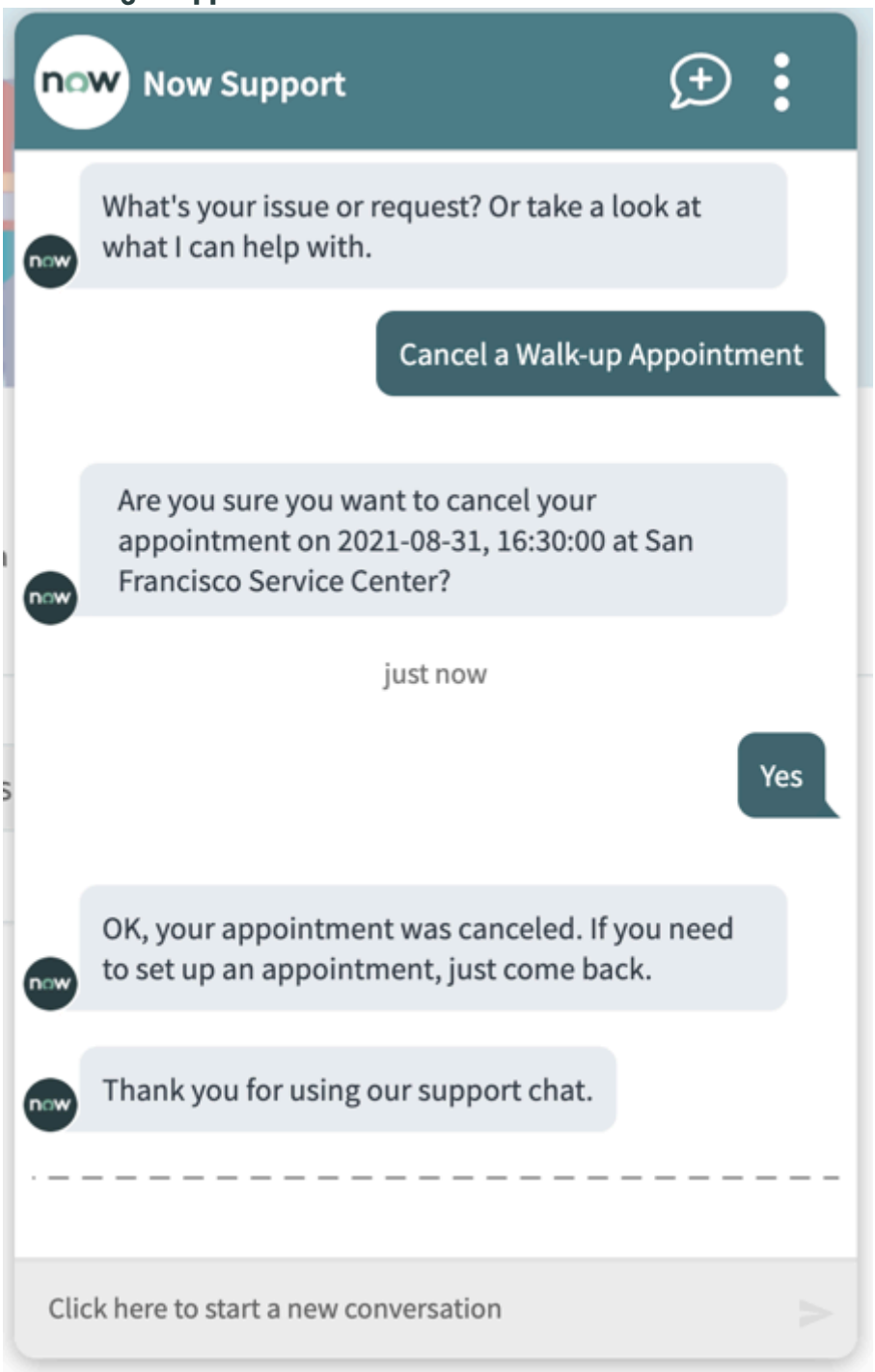
Cancelling an appointment



4. Confirm the cancellation.

Result
The appointment is canceled.

Related topics

Schedule an appointment

Reschedule an appointment

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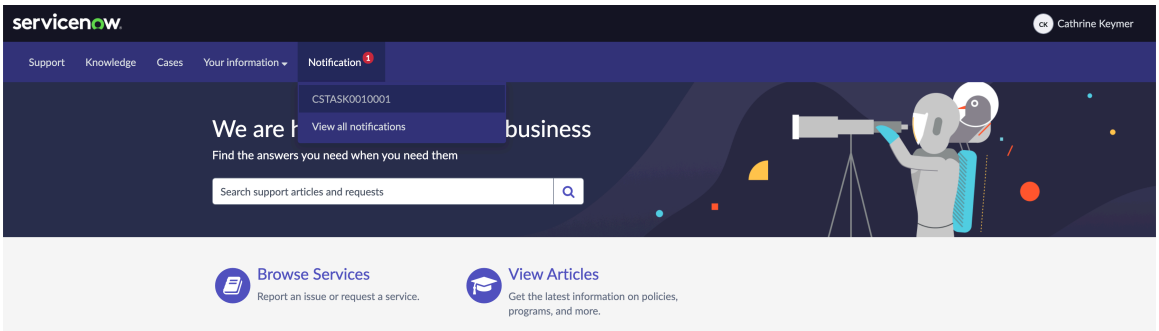
Using the Business Location Service Portal

Use the Business Location Service Portal (BLSP) available with the Customer Service Management (CSM) application as a one-stop shop to manage the internal and external business locations.

As a user with the sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and admin role, you can use the Business Location Service Portal page to:

- Get a 360° view of a business location.
- Add and manage staff members.
- Submit cases against business locations, sold products, or install base items deployed at a service organization.
- Access Knowledge Base articles and engage with the community.

Business Location Service Portal



From the Business Location Service Portal, you can access and use the following features:

Business Location Service Portal

UI component	Description
Support	Click **Support** to create a customer case.
Knowledge	Clicking **Knowledge** on the header takes you to the kb_home page. You can search the Knowledge Base or view a list of top-rated or most viewed Knowledge Base articles.
Cases	View the list of cases.
Your Information	Navigate to business locations, sold products, and install base items.
Notification	Displays notifications for case tasks with the following criteria • State is **Open**. • **Visible to customer** check box is selected. • User has the Location manager Contributor (sn_customerservice.svc_location_manager_contributor), or Service Organization Contributor roles (sn_customerservice.service_organization_contributor). • User is a member of the business location for which the case task is created.

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Business Location Service Portal (continued)

UI component	Description
	You can view only 7 notifications in the notification tab. To view all the notifications for a case task, select **View all notifications**.
Profile menu	Click your profile photo to either view your profile or log out.
Search	Enables you to search support articles and requests. Enter a search term and click **Search** to view the search results.
Browse Services	Click **Browse Services** to report an issue or request a service. Use the service to register a member at an external business location.
View Articles	Explore the knowledge base to get the information.
Ask the community	Provides access to the Community homepage. You can use the community to ask questions and get answers, connect with people who share similar expertise, and join forums and participate in discussions.
My Business Locations	Get the 360° view of the business location. Use the feature to: • Add a member to an external business location. • Report cases on behalf of a business location. • Report cases against sold products deployed at a business location. • Report cases against install base items deployed at a business location.
Featured Articles	View featured community content.
Most Viewed articles	View a list of the most viewed articles.

Depending on the configuration set by your administrator, you can perform the following tasks from the Business Location Service Portal:

- Register and assign staff members to a business location
- Report cases on behalf of a business location
- Report cases against sold products deployed at a business location
- Report cases against install base items deployed at a business location
- Access knowledge base articles and frequently asked questions

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Related topics

- Add staff members to a business location in the Business Location Service Portal
- Create cases for a business location in the Business Location Service Portal
- Track cases on the Business Location Service Portal

Add staff members to a business location in the Business Location Service Portal

Add users as staff members to a business location to support accounts, contacts, consumers, and households.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

Add internal and external members to a business location. You can add both internal users with the snc_internal role and external users with the snc_external role as staff members to an external business location.

- Administrators and customer service managers can add staff members to any business location.
- Location managers can add staff members to the business locations that they have access to.

Note:
As a user with the sn_customerservice.svc_location_manager role, you can create both internal and external staff members. However, as a user with the sn_customerservice.svc_location_manager_contributor role, you can only create external staff members.

Procedure

1. Navigate to **Home** > **Busines Location Support** > **Services**.
2. Select **Register Member at External Business Location** to open the Register Member at External Business Location record.
   You can use the record to register new location staff or move existing staff between locations managed by the Location manager, and assign responsibilities to staff accordingly.
3. On the form, fill in the fields.

Register Member at the External Business Location form

Field	Description
External Business Location	The external business location. This field is automatically generated.
Register Staff	Field used to register new location staff or move existing staff from an external business location hierarchy between locations.

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Field	Description
	○ **New Staff**: Create a user in Service Organization External Staff (sn_csm_service_organization_external_staff) table with (snc_external) role. ○ **Existing Staff**: List of staff members already working under the service organization hierarchy.
First Name	First name of the staff member.
Last Name	Family name of the staff member.
User ID	User ID of the staff member.
Email	Email address of the staff member.
Member	Field used to select an external staff member from the list of service organization external staff record. **Note:** The **Member** field appears only when **Existing Staff** is selected from the **Register staff** field.
Member Type	Field used to assign responsibility for the selected business location. ○ **None**: Creates a member record. ○ **Listed Member**: Creates a member record. With the member record, a responsibility record is created with the type as Listed Member and the responsibility as empty. ○ **Location Contributor**: Creates a member record. With the member record, a responsibility record is created with the type as Location Contributor and responsibility as the Location Contributor. **Note:** Assigning responsibility is applicable to both existing and new staff members.

4. Select **Submit**.
   Additionally, the external business location record is created in the **Service Organization** field of the service organization external staff [sn_csm_service_organization_external_staff] table. A new external staff member record is created for the selected external business location. The admin must assign responsibilities to the staff members. However, if you have selected **None** as a member type, then you must not create a responsibility record.

Result

Once a staff member is added to a business location, the following details can be accessed from the **Business Location Details** tab:

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- Cases Requested
- Members
- Available Services
- Accounts
- Consumers
- Households
- Child Business Locations
- Projects

Related topics

Create cases for a business location in the Business Location Service Portal

Track cases on the Business Location Service Portal

Agent assistance for your business location staff

Customer service agents receive chat requests from your business location staff on the CSM Agent Workspace. These agents can assist your staff members to resolve issues and manage their cases more efficiently if your staff members fill out a pre-chat survey first.

The customer service agents have visibility into the ongoing requests and case statuses. The agents can efficiently handle the issues from the staff members of a business location.

After an agent accepts an incoming chat request, the **Requesting service organization** field on the Interaction form that the agent sees is automatically filled in with the business location that a staff member selected during the pre-chat survey. To learn more about the pre-chat surveys, see Define pre-chat survey configurations.

Note:
The **Number**, **Type**,**State**, and **Assigned to** fields on the Interaction form are filled by default. To know more about the fields, see Create cases for a business location in the Business Location Service Portal.

The Open Cases and Recent Interactions related lists on the Interaction form shows a list of the active cases and interactions for the requesting service organization.

A resolution is also provided by interacting with the user. For further assistance, an agent can create a case or link the discussion to an existing case. The **Requesting service organization** field is populated by default when a case is created from an interaction.

Related topics

Chat with Virtual Agent from the Business Location Service Portal

Create cases for a business location in the Business Location Service Portal

As a staff member with the location agent role, create and manage cases for your business locations.

Before you begin

Role required: admin, sn_customerservice.svc_location_agent, and sn_customerservice.svc_location_manager

About this task

Staff members with the location agent role can do the following:

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- View information for the customers at their location.
- Create cases for an account, consumer, business location, and themselves.
- Register staff members at an external business location.
- Track and update cases created at their location.

Procedure

1. Navigate to **Home** > **Business Location Support** > **Support** > **Create a Customer Case**.
2. On the form, fill in the fields.

Create a Customer Case form

Field	Description
Who are you creating this case for?	The record producer used for creating a case for the contributor user. When the contributor user selects an option, depending on the roles assigned to the logged-in user, additional fields related to that customer type are displayed. ○ **Account**: The logged-in user with the account contributor role. ○ **Consumer**: The logged-in user with the consumer contributor role. ○ **Business Location**: The logged-in user with the service organization contributor role. ○ **Myself**: The logged-in user with the self-contributor role.
Requesting Business Location	Name of the service organization requesting assistance.
Requesting support from Business Location	Name of the service organization from which the **Requesting Business Location** is asking assistance.
Account	Name of the account.
Contact	Contact for the account.
Consumer	Name of the consumer. **Note:** This field is active only when the B2B2C plugin is installed.
Household	Household that the consumer belongs to.
Product	Sold product associated with the case.
Install Base	Install base item associated with the case.
Priority	The assigned priority: ○ 1 — Critical ○ 2 — High

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Field	Description
	○ 3 — Moderate ○ 4 — Low (default)
Channel	Method by which the customer initiated contact and opened the case. ○ Web (default) ○ Phone ○ Email ○ Chat ○ Social ○ Community ○ Alert ○ Virtual Agent ○ In Person
Subject	Subject line specifying the case.
Description	Brief description of the customer question, issue, or problem.

3. Click **Submit**.

What to do next

Similarly, you can report cases on behalf of a business location, against sold products deployed at a business location, or against installed base items deployed at a business location.

Related topics

Track cases on the Business Location Service Portal

Track cases on the Business Location Service Portal

Track cases on behalf of a business location against sold products deployed at a business location, or against installed base items deployed at a business location.

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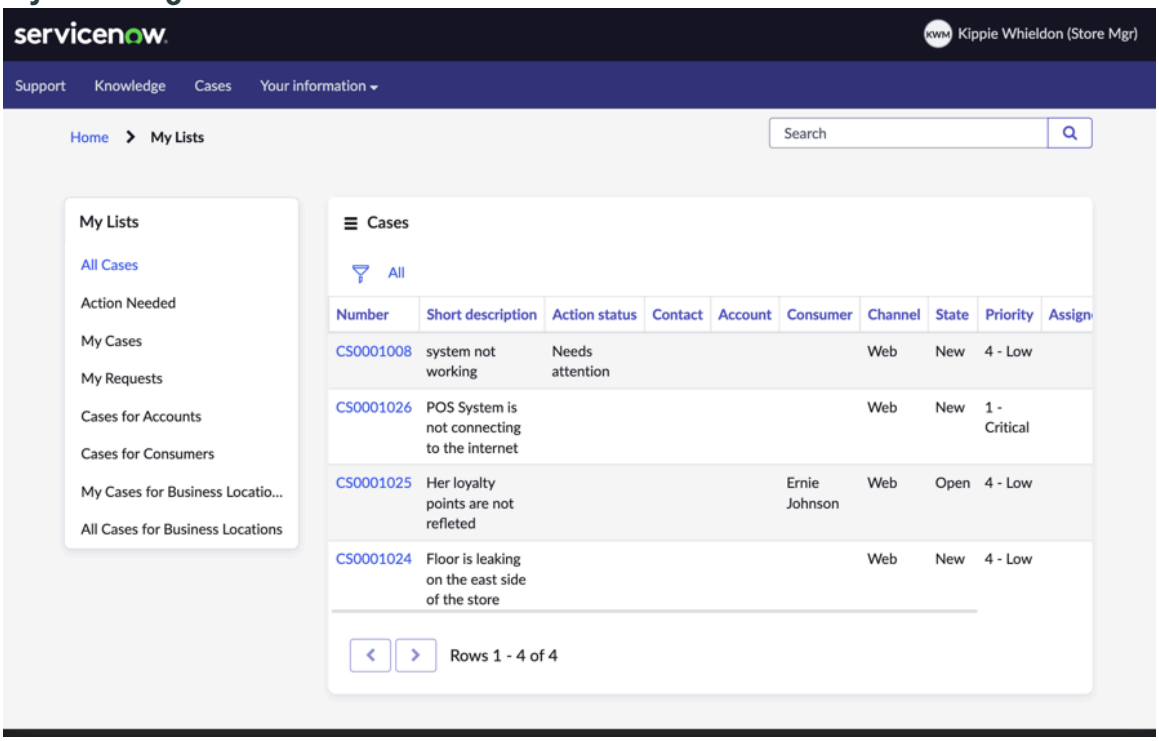
My Lists widget on the Business Location Service Portal



Depending on the roles assigned to the logged-in user, the widget displays the following filters.

My Lists widget filters

My Lists filters	Description
All Cases	List of all the cases.
Action Needed	Cases in the **Resolved** state that are waiting for a customer response.
My Cases	Cases for myself.
My Requests	Cases that are created as a request. To integrate request management, see, CSM integration with Request Management.
Cases for Accounts	Cases created by the account contributor.
Cases for Consumers	Cases created by the consumer contributor.
My Cases for Business Locations	Cases created by the contributor user on behalf of their business locations.
All Cases for Business Locations	All cases created on behalf of the contributor users' business locations, independent of who created the case.

Track work orders on the Business Location Service Portal

Enable your location staff to track work orders for their business locations using the Business Location Service Portal (BLSP). It allows you to view and manage work orders, helping you track tasks and updates directly related to your specific locations.

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Before you begin

Role required: admin, sn_customerservice.service_organization_contributor, sn_customerservice.svc_location_manager_contributor, sn_bus_loc.location_relationship_manager, and sn_customerservice.svc_location_manager

Note:
To access the complete work order functionality, a sn_fsm_servicedesk_agent role is added to the sn_customerservice.service_organization_contributor role.

About this task

Work orders are requests for off-site work. Users with the appropriate roles create the work orders and provide the necessary information needed for the work order tasks. These orders include information about the requested services, including customer names and addresses, the work locations, and any related configuration items. Each work order includes one or more tasks that contain specific details about the work to be performed, such as required agent skills or part requirements.

For more information about work orders, see Manage work orders.

Procedure

1. Navigate to **Home** > **Your Information** > **Business Locations**.
2. On the Business Location Details page, select the business location you want to track the work order for.
3. From the list of work orders at your business location, select a work order number to view its details, including location, activity, and tasks.

Note:
External location contributors can't access the **Work Order Tasks** tab.

Track and update projects

Enable your location staff to track projects for their business locations using the Business Location Service Portal (BLSP). You can manage projects, enabling efficient monitoring of progress and updates of your locations.

Before you begin

Role required: admin, sn_bus_loc.location_project_stakeholder, sn_customerservice.service_organization_contributor, sn_customerservice.svc_location_manager_contributor, sn_bus_loc.location_relationship_manager, and sn_customerservice.svc_location_manager

Procedure

1. Navigate to **Home** > **Your Information** > **Business Locations**.
2. On the Business Location Details page, select the business location that you want to track the projects for.
3. See the list of projects by selecting the **Projects** tab.
4. **Optional:** Create a case for the business location or account or consumer by selecting **Create Case**.
5. Register a staff member to the business location by selecting **Add Member**.
   To learn more, see Add staff members to a business location in the Business Location Service Portal.
6. To see **Project Tasks**, **Sub-Projects** and **Cases**, select a project.

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7. To update a task, select a task from the list.
   Dates, state, tasks, and cases can be updated.
8. **Optional:** Mark a task as completed by selecting **Mark Complete**.
   State and **Actual end date** is updated automatically.

Analytics and reporting for Customer Service Management

Customer Service Platform Analytics Solutions contain preconfigured dashboards with actionable data visualizations to improve your business processes and quantify the value of self-service.

Customer Service Platform Analytics and Reporting Solutions

Customer Service Platform Analytics Solutions contain preconfigured dashboards with actionable data visualizations to improve your business processes.

Platform Analytic and Reporting Solutions for Self-Service Analytics for Customer Service

Platform Analytics Solutions contain prepackaged Performance Analytics and Reporting content for use with other ServiceNow AI Platform products. This Platform Analytics Solution quantifies the value of self-service using the Self-Service Analytics dashboard for customer service.

Customer Service Platform Analytics Solutions

Customer Service Platform Analytics Solutions contain preconfigured dashboards with actionable data visualizations to improve your business processes.

Platform Analytics data visualizations use Performance Analytics indicator data to show you data over time, helping you analyze your business processes and identify areas of improvement. With Platform Analytics Solutions, you can get value from Performance Analytics for your application with minimal setup. You can always create your own objects as well.

To access available dashboards, navigate to **Performance Analytics** > **Dashboards** and select **All**.

Two Platform Analytics Solutions are available for Customer Service:

- Customer Service (com.snc.pa.customer_service)
- Customer Service Management - Advanced (com.snc.pa.customer_service_advanced)

Note:
Customer Service Performance Analytics solutions are an optional feature available for the Customer Service Management application. To use them, your license must also include Performance Analytics. Once licensed, enable the Performance Analytics Premium for Customer Service and the Customer Service Performance Analytics solutions on the instances where you wish to leverage the enhanced functionality. For more information about licensing Performance Analytics, see Activating your Performance Analytics subscription.

Customer Service solution

The Customer Service solution adds the following features.

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Note:
Performance Analytics - Spotlight (com.snc.pa.spotlight) is automatically activated with this solution.

Spotlight groups: Case Spotlight.

Dashboards:

- Customer Service Agent
- Customer Service Manager

Customer Service Management - Advanced solution

The Customer Service Management - Advanced solution adds the following features.

Note:
Performance Analytics - Spotlight (com.snc.pa.spotlight) is automatically activated with this solution.

Spotlight groups: Case Spotlight.

Dashboards:

- Customer Service Agent - Advanced
- Customer Service Manager - Advanced

These dashboards have all the information shown on the dashboards for the basic Customer Service solution, but also contain additional indicators for the following features. Activate all the plugins below in order to view the additional indicators.

- Major Issue Management
- Customer Service Case Action Status
- Customer Service with Request Management
- Customer Service with Service Management
- Agent Chat
- Advanced Work Assignment for CSM
- Performance Analytics - Content Pack - Advanced Work Assignment

Note:
For more information about the Major Issue Management indicators, see Major issue management analytics.

The Customer Service Management - Advanced solution also adds additional Service Management indicators to the Analytics Hub. For more information, see Customer Service Management integration with Service Management analytics.

Enable Performance Analytics for Customer Service Management

To enable Performance Analytics for Customer Service Management, a user with the admin role can navigate to **Performance Analytics** > **Guided Setup**. Click **Get Started** and then scroll to the section for Customer Service. The guided setup takes you through the entire setup and configuration process.

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Related topics

- Platform Analytics Solutions
- Ranking records with Spotlight

Customer Service Agent dashboard

The Customer Service Agent dashboard provides quick access to your cases based on criteria that help you prioritize your work. The dashboard also displays summary data on metrics for your organization.

To view the Customer Service Agent dashboard, navigate to **Performance Analytics** > **Dashboards**. Click the **All** tab and select **Customer Service Management** from the Group menu. Click the **Customer Service Agent** or **Customer Service Agent - Advanced** tile.

The Customer Service Management - Advanced Performance Analytics Solution adds the Customer Service Agent - Advanced dashboard. The Advanced dashboard contains two additional indicators: Exceeding Chat Target and Exceeding Case Target.

End users and roles

The Customer Service Agent dashboard includes the following end users and roles.

Agent dashboard end users and roles

End user and goal	Required role
Customer service agent: View and prioritize your assigned cases. View case trends for all agents.	sn_customerservice_agent
Customer service manager: View and prioritize your assigned cases. View case trends for all agents.	sn_customerservice_manager
Content administrator: Can edit the dashboard and manage users, groups, and roles for the dashboard.	pa_admin
Content creator: Can view the dashboard.	pa_viewer

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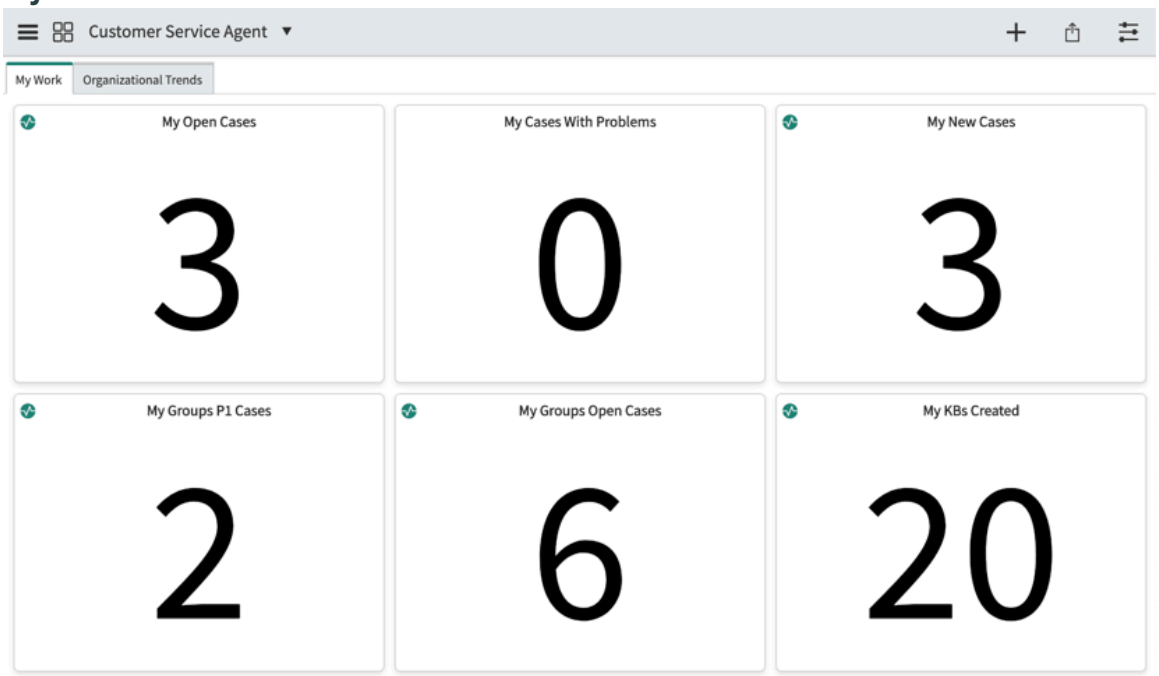
My Work tab



Reports

The Customer Service Agent dashboard includes the following reports.

Agent dashboard reports

Title	Description
My Open Cases	Cases assigned to me that are not resolved, closed, or canceled.
My Cases With Problems	Cases assigned to me that are part of a parent case that is assigned to a system admin. **Note:** To view this data in the dashboard, add the sn_problem_read role to the sn_customerservice_agent role.
My New Cases	Cases that I have not yet responded to.
My Group's P1 Cases	P1 cases that are assigned to a member of my group.
My Group's Open Cases	Cases assigned to a member of my group that are not resolved, closed, or canceled.
My KBs Created	List of all KB articles that I created.

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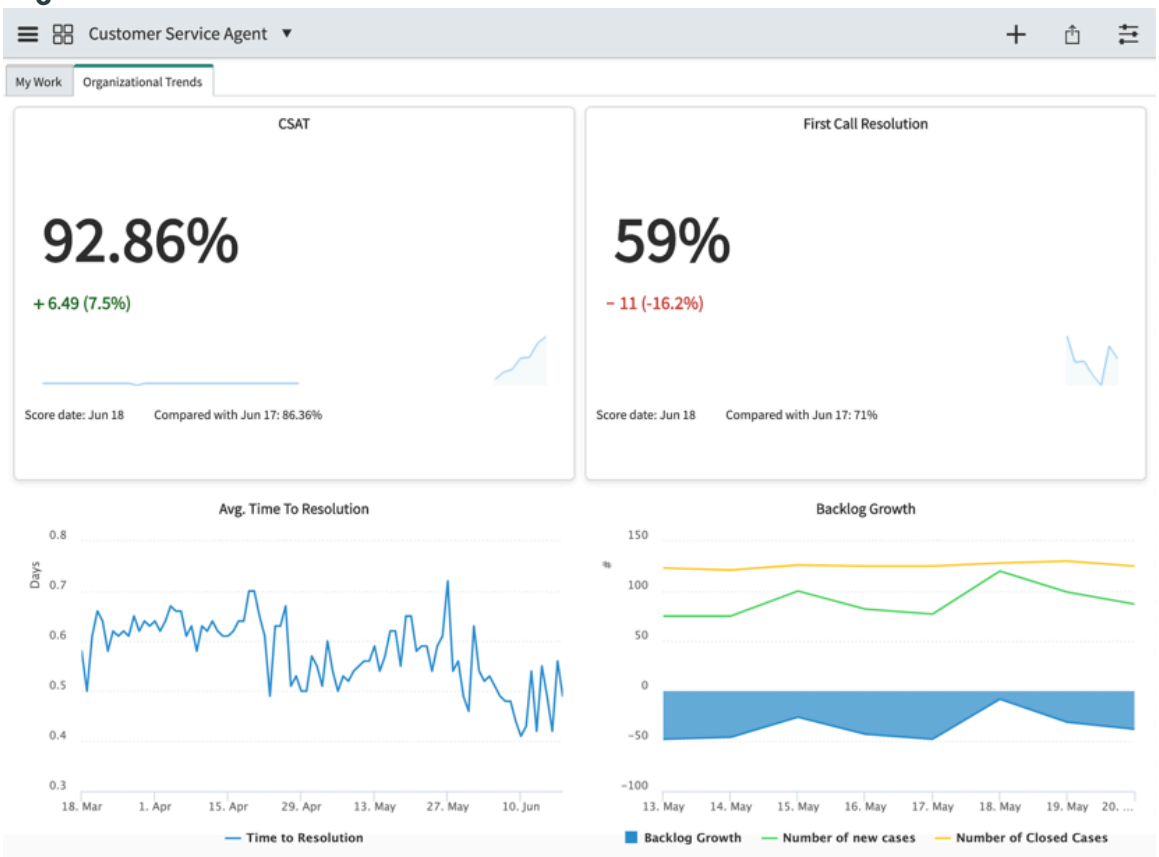
Organizational Trends tab



Indicators

The Customer Service Agent dashboard includes the following indicators.

Agent dashboard indicators

Indicator	Description
CSAT	Average customer satisfaction based on survey results. The percent change in the current period appears under the total percentage. For more information about CSAT, see Customer service satisfaction surveys.
First Call Resolution	Percentage of cases that were resolved during first contact with the customer. The percent change in the current period appears under the total percentage.
Exceeding Chat Target	Percentage of all Chat work items that have exceeded the target wait time. For more information about the Chat service channel, see Advanced Work Assignment service channels **Note:** This indicator is only viewable on the Customer Service Agent - Advanced dashboard.
Exceeding Case Target	Percentage of all Case work items that have exceeded the target wait time. For more information about the Case service channel, see Advanced Work Assignment service channels

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Agent dashboard indicators (continued)

Indicator	Description
	Note: This indicator is only viewable on the Customer Service Agent - Advanced dashboard.
Avg. Time to Resolution	Average time for a case to be marked as closed or resolved. **Note:** On the Customer Service Agent - Advanced dashboard, this indicator is called Mean Time to Resolve.
Backlog Growth	Number of backlogged cases for all agents over time.

Customer Service Manager dashboard

The Customer Service Manager dashboard displays charts and summary data on metrics like backlog, resolution rates, SLA, customer satisfaction, and per-agent KPIs.

To view the Customer Service Manager dashboard, navigate to **Performance Analytics** > **Dashboards**. Click the **All** tab and select **Customer Service Management** from the Group menu. Click the **Customer Service Manager** or **Customer Service Manager - Advanced** tile.

The Customer Service Management - Advanced Performance Analytics Solution adds the Customer Service Manager - Advanced dashboard. The Advanced dashboard contains the additional tab Work Assignment Analytics.

End users and roles

End user roles and goals

End user and goal	Required role
Customer service manager: View case metrics like backlog, resolution rates, SLA, customer satisfaction, and per-agent KPIs to understand the current performance of customer service at your organization.	sn_customerservice_manager
Content administrator: Can edit the dashboard and manage users, groups, and roles for the dashboard.	pa_admin
Content creator: Can view the dashboard.	pa_viewer

Dashboard breakdowns

The Customer Service Manager dashboard uses the Case Assignment Group breakdown. Select one or more groups to view data for only those groups. By default, data from all groups is shown on the dashboard.

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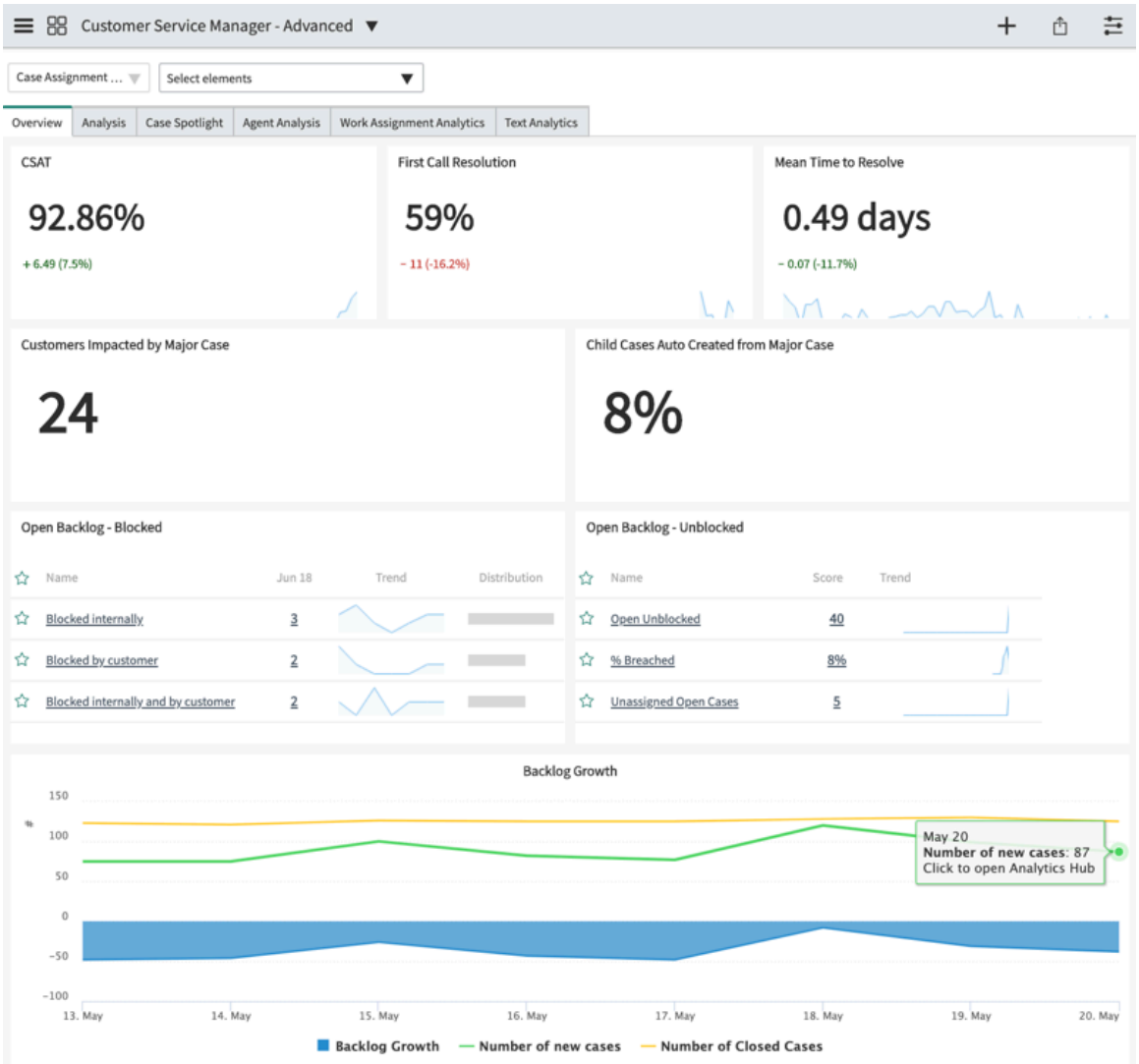
Overview tab



Overview indicators

Customer Service Manager - Advanced indicators

Indicator	Description
CSAT	Average customer satisfaction based on survey results. The percent change in the current period appears under the total percentage. For more information about CSAT, see Customer service satisfaction surveys.
First Call Resolution	Percentage of cases that were resolved during first contact with the customer. The percent change in the current period appears under the total percentage.
Mean Time to Resolve	Average time for a case to be marked as closed or resolved. The percent change in the current period appears under the total percentage.
Customers Impacted by Major Case	Number of customers impacted by major cases.
Child Cases Auto Created	Percentage of child cases that are automatically created from a major case.

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Customer Service Manager - Advanced indicators (continued)

Indicator	Description
from Major Case	
Open Backlog - Blocked	Number of cases that are blocked and are not resolved.
Open Backlog - Unblocked	Number of cases that are not blocked and are not resolved.
Backlog Growth	Number of backlogged cases for all agents over time.

Customer Service Manager indicators

Indicator	Description
CSAT	Average customer satisfaction based on survey results. The percent change in the current period appears under the total percentage. For more information about CSAT, see Customer service satisfaction surveys.
First Call Resolution	Percentage of cases that were resolved during first contact with the customer. The percent change in the current period appears under the total percentage.
Open Cases with Breached SLAs	Percentage of cases that have remained open past the time required by the Service Level Agreement (SLA).
Unassigned Open Cases	Number of open cases that are not assigned to an agent.
Avg. Time to Resolution	Average time for a case to be marked as closed or resolved. The percent change in the current period appears under the total percentage.
Backlog Growth	Number of backlogged cases for all agents over time.
Open Case Backlog	Chart of cumulative open cases and case age over time.
Open Backlog	Number of cases that are not resolved.

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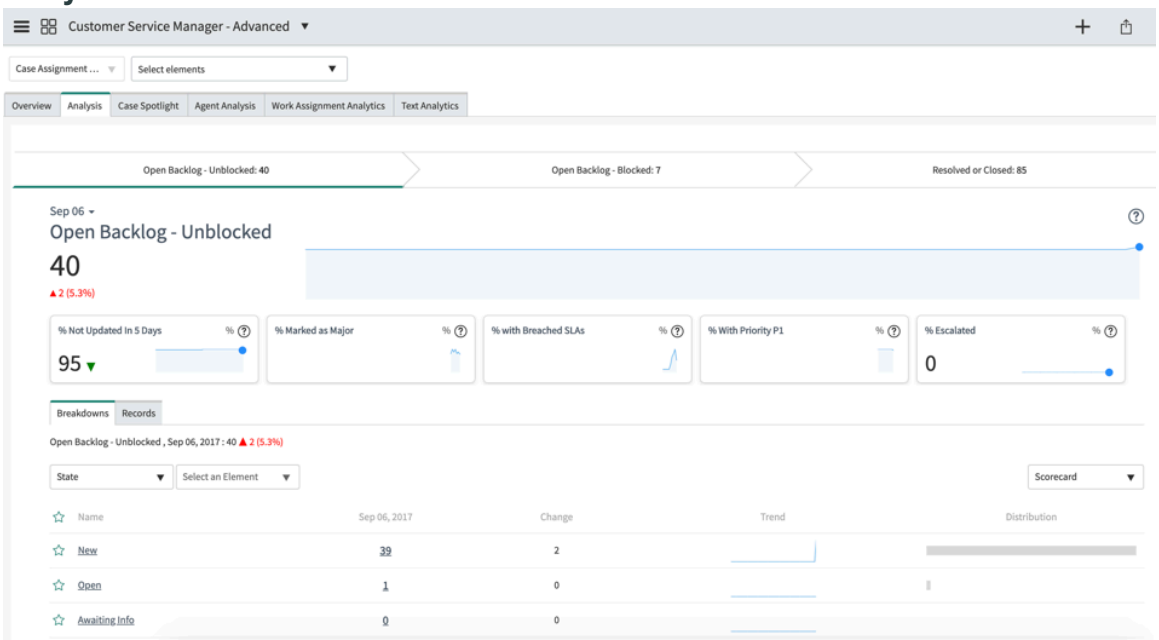
Analysis tab



Trend chart of case backlog over time. Click and move your cursor to view data for any date. Indicators display data for the selected date.

Analysis indicators

Customer Service Manager analysis indicators

State	Indicator	Description
Open Backlog - Unblocked	% Not Updated in 5 Days	Percentage of open cases that agents have not updated within the last 5 days.
	% Marked as Major	Percentage of open cases that are major.
	% with Breached SLAs	Percentage of open cases that have remained open past the time required by the SLA.
	% with Priority P1	Percentage of open cases that are critical priority.
	% Escalated	Percentage of open cases that have been escalated.
	% with Problem	Percentage of open cases connected to a problem.
	% Agent Reassignment	Percentage of open cases where the Assigned to field has changed at least once.
	% of Major Candidates	Percentage of open cases that have been proposed as major case candidates.
	% Re-opened At Least Once	Percentage of open cases where the State was previously Resolved.
	% with Request	Percentage of open cases connected to a request.
Resolved or Closed	% with Problem	Percentage of closed cases connected to a problem.
	% Caused by Change	Percentage of closed cases caused by a change.

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Customer Service Manager analysis indicators (continued)

State	Indicator	Description
	Closed in Same Day	Number of cases that were closed on the same day they were created.
	% Re-opened At Least Once	Percentage of closed cases that were reverted to the open State at least once.
	% Resolved Major Cases	Percentage of closed cases that are major cases.
	% Re-assigned	Percentage of closed cases that are reassigned.
	% with Breached SLAs	Percentage of closed cases that remained open past the time required by the SLA.
	% with Change	Percentage of closed cases connected to a problem.
	% with Incident	Percentage of closed cases connected to an incident.
	% with Request	Percentage of closed cases connected to a request.

Analysis breakdowns

Select a breakdown to view cases grouped by that breakdown.

Cases in the Open Backlog - Unblocked state can be grouped by the following breakdowns.

- Case Assignment Group
- Case Assigned To
- Account
- Product
- State
- Priority
- Category
- Channel

Cases in the Open Backlog - Blocked state can be grouped by the following breakdowns.

- Blocked Action Status
- Case Assignment Group

Cases in the Resolved or Closed state can be grouped by the following breakdowns.

- Case Assignment Group
- Case Assigned To
- Account
- Product
- Age
- Priority
- Category
- Contact

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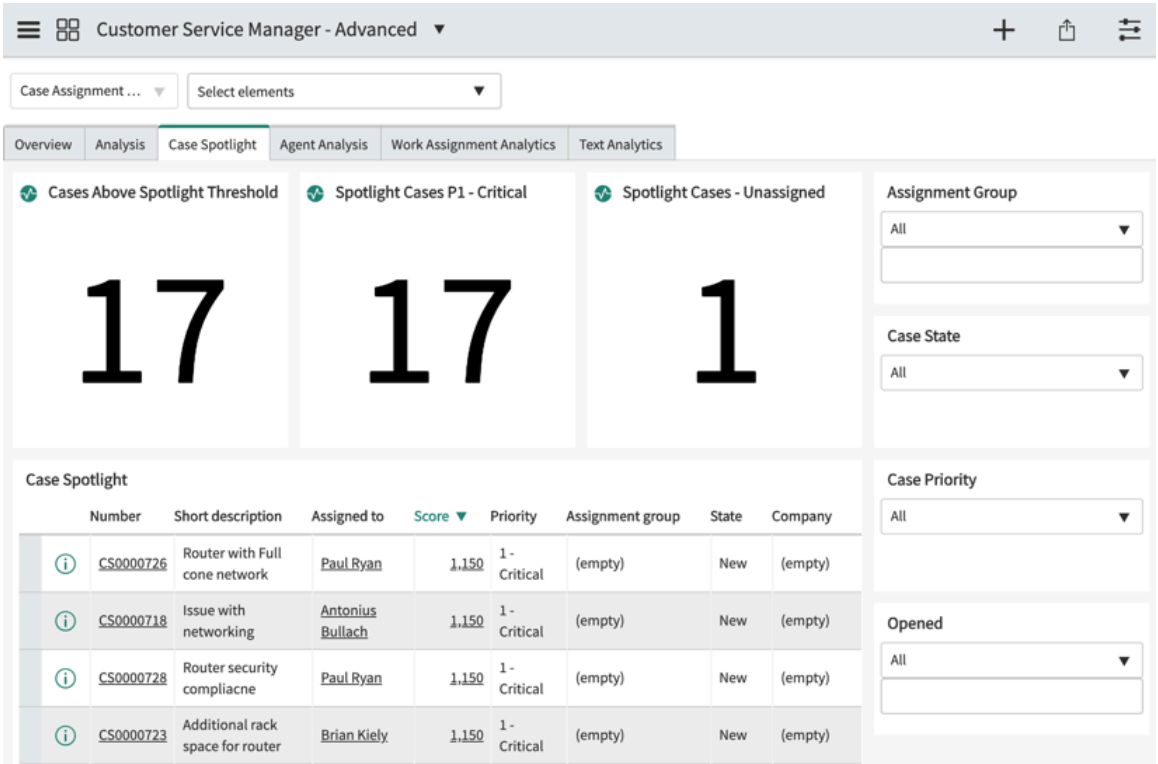
Case Spotlight tab



Case Spotlight breakdowns

Select values for the breakdowns to filter the data shown on the dashboard.

- Assignment Group
- Case State
- Case Priority
- Opened

Case Spotlight reports

Customer Service Manager case spotlight reports

Title	Description
Cases Above Spotlight Threshold	Number of cases that exceed the Case Spotlight threshold. Every case where **State** is New, Open, or Awaiting info is scored based on priority and last updated date. The score is compared against the threshold value to put cases with high priority in the spotlight. **Note:** You can edit the Case Spotlight spotlight group threshold and criteria to put different types of cases in the spotlight based on your organization's needs.
Spotlight Cases P1 - Critical	Number of cases that exceed the Case Spotlight threshold and are Priority 1.

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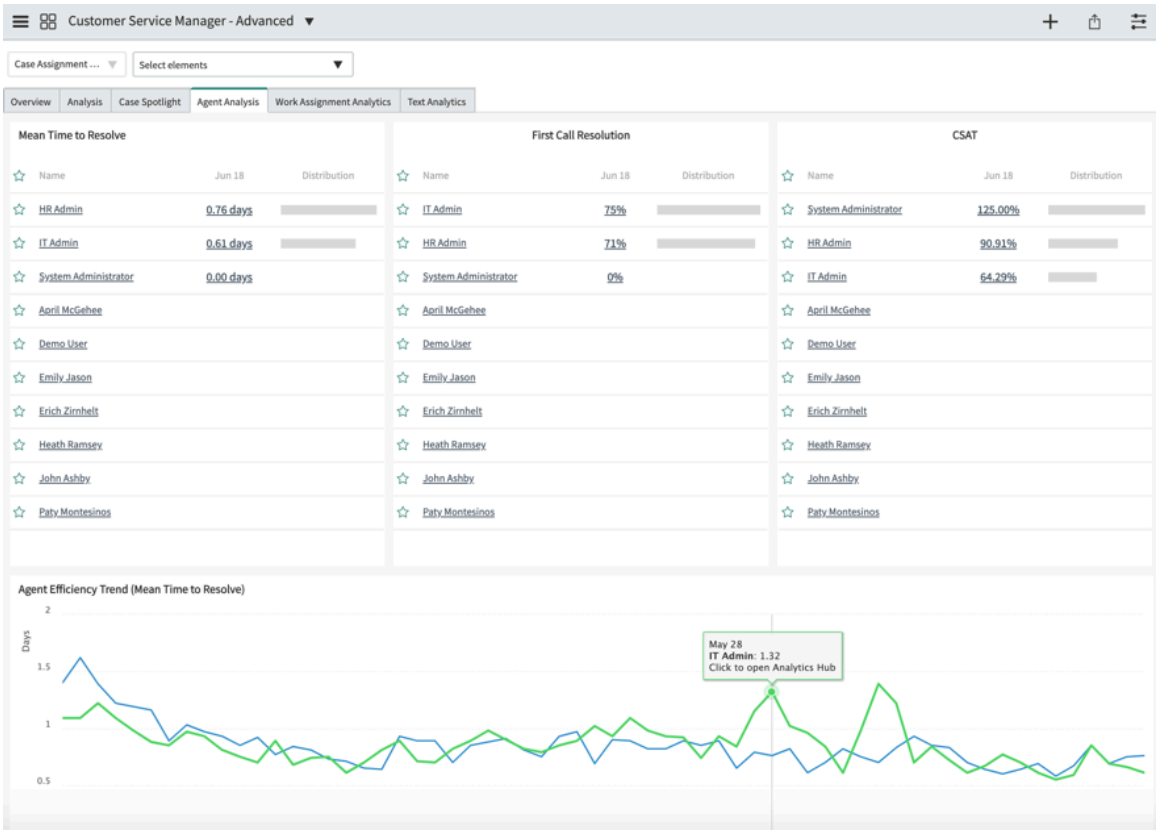
Customer Service Manager case spotlight reports (continued)

Title	Description
Spotlight Cases - Unassigned	Number of cases that exceed the Case Spotlight threshold and are not assigned to an agent.
Case Spotlight	List of cases that exceed the Case Spotlight threshold.

Agent Analysis tab



Agent analysis indicators

Customer Service Manager agent analysis indicators

Indicator	Description
Avg. Time to Resolution	Average time for a case to be marked as closed or resolved for each agent. Ranked from fastest to slowest. **Note:** On the Customer Service Manager - Advanced dashboard, this indicator is called Mean Time to Resolve.
First Call Resolution	Percentage of cases for each agent that were resolved during first contact with the customer. Ranked from highest to lowest.

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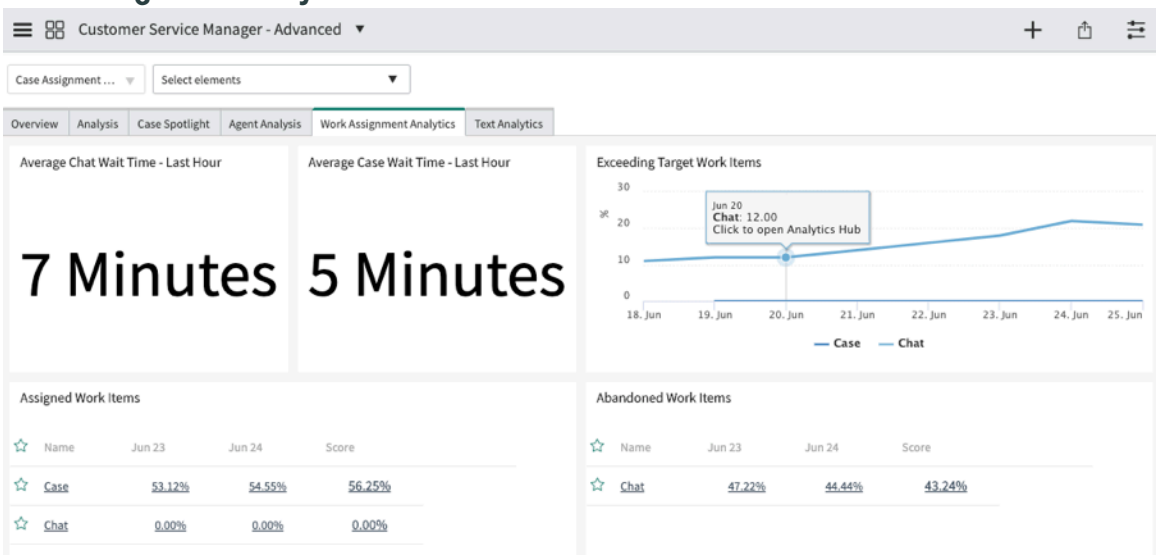
Customer Service Manager agent analysis indicators (continued)

Indicator	Description
CSAT	Average customer satisfaction for each agent based on survey results. Ranked from highest to lowest. For more information about CSAT, see Customer service satisfaction surveys.
Agent Efficiency Trend (Mean Time to Resolve)	Average time for a case to be marked as closed or resolved for each agent shown over time.
Closed Cases by Agent and Account.	Number of cases closed by each agent for each account.

Work Assignment Analytics tab



Note:
The Work Assignment Analytics tab can only be viewed on the Customer Service Manager - Advanced dashboard. Customer Service [com.sn_customerservice] and Performance Analytics - Content Pack - Advanced Work Assignment [com.snc.pa.awa] must be activated on your instance.

Work Assignment Analytics reports

Customer Service Manager work assignment analytics reports

Report	Description
Average Chat Wait Time - Last Hour	Average amount of time that customers have spent waiting for an agent response in the past hour for chat work items.
Average Case Wait Time - Last Hour	Average amount of time that customers have spent waiting for an agent response in the past hour for case work items.

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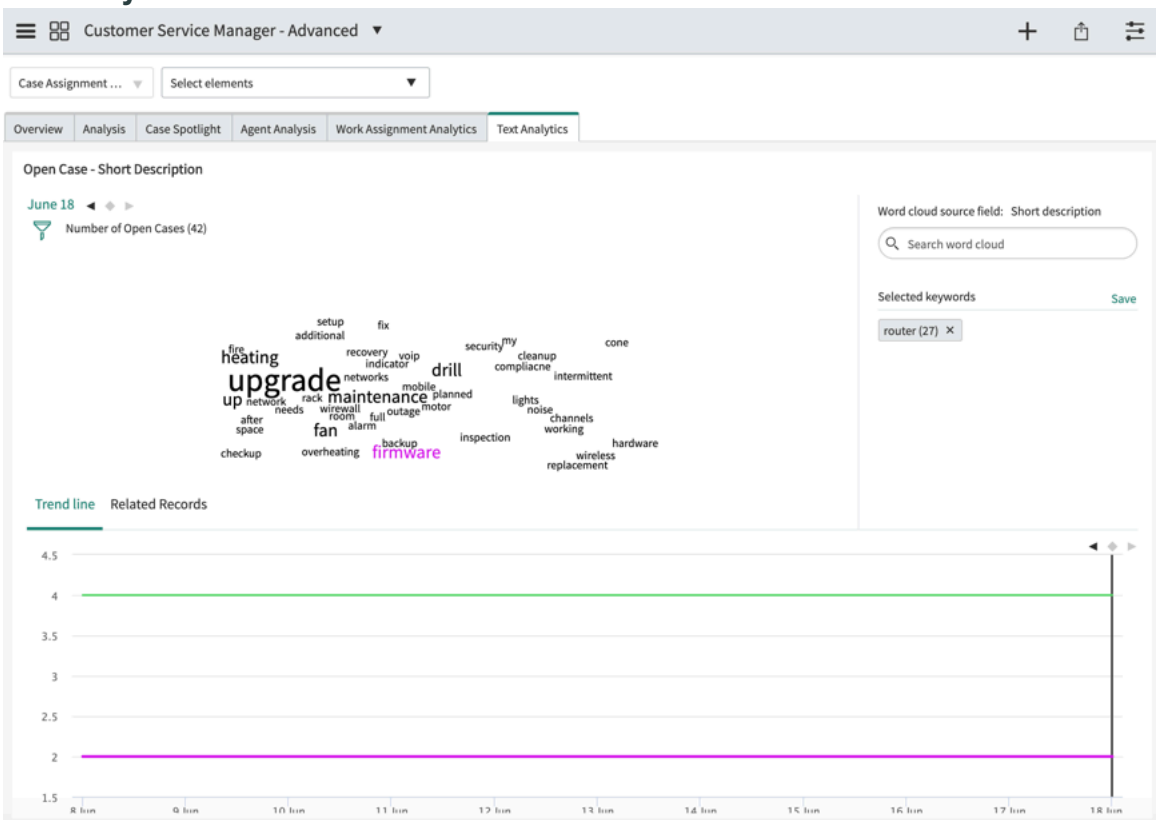
Work Assignment Analytics indicators

Customer Service Manager work assignment analytics indicators

Indicator	Description
Exceeding Target Work Items	Percentage of all work items that have exceeded the target wait time.
Assigned Work Items	Percentage of all work items that are assigned to agents.
Abandoned Work Items	Percentage of all work items that agents have abandoned.

Text Analytics tab



Note:
The Text Analytics tab is visible only if the Performance Analytics Premium for Customer Service plugin [com.snc.pa.premium.cs] is installed.

Text Analytics displays a word cloud of most frequently used words and phrases in the short descriptions of open cases, providing insight into emerging issues reported by users.

- Drill down on a word to view other words associated with cases that contain that keyword.
- Search the word cloud for specific terms.

Trend line: Shows the frequency of top keywords over time. Click and move your cursor to view data for any date.**Related Records**: List of cases containing the keywords you selected from the word cloud.

Proactive Customer Service - Advanced dashboard

The Proactive Customer Service - Advanced dashboard helps customer service managers track key performance indicators (KPIs) to understand how proactive they were in identifying and

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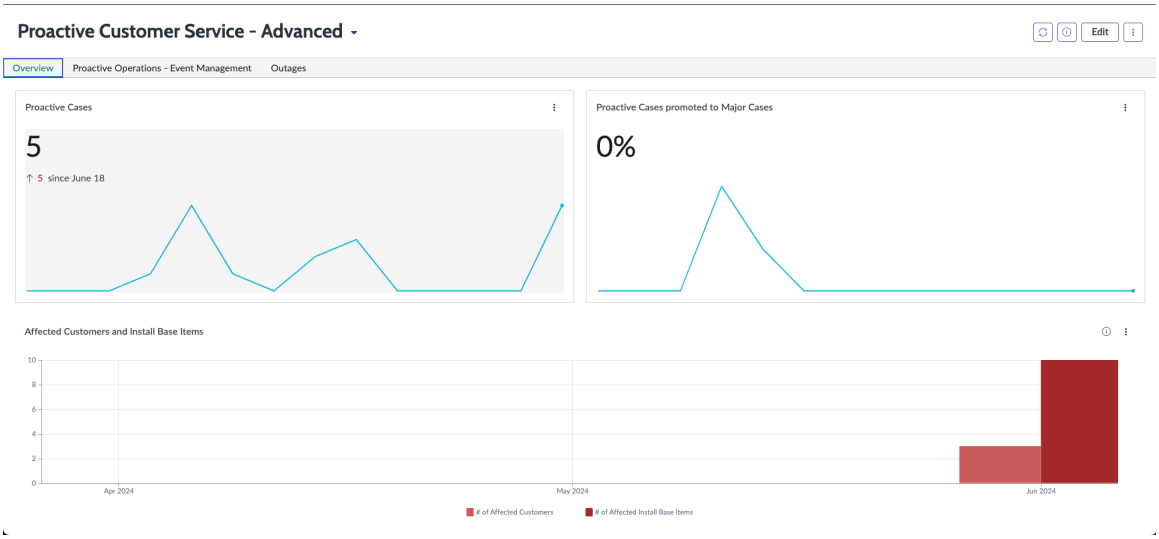
communicating issues that impact customers. The dashboard also enables customer service managers to assess the business impact of outages over time. Install the Proactive Customer Service Advanced Dashboard plugin (com.snc.pa.customer_service_advanced) to view and monitor the advanced dashboards.

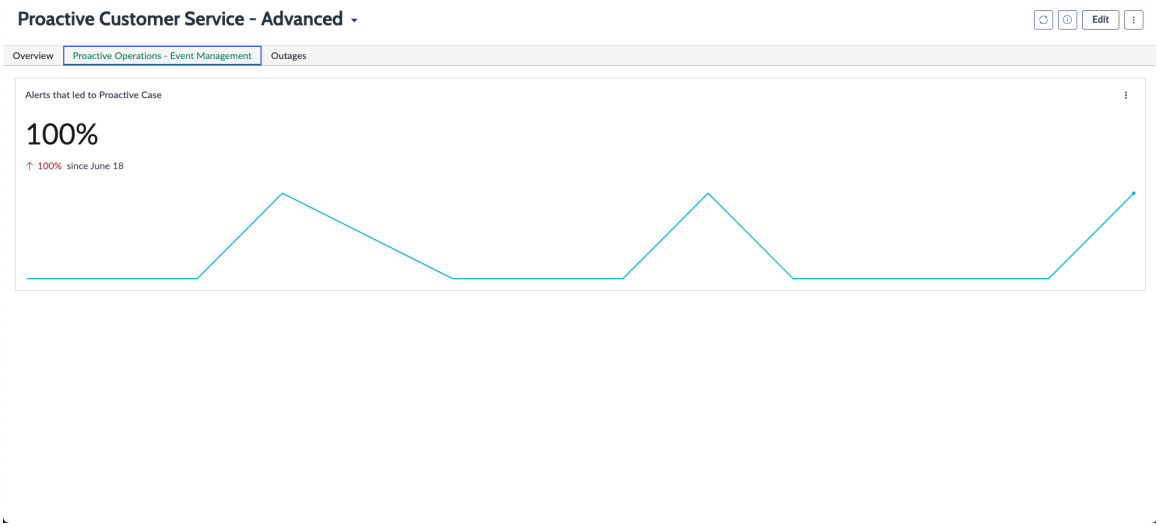
Important:
Starting with the Xanadu release, the Proactive Customer Service- Advanced dashboard has a new, modernized look and feel.

To access the new Proactive Customer Service- Advanced dashboard, navigate to **All** > **Platform Analytics** > **Library** > **-Dashboard**, and select the Proactive Customer Service- Advanced dashboard. Upgrade customers can view the Proactive Customer Service Operations dashboard but should use the new Proactive Customer Service - Advanced dashboard.New customers on the Orlando and later releases can only view the Proactive Customer Service - Advanced dashboard.

Overview tab



Proactive Operations - Event Management tab



Note:
The Proactive Operations - Event Management tab is only visible if the Proactive Customer Service Operations plugin (com.snc.proactive_cs_itom) is activated.

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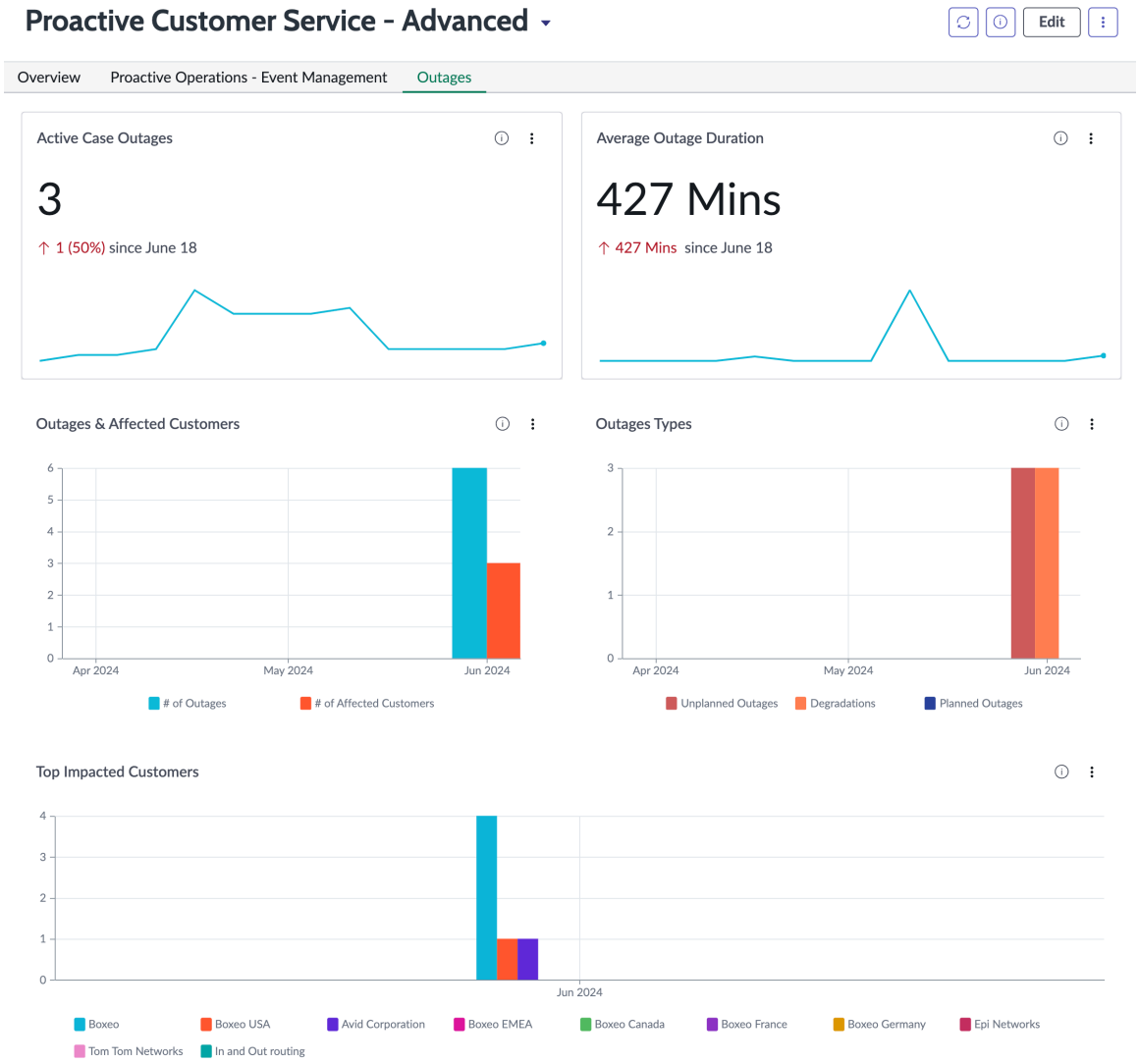
Outages tab



End user and roles

Advanced dashboard access by user role

End user	Required role	Benefits
Customer Service Manager	sn_customerservice_manager	Can view the dashboard.
Content administrator	pa_admin	Can edit the dashboard and manage users, groups, and roles for the dashboard.
Content creator	pa_viewer	Can view the dashboard.

Indicators

The Proactive Service - Advanced dashboard provides the following key performance indicators:

Proactive Cases

Number of active cases with critical and acknowledged alerts.

Proactive Cases Promoted to a Major Case

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Percentage of proactive cases promoted to a major case.

Affected Customers and Install Base Items

Number of customers affected per month.

Alerts that led to Proactive Case

Percentage of critical or acknowledge alerts that triggered case creation.

Active Case Outages

Number of active case outages per day.

Average Outage Duration

Average outage duration per day.

Outages and Affected Customers

Number of outages and affected customers per month.

Outages Types

Number of outages for each outage type per month.

Top Impacted Customers

Customers most impacted by outages.

Breakdowns

The following breakdowns apply to the indicators on the dashboard:

- # of Affected Customers
- # of Affected Install Base Items
- # of Outages
- Planned Outages
- Unplanned Outages
- Degradations

Customer Service Management integration with Service Management analytics

The Customer Service Management - Advanced Performance Analytics solution provides indicators for incident, problem, change, and request records associated with customer service cases.

The Customer Service Management - Advanced Performance Analytics solution adds additional indicators. Some of these indicators are automatically displayed on the Customer Service Manager dashboard in the Analysis tab. All the indicators can be viewed in the Analytics Hub or can be manually added to a dashboard.

Note:
To view the indicators, you must activate the Customer Service with Service Management plugin (com.sn_cs_sm) and the Customer Service with Request Management plugin (com.sn_cs_sm_request).

Incident indicators:

- Number of Open Cases with Incident
- Number of Closed Cases with Incident

Problem indicators:

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- Number of Open Cases with Problem
- Number of Closed Cases with Problem

Change indicators:

- Number of Open Cases with Change
- Number of Closed Cases with Change

Request indicators:

- Number of Open Cases with Request
- Number of Closed Cases with Request

Caused By Change indicators:

- Number of Open Cases Caused By Change
- Number of Closed Cases Caused By Change

To view the indicators in the Analytics Hub, navigate to **Performance Analytics** > **Analytics Hub** and search for any of the above indicators.

To add an indicator to a dashboard, a user with the role pa_admin can navigate to the desired dashboard and then click the **Add Widgets** icon at the top right of the dashboard. Select **Performance Analytics** from the drop down menu, then click **Insights** in the list below. Search for the indicator using the search bar. Click the indicator, and then click **Add**.

Service Manager dashboard

Use the Service Manager dashboard to track and analyze customer service case data.

To view the Service Manager dashboard, navigate to **Customer Service** > **Overview**.

Important:
Navigating to Customer Service Overview to display the Service Manager dashboard may result in an error. Users with the admin role can update the link for the Overview module using the following steps:

1. Select the Edit Module icon on the Overview module.
2. Select the Link Type tab on the Overview Module record.
3. Replace the link in the **Arguments** field with the following text:

   ```
   now/platform-analytics-workspace/dashboards/params/edit/false/tab-sys-id/cfd42b49713354023ee53ca6498cb5d7/sys-id/06e36279f3d8b8349c285a79155206f8
   ```

4. Select **Update**.

The Service Manager dashboard displays four case-related reports, which are created using the Reports application. You can drill down into these reports for more information about the related cases.

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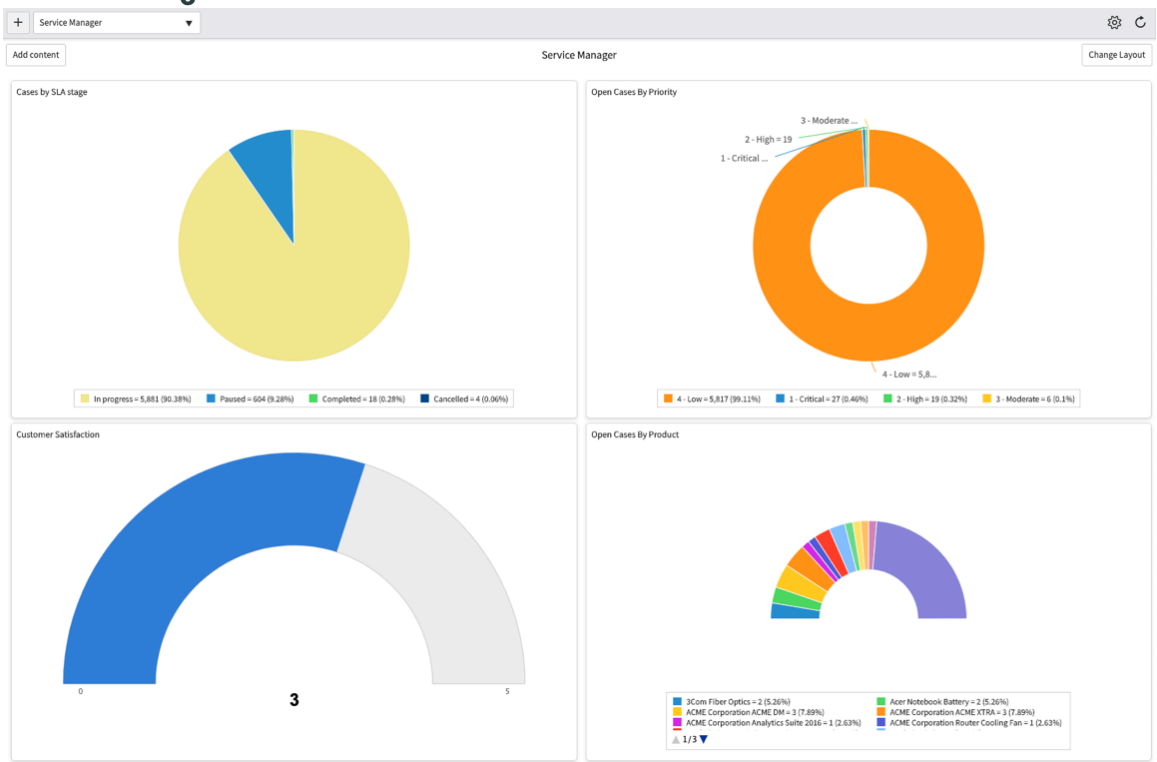
Service Manager dashboard



End users and roles

Dashboard access by role

End user and goal	Required role
Customer service manager: Track status of cases and customer satisfaction.	sn_customerservice_manager
Customer service agent: Track status of cases and customer satisfaction.	sn_customerservice_agent
System administrator: Can edit the dashboard.	admin

Reports

Dashboard report types

Title	Type	Description
Cases by SLA stage	Pie Chart	Displays the number of cases by SLA stage.
Open Cases By Priority	Donut	Displays the number of open cases by priority. • Click a priority to show the case list. • Click a case from the list to view details.

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Dashboard report types (continued)

Title	Type	Description
Customer Satisfaction	Gauge	Displays the results of the customer satisfaction survey that a customer is asked to take after a case is closed.
Open Cases By Product	Semi-Donut	Displays the number of open cases for each product.

Major issue management analytics

Provides indicators on the Customer Service dashboards for major cases and child cases.

Action indicators are available on the Customer Service dashboards when the Performance Analytics - Content Pack - Customer Service Management - Advanced plugin (com.snc.pa.customer_service_advanced) is activated.

Note:
Activate the Major Issue Management plugin (com.sn_majorissue_mgt) to view the related indicators. Without this plugin, the indicators may not display correctly.

Indicators:

- Number of Open Major Cases (by day, week, month)
- Percentage of Resolved Major Cases (by day, week, month)
- Number of Cases which are Child of Major Case
- Percentage of Major Case Candidates (by day, week, month)
- Percentage of Child Cases which are Auto Created from Major Case
- Number of customers impacted by major issue

Platform Analytics Solutions for Self-Service Analytics for Customer Service

Platform Analytics Solutions contain prepackaged Performance Analytics and Reporting content for use with other ServiceNow AI Platform products. This Platform Analytics Solution quantifies the value of self-service using the Self-Service Analytics dashboard for customer service.

The following roles and tasks are associated with this Solution:

- ServiceNow AI Platform administrator (admin): Install and activate this Platform Analytics Solution and make any necessary changes to system properties.
- Performance Analytics administrator (pa_admin): Review the indicators, breakdowns, widgets, and dashboards. Set up and start data collection. Share the dashboards with appropriate stakeholders.
- Customer service manager (sn_customerservice_manager): Use the Self-Service Analytics dashboard to view case metrics to understand the current performance of self-service at your organization.

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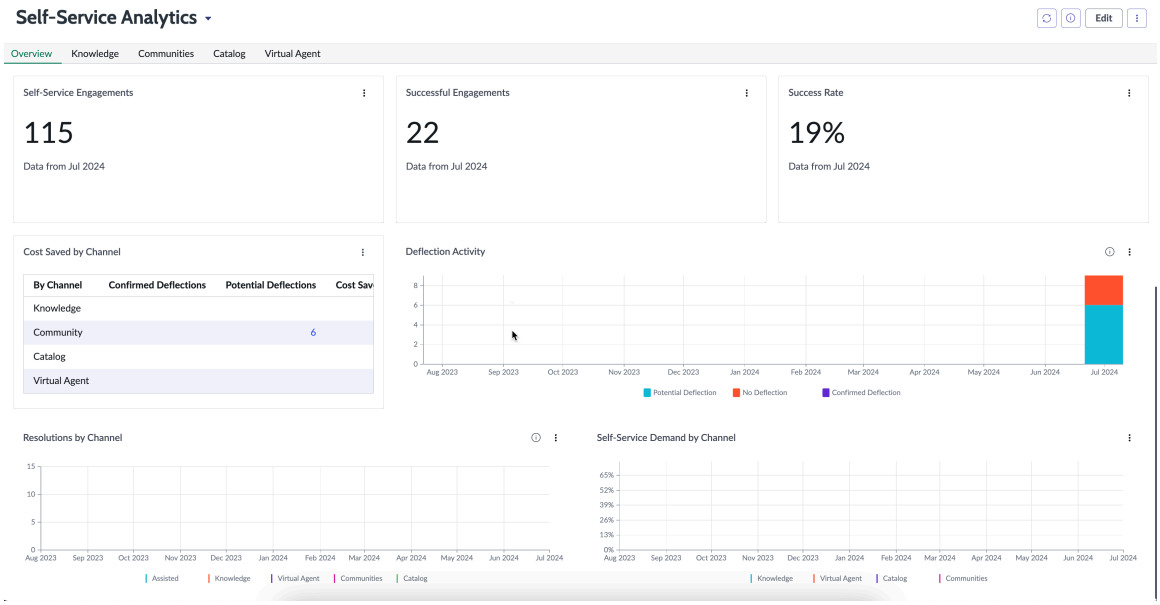
Related topics

- Configure the Platform Analytics Solution for Self-Service Analytics for Customer Service
- Platform Analytics Solutions
- Self-Service Analytics

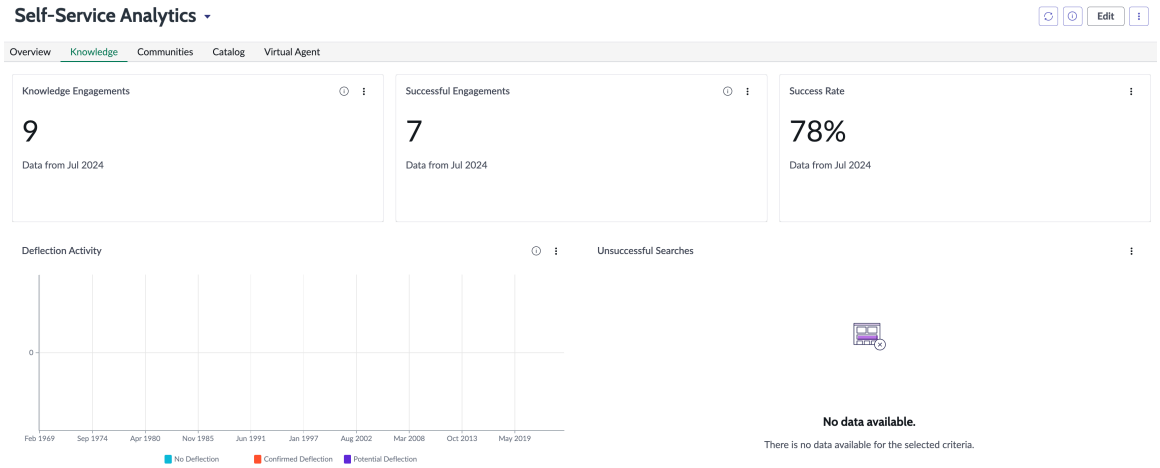
Self-Service Analytics dashboard for customer service

Measure and track the effectiveness of self-service content through user activities on a self-service portal to enrich the content and address any self-service gaps.

Overview tab



Knowledge tab



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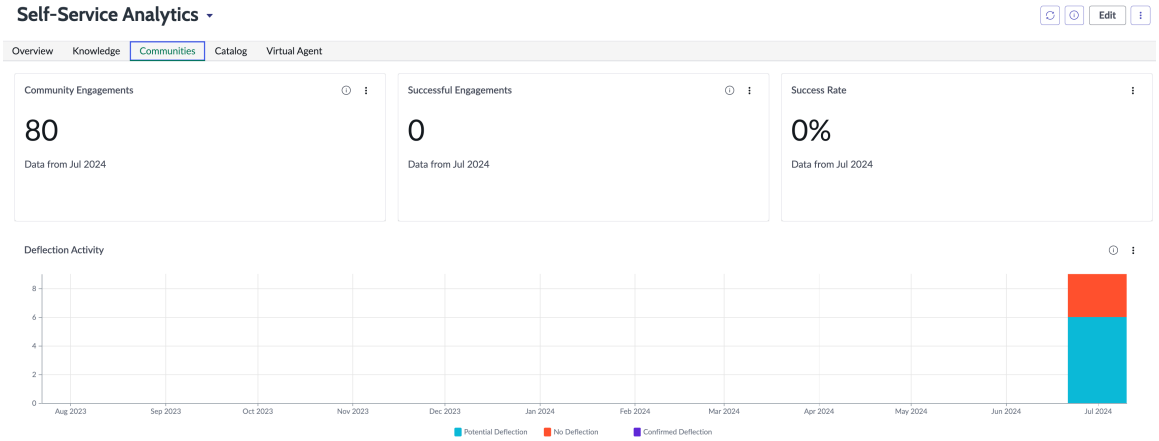
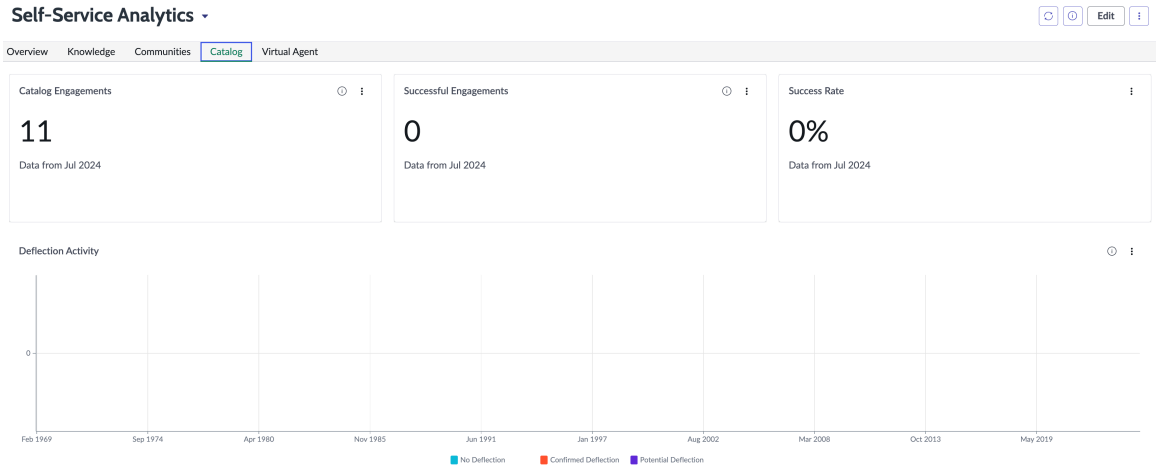
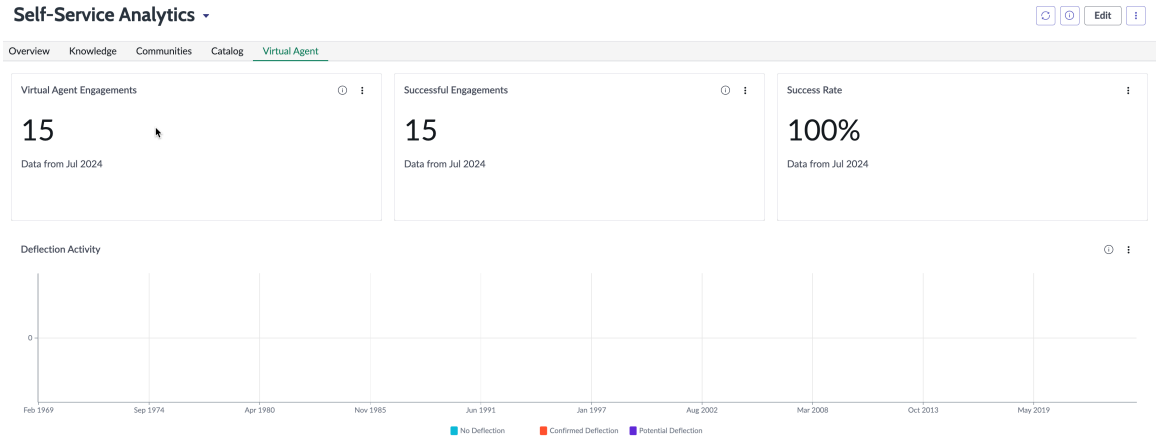
Communities tab



Catalog tab



Virtual agent tab



You can access this dashboard by navigating to **All** > **Platform analytics** > **Library** > **Dashboards**, and search for Self-Service Analytics dashboard. To edit this dashboard, you must set the application scope to **Self-Service Analytics for Customer Service** using the application picker.

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Note:

- On the Knowledge tab, you can report knowledge gaps for unsuccessful searches. For more information, see Report knowledge gaps based on unsuccessful searches.
- The Communities tab is available when the Communities plugin (com.sn_communities) is activated.
- The Virtual Agent tab is available when the Glide Virtual Agent plugin (com.glide.cs.chatbot) is activated.

End user and roles

End user and goal	Required role
Customer service manager: Can view case metrics like backlog, resolution rates, SLA, customer satisfaction, and KPIs to understand the current performance of self-service at an organization.	sn_customerservice_manager

Use case

Example 1

A user faces an issue with a purchased product. To resolve the issue, the user logs in to the portal, and searches for and views content. However, the user does not find any content helpful and creates a case.

Example 2

A user faces an issue with a purchased product. To resolve the issue, the user logs in to the portal, searches for and views content, marks the content as helpful, and continues to do other activities without creating a case.

The self-service content was available in both examples. However, in example 1, the user did not find the content helpful and therefore it did not help deflect the case creation. The Self-Service Analytics for Customer Service dashboard enables you to capture not deflected, deflected, or potentially deflected instances with details such as what the user was searching for using the searched terms, the content viewed, and the task created.

Indicators

Indicators define a performance measurement taken at regular intervals of a business service, an activity, or organizational behavior. These performance measurements result in a series of indicator scores over time.

When an administrator activates the Self-Service Analytics for Customer Service plugin (com.snc.pa.self_service_analytics_csm), the Self-Service Analytics PA (com.snc.pa.self_service_analytics) is also activated. Both plugins include indicators for the Self-Service Analytics dashboard for customer service.

The Self-Service Analytics for Customer Service plugin includes the following indicators:

Catalog: Deflections

A monthly count of catalog requests after which the primary activity (case creation) is either found (no deflection) or not found (confirmed or potential deflection) within an activity window.

Communities: Deflections

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A monthly count of community content types after which the primary activity (case creation) is either found (no deflection) or not found (confirmed or potential deflection) within an activity window.

Knowledge: Deflections

A monthly count of knowledge articles after which the primary activity (case creation) is either found (no deflection) or not found (confirmed or potential deflection) within an activity window.

Number of cases resolved

A monthly count of resolutions addressed by customer service agents.

> **Note:**
> The **Resolutions by Channel** widget on the Overview tab of the Self-Service Analytics dashboard for customer service displays this indicator as **Assisted**.

Number of Deflections

A monthly count of deflections for all self-service channels (Knowledge, Communities, Catalog, Virtual Agent).

Self-Service: Confirmed Deflections

A monthly count of deflections after which the primary activity (case creation) was not found depending on the activity type (helpful knowledge articles, helpful community content, catalog requests) within an activity window. An increase in value indicates better performance.

Self-Service: Cost Saved

A monthly calculation of the cost saving for a deflection. The score is calculated according to the formula `([[Self-Service: Confirmed Deflections]] + [[Self-Service: Potential Deflections]]) * 20`.

> **Note:**
> By default, the cost saved by each deflection is set to $20. However, you can modify the formula and set a different cost. To edit the formula, navigate to **Performance Analytics** > **Formula Indicators**, search for and click the **Self-Service: Cost Saved** indicator, and edit the numeric value in the **Formula** field. For more information, see Create a formula indicator.

Self-Service: Potential Deflections

A monthly count of deflections after which the primary activity (case creation) was not found depending on the activity type (knowledge articles views, community content views, Virtual Agent conversations) within an activity window. An increase in value indicates better performance.

VA: Deflections

A monthly count of Virtual Agent conversations after which the primary activity (case creation) is not found (potential deflection) within an activity window.

The Self-Service Analytics PA plugin includes the following indicators:

Catalog: Percentage of requests

A monthly calculation of the percentage of catalog usage compared with the use of other self-service channels. The score is calculated according to the formula `[[Number of Catalog requests]] / ([[Knowledge: Articles viewed this month]] + [[Communities: Views this month]] + [[Number of Catalog requests]] + [[VA: Conversations this month]]) * 100`.

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Catalog: Success Rate

A monthly calculation of the percentage indicating the success of the catalog as a self-service channel. The score is calculated according to the formula `[[Number of Catalog requests]] / [[Catalog: Views this month]] * 100`.

Catalog: Views this month

A monthly count of catalog item views. An increase in value indicates better performance.

Communities: Helpful Feedback

A monthly count of helpful Community content types.

Communities: Percentage of community viewed

A monthly calculation of the percentage of Community content types usage compared with the usage of other self-service channels. The score is calculated according to the formula `[[Communities: Views this month]] / ([[Communities: Views this month]] + [[Knowledge: Articles viewed this month]] + [[Number of Catalog requests]] + [[VA: Conversations this month]]) * 100`.

Communities: Views this month

A monthly count of Community content type views. An increase in value indicates better performance.

Knowledge: Articles viewed this month

A monthly count of knowledge articles views. An increase in value indicates better performance.

Knowledge: Helpful Feedback

A monthly count of knowledge articles marked as helpful or rated either 4 or 5.

Knowledge: Percentage of articles viewed

A monthly calculation of the percentage of knowledge articles usage compared with the usage of other self-service channels. The score is calculated according to the formula `[[Knowledge: Articles viewed this month]] / ([[Knowledge: Articles viewed this month]] + [[Communities: Views this month]] + [[Number of Catalog requests]] + [[VA: Conversations this month]]) * 100`.

Number of Catalog requests

A monthly count of catalog requests.

Percentage of helpful Community Content

A monthly calculation of the percentage indicating the success of Communities as a self-service channel. The score is calculated according to the formula `[[Communities: Helpful Feedback]] / [[Communities: Views this month]] * 100`.

Percentage of helpful Knowledge Articles

A monthly calculation of the percentage indicating the success of Knowledge as a self-service channel. The score is calculated according to the formula `[[Knowledge: Helpful Feedback]] / [[Knowledge: Articles viewed this month]] * 100`.

Self-Service: Engagements

A monthly calculation of the total of views from all self-service channels. The score is calculated according to the formula `[[Knowledge: Articles`

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`viewed this month]] + [[Communities: Views this month]] + [[Catalog: Views this month]] + [[VA: Conversations this month]]`.

Self-Service: Success Rate

A monthly calculation of the percentage indicating the success of self-service channels. The score is calculated according to the formula `[[Self-Service: Successful Engagements]] / [[Self-Service: Engagements]] * 100`

Self-Service: Successful Engagements

A monthly count of helpful content from all self-service channels. The score is calculated according to the formula `[[Knowledge: Helpful Feedback]] + [[Communities: Helpful Feedback]] + [[Number of Catalog requests]] + [[VA: Successful Conversations]]`.

VA: Conversations this month

A monthly count of Virtual Agent conversations. An increase in value indicates better performance.

VA: Percentage of Conversations

A monthly calculation of the percentage of Virtual Agent conversation usage compared with the usage of other self-service channels. The score is calculated according to the formula `[[VA: Conversations this month]] / ([[Knowledge: Articles viewed this month]] + [[Communities: Views this month]] + [[Catalog: Views this month]] + [[VA: Conversations this month]]) * 100`.

VA: Success Rate

A monthly calculation of the percentage indicating the success of Virtual Agent as a self-service channel. The score is calculated according to the formula `[[VA: Successful Conversations]] / [[VA: Conversations this month]] * 100`

VA: Successful Conversations

A monthly count of Virtual Agent conversations that were not directed to live agents. An increase in value indicates better performance.

Breakdowns

Breakdowns enable you to group or filter indicator scores by a qualitative attribute.

This dashboard includes the following breakdowns:

Channel

Enables you to view indicator scores by a self-service channel such as Knowledge, Communities, Catalog, or Virtual Agents.

Communities Content Type

Enables you to view indicator scores by a Community content type such as answer, blog, comment, document, event, question, or video.

Knowledge Base

Enables you to view indicator scores by knowledge base.

Knowledge Category

Enables you to view indicator scores by knowledge article category.

Type of Deflection

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Enables you to view indicator scores by deflection type: no deflection, confirmed deflection, and potential deflection.

Data visualization

Title	Type	Description
Unsuccessful Searches	Bar	A monthly collection of searches for knowledge articles with no results or results with no clicks.

Related topics

Self-Service Analytics

Report knowledge gaps based on unsuccessful searches

Report a knowledge gap from the Unsuccessful Searches report in the Self-Service Analytics dashboard for customer service.

Before you begin

Role required: sn_customerservice_manager

About this task

The Unsuccessful Searches report in the Self-Service Analytics dashboard for customer service reports a collection of searches for knowledge articles with no results or results with no clicks. You can report a knowledge gap for such unsuccessful searches.

Procedure

1. Navigate to **All** > **Self-Service** > **Dashboards**.
2. Click **Self-Service Analytics**.
3. On the Knowledge tab, on the Unsuccessful Searches report, click a bar.
4. Click **Report Knowledge Gap**.
5. In the **Description** field, describe the knowledge gap.
   By default, the **Description** field shows frequently appearing words in the associated collection. You can also enter custom instructions for addressing the knowledge gap. When entering instructions, you can provide a summary of your analysis so that knowledge authors have the necessary information to create an article from the feedback task.
6. Click **Submit**.

Result

If a collection is reported as a knowledge gap, a feedback task of type Unsuccessful search is created in the Knowledge Management application. If the assignment rules are set, the feedback task is assigned to an ownership group or an author.

Related topics

Self-Service Analytics dashboard for customer service

Customer Service Management reference

Reference topics provide additional information about the Customer Service Management application.

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Reference information	Links to topics
Customer Service lists and forms	• Customer Service Cases list • Customer Service forms • Chat Setup configuration form
Components installed with Customer Service Management applications	• Components installed with CSM workspaces • Components installed with additional plugins for Customer Service Management • Components installed with CSM workspaces
Engagement Messenger topics	• Components installed with Engagement Messenger • Engagement Messenger reference • Feature context parameters supported in Engagement Messenger • Engagement Messenger translation tables
Portal topics	• Portal Banner widget JSON parameters • Portal Data List widget JSON parameters • Default highlight color for different case states
CSM Query Rules	The system uses query rules to filter the records in CSM-related tables that are accessible by users with CSM roles.

Configurable Portal widgets instance options

Reference topics provide information about the instance options for all the Configurable Portal widgets.

Portal Browse Taxonomy widget instance options form

Instance options enable you to configure the Portal Browse Taxonomy widget on the portal.

Behavior fields on the Instance form

Instance option	Description
Records Per View	The number of catalog items and knowledge articles to appear by default on the widget. The default value is 9.

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Behavior fields on the Instance form (continued)

Instance option	Description
Glyph for Article Cards	The glyph to appear on the cards, which is chosen from a set of predefined glyphs.
Show Author	Option to display the author's name.
Show View Count	Option to display the total number of views of an article.
Show Last Updated	Option to display the date of the last changes made to an article.
Show Rating	Option to display the rating received on an article. The appearance of the star rating is defined by the (*glide.knowman.show_star_rating*) system property.
Article View Page	The article page that opens when the article card is accessed. By default, this field is set to the Knowledge Article View (kb_article_view) page.
Catalog Card Display Style	The display style of a catalog card inside the widget. The available choices are: • Icon: An image that appears next to a catalog item. Each catalog item can have its own image. This image is defined by the catalog item entry in the Catalog item [sc_catalog_item] table. • Glyph: Glyph that appears next to all catalog items. The default display style is Icon. **Note:** Currently, if you select None, the display style is set to Icon.
Glyph for Catalog Items	Displays a window to select a symbol for a catalog items. **Note:** The value in this field is used only when Glyph is selected in the **Catalog Card Display Style** field.
Catalog Item Page	The Catalog item page that opens when the catalog item is accessed. By default, this field is set to the Catalog Item [sc_cat_item] table.
Display icon for topics	Option to display an icon for the taxonomy topics.

Related topics

Portal Browse Taxonomy widget

Add and configure the Portal Browse Taxonomy widget

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Portal Banner widget instance options form

Instance options enable you to configure the Portal Banner widget on a portal page.

Presentation fields on the Instance form

Instance option	Description
Heading	Required title of a Portal Banner widget to greet a user who signs in into the website. The default text is `Home Page Banner`. The heading field supports placeholder variables such as <user>, <title>, and <part_of_day>. For example, you could display a banner title such as `Hello Mr. Luddy! Good Morning`. • <user>: The name of the logged-in user. • <title>: The salutation of the logged-in user. The <title> variable details are retrieved from the User [sys_user] table. • <part_of_day>: Displays the greeting based on the part of the day of the user's region. For example, Good morning, Good afternoon, or Good evening.
Description	Required subtitle that appears below the heading. The default description is `This is home page description`.
Background Image	Image to appear as the background on the banner. **Note:** You can select images from the Images [db_image] table or upload a new image to it. For more information, see Storing images in the database.
Heading Text Color Hex code	Color of the heading text in hex code format. The default value is #FFFFFF (white).
Description Text Color Hex code	Color of the description text color in hex code format. The default value is #FFFFFF (white).
Alignment	Alignment of the banner content inside the widget. The available options are: • Left • Center The default alignment is Center. **Note:** Currently, if you select None, the alignment is set to Left.
Show Search bar	Option to display the search bar on the Portal Banner widget to search content. **Note:** You can enable the AI search for a banner widget to get quick results. For more information, see Enable and configure AI Search in Service Portal.

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Presentation fields on the Instance form (continued)

Instance option	Description
Show Primary Button	Option to display the primary button on the Portal Banner widget.
Primary Button Label	Label of the primary button.

Primary Button URL	The URL that opens an internal web page or a portal page in the same tab and an external page or a portal in a new tab. The two types of primary URLs are:
	• Absolute URL: The full URL including its protocol (http or https). For example:
	`https://example.servicenow.com/scripts/sn_csm_ec.js?v=3.1`
	• Relative URL: A URL that includes only the path that comes after the domain. For example:
	`scripts/sn_csm_ec.js?v=3.1`

Show Secondary Button	Option to display a secondary button on the banner widget.
Secondary Button Label	Label of a secondary button.

Secondary Button URL	The URL that opens an internal web page or a portal page in the same tab and an external page or a portal in a new tab. The two types of secondary URLs are:
	• Absolute URL: The full URL including its protocol (http or https). For example:
	`https://example.servicenow.com/scripts/sn_csm_ec.js?v=3.1`
	• Relative URL: A URL that includes only the path that comes after the domain. For example:
	`scripts/sn_csm_ec.js?v=3.1`

Search Placeholder Text	Placeholder text for the search option. The default text is `Search articles and request items`.

Behavior fields on the Instance form

Instance option	Description
Buttons Condition Script	Script to show or hide the primary or secondary button. You can use the scripted extension point to implement the condition script. By default, the new script displays both buttons and doesn't include any condition.

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Behavior fields on the Instance form (continued)

Instance option	Description
	For more information, see Provide web page link buttons to display on the Portal Banner widget.
Widget Placeholder	Option to embed an additional widget on the Portal Banner widget. You can include only widgets from the Widgets [sp_widget] table.
Widget Option Schema	Defines the parameters of the widget that you want to add. For more information, see Add a widget in the Portal Banner widget.

Related topics

- Portal Banner widget
- Add and configure the Portal Banner widget
- Provide web page link buttons to display on the Portal Banner widget
- Add a widget in the Portal Banner widget

Portal Banner Carousel widget instance options form

Instance options enable you to configure the Portal Banner Carousel widget on a portal page.

Data fields on the Instance form

Instance option	Description
Slides	The images to appear on the widget chosen from a set of predefined slides or slides that you have created. For more information, see Create a slide for the Portal Banner Carousel widget.

Presentation fields on the Instance form

Instance option	Description
Title color	Color of the title for all carousel slides in hex code format. The default value is #FFFFFF (white).
Alignment	The alignment of content inside the widget for all carousel slides. The available options are: • Left • Center The default alignment is Left.

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Presentation fields on the Instance form (continued)

Instance option	Description
	Note: Currently, if you select None, the alignment is set to Left.

Related topics

Portal Banner Carousel widget

Add and configure the Portal Banner Carousel widget

Create a slide for the Portal Banner Carousel widget

Portal Case Cards widget instance options form

Instance options enable you to configure the Portal Case Cards widget on a portal page.

Data fields on the Instance form

Instance option	Description
Case Table	Table from which the records shown as case cards on the widget are selected. By default, this field is set to the Cases [sn_customerservice_case] table and the extended table is Complaint Case [sn_complaint_case].
Query	Query to filter the case records. The default query shows cases that are awaiting information or are resolved. **Note:** If no query is provided, all case records are displayed in the widget. For more information, see Generate an encoded query string through a filter.
Sort by	Field in the Cases [sn_customerservice_case] table that determines the field by which cases are sorted when displayed on the widget. The default value is Last updated.
Sort Order	The order in which the cases appear on the widget. The available options are: • z to a • a to z The default sort order is z to a. **Note:** Currently, if you select None, the order is set to z to a.

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Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal Case cards widget. The default text is `Track case updates`.
Description	Subtitle that appears below the heading.

Behavior fields on the Instance form

Instance option	Description
Max Cases to Display	Number of cases to appear by default on the widget. The default value is 10.
Card Title	Required title of the Case Cards widget.
State Highlight Color	Color of the background and text for the different states of a case in hex code format.
Card Display style	Display style for a case card inside the widget. The available options are: • Show case fields • Show latest activity • Title only The default display style is Show the latest activity **Note:** Currently, if you select None, the display style is set to Show latest activity.
Select Case Fields	Display case fields for a case card in the widget, which are chosen from a set of predefined set of fields in the Cases [sn_customerservice_case] table. You can show a maximum of three fields. This field is available only when **Show case fields** is selected from **Card display style**.
Case View Page	The portal page that displays the details of a case record when the case card is accessed. By default, this field is set to the Case (csm_ticket) page.
View All Page	Option to display all cases when **View all** is accessed on the widget. The **View all** option on the Portal Case Cards widget is displayed under the following conditions: • The number of cases resulting from the query provided in the **Query** field is more than the defined value in the **Max Cases to Display** field • A page has been selected from a set of predefined set of pages

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Behavior fields on the Instance form (continued)

Instance option	Description
Hide Empty Case Widget	Option to hide the widget when no records are available to display. If this option isn't selected, an empty widget shows the text defined in the **Empty State Text** option.
Empty State Text	The text displayed in the widget when **Hide Empty Case Widget** isn't selected and the widget has no records to display. The default text is `No updates right now`.

Related topics

- Portal Case Cards widget
- Add and configure the Portal Case Cards widget
- Display the integer values of all case states

Portal Quick Links widget instance options form

The instance options enable you to configure the Portal Quick Links widget on a portal page.

Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal Quick Links widget. The default text is `Quick Links`.
Show Carousel	Option to switch between carousel view and grid view.
Quick Links	Field from which you can select the catalog items, knowledge articles, or URL to show as quick links on the widget. By default, this field is set to the pre-defined Quick Links from the sn_ex_sp_quick_link table. You can also create a quick link and add it to the Quick Links [sn_ex_sp_quick_link] table. For more information, see Create a quick link. You can display title, short description, background image, and icon fields on the card in the widget. Following are the fields of the table • Content type: options are: article, catalog item, external link and page • Content: select the content • Quicklink name • Title: Displays as a title of quick link card • Short description: Displays as description of quick link card

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Presentation fields on the Instance form (continued)

Instance option	Description
	• Background image: Displays as thumbnail quick link card when card display style is thumbnail • Icon: Displays as an icon on quick link card when card display style is icon on top or left

Behavior fields on the Instance form

Instance option	Description
Card Display Style	Display the style of a card tile on the widget. The available options are: • Thumbnail • Icon on top • Icon on left • Simple text • Tile only The default display style is Thumbnail. **Note:** Currently, if you select None, the style is set to Thumbnail.

Related topics

Portal Quick Links widget

Add and configure the Portal Quick Links widget

Portal Knowledge Quick Links widget instance options form

The instance options enable you to configure the Portal Knowledge Quick Links widget on a portal page.

Data fields on the Instance form

Instance option	Description
Knowledge Table	Table from which the records shown as a card on the widget are selected. By default, this field is set to the Knowledge [kb_knowledge] table.
Display Articles	Displays knowledge articles from the associated knowledge base. The available options are:

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Data fields on the Instance form (continued)

Instance option	Description
	• Manually select: Displays knowledge articles chosen in the **Manually Select Articles** field. • Dynamic query: Displays knowledge articles that meet the condition of a query in the Knowledge [kb_knowledge] table defined in the **Dynamic Query** field. If no query is provided, all knowledge articles are displayed in the widget. For more information, seeGenerate an encoded query string through a filter • Criteria based: Displays knowledge article based on the criteria Most viewed, Most useful, and Featured. The criteria is determined by the **View** field in the Knowledge [kb_knowledge] table. The default selection is Criteria based. **Note:** Currently, if you select None, the selection is set to Criteria based.
Manually Select Articles	The knowledge base articles to appear on the widget that are chosen manually from a set of predefined articles associated with the portal using the knowledge base ID of the article. This field applies only when **Manually select** is selected from **Display Articles**.
Dynamic Query	Query to filter the records to display on the widget
Criteria Based	Displays articles on the widget based on the selected criteria. The available options are: • Most Viewed • Most Useful • Featured This field applies only when **Criteria based** is selected from **Display articles**. **Note:** Currently, if you select None, the criteria is set to Most Viewed.
Sort by	Determines the field in the Knowledge [kb_knowledge] table by which quick links are sorted and displayed on the widget. The default value is View Count. This field applies only when **Manually select** or **Dynamic query** is selected from **Display articles**.
Sort Order	The order in which knowledge articles appear on the widget. By default, the order is z to a The available options are:

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Data fields on the Instance form (continued)

Instance option	Description
	• z to a • a to z This field applies only when **Manually select** or **Dynamic query** is selected from **Display articles**. **Note:** Currently, if you select None, the order is set to z to a.

Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal Knowledge Quick Links widget. The default text is `Article Quicklinks`.

Behavior fields on the Instance form

Instance option	Description
Show Carousel	Option to switch between carousel view and grid view.
Max Quicklinks to Display	Number of knowledge article quick links to appear by default on the widget. **Note:** The default value is 10.
Glyph	Glyph to appear on all cards chosen from a set of predefined glyphs.
Show Author	Option to display the author's name.
Show View Count	Option to display the total number of views of an article.
Show Last Updated	Option to display the date of the last changes made to an article.
Show Rating	Option to display the rating received on an article. The appearance of the star rating is defined by the (*`glide.knowman.show_star_rating`*) system property.
Article View Page	The article page that opens when the article card is accessed. By default, this field is set to the Knowledge Article View (kb_article_view) page.

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Related topics

Portal Knowledge Quick Links widget

Add and configure the Portal Knowledge Quick Links widget

Portal Catalog Quick Links widget instance options form

The instance options enable you to configure the Portal Catalog Quick Links widget on a portal page.

Data fields on the Instance form

Instance option	Description
Catalog Item Table	Table from which the records shown as a card on the widget are selected. By default, this field is set to the Item [sc_cat_item)] table.
Display Catalog Items	Displays catalog items according to the selection. The available options are: • Manually select • Dynamic query The default selection is Dynamic query. **Note:** Currently, if you select None, the selection is set to Dynamic query.
Manually Select Catalog Items	The catalog items to appear on the widget chosen manually from a set of predefined catalog items that are associated with the portal. This field applies only when **Manually select** is selected from **Display Articles**.
Dynamic Query	Query to filter catalog records to display on the widget. By default, this field is set to the Service Catalog items [sc_cat_item] table. This field applies only when **Dynamic query** is selected from **Display articles**.
Sort by	Field in the Service Catalog items [sc_cat_item] table that determines the field by which records are sorted and displayed on the widget. This field applies only when **Manually select** or **Dynamic query** is selected from **Display articles**.
Sort Order	The order in which the catalog items appear on a widget. The default sort order is Z to A.

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Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal Catalog Quick Links widget. The default text is `Article Quicklinks to catalog items`.

Behavior fields on the Instance form

Instance option	Description
Show Carousel	Option to switch between carousel view and grid view.
Max Quicklinks to Display	Number of catalog items to appear by default on the widget. The default value is 10.
Card Display Style	The display style of a card on the widget. The available options are: • Thumbnail • Icon on top • Icon on left • Simple text • Title only The default display style is Thumbnail. **Note:** Currently, if you select None, the display style is set to Thumbnail.
Catalog Item page	The Catalog item page that open when the catalog item is accessed. By default, this field is set to the Service Catalog items [sc_cat_item] page.

Related topics

Portal Catalog Quick Links widget

Add and configure the Portal Catalog Quick Links widget

Portal Data List widget instance options form

The instance options enable you to configure the Portal Data List widget on a portal page.

Data fields on the Instance form

Instance option	Description
Data	Defines the configuration of different categories in the navigation within the widget.

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Data fields on the Instance form (continued)

Instance option	Description
Dynamic data list	Option to display records dynamically based on the configuration provided in the parameter of a portal page URL. **Note:** • The configuration enables administrator to display records from any tables by passing following URL parameters: table, filter, sort order, view, and target view page. • When the **Dynamic data list** is selected, the JSON configuration in the **Data** field is not available.

Presentation fields on the Instance form

Instance option	Description
Categories heading	Required title for all categories. The default text is `Categories`.

Behavior fields on the Instance form

Instance option	Description
Layout	Layout type of the case records and their details displayed in the widget. The available options are: • List view (for both desktop and mobile) • Card view (for both desktop and mobile) • List view (for desktop) & Card view (for mobile) **Note:** Currently, if you select None, the layout is set to List view (for desktop) & Card view (for mobile). The default layouts are: • Desktop: List view (for desktop) & Card view (for mobile) • Mobile: Card view (for both desktop and mobile)
Number of records per page (Desktop)	The number of cases to appear by default on the widget in the desktop. The default value is 20. The maximum value is 1000.
Number of records per page (Mobile)	The number of cases to appear by default on the widget on a mobile device. The default value is 8.
Show search	Option to display a search field in the widget.
Show export actions	Option to enable the export of records in pdf, Excel, and csv formats.
Categories condition script	Script to show or hide the data list category on the widget. For more information, see Hide or show categories in the Data List widget. The default script is *`DataListCategoryConditionScript`*.

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Related topics

- Portal Data List widget
- Add and configure the Portal Data List widget
- Hide or show categories in the Data List widget

Portal FAQ widget instance options form

The instance options enable you to configure the Portal FAQ widget on a portal page.

Data fields on the Instance form

Instance option	Description
Table	Table from which the records shown as frequently asked questions (FAQs) on the widget are selected. By default, this field is set to the Knowledge [kb_knowledge] table.
Question Field	The field of the table set in the **Table** field that contains the questions. Records with an empty question field aren't displayed on the widget.
Answer Field	The field of the table set in the **Table** field that contains the answer. Records with an empty answer field aren’t displayed on the widget.
Query	Query to filter FAQs. If this field is empty, the widget displays all the FAQs. You can include fields from the provided table only in the encoded filter query. For more information, see Generate an encoded query string through a filter
Sort by	Field in the Knowledge [kb_knowledge] table that determines the field by which FAQs are sorted and displayed on the widget. By default, the field is set to View Count.
Sort Order	The order of the FAQs on the search result page on the widget. The available options are: • z to a • a to z The default order is z to a. **Note:** Currently, if you select None, the order is set to z to a.

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Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal FAQ widget. The default text is `Frequently Asked Questions`.

Behavior fields on the Instance form

Instance option	Description
Display search	Option to display a Search field on the widget.
Search Bar placeholder text	Placeholder text for the search field label. The default text is `Search FAQs`.
FAQ View Page	The article page that opens when the **Read more** option is selected by the user. By default, this field is set to the kb_article_view.
FAQ per page	The number of FAQs to appear by default on the widget. The default value is set to 5.
Browse Options	The filter options that appear in the widget and can be selected by the user. The available options are: • Knowledge Category • Related products The default option is Knowledge Category. **Note:** Currently, if you select None, the filter option is set to Knowledge Category.
Show Read More	Displays the entire content of an article when the related FAQ is accessed on the widget. The available options are: • Always: Display the **Show Read More** option on a widget for both complete and incomplete preview content • Exceeds preview: Display the **Show Read More** option only when the article content exceeds the preview limit on the widget The default option is Exceed preview. **Note:** Currently, if you select None, the filter option is set to Knowledge Category.

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Related topics

Portal FAQ widget

Add and configure the Portal FAQ widget

Portal Object widget instance options form

Instance options enable you to configure the Portal Object widget on a portal page.

Data fields on the Instance form

Instance option	Description
Table	Table from which the fields of the selected record are shown as cards on the widget. The default table is the Asset [alm_asset] table.
Record	The system identifier (sys_id) of the record from the specified table. The default sys_id is 00a96c0d3790200044e0bfc8bcbe5dc3. **Note:** Note: • Displays details of the record identified by the sys_id in the URL. If no sys_id is found in the URL, displays details of the record identified by the sys_id in the instance option. • If the sys_id is provided in both the portal web page URL and the **Record** field, the widget displays information based on the portal web page URL. • The sys_id of a record should be taken from the table specified in the **Table** field.

Behavior fields on the Instance form

Instance option	Description
Card title	Fields of the selected record from the specified table to be displayed as the card title in the widget. **Note:** You can select up to three fields from the defined table. They'll be combined to form a title for each record displayed on the widget. For example, if you combine the Asset tag, Model category, and Display name fields of a record from the specified table, the card title would be "P1000479 Computer Apple MacBook Pro 15."
Image field	The name of the field of the selected record that contains an image to be displayed as an image on the card.
Image style	The display style for an image inside the widget. The available choices are: • Thumbnail • Avatar

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Behavior fields on the Instance form (continued)

Instance option	Description
	The default display style is Thumbnail.
Summary view fields (Desktop)	Fields from the specified table whose name and value are displayed as field value pairs on the card in the desktop view.
Summary view fields (Mobile)	Fields from the specified table whose name and value are displayed as field value pairs on the card in the mobile view.
Details view	Field value pairs and sections from the specified table to be displayed when the **View all** option is selected on the card.
Actions	The actions to appear on the card, which are chosen from a set of predefined actions. The title field from the specified table is used as the display name of the actions. **Note:** • If you select multiple actions, the button label displays **Actions**. • If one action is selected, the actions button displays the name of that action. • If no action is selected, the actions button isn't displayed on the card.
Enable Service Definitions	Option to display the service definitions associated with the record under **Actions**. For details, see Service definitions.
Enable Editing Record	When enabled, users with edit permissions see **Edit details** button as one of the Actions. On selecting it users are navigated to a form page with the default view to edit the record details.

Portal Taxonomy Topic widget instance options form

Instance options enable you to configure the Portal Taxonomy Topic widget on a portal page.

Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal Taxonomy Topic widget. The default text is `Browse topics`.
Description	Required subtitle that appears below the title. The default text is `Navigate through topics to explore our services and resources.`

Behavior fields on the Instance form

Instance option	Description
Max topic cards to display	Number of topic cards to appear by default on the widget.

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Behavior fields on the Instance form (continued)

Instance option	Description
	The default value is 8.
Display icon for topics	Option to display an icon for the taxonomy topics. By default, the card displays an icon for topic cards.
Display topic description	Option to display the description for the topic.
Button label	Name for the **View all** button. The default text is `View all`.
Browse taxonomy page	The page ID of a portal page that opens when a topic card is accessed in the Portal Browse Taxonomy widget.

Customer Service Cases list

The Cases list displays a list of customer service cases for the current user.

Users with the sn_customerservice_agent or sn_customerservice_manager roles can view the Cases list in the Customer Service Management application. The default view of the Cases list includes the following columns:

- **Number**
- **Short description**
- **Contact**
- **Account**
- **Channel**
- **State**
- **Priority**
- **Assigned to**
- **Updated**
- **Case Report** (add a column to access this table if needed)

External customers can view a list of cases from the customer portal. For external users with the sn_customerservice.customer or sn_customerservice.customer_admin roles, the Cases list displays a subset of case information, including:

- **Number**
- **Short description**
- **Product**
- **Priority**
- **State**
- **Updated**

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For external users with the sn_customerservice.partner or sn_customerservice.partner_admin roles, the **Account** column is also displayed.

Cases displayed in the Case list by user role

The cases included in the Case list are determined by user role.

Internal and External for the Case List

User Role	Cases Included in Case List
Internal roles	
sn_customerservice.customer_admin	All cases
sn_customerservice_manager	All cases
sn_customerservice_agent	All cases
External roles	
sn_customerservice.customer_admin	• Cases created for the customer administrator's account • Cases created by contacts who have a contact relationship with the customer administrator's account **Note:** A contact relationship enables a contact with the customer role or customer admin role to manage the account for which the contact relationship has been established.
sn_customerservice.customer	• Cases created by the customer • Cases created by an agent for the customer

sn_customerservice.partner_admin	• Cases created by the partner:
	  ○ For their own account
	  ○ For a customer account
	• Cases created for the partner administrator's account

sn_customerservice.partner	• Cases created by the partner • Cases created by an agent for the partner • Cases created for the same account • Cases created from a partner account

Engagement Messenger reference

Reference topics provide additional information about Engagement Messenger.

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Greeting feature configuration

Understand the configuration of the Greeting feature in the Engagement Messenger to configure the field values.

Greeting feature configuration form

Field	Description
Enable for unauthenticated users	Option for enabling this feature for guest users who visit the website that hosts the messenger.
Unauthenticated user greeting	Text that is displayed in the header of the messenger home page to greet a guest user. For example, Hello!
Enable for authenticated users	Option for enabling this feature for users who sign in into the website that hosts the messenger.
Authenticated user greeting	Text that is displayed in the header of the messenger home page to greet a user who signs in into the website. This field is automatically set to **Hi, <user>!**, where <user> indicates the name of the user who has logged in. The other variables that you can use with <user> are the following: • <title> which indicates the salutation such as Mr., Ms., or Dr. as per the details in the Users [sys_user] table. • <part_of_day> which displays the greeting based on the part of the day of the user's region. For example, Good morning, Good afternoon, or Good evening.
Greeting message	Tagline for the user greeting on the header of the messenger home page. [[URL|Display Text]] indicates format to define URL and display text. For example, `[[https://www.example.com|Example]]`

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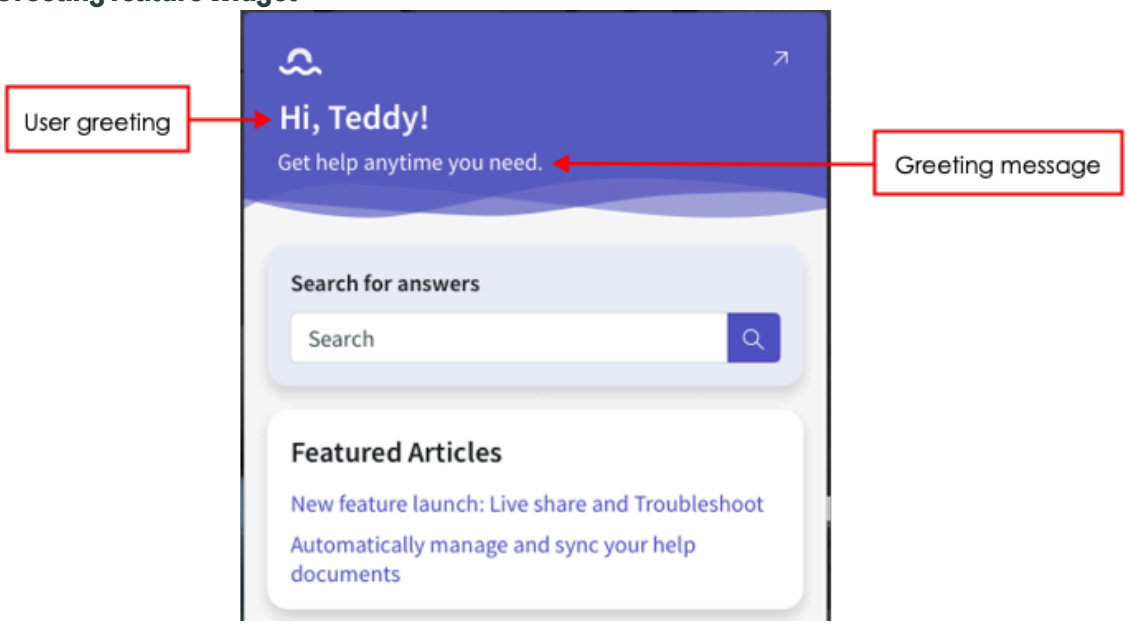
Greeting feature widget



Knowledge feature configuration

Understand the configuration and related lists of the Knowledge feature in Engagement Messenger to configure the field values.

Knowledge feature configuration form

Field	Description
Show articles by	Article category that is shown on the home page of the messenger. You can select one of the following categories: • Featured articles: Articles that are based on the keywords that are associated with the articles. For information on displaying articles in the Featured content section, see Add a knowledge article to featured content. • Most viewed articles: Articles that have the highest view among the articles of your knowledge base. The articles shown in the messenger are from the knowledge bases that you add in the **Knowledge bases** field.
Article count	Number of articles that are shown on the messenger home page. The articles are shown based on the option that you select in the **Show articles by** field.

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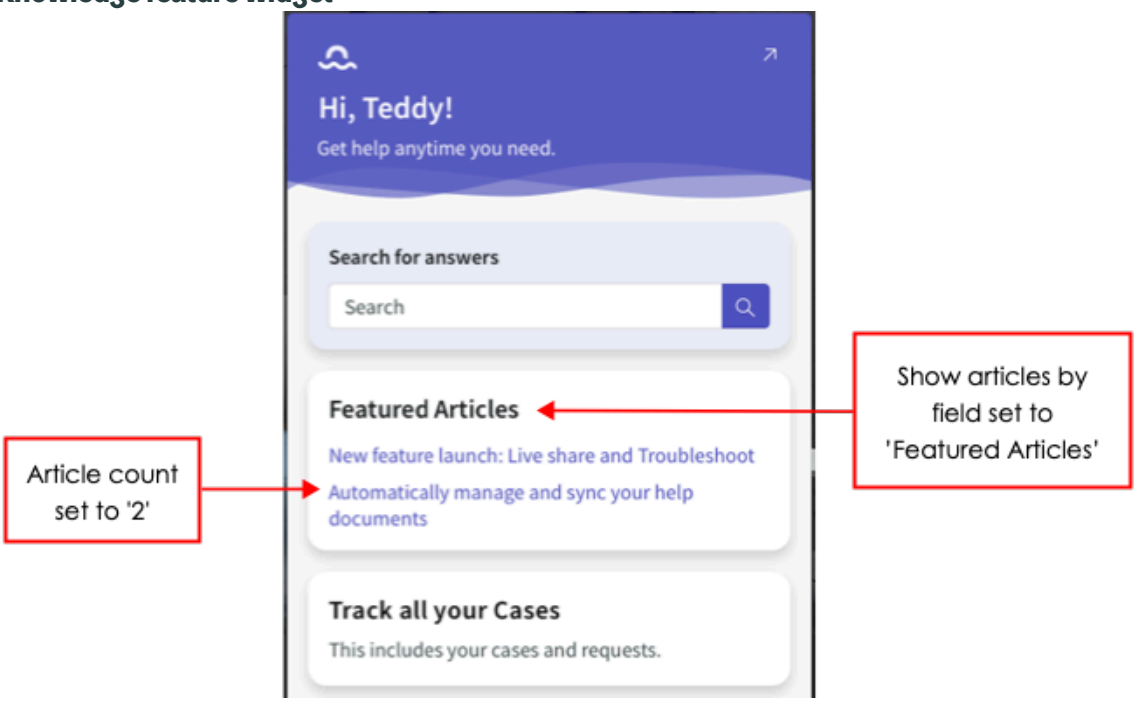
Knowledge feature configuration form (continued)

Field	Description
Knowledge Bases	List of knowledge bases that are associated with your messenger module. Use the Edit option ( ) and search to add a knowledge base to your messenger module.
Enable copy permalink	Option for enabling your customer to copy the permalink of a knowledge article.

Knowledge feature widget



Note the following points while you are configuring the Knowledge feature on your Engagement Messenger module:

- To add knowledge bases to your messenger module, verify that the knowledge_admin role is manually assigned to the user with Engagement Messenger admin [sn_csm_ec.ec_admin] role.
- If the knowledge base that you added to the Engagement Messenger has no articles, then the homepage of the messenger UI does not display any knowledge article widget even when you select a value for the **Show articles by** and **Article count** fields.

Note the following points regarding the live preview of Knowledge feature. However, the actual functionality of the feature is not affected when the Engagement Messenger is deployed in your website.

- The list of articles that is shown in the messenger live preview depends on the application access that the knowledge_admin has to the articles.

  If the knowledge_admin does not have access to any articles, then no content is displayed in the preview. In such a case, only a title **Featured articles** or **Most viewed articles** is displayed.

- Changing the value of the **Show articles by** field refreshes only the title and not the content in the messenger preview.

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Search feature configuration

Understand the configuration of the Search feature in Engagement Messenger to configure the field values.

Search feature configuration form

Field	Description
Search message	Text that is used for the search feature widget in the messenger.
Placeholder text	Placeholder text that appears in the search box.
Enabled for unauthenticated users	Option for enabling this feature for guest users who visit the website that hosts the messenger. **Note:** • You also must configure EC AI Homepage Search widget, Typeahead Search widget, and AI Search Assist widget for public access to enable AI search for unauthenticated users. For more information, see Enable AI Search in Engagement Messenger for unauthenticated users. • Starting with the Vancouver release, the chat client was enabled by default only for authenticated users. To enable the chat client for unauthenticated users to be able to access Virtual Agent chat and Live Agent chat, you must enable the *$sn-va-web-client-app* and *sn_va_web_client_app_embed* pages for public access. For more information, see Make UI pages public or private.
Enabled for authenticated users	Option for enabling this feature for users who sign in to the website that hosts the messenger.
Search application	Application that is used to power the search functionality in Engagement Messenger. This field is automatically set to **Engagement Messenger AI Search Config**. To configure the new search application, navigate to **Engagement Messenger** > **Modules** > **Administration** > **Search Applications**.

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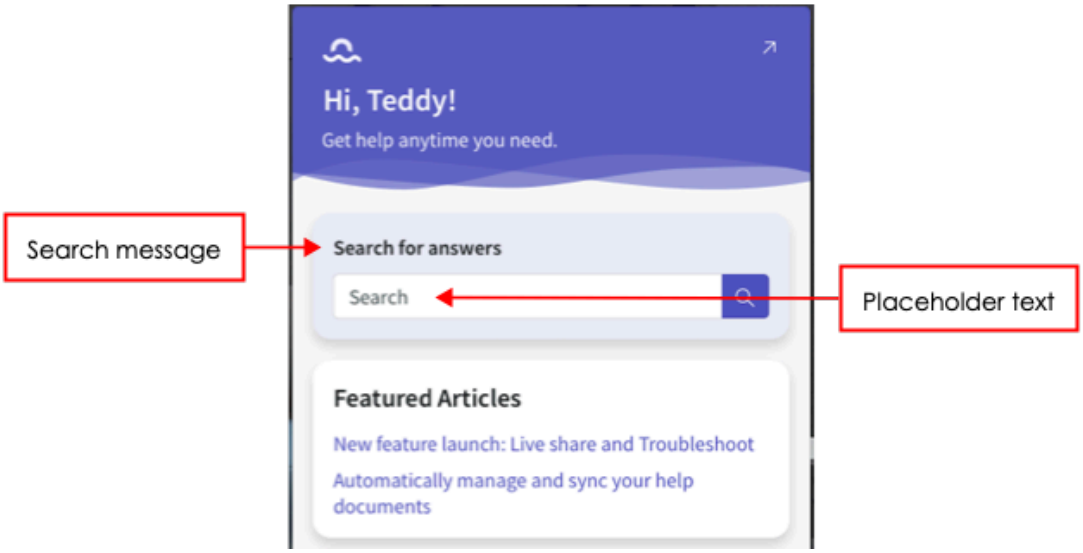
Search feature widget



In addition to configuring these fields for Engagement Messenger, you must configure AI Search in your ServiceNow instance and then enable Typeahead Search and AI Search Assist widgets so that the unauthenticated users can use the AI search feature from Engagement Messenger.

For more information on enabling Typeahead Search and AI Search Assist widgets for Engagement Messenger, see Enabling AI search in the Customer and Consumer Service Portals for unauthenticated users.

For more information of AI Search configuration, see Configuring AI Search.

For more information on the availability of AI Search in your instance, see the AI Search Availability [KB0867751] article.

Note:

- In the Firefox browser, AI Search results aren't displayed on the Engagement Messenger home page.
- If AI Search isn't enabled:
  - The search feature won't be available for users if the messenger module is created on or after version 5.6.
  - Zing search is used for messenger modules created before version 5.6.

Case management feature configuration

Understand the configuration of the Cases feature in Engagement Messenger to configure the field values.

Cases feature configuration form

Field	Description
Title text	Title for the feature widget in the messenger.
Subtitle text	Description for the feature widget in the messenger.
Feature launch message	Text for the Case form launcher widget in the messenger.

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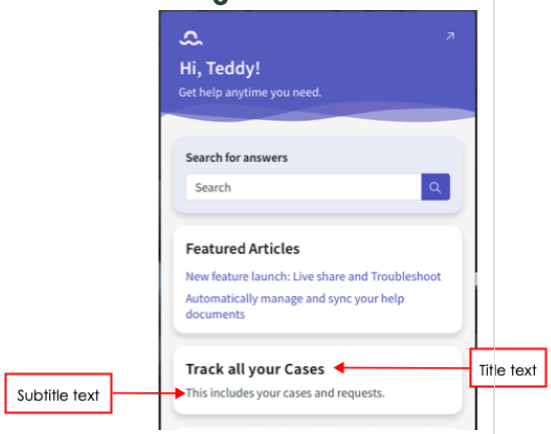
Cases feature configuration form (continued)

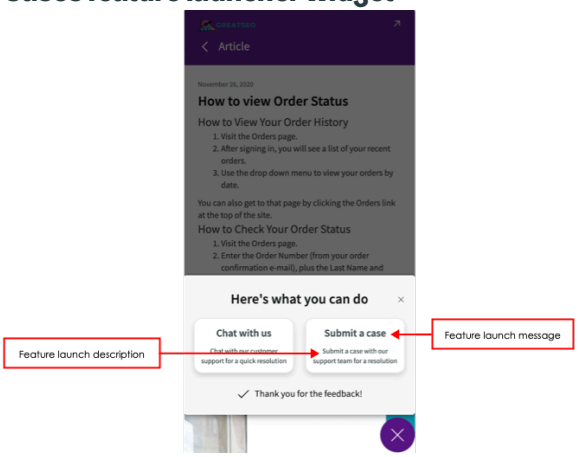
Field	Description
	For example, if a user provides feedback to a knowledge article that it wasn't helpful, the messenger displays a widget to create a case. Clicking this widget launches a case form for the user to fill and submit.
Feature launch description	Description for the Case form launcher widget in the messenger.

Note:
The Case feature is not available for the guest users.

Cases feature widget



Cases feature launcher widget



Catalog feature configuration

Understand the configuration of the Catalog feature in Engagement Messenger to configure the field values.

Catalog feature configuration form

Field	Description
Title text	Title for the feature widget in the messenger.
Subtitle text	Description for the feature widget in the messenger.
Catalogs	List of catalogs that are associated with your messenger. Use the Edit option ( ) and search for a catalog to add to your messenger.

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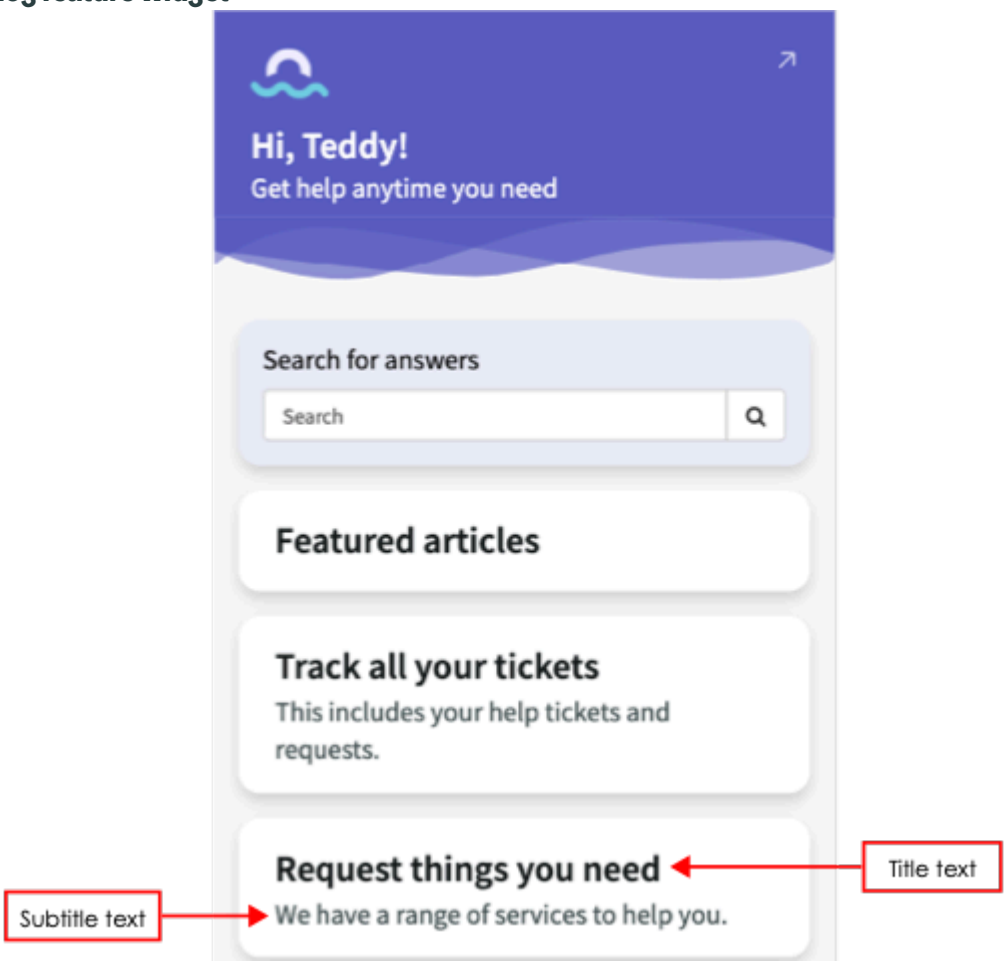
Catalog feature widget



Note:
When you upgrade Engagement Messenger application from v1.0.0 to a newer version, the Catalog feature is disabled for all the existing messenger modules. However, AI search results from the home page of the Engagement Messenger still show catalogs to the users. For more information, see the Known issues in Engagement Messenger [KB0952509] article.

Field service feature configuration

Understand the configuration of the field service feature in Engagement Messenger module to configure the values.

To enable the field service feature, ensure that you activate the Field Service Management - Customer Experience plugin (com.snc.fsm_customer_experience) in your ServiceNow instance.

Once the plugin is active, navigate to the Features section of the guided configuration view of your Engagement Messenger module and enable the Field service feature.

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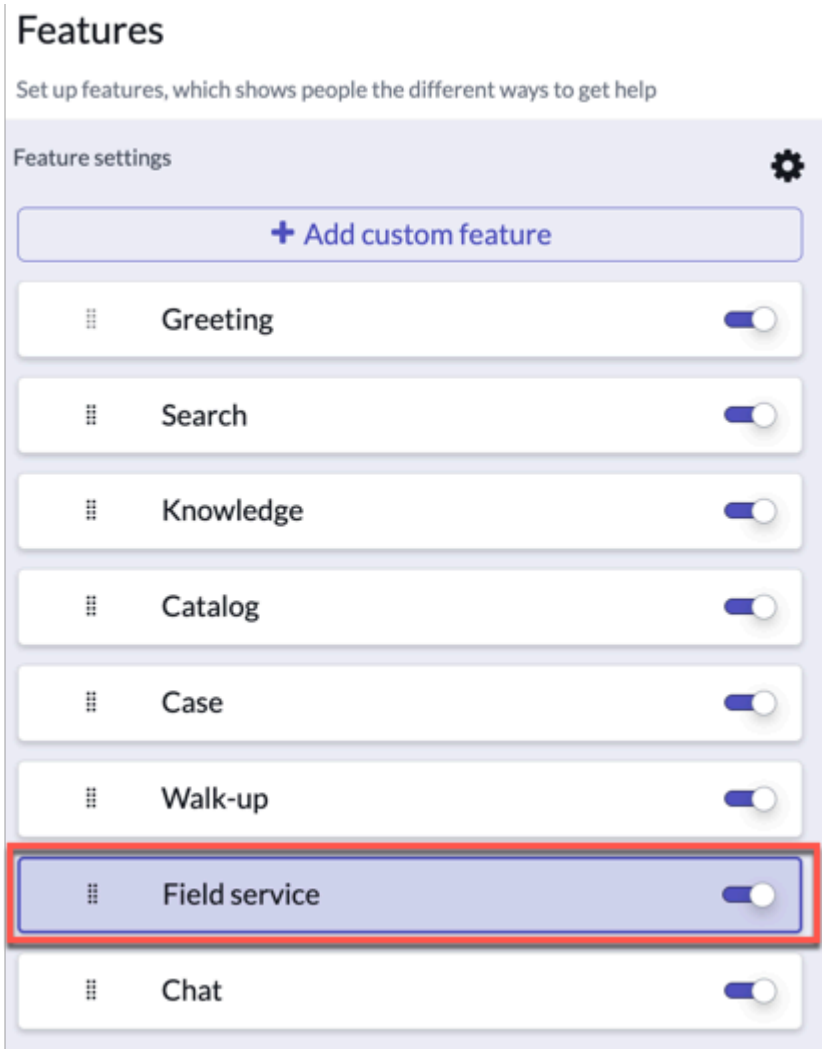
Field service features



Field service feature configuration fields

Field	Description
Title text	Title for the feature widget in the messenger.
Subtitle text	Description for the feature widget in the messenger.

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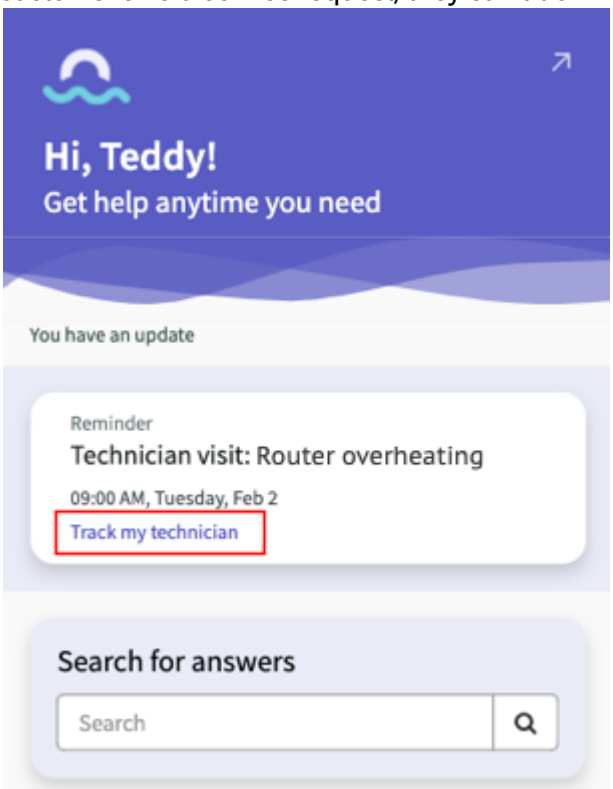
Enabling technician tracking from Engagement Messenger

When a technician is assigned to resolve your customer's field service request, they can track their technician from Engagement Messenger.



To enable this functionality, ensure that you meet the following criteria:

- Activate the Field Service Management - Customer Experience plugin (com.snc.fsm_customer_experience).
- in the sys_user table, enable the **Geolocation tracked** field for all your field service agents who would be assigned to the customer work orders.

  For more information, see Location tracking.

Walk-up feature configuration

Understand the configuration of the Walk-up feature in the Engagement Messenger module to configure the field values.

To enable a walk-up feature for your customers, verify that you activate the following plugins in your ServiceNow instance:

- Walk-up for CSM plugin (com.snc.walkup_for_csm) for authenticated users
- Guest Walk-up Experience for Customer Service plugin (sn_guest_walkup_cs) for unauthenticated users

Once the plugin is active, navigate to the Features section of the guided configuration view of your Engagement Messenger module and enable the Field service feature.

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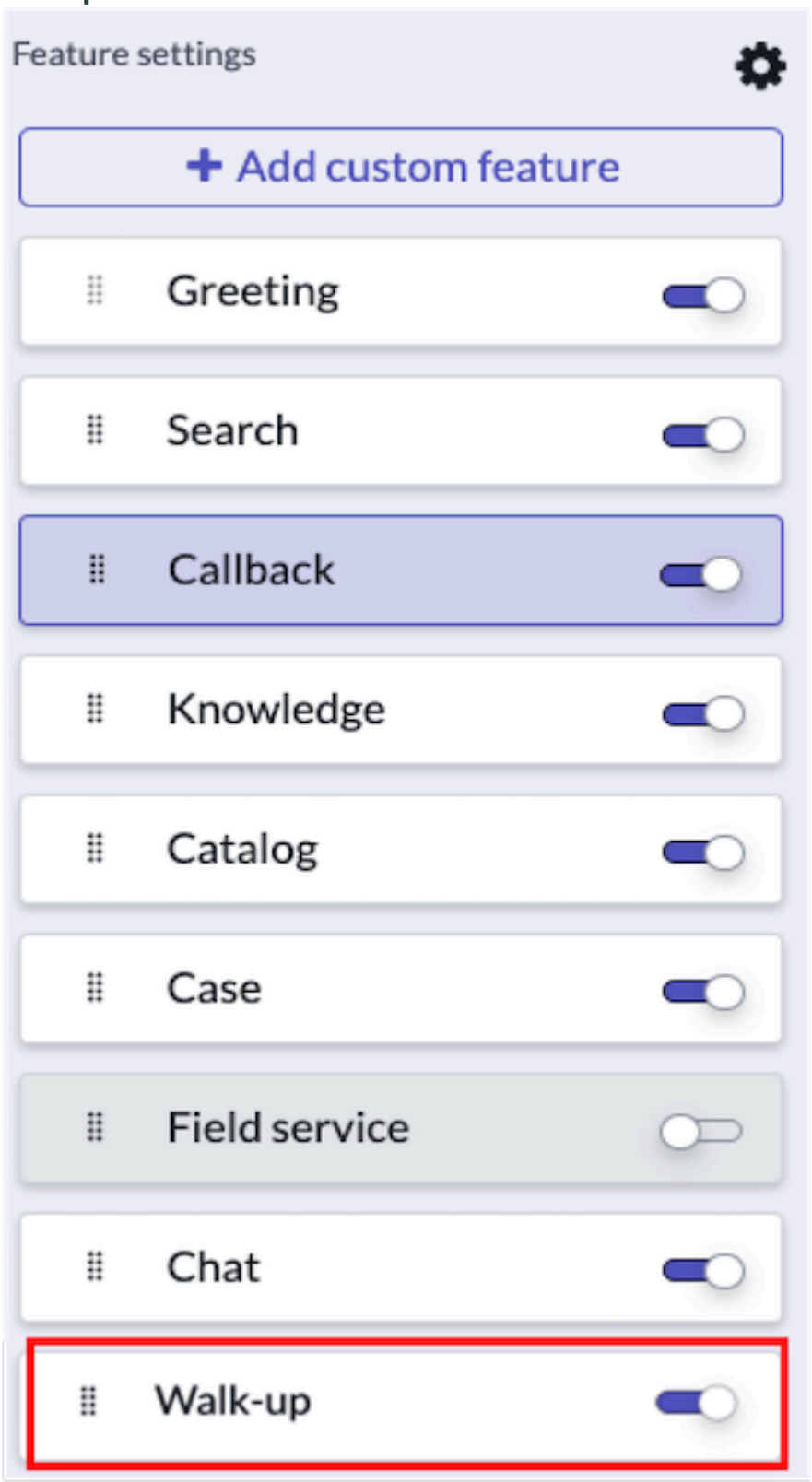
Walk-up feature



Walk-up feature configuration fields

Field	Description
Title text	Title for the feature widget in the messenger.

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Walk-up feature configuration fields (continued)

Field	Description
Subtitle text	Description for the feature widget in the messenger.
Enable for unauthenticated users	Option for enabling the walk-up feature for guest users who visit the website that hosts the messenger.
Enable for authenticated users	Option for enabling the walk-up feature for users who sign in into the website that hosts the messenger.

Select **Configure walk-up here** to configure details of your customer support centers. For more information, see Configure Walk-up Experience locations.

Chat feature configuration form fields

Description of the Chat feature configuration form fields.

Chat feature configuration form

Field	Description
Title text	Title for the chat feature widget on the messenger home page. The default title is `Chat with an agent.`
Reference chat topic	The topic that enables contextual chat for case or work order. This field is automatically set to **EC Contextual help**.
Message for when chat is offline	The message that appears on a messenger when an agent is offline and Virtual Agent isn't set up. The default message is `Our customer support is offline.`
Enabled for unauthenticated users	Option for enabling the Live and Virtual Agent chat feature for guest users who visit the website that hosts the messenger.

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Chat feature configuration form (continued)

Field	Description
	Note: Starting with the Vancouver release, the chat client was enabled by default only for authenticated users. To enable the chat client for unauthenticated users to be able to access Virtual Agent chat and Live Agent chat, you must enable the *$sn-va-web-client-app* and *sn_va_web_client_app_embed* pages for public access. For more information, see Make UI pages public or private.
Enabled for authenticated users	Option for enabling the Live and Virtual Agent chat feature for users who sign in to the website that hosts the messenger.
Feature launch messaging	
Feature launch message	Title of a chat card when it's initiated from a chat feature.
Feature launch description	Description of a chat launcher that is within a feature launch message.
Global chat settings	
Change the default mode for chatting	Determines the default mode for chatting, either synchronously (Chat) or asynchronously (Messaging). For information on how to set the default chat mode, see Change the default chat mode for the Chat feature.
Configure advanced chat options	Determines the chat options for managing various conversation features. For more information, see Chat Setup configuration form.
Email notifications for unread messages	Determines the email settings for sending email summaries for unread messages. For more information on how to enable email notifications for a specified duration, seeConfigure email notifications for unread chat messages.

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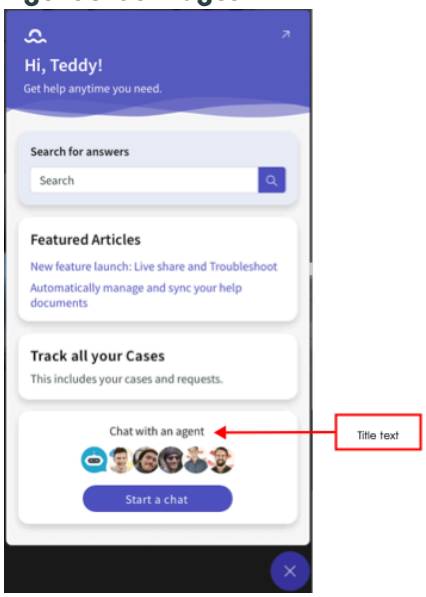
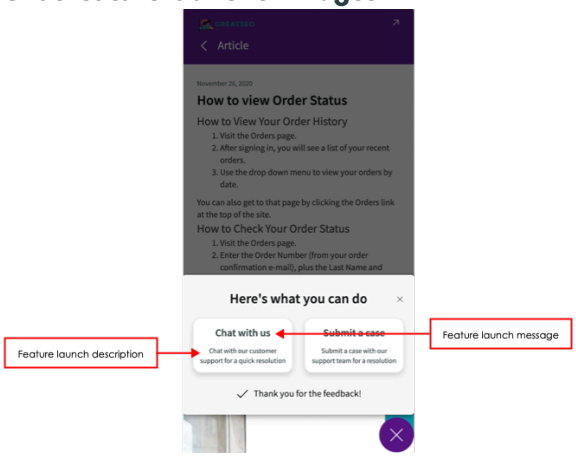
Chat feature configuration form (continued)

Field	Description
	Note: The green color next to **Status** indicates that the email notification is enabled.

Agent chat widget



Chat feature launcher widget



Callback feature configuration form

Description of the Callback feature configuration form fields.

- For more information about how to configure Omnichannel Callback for Customer Service Management (CSM), seeConfiguring Omnichannel Callback for Customer Service Management
- For more information about how to manage a callback from an agent using Engagement Messenger, see Working with callback requests using Engagement Messenger

Callback feature configuration form

Field	Description
Choose how to display the card	The type of display for the feature card on the messenger's home page. The available options are: • **Use an image in a card**: Shows a feature card as a clickable image. • **Use a title and subtitle in a card**: Shows a title and subtitle text as a display feature card

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Callback feature configuration form (continued)

Field	Description
Image	An image that appears as a feature card on the messenger's home page and has a portal or catalog link embedded in it. **Note:** This field appears only when **Use an image in a card** is selected from the **Choose how to display the card** field.
Use a title and subtitle in a card	• **Title text:** Title of the feature widget in the messenger. • **Subtitle text**: Description for the feature widget in the messenger. **Note:** This field appears only when **Use a title and subtitle in a card** is selected from the **Choose how to display the card** field.
Page type	The portal page that opens within the messenger when the user clicks on the feature card. By default *em_show_callback* is set to a portal page. For more information, see Requirements for embedding portal pages in Engagement Messenger.
Enable for authenticated users	Option for enabling the Callback feature for users who sign in to the website that hosts the messenger.

Configurable Cards feature configuration

The Configurable Cards feature enables you to add and customize the features in Engagement Messenger that aren't available by default.

Show a portal page or catalog item configuration form

Field	Description
Choose how to display the card	The type of display for the feature card on the messenger's home page. The available options are: • **Use an image in a card**: Shows a feature card as a clickable image. • **Use a title and subtitle in a card**: Shows a title and subtitle text as a display feature card

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Show a portal page or catalog item configuration form (continued)

Field	Description
Image	An image that appears as a feature card on the messenger's home page and has a portal or catalog link embedded in it. The requirements for using images are: • Supported formats are .jpg, .png, .bmp, and .gif. • Dimensions are a minimum of 120x370px and a maximum of 250x370px. **Note:** This field appears only when **Use an image in a card** is selected from the **Choose how to display the card** field.
Use a title and subtitle in a card	• **Title text:** Title of the feature widget in the messenger. • **Subtitle text**: Description for the feature widget in the messenger. **Note:** This field appears only when **Use a title and subtitle in a card** is selected from the **Choose how to display the card** field.
Page type	The type of page that opens when the feature card is clicked. • **Catalog Item**: The catalog item that opens within the messenger when the user clicks on the feature card. • **Portal Page**: The portal page that opens within the messenger when the user clicks on the feature card. You can configure additional parameters to load specific content from the portal page. For more information about embedding portal pages on Engagement Messenger, see Requirements for embedding portal pages in Engagement Messenger.
Enable for unauthenticated users	Option for enabling this feature for guest users who visit the website that hosts the messenger.
Enable for authenticated users	Option for enabling this feature for users who sign in to the website that hosts the messenger.

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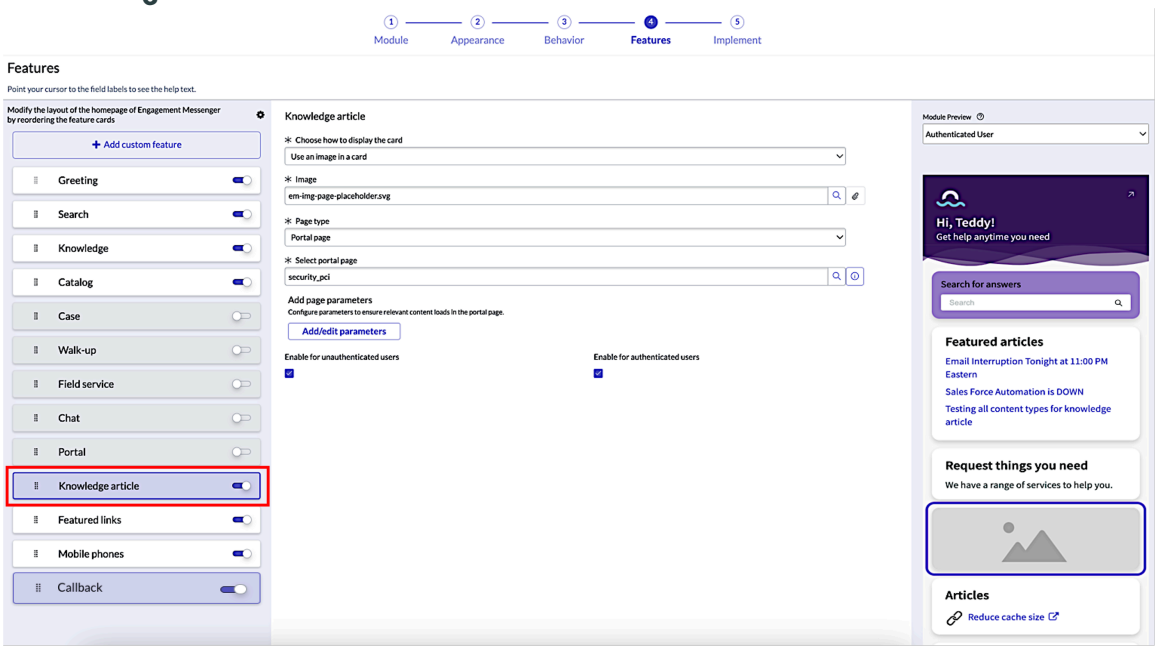
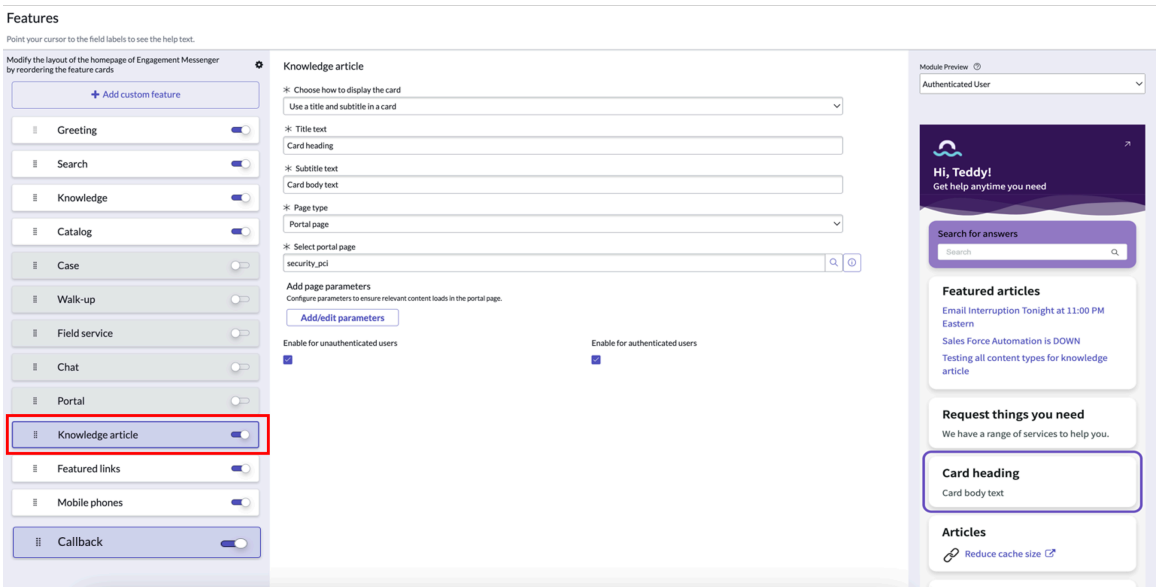
Show a portal page or catalog item configuration form (continued)

Field	Description
Note: Engagement Messenger honors access permissions defined for the portal page or catalog item. If the users do not have access, the feature card will not appear on the messenger.	

Use an image in a card



Use title and subtitle in a card



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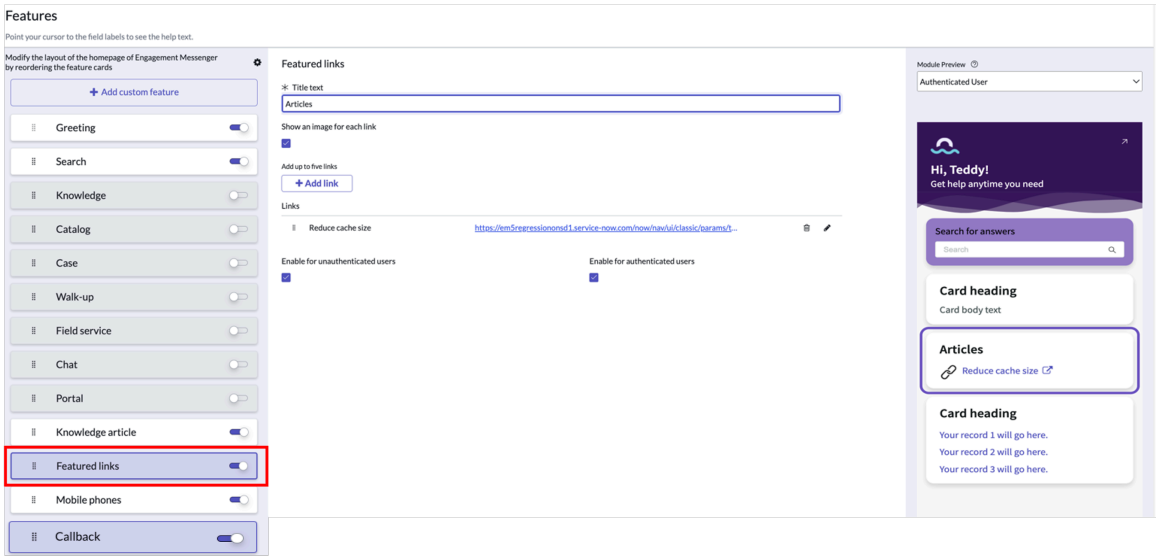
Show links to related websites configuration form

Field	Description
Title text	Title of the feature card in the messenger.
Show an image for each link	Option to display an image along with a link on the messenger's home page.
Add up to five links	Displays external website links on the messenger's home page. **Note:** You can add a maximum of five links.
Enable for unauthenticated users	Option for enabling this feature for guest users who visit the website that hosts the messenger.
Enable for authenticated users	Option for enabling this feature for users who sign in to the website that hosts the messenger.

Featured links



Show records from any table form fields

Field	Description
Choose a way to display records	Determines the appearance of records on the messenger. • **Each record displays as a link**: Shows a title and list of records from the selected table on the messenger's home page. It displays

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Show records from any table form fields (continued)

Field	Description
	up to five records on the messenger home screen. • **Each record displays as a card**: Shows a feature card through which users can access data from the selected table.
Enable for unauthenticated users	Option for enabling this feature for guest users who visit the website that hosts the messenger.
Enable for authenticated users	Option for enabling this feature for users who sign in to the website that hosts the messenger.
Homepage	
Title text	Title of the feature card displayed in the messenger.
Subtitle text	Description for the feature card displayed in the messenger.
Display of records	
Choose table	Determines the table that the card displays records from, either on your ServiceNow instance or from a remote third-party source.
Number of records to show	The total records to be shown as links on the messenger's home page. The maximum value is five. **Note:** This field is applicable only when **Each record displays as a link** is selected from the **Choose a way to display records** field.
Page title	Title of the messenger page that appears when a custom feature card is clicked. **Note:** This field is applicable only when **Each record displays as a card** is selected from the **Choose a way to display records** field.
Display field	The field from the selected table that you want to use as the primary display field.
Details field	The fields to display on the card that represent your data. You can select up to four detail fields.

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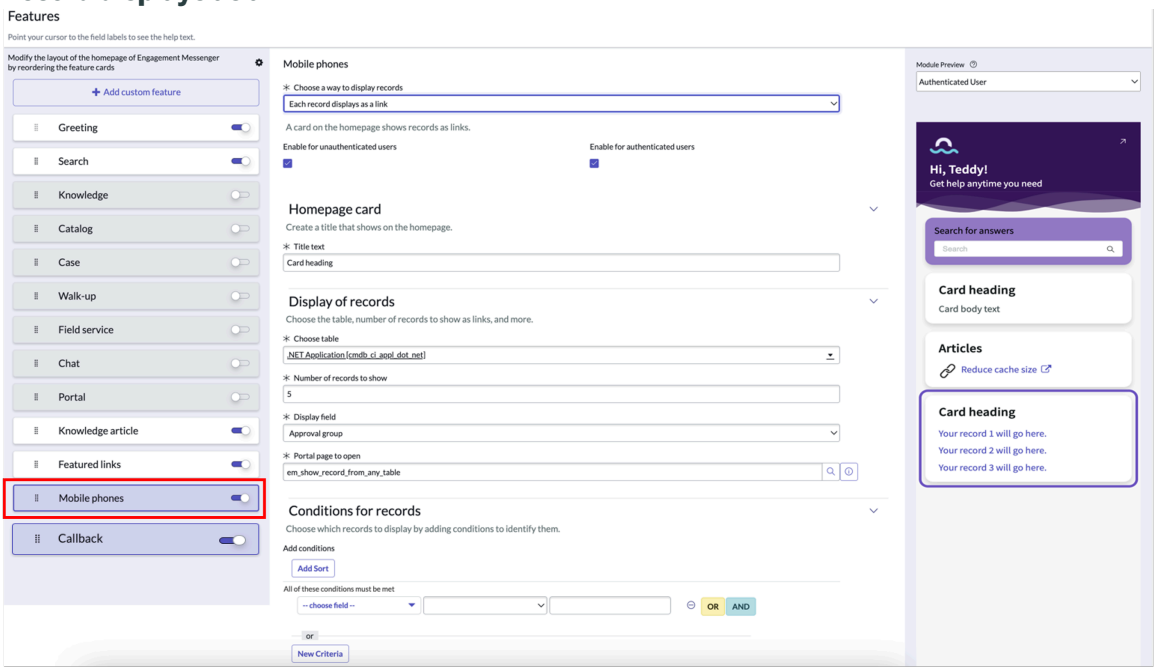
Show records from any table form fields (continued)

Field	Description
	Note: Applicable only when **Each record displays as a card** is selected from the **Choose a way to display records** field.
Portal page to open	The portal page to display when the user selects any link or card.
Condition for records	Condition that restricts the records that appear in a list in the messenger.

Note: Engagement Messenger honors Access Control rules (ACLs) defined for any tables in your ServiceNow instance. If users don't have access, the feature card doesn't appear on the messenger.

Record displays as a link



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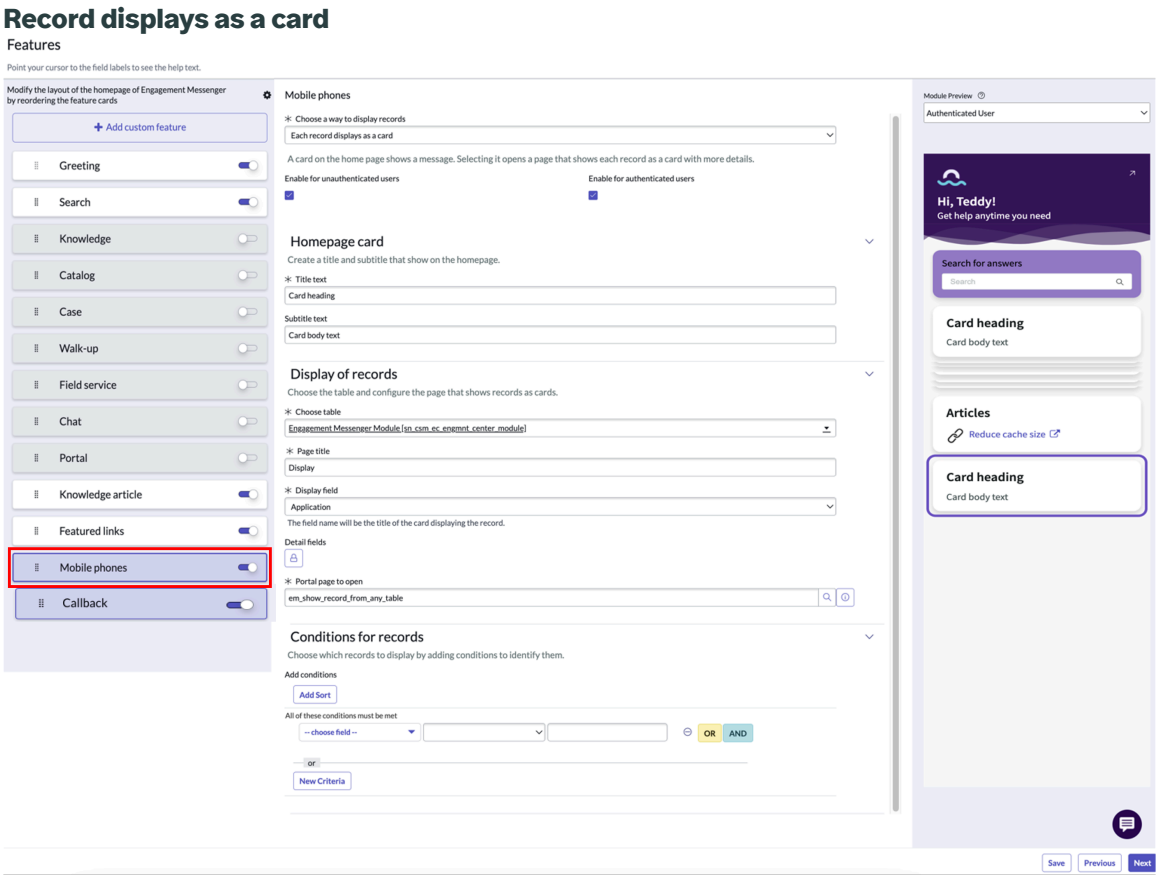

Chat Setup configuration form

Description of the Chat setup configuration form fields.

Chat Setup configuration form

Field	Description
Name	Name of the Live Agent chat setup configuration. The default name is `Chat setup`.
Live chat enabled	Option to enable a live chat.
Allow transcript download	Option that enables to download a transcript of the conversation.
Show agent names and avatars	Option to display agent names and avatars in the Agent Chat client when a live agent enters, transfers, or exits a chat.
Enable notifications for all users	Option to enable the delivery of notifications.
Agent Whisper	Option to enable Agent Whisper, which enables agents to message supervisors without the requester knowing. For more information, see Agent Whisper.
Emoji Enabled	Option to enable the ability to include emojis in Agent Chat. For more information, see Using emojis in Agent Chat.

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Chat Setup configuration form (continued)

Field	Description
No Agent Available message	Message that appears when a live agent isn't available. The default message is `There are no agents available at the moment. Please try again later.`
Application	The application that contains this configuration record. This field is automatically set to Global.
Live chat wait status	Displays the wait time for Live Agent support in the Chat menu if **Wait Time** has been selected.

Configurable Portal widget library

The Configurable Portal widget library is a collection of prebuilt and reusable widgets that enables you to configure the portal homepage.

Configurable Portal widgets

Widget	Description
Portal Polaris Header widget	Display access key features and pages from any place in portal. It shows logo, search, profile, and others on level 1 of the header, and menu items on level 2 of the header. The appearance of menu items in level 2 of the header is determined by the Portal Mega Menu widget selected.
Portal Mega Menu widget	The menu on the header of the portal home page to navigate to different pages. It displays topics in a menu format organized hierarchically.
Portal Browse Taxonomy widget	Display taxonomy topics along with the articles and catalog items related to them.
Portal Banner widget	Banner to display the announcements, new product or feature highlights, and important information on the top of the page.
Portal Banner Carousel widget	Displays multiple banners in a carousel to display information on multiple announcements, features, and products.
Portal Quick Links widget	Display different links for quick access including links to a knowledge article, a catalog item, a custom page, or an external URL. You can also select different layouts for quick links cards.
Portal Knowledge Quick Links widget	Display a list of articles for quick access. Articles can be selected based on featured articles, most viewed articles and more criteria or can be selected manually.
Portal Catalog Quick Links widget	Displays catalog items for important request items based on the criteria.
Portal Case Cards widget	Displays case records according to the filter criteria. You can display case details such as state, update, date, and more in a card format.
Portal Data List widget	Displays a list of cases, appointments, work orders, or other records from any ServiceNow table in list or card format.

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Configurable Portal widgets (continued)

Widget	Description
Portal FAQ widget	Displays a list of frequently asked articles from a selected knowledge table that are categorized based on knowledge article category or related product.
Portal Polaris Footer widget	Display important information at the bottom of each page. The information includes company information and logo, site links, external links, and social media links.
Portal Object widget	Display key information of a record from the tables available on ServiceNow® table. Your users can also take related actions on the selected record.
Portal Taxonomy Topic widget	Displays topics as cards on your portal page enabling your users to access knowledge articles and catalog items related to a topic displayed on your portal in a Portal Browse Taxonomy widget.

Script parameters for the search option in the Portal Banner widget

Description of the JSON parameters for the search option in the Portal Banner widget.

JSON parameter and description

Parameter	Description
Title	Text to appear in the search field before a user starts typing.
Size	Determines the font size and height of the widget. The permitted values are xs, sm, md, and lg.
Color	Color of the search button provided in hex code. The default value is #FFFFFF (white).

Portal Banner widget JSON parameters

JSON parameters define aspects of the Portal Quick Links widget on the Portal Banner widget.

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

JSON parameters

Parameter	Description
widget_title	Required title of the widget. The default text is `Quick Links`.
card_display_style	The style of a card tile for quick links inside the Portal Banner widget. The available options are: • Thumbnail • Icon on top • Icon on left

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JSON parameters (continued)

Parameter	Description
	• Title & description only • Title only The default display style is Thumbnail. **Note:** Currently, if you select None, the style is set to Thumbnail.
show_carousel	Option to switch between carousel view and grid view.
quick_links	Name of the field in the presentation section. The default text is `Quick Links`.

Portal Data List widget JSON parameters

JSON parameters define aspects of the Portal Data list widget on the portal page.

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

JSON parameters

Parameter	Description
categories	Each category displays a set of records from the Customer Case View Case [sn_customerservice_case] table that meets the filter criteria. For each category, you can choose from pre_defined_filters and run_time_filters predefined filter tabs, set the columns for the list view, and determine the fields to be shown in the card view.
ID	A unique identifier that enables the categories condition script to determine whether to show or hide categories on the widget.
label	Name of the category that appears on the navigation pane. If a label isn't entered, the category doesn't appear.
table	The table from which the records are shown on the widget when a category is selected. By default, this field is set to the Case [sn_customerservice_case] table.
list_view	The name of the view that defines the list of columns or fields to appear on the widget.

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JSON parameters (continued)

Parameter	Description
	For more information on these views, see Create and delete views. If no value is provided, all columns are shown.
card_view_primary_column	A field from the defined table to be displayed in the first column of a card. For example, you can show the case number in the first column.
card_view_secondary_column	A field from the defined table to be displayed in the second column of a card. For example, you can show short description of the case record. This parameter is optional.
card_view_additional_columns":"column1|column2|column3|column4	Field pairs from the defined table to be displayed as additional columns of a card. You can add a maximum of four additional columns. This parameter is optional.
query":"active=true"	Query to filter the records that display under the category. If no value is provided, all records are displayed.
glyph":"glyph_name"	The glyph to appear on the left of the category label in the navigation pane. The glyph name provided should be from the font-awesome library, which can be accessed at the following URL: `https://fontawesome.com/versions/icons` The currently supported version of the font-awesome library is v4.1. If you use a glyph name from a different version, the image will not appear correctly. **Note:** If both a glyph and an image are defined, the image is displayed. This parameter is optional.
"image_name":"file_img"	An image to appear on the left of the category. The image name should be selected from the Images [db_image] table.

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JSON parameters (continued)

Parameter	Description
	Note: If both a glyph and an image are defined, the image is displayed. This parameter is optional.
record_view_page	The Service Portal that displays the page with details of any record accessed in the widget. This parameter is optional. By default, this field is set to the Case (csm_ticket) page.
pre_defined_filters "filter_name":"Value",	Display cases which are in New, Closed, Open, or Awaiting Info state in any selected category. These filters appear as tabs in the widget. Only Open and Closed case are included by default in the JSON code. The available values are: • filter_name: Name of the filter tab • Value: Name of the case state such as New, Closed, Open, or Awaiting Info. This parameter is optional.
run_time_filters	Displays column and its fields from the defined table as runtime filters in a drop-down list. These runtime filters filter the case records displayed in the widget based on different fields from the defined table. For example, you can display Priority as a column and State, Contact, or Updated as fields. If the runtime filters values are not provided in the column and selection_type parameters, the filter icon will not appear for the category. This parameter is optional.
selection_type	Display the type of selection. The available options are: • Single select: Single selection for the filter column • Multi select: Multiple selection values for the filter columns
values "value":"4"	Values from the defined table for the column parameter. The available values are:

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JSON parameters (continued)

Parameter	Description
	• Label: Name of a value • Value: Integer value of a field
"ranges": label":"Last Month", "query":"<Range condition>",	Used to filter the records using a query defined in label and query parameters. For example, you can display case records that have been updated in the last month, last 3 months, or last 6 months. The range configuration is: • Label: Name of the filter option • Query: Query that defines a set of values grouped under a label This parameter is optional.

Portal Footer widget JSON parameters

Use the JSON parameters to define aspects of the Portal Footer widget on the portal page.

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

JSON parameters

Parameter	Description
org_info	The company name and address to appear on the portal footer.
copyright	Copyright information to appear on the portal footer. You can display copyright symbol, the year of copyright, and the name of the copyright holder or organization in the footer.
logo_img_name	The image that can be displayed as a logo in the footer. The image name should to be accessed from the Images [db_image] table.
sitemap_links_menu_sys_id	The system identifier (sys_id) of the menu record is used to display sitemap links in the Portal Polaris Footer widget. You can create a menu record and map it to the sitemap links by including its sys_id in the JSON code. For more information on how to create a menu record, see Menu Item form.
footer_links_menu_sys_id	The system identifier (sys_id) of the menu record is used to display footer links in the Portal Polaris Footer widget. You can create a menu record and map it to the footer links by including its sys_id in the JSON code. For more information on how to create a menu record, see Menu Item form.

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JSON parameters (continued)

Parameter	Description
social_links_menu_sys_id	The system identifier (sys_id) of the menu record is used to display social links in the Portal Polaris Footer widget. You can create a menu record and map it to the social links by including its sys_id in the JSON code. For more information on how to create a menu record, see Menu Item form.

Default highlight color for different case states

Default values for the background and text color for all case states on the Portal Case Cards widget.

Default background color for all case states

State name	Default value	Color
New	#CBE9FC	Pale blue
Open	#D1D2EE	Pale purple
Awaiting Info	#FBF7BF	Pale yellow
Resolved	#D2EABC	Celadon green
Closed	#C2C4CA	Grey
Canceled	#FFCCD2	Salmon pink

Customer Service forms

Use forms to view and update Customer Service Management information.

Customer Service forms overview

Customer Service Management provides an intuitive platform for creating and managing forms that enables you to submit requests, track issues, or interact with the support team. These forms are customizable to meet the unique needs of your organization, that confirms every customer interaction is captured accurately.

With options for creating incident reports, service requests, or even feedback forms, you can enable your support agents to manage customer queries easily. By using dynamic form elements, workflows, and automatic data routing, customer service teams can streamline the support process, reduce response times, and improve customer satisfaction. Forms can be integrated into portals, emails, or other channels, giving customers multiple ways to reach out for help. Whether you're addressing a simple query or managing complex service requests, these forms help ensure that your support team is well equipped to deliver timely, effective service.

Case form

The Case form displays detailed information about a customer issue or problem.

A customer service agent creates a case to identify a customer's question or issue and to track the activities related to resolving the issue. An agent also uses a case to track communication to and from the customer, including the communication channels being used.

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Case activities include any action that is taken to resolve an issue. This can include phone calls or emails, knowledge base research, conversations with subject matter experts, and dispatch requests to field service agents, as well as other activities.

From the Case form, an agent can associate and store the related information, such as the customer's name, phone number, and company; account information; product and asset information; service contract and entitlement details, and any associated service level agreements (SLAs).

There are several key features to a case.

- Communication between an agent and the customer or an agent and other employees within the organization. Details of all internal and external communication are recorded on the Case form.
- Any additional tasks that result from a case, such as a work order. Tasks are tracked from a related list on the Case form. These tasks may be internal to the organization or they may involve the customer.
- Information from the case that can be included in the knowledge base and used to help resolve other cases.

There are two different Case form views: a detailed view that is available to agents and agent managers in the Customer Service Management application and a simplified view that is available to external customers from the Customer and Consumer Service Portals.

Agent view

The agent view of the Case form includes the following components:

- A timeline that provides a visual display of case activities.
- Referenced entities for the case including account and contact information, product and asset information, service contract and service entitlement details, and any pertinent SLAs. Except for SLAs, this information exists in the system and can be associated with the case by the agent or agent manager.
- All communication about the case, both external and internal. This information is stored in the **Additional comments** field (external communication), the **Work notes** field (internal communication), the **Resolution notes** field. The **Resolution notes** field stores details about the case resolution, and the **Activity** field, which stores all communication in a chronological list.

Agents and managers can view a Case form by navigating to **Customer Support** > **Cases** and selecting one of the following menu options:

- **My Cases**
- **All**
- **Open**
- **Unassigned**

From the Case list, select a case number to display the Case form.

Customer Service Case form (agent view)

Field	Description
Number	The automatically assigned case number.
Channel	The method by which the customer initiated contact and the case was opened.

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Customer Service Case form (agent view) (continued)

Field	Description
	• Web (default) • Phone • Email • Chat • Social
Contact Local Time	The local time of the contact assigned to the case. It is automatically filled according to the time zone set on the Contact form. If no time zone is set on the Contact form, it is filled according to the **Contact Timezone** set on the case itself. If no time zone is set on the Contact form or in the case, the field is left blank and is read-only. If a case is closed or canceled, the **Contact Local Time** field is hidden. **Note:** Configure the form layout to add this field to the Case form.
Contact time zone	The contact time zone if the customer is working in a different time zone for the case. It overrides the Contact form time zone. If no contact local time or contact time zone is set, the instance time zone is displayed. Once the case is created, the field is read-only. **Note:** Configure the form layout to add this field to the Case form.
Account	The name of the contact's company. This field is filled in automatically if the information is available in the contact record.
Contact	The name of the customer contact for this case.
Consumer	The name of the consumer for this case.
Service Organization	The name of business location.
Requesting Service Organization	The service organization for which this case is being requested.
Product	The product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro). If you select an asset in the **Asset** field and the asset has an associated product, the **Product** field is automatically updated. A product can be associated with multiple assets.

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Customer Service Case form (agent view) (continued)

Field	Description
Asset	The asset tag number or the serial number of the asset involved in this case.
Install base	The Install base field helps you track which products and services have been purchased by a customer, how they have been installed or provisioned, along with the detailed configuration for each installed item.
Partner Contact	The name of the partner contact for this case.
Follow the sun	A check box to indicate that a case should be handed-off for global follow-up. If a customer enters additional comments on a **Priority 1 - Critical** or a**Priority 2 - High** case, or if the case is escalated, the flag is automatically selected. You can also manually select the check box. The activity stream on the case form is updated with any changes. **Note:** Enable the **Follow the sun** check box on the Customer Service case form by setting the value of the property *sn_customerservice.FTS_flag_enabled* to **true**. Configure the form layout to add this field to the Case form.
Short description	A brief description of the issue or problem.
Opened	The date and time that the case was opened.
Priority	The assigned priority: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
State	Customer service case states: • New • Open • Awaiting Info • Resolved • Closed • Canceled **Note:** Configure the form layout to add this field to the Case form
Assignment group	The assigned customer service agent group.

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Customer Service Case form (agent view) (continued)

Field	Description
Assigned to	The assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Assigned on	The data and time when the case is assigned. This field is updated when a user is added or changed in the **Assigned to** field.
Contract	The contract number associated with this case.
Entitlement	The entitlement associated with this case. The entitlements available for selection in the reference list channel matches the case creation channel. The available entitlements are filtered by the settings in the **Account**, **Contract**, **Product**, **Asset** fields. If only one entitlement is available for this case, it is automatically added to the **Entitlement** field.
Partner	The name of the partner company.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to **Resolved** or **Closed**. Select the add me icon to add yourself to the watch list.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Select the add me icon to add yourself to the work notes list. To enable notifications for users in the **Work notes list** field: **1.** Navigate to the Notifications (sys_notification) table. **2.** Select Case Action Status. **3.** In the **Who will receive** tab, do one of the following: ○ Add a user in the **Users** field. ○ In the **Recipients listed in fields** field, add the **Work notes list** field. **4.** Select **Update**.
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the **Contributor Users** field. If this user is removed from the **Assigned to** field on the Case Task form, and they are not assigned to any other tasks for the case, they are also removed from the **Contributor Users** field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the **Contributor Groups** field. If this user is removed from the **Assigned to** field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field.

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Customer Service Case form (agent view) (continued)

Field	Description
	If a group is removed from the **Assignment group** field on the Case Task form, and the group is not assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field.
Additional comments	Customer-viewable comments. Each comment is inserted into the **Activity** field when the user selects the **Post** button.
Work notes	Information about how to resolve the case, or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive the Case work notes added notification containing the work notes when added. You can configure the notification, as required. The notes are viewable by the admin, agent, and agent manager.
Activities	Records all activity associated with this case.
Resolution Information	
Resolved by	The agent to whom the case is assigned when the case is resolved.
Closed by	The name of the user who closed the case.
Resolution Code	Choice list indicating the resolution states for the case. This field is mandatory when an agent proposes a solution for a case.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is mandatory if a customer service agent or agent manager closes a case. If a customer closes a case, it is not mandatory.
Add resolution notes to comments	A check box to determine if the resolution notes are added to customer-viewable comments when the case is resolved. If selected, the resolution notes are added to the **Additional comments** (customer-visible) field. By default, the check box is cleared.
Resolved	The date and time that the case was resolved.
Closed	The date and time that the case was closed.

Customer view

Customers can view a Case form by selecting **My Cases** on the customer portal and then selecting a case number from their Case list.

The customer view of the Case form includes the following components:

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- A process flow formatter that indicates the current state of the case.
- The related entity information, including account and contact information, product and asset information, and service contract information.
- An **Activity** field that stores all communication for the case in a chronological list.

Case timeline

The timeline provides a visual display of case activities. The timeline appears at the top of the Case form when viewed by an agent or manager in the Customer Service Management application.

The timeline uses blue circles to represent case state changes and markers to represent case activities. The information included in the timeline is also shown on the Case form in the **Activity** history.

Header

The timeline header displays the time that the case began. It also displays the time that the case was either last updated or closed.

State changes and case activities

Each state change for a case is represented by a blue circle on the timeline. Pointing to these circles provides more information about the state change in a tooltip. For example, pointing to the first blue circle that represents the **New** state displays the name of the user who created the case and the approximate time that the case was created.

Activity lines above and below the timeline represent other case activities, including comments, information requests, close notes, email, and phone calls. Activities performed by an agent are shown above the timeline and activities performed by a customer are shown below. Pointing to these activities on the timeline displays additional information.

Overlapping states and conversations are represented by thicker borders and thicker lines. Pointing to overlapped states and conversations results in grouped tooltips.

If a case is ongoing, the end of the timeline shows the last updated activity or state change. If a case is closed, the end of the timeline shows a blue circle that represents the **Closed** state.

Time metric

The metric to the right of the timeline tracks the amount of time that a case is open. The date and time that the case was opened is used as the start of the time calculation. When a case is ongoing, the current time is used as the end time calculation. When a case is closed, the close time is used as the end time calculation.

The metric breaks down the time by the number of minutes and hours that a case is with the agent or with the customer. A case is considered to be with the agent when it is in the **New**, **Open**, or **Closed** state.

When a case is in the **Awaiting Info** or **Resolved** state, it is considered to be with the customer.

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Use the case timeline with other applications

You can use the Customer Service case timeline with other ServiceNow applications by creating a configuration for each application and adding the **ResolutionShaper** field to the desired form.

Before you begin

Role required: admin

Procedure

1. Ensure that the Customer Service plugin (com.sn_customerservice) has been activated.
2. Navigate to the Resolution Shaper Configs page (`<instance>sys_resolutionshaper_config_list.do`) and click **New**.
3. Select a table in the **Task Table** field.
4. Add the desired states in the **Requestor States** field using a comma-separated list. For example, `New,Active,Resolved,Closed`.
5. Make any necessary changes to the remaining fields and click **Submit**.
6. Navigate to the desired form.
7. Right-click the form header and select **Configure** > **Form Layout**.
8. Using the slushbucket, select **ResolutionShaper** and move it to where you want the timeline to appear.
9. Click **Save**.

Case process flow formatter

The process flow formatter provides a graphical summary of the stages of a customer service case.

The process flow formatter is available in the platform interface when you select the Customer Self Service view.

Process flow formatter

The process flow formatter appears at the top of the Case form. It highlights the current state of the case and checks off the states through which the case has passed.

By default, the process flow formatter displays the following states:

- New
- Open
- Resolved
- Closed

Related topics

Process flow formatter

Case form related lists

The Case form includes related lists that store case information and that agents can use to perform case-related tasks.

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Customer service case form related lists

Related List	Description
SLAs	The service level agreements that are associated with this case.
Tasks	Tasks that have been created for this case by the customer service agent or agent manager. When you create a task or change the state of a task, the information is recorded in the case **Activity** field. When you create a case task, the system generates a task number with a prefix. Following upgrade to the New York release: • New case tasks use the CSTASK prefix. • Existing tasks, regardless of state, use the TASK prefix.
Phone	The case phone log. A list of incoming or outgoing phone calls associated with this case.
Appointments	Appointments that the customer service agent makes with the customer or others as part of resolving this case. When you create an appointment, an appointment creation message is recorded in the case **Activity** field. The user selected in the **To** field on the appointment form receives an email with the appointment details.
Emails	The case email log. A list of the emails that are sent or received as part of resolving this case. The customer service agent or agent manager can send email from within the case, such as updates and inquiries to customers or other employees. A change in the state of the case triggers an automatic email to be sent to the customer. Customer contacts can create and update cases by email as well as receive updates from customer service agents.
Problems	A list of problems related to this case.
Work Orders	A list of work orders created for this case.
Social Logs	A list of the communication with customers or consumers that takes place through social media channels. The Social Log form includes the **Social Profile** of the user that created the communication and the **Social URL** for the conversation. Click the URL to open the conversation in a new tab.
Attached Knowledge	Knowledge articles attached as a proposed solution to the case.
Knowledge Gaps	Feedback tasks that are created when a knowledge gap is reported.
Escalations	A list of escalation records that are related to this case.
Child Cases	A list of child cases associated with this case
Requests	A list of requests associated with this case.
Blocked by	A list of blocking tasks that have been created for this case.
Related Parties	A list of related parties, such as contacts or consumers added to the case.

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Case states

A customer service case can be in one of several states as the agent gathers information and works toward a resolution.

Customer service case states

Term	Definition
New	The initial state for a new case, which is created through any one of the channels: customer portal, email, chat, telephone, or from the Customer Service application. Actions the agent can take: • **Assign to me**: The case is assigned to the agent and the state changes to **Open**. • **Accept**: If assigned by the customer service manager, the agent accepts the case and the state changes to **Open**. • **Update**: updates the case. • **Close Case**: Closes the case. • **Delete**: Deletes the case. Actions the customer can take: • **Update**: updates the case. • **Close Case**: Closes the case
Open	The case is assigned to an agent and the agent clicks **Accept** or an agent opens a case and clicks **Assign to me**. Both of these actions change the state from **New** to **Open**. Actions the agent can take: • **Update**: Updates the case. • **Request Info**: The agent requests additional information from the customer. The state changes to **Awaiting Info**. • **Propose Solution**: The agent proposes a solution for the case. **Note:** The **Resolution Code** and **Resolution notes** must be entered in the **Resolution Information** tab. The state changes to **Resolved**. • **Close Case**: Closes the case. • **Delete**: Deletes the case.
Awaiting Info	An agent clicks **Request Info**, changing the state from **Open** to **Awaiting Info**. Actions the agent can take: • **Open Case**: Changes the state back to **Open**. • **Update**: Updates the case • **Close Case**: Closes the case. • **Delete**: Deletes the case. Actions the customer can take:

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Customer service case states (continued)

Term	Definition
	• **Update**: Once the customer updates the case, the state changes to **Open**. • **Close Case**: Closes the case.
Resolved	An agent provides a resolution code and enters resolution notes in the**Resolution Information** tab and clicks **Propose Solution**, changing the state from **Awaiting Info** to **Resolved**. The **Resolution code** and **Resolution notes** fields are mandatory when an agent proposes a solution for the case. Actions the agent can take: **Update** (Updates the case) Actions the customer can take: • **Accept Solution**: The customer accepts the solution proposed by the agent. The state changes to **Closed** and a survey is displayed. • **Reject Solution**: The customer rejects the solution proposed by the agent and the state changes to **Open**. • **Delete**: Deletes the case. • **Close Case**: Closes the case.
Closed	After proposing a solution, an agent waits for the customer to respond. • If the customer clicks **Accept Solution**, the state changes from **Resolved** to **Closed**. • If the customer clicks **Reject Solution**, the state changes from **Resolved** to **Open**. An agent, agent manager, or a customer can close a case at any time, except when it is in the **Resolved** state. When it is in the **Resolved** state, only a customer can accept or reject the proposed solution. When an agent or agent manager closes a case, details must be included in the **Resolution notes**. This is not required when a customer closes a case. A case cannot be updated once it is closed.

Related topics

State flows

Create a case for a new install base item

Create a case for a new install base item by using the case form in the CSM Agent Workspace.

Before you begin

Role required: sn_customerservice_agent or sn_customerservice.consumer_agent

Procedure

1. Navigate to **All** > **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, navigate to **Cases** > **My Cases**.
3. Select **New**.

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4. Perform one of the following actions before selecting an install base item on the Create Case form.
   For a description of the field values, see Case task form.

5. Next to the **Install Base** field, select the search icon , and then select the install bases from the pop-up window.

   The pop-up window displays only the list of install base items that are related to the selected account or consumer.

6. In the **Short Description** field, enter a description of the install base item.

7. Save the form.
   A new case with the install base item details appears in the My cases list.

Migrating the install base information for existing cases

Your customer service agents can use the case form on the CSM Agent Workspace to add an install base item to an existing case.

To populate existing cases with the install base information, agents can use the following sample script:

```
var installBaseMigrationUtil = new
 sn_install_base.InstallBaseMigrationUtils();
installBaseMigrationUtil.populateInstallBaseOnCases();
```

The migration script populates cases with the install base information, only if the case is associated with the install base item. To associate a case to an install base item, see Associate multiple install base items to a case.

Assign a partner contact on the case form

Enable Customer Service Management agents to assign partner contacts for an account that is associated to an install base item on the case form. By adding partner contacts, you can provide access to multiple partners to access their accounts.

Before you begin

Role required: customer service agent

Procedure

1. Navigate to **CSM/FSM Configurable Workspace** > **Cases** > **My Cases**.
2. Select **New**.
3. In the **Install Base** field, use the search icon to add an install base item on the Create Case form.
   The **Account** and **Contact** fields are automatically filled from the install base form. For a description of the field values, see Case task form.
4. In the **Partner** field, use the search icon to search for a partner associated with the selected account.
   The partner in the **Partner** field is the partner account that is associated with the account.
5. In the **Partner Contact** field, enter an eligible partner contact who has the following criteria:

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- All partner contacts of the partner account are eligible if the **Restrict Account Access** isn't enabled.
- All partner contacts with the partner admin role are eligible if **Restrict Account Access** is enabled.
- Partner contacts that are added as an Authorized Representative through the related party list for the install base item.
- Partner contacts that are added as an Authorized Account through the related party list for the install base item.

To add a related party to an install base item, see Add related parties to an install base item.

6. Select **Submit**.

Result
A partner contact is assigned to the case.

Case task form

The case task form displays information about case tasks, which are created and assigned to users to complete the work necessary to resolve customer service cases.

The case task form includes the following fields.

Case task form fields

Field	Description
Number	The automatically assigned case task number.
Parent case	The number of the parent case. This can be a case from the Case [sn_customerservice_case] table or any child tables of the Case table.
Parent	The number of the parent record if the task is created from a type of record other than a case. This field is populated when a case task is created from a non-case record such as an incident, problem, change, or request. This field is a reference to the Task [task] table. **Note:** You may need to configure the case task record to display the **Parent** field.
Contact	The contact for the parent case. This field is a reference to the Contact [customer_contact] table.
Account	The account for the parent case. This field is a reference to the Account [customer_account] table.
Consumer	The consumer for the parent case. This field is a reference to the Consumer [csm_consumer] table.
Subject	The subject of the case task.
Description	A description of the work that needs to be done in order to complete the case task.

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Case task form fields (continued)

Field	Description
Service	If a service has been selected for a case task, the service is displayed in this field. The **Service** field is a reference to the Service Definitions table (sn_case_type_selection). **Note:** The Customer Service plugin (com.sn_customerservice) and the Customer Service Case Types plugin (com.snc.csm_case_types) are required for the **Service** field to appear on case task lists and forms.
Priority	The assigned priority of the case task: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low (default)
State	The current state of the case task: • Open • Closed
Assigned to	The assigned user.
Service	This field is a reference to the Service [cmdb_ci_service] table.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list.
Work notes	Information about the case task, such as steps taken toward resolution. Internal users who have been added to the **Work notes list** receive a notification when work notes are added to a case task.
Additional comments	Customer-viewable comments. Each comment is inserted into the **Activity** field when the user selects **Post**.
Visible to customer	If this check box is enabled, the case task is visible to end users from the Customer or Consumer Portals.

Case Report form

The Case Report form includes reporting-related fields that are derived from case records.

The Case Report table (sn_customerservice_case_report) extends from the Customer Service Case table (sn_customerservice_case). This table stores KPIs and metrics for case records and

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includes the following calculated metrics which are displayed on the Customer Service Manager dashboard.

- Agent Reassignment Count
- First Contact Resolution
- Reopen Count

The Customer Service Manager dashboard includes the **First Call Resolution** indicator, which shows the percentage of cases that were resolved during the first contact with the customer. The percent change in the current period appears under the total percentage. The value for the First Call Resolution indicator is returned by the `CaseReportUtils` script include.

Customer Service Case Report form fields

Field	Definition
Number	The automatically generated case report number.
First Contact Resolution	Records whether a case was resolved during a customer's first contact with an agent. This field can have one of the following values: • 0: None (default value) • 1: True • 2: False For more information about how this field is calculated, see First Call Resolution (FCR) metric below.
Agent Reassignment Count	The number of times that a case has been reassigned to a different agent. The default value is 0.
Reopen Count	The number of times a case has been closed and reopened. The default value is 0.
Skipped by Prediction	Used to identify cases that are skipped by the Predictive Intelligence feature. The default value is false (disabled).
Case	The case for which this case report was generated.
Customer Satisfaction Score	The customer gives the customer satisfaction score on accepting the case resolution.
Time to Resolve	Time taken by an agent to resolve the case. Calculated as the difference between the case resolved time and case created time.

First Call Resolution (FCR) metric

The First Call Resolution (FCR) metric relates to the number of times that a customer request is resolved during the first contact with an agent. Out of box, the First Call Resolution script returns a value of true or false.

FCR is true if a record has one update. For example, if the state of a new case is set to Closed and then updated or saved, the FCR value is True.

FCR is false if:

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- A case is reopened.
- The state of a case is updated to Awaiting Info.
- An Openframe phone record exists for the case and the date of that record is prior to the case resolution date.
- An email log exists for the case, the email was not created by the system, and the email creation date is prior to the case resolution date.
- A work order entry exists for the case and the date of that work order is prior to the case resolution date.

Case Type form

Use the Case Type form to manage the settings for a case type.

To access a Case Type form, navigate to **Customer Service** > **Case Types** > **Manage Case Types** and select a case type from the list.

Customer Service Case Type form fields

Field	Definition
Table	The table for the case type that extends the Case table (sn_customerservice_case).
Category	An optional category for a case type. When creating cases, customer service agents can filter the available case types by category in the Select Case Type popup window. The Customer Service Case Types plugin (com.snc.csm_case_types) includes the following categories: • Onboarding • Complaint • Orders • General
Subtype	An optional sub-category for a case type. When creating cases, customer service agents can filter the available case types by category and then by subtype in the Select Case Type popup window. The **Subtype** field displays fields from the selected **Table** that are of the following type: • Choice list • Reference
Short description	A brief description of the case type.

Related links

The Case Type form includes the following related links:

- **View Case Type Configuration**: View the current configuration for this case type table.
- **Launch Guided Setup for Case Types**: Go to the Case Types setup tasks in Customer Service Guided Setup.

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- **Launch Guided Setup for AWA**: Go to the Advanced Work Assignment (AWA) setup tasks in Agent Workspace Guided Setup.
- **Launch Guided Setup for Agent Workspace**: Go to the Agent Workspace for CSM setup tasks in CSM Guided Setup.

Related lists

The Case Type form related lists display items configured for the case type table. Use the related lists to create additional configurations.

- Record Producers
- State Flows
- Special Handling Notes
- Notification Triggers
- SLAs
- Email Templates
- Quick Messages
- Reports

Queue registration form for recommendation process

The Recommended Actions use the queue registration form to create queues for recommendation process.

Queue Registration form

Field	Description
Suffix	Suffix of the queue. For example, ra_processor_queue_1. **Note:** When creating additional custom queues beyond the default ra_processor_queue_1, it's important to follow the established naming convention to ensure proper system recognition and functionality. You should increment the trailing number in the queue name accordingly. For the second queue, name it as ra_processor_queue_2 and so on. Continue this pattern for subsequent queues. Maintain the exact naming pattern to avoid configuration issues.
Application	Associated application name or identifier.
Queue	Title of the selected queue. For example, sn_nb_action.ra_processor_queue_1.
Automatic Job Scheduling	Option to enable the automated job schedule for the queue.
Event Processing Order	Sequence in which events are processed.
Job Configuration type	Definition of how jobs are configured or processed.
Scale Factor	Number of polling jobs created for a particular queue.

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Queue Registration form (continued)

Field	Description
	Note: Each application node gets a job and an order according to queue. The customer can increase the value up to a maximum of 3. Increasing the scale factor creates more polling jobs according to application node for that queue. For configuring queues: • You can create a maximum up to 8 custom queues for a recommended action use case. • Only one queue with one scale factor and a 10-second poll interval is shipped out of the base system. For a higher load: • Increase number of queues. • Adjust scale factors accordingly. • Consider adding nodes, if needed. • Decrease polling interval.
Poll Interval	The poll interval is the waiting time before the queue is processed. It determines how often the queue is polled, that is, how frequently new events are fetched. **Note:** You can customize to a lower value (for example, 1 second) for reduced latency. The default poll interval is every 10 seconds. You can reduce the interval to 1 second to decrease waiting time. Decreasing the value to a lower number might cause acquiring most of the worker threads. Those threads are picked for RA use-case and can cause delays to other tasks on the instance. The poll interval displays the duration in: • **Days**: Shows the number of days the queue has been added. • **Hours:** Indicates the duration (in seconds, minutes, or hours) that an event has been in the queue once added.
Description	Additional details about the queue.

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Account form

The Customer Service Management application uses the Account form to store customer account information.

For information about creating a customer account, see Configure accounts and contacts.

Customer Service Account form fields

Field	Definition
Name	The name of the company.
Number	The automatically generated account number for this customer.
Primary Contact	The name of a user who is the main contact for this company.
Parent Account	The parent account for this account. Use this field to create an Account hierarchy.
Registration Code	A unique code for this account. The customer administrator can provide this code to customers for use when requesting a login on the customer portal. The registration code provides a method for validating the customer and the company before the login request is granted. Enter an alphanumeric code in this field or click the Generate Code icon to generate a unique code. For more information about generating unique account registration codes, see the Account Registration code generation in Customer Service [KB0753505] article in the HI Knowledge Base.
Customer	Denotes this account as a customer account. **Note:** If you are creating a customer account, this field is enabled by default.
Partner	Denotes this account as a partner account. A partner can report and manage cases on behalf of customers. A partner can also be a customer. **Note:** If you are creating a partner account, this field is enabled by default.
Website	The web address for the company.
Phone	The phone number for the company.
Street	The street address of the company.
City	The city in which the company is located.
State/ Province	The state or province in which the company is located.
Zip/Postal code	The zip code or postal code for the company.
Country	The country in which the company is located.

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Customer Service Account form fields (continued)

Field	Definition
Notes	Any additional information about the company.
Account Code	This field stores a unique value for each account. The value is determined by the last used value, which is stored in the *com.snc.cs_base.last.generated.code.tree.path* system property. For more information, see Properties installed with Customer Service Management. **Note:** If this property is reset to the original value, the system attempts to create new accounts with account codes that are already in use, which can result in an invalid insert.

Contact Relationship form

The Customer Service Management application uses the Contact Relationship form to store information about the account, contact, and assigned responsibility in a contact relationship.

Contact Relationship form fields

Field	Definition
Account	The account to which the contact is assigned. This field is automatically filled in.
Contact	The customer contact selected to fulfill the role or responsibility. The Contacts list includes contacts from any related partner or account as well as contacts from the account hierarchy.
Responsibility	The role or responsibility selected for this customer contact. **Note:** As part of creating a responsibility definition, the admin can specify if the responsibility is unique. If so, the responsibility can only be assigned to one contact per account. For more information, see Create account teams.

Asset form

The Asset Management application uses the Asset form to store asset information.

Field	Description
Display name	Name of the asset as it appears in the record lists. This field is automatically set when you create an asset, based on the **Asset Tag** and **Model** fields.
Model category	Model grouping of the asset. Based on the model category you select, the asset is linked to a configuration item.
Model	Specific product model of the asset.

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Field	Description
Configuration Item	CI is automatically created when you create an asset. The name that appears in this field is based on the **Serial number** and **Model** field values. Hover over the reference icon to view the configuration item details inherited from the asset record.
Quantity	Number of items this asset represents. An asset always has a quantity of one unless one or more of these points are true. • If the asset is a consumable, the quantity is unrestricted because consumables are tracked in groups. • If the asset is pre-allocated, the quantity is unrestricted when the **Model category** and **Model** values are defined and **Substate** is set to **Pre-allocated**.
General All the fields aren't available for each type of asset.	
Asset tag	Alphanumeric information assigned by your organization to help track the asset.
State	Current state of the asset, such as **On order** or **In use**.
Assigned to	Person using or primarily responsible for this item. This field appears when the asset state is **In Use**.
Stockroom	Name of the stockroom. This field appears only when the state of the asset is **In stock** or **Build**.
Aisle	Aisle details of the asset within the stockroom. This field appears only when the state of the asset is **In stock** or **Build**. **Note:** This field would appear only when the Hardware Asset Management Professional plugin (com.sn_hamp) is installed.
Space	Space details of the asset within the aisle. This field appears only when the state of the asset is **In stock** or **Build**. **Note:** This field would appear only when the Hardware Asset Management Professional plugin (com.sn_hamp) is installed.
Managed by	Person who maintains the asset. This field value can be different from the person in the **Owned by** field.
Owned by	Person who has financial ownership of the asset. This field value can be different from the person in the **Managed by** field.
Parent	Parent asset of the asset. For example, a monitor or peripheral can have a workstation as their parent asset. When a parent link is defined, the fields related to assignment and state of the child assets is set to read-only and are populated based on the parent assignment and state fields. For more information, see Bundled models.
Class	Asset group, for example, base, hardware, license, or consumable.
Comments	Information about the asset that would be helpful for others to know.

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Field	Description
Serial number	Serial number of this asset.
Substate	Current substate of the asset. The available substate settings depend on the state selected. For example, the **Retired** state contains the **Substate** options **Disposed**, **Sold**, **Donated**, and **Vendor credit**.
Location	Current physical location of the asset. **Note:** You can set the location to a place, floor, building, or campus. When you set the location to any of the options except the campus, the Location hierarchy section is shown on the asset form. The location hierarchy shows the hierarchical relationship between the specified location and its parent locations. Also, when you set the Location field to a place and then set the *sn_itam_common.sn_enable_indoormap_for_assets* system parameter to **true** on your ServiceNow instance, a real-time location map of the asset is shown on the asset form. The Location map doesn't appear by default. To view the map, select the Location map ( ) icon on the contextual sidebar of the asset record. Location map doesn't appear for excluded assets. You can also track your asset location using the Asset Indoor map in the Asset estate view of the Hardware Asset Workspace. For more information, see Track asset location using indoor maps.
Department	Department to which the asset belongs.
Company	Company or organization to which this asset belongs.
Assigned	Date on which the asset was assigned to a user.
Installed	Date on which the asset was installed.
Location Hierarchy The Location Hierarchy section is available only for hardware, consumables, bundle, and pallet assets. This section appears only under the following conditions: • When the *sn_itam_common.sn_enable_indoormap_for_assets* system parameter is set to **true** on your ServiceNow instance • When you select any location except the campus	
Floor	Floor where the place specified in the Location field is located. **Note:** This field appears only when you select a place in the Location field and is populated automatically based on the location.
Building/ Structure	Building to which the floor belongs. **Note:** This field appears only when you select a place or floor in the Location field and is populated automatically based on the location.

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Field	Description
Campus	Campus where the building is located. **Note:** This field appears only when you select a place, floor, or building in the Location field and is populated automatically based on the location.
Financial The Financial section is available only for hardware, software entitlement, and facility assets.	
Request line	Requested item to which the asset is linked.
Invoice number	Invoice under which the asset was billed.
Cost	Price at which the asset was purchased.
Vendor	Vendor from which the asset was purchased. The assets that are automatically created from purchase orders in Procurement, the default value of the **Vendor** field is the vendor specified on the purchase order.
Opened	Date on which the requested item record was opened. The system automatically populates the field when a request line is specified.
GL account	General ledger account number with which the asset is associated.
Cost center	Group financially responsible for the asset.
Acquisition method	The way of acquiring the asset. Base system choices are **Purchase**, **Lease**, **Rental**, and **Loan**. The assets that are automatically created from purchase orders in Procurement, the default value is **Purchase**
Expenditure type	The type of expenditure. • **Capex**: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. • **Opex**: Operational expenditure is an ongoing expenditure. For example, toners for the photocopier.
Disposal	
Disposal order number	A unique number assigned to the asset disposal order. **Note:** This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Disposal vendor	The vendor assigned to carry out the asset disposal order. **Note:** This field appears only if you've installed Hardware Asset Management from ServiceNow Store.

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Field	Description
Vendor disposal order ID	Order number assigned by the vendor to carry out the asset disposal order. **Note:** This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Disposal date	The date when the asset disposal order process is completed. **Note:** This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Disposal reason	Text explaining why the asset is being retired.
Beneficiary	Organization that receives the asset when it's retired.
Resale price	Value of the asset when it's retired. For example, if the asset is donated, the value used when reporting taxes.
Scheduled retirement	Scheduled date on which the asset is retired.
Retired date	Actual date on which the asset was retired.
Depreciation The Depreciation section is available only for hardware and facility assets.	
Depreciation	Depreciation method that is applied. Base system choices are **Declining Balance** and **Straight Line**. The depreciation value is defaulted from the associated Model.
Depreciation effective date	Date on which the specified depreciation method begins.
Salvage value	Estimated value of an asset at the end of its useful life. This value must be less than or equal to the Cost of the asset.
Residual date	Number of days that have passed since the **Depreciation effective date**.
Residual value	Value in the Cost field with the depreciation method applied.
Depreciated amount	Amount the asset has depreciated.
Contracts The Contract section is available only for hardware, software entitlement, or facility assets.	
Lease contract	Name of the lease contract that applies to the asset.
Warranty expiration	Expiration date of the asset warranty.

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Field	Description
Lease expiration date	Date on which the contract gets expired. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Lease term (months)	The period in months the lease contract is active for. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Monthly lease payment	Amount that you pay monthly for the contract. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Support group	Group managing the contract covering the asset.
Like-kind exchange	A similar asset that you want to return to the contract vendor instead of the asset that you brought in lease. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Supported by	Person managing the contract covering the asset.
Activities	
Work notes	Work notes are updated for the following cases: • Updates to **Assigned To**, **Managed To State**, **Substate**, and **Reserved** fields of asset. The columns for these fields are audited by default and any update is recorded in the work notes. • Work notes for hardware and software assets are updated when the asset is received by a purchase order and transfer order. These work notes help in tracking the life cycle of the asset.
Audit	
Audit number	Audit number of the asset.
Audit type	Type of audit that was carried out on the asset.
Last audit date	Date on which the last audit was done.
Last audit state	State of the last audit.
Audited by	Person who performed the last audit.

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Field	Description
Mobile The Mobile section is available only for the Mobile Device model category. **Note:** This section appears only when Hardware Asset Management (sn_hamp) is installed.	
Carrier	Name of the carrier company.
Ownership	Ownership of the asset. The available values are: • Employee • Corporate
IMEI	Unique number for tracking the mobile device.
Pre-enrollment ID	User who conducted the last audit.
MAC Address	MAC address of the mobile device.
Enrollment ID	User conducting the current audit.
Phone number	Phone number associated with the mobile device.
Enrollment name	Name of the mobile device enrollment.
Platform	Platform of the mobile device. The available options are: • Android • iOS • Windows • ChromeOS • Other
Enrollment state	Current enrollment state of the device. The available options are: • Enrolled • Unenrolled • Expired • Pending enrollment • Pending unenrollment
Purchased	Date on which the mobile device was purchased.
Enrollment date	Initial enrollment date.
Upgrade eligible date	Date on which the mobile device is eligible for an upgrade.

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Field	Description
Last enrolled	Date of last enrollment.
Service contract	Contract number associated with the mobile device.
Device activated	Activation status of the mobile device. The available options are: • Yes- The mobile device is activated. • No- The mobile device isn't activated.
Related links	
Calculate Depreciation	Select to calculate the depreciation amount and residual value.
Delete Assets Only	Select to delete the assets and not the associated CI.
Related lists	
Assets	Assets that 's related to the asset you created.
Expense lines	Expense line associated with the asset.
RMA	Return Merchandise Authorization associated with the asset.

Internal Business Location form

In the Customer Service Management (CSM) application, the Service Model Foundation uses the Internal Business Location (IBL) form to store information about an internal business location. This information includes the staff members assigned to that location, cases, sold products, and install base items created for customers.

Internal Business Location form fields

Field	Definition
Number	Automatically generated number of the internal business location. By default, the location numbers start with the prefix IBL.
Name	Name of the internal business location.
Manager	Manager of the internal business location. **Note:** Only internal users can be added as managers for the internal business locations.
Parent Internal Business Location	Parent of the business location. Use this field to create a parent-child hierarchy.
Street	Street address of the internal business location.
City	City where the internal business location is located.
State/Province	State or province where the internal business location is located.

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Internal Business Location form fields (continued)

Field	Definition
Zip/Postal code	ZIP code or postal code for the internal business location.
Customers served	Type of customers who are served at a business location. The customers served can be defined with two options: • **All Customers**: Allows service organization staff to create and resolve issues for all the customers. • **Criteria-based**: Allows service organization staff to create and resolve issues only for customers associated with the service organization using certain criteria.
Website	Web address for the internal business location.
Email	Email ID used by the internal business location.
Phone	Phone number for the internal business location.
Open date	Date on which the business location becomes operational and available for customers.
Close date	Date on which the business location becomes non-operational and unavailable for customers. **Note:** The closed date must not be earlier than the open date.
Status	Current status of the business location whether In progress, Operational, non-operational, or closed.
Description	Description of the business location.

Internal business location related lists

The Internal Business Location form includes the following related lists.

Internal business location related lists

Related list	Description
Members	Internal users (users with the snc_internal role) who have been added as staff members at this business location. • Staff members can create cases for customers at their business locations. • Staff members can access customer cases and information where the **Service Organization** field on the Case form matches their business locations. For more information, see Add staff members to a business location.

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Internal business location related lists (continued)

Related list	Description
Child Internal Business Locations	List of internal business location of the current parent business location. For more information, see Create an internal business location.
Child External Business Locations	List of external business location of the current parent business location. For more information, see Create an external business location.
Assignment Groups	List of all associated assigned groups of the internal business location. For more information, see Setting up assignment groups.
Available Services	List of services supported by the business location. For more information, see Setting up products and available services at a business location.
Service Organization Customer Criteria	List of customers that are supported by an internal business location. For more information, see Define the configuration type for customers or business locations.
Customer Projects	List of all projects assigned to the business location. Select a project to see **Project Tasks**, **Sub Projects** and **Cases** assigned to the project. **Note:** • A location contributor manager or location relationship manager can see projects of their respective and child business locations. To learn more about roles, see Service Model Foundation roles. • List of project tasks under customer project tab is visible only if the **Visible to Customer** is selected during project task creation. To learn more about project creation, see Create customer projects.

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Internal business location related lists (continued)

Related list	Description
	To learn more about project task creation, see Create a project task from a project.
Cases Requested by Location	List of all cases requested by the internal business location to work. For more information, see Create and manage cases for a business location
Cases Assigned to Location	Cases that have been created and assigned to this location. For more information, see Create and manage cases for a business location.
Account Staff Relationships	Relationships that have been created between staff members and accounts at this location. Create account staff relationships by using the Account Manager responsibility. For more information, see Create an account staff relationship.
Consumer Staff Relationships	Relationships that have been created between staff members and consumers at this location. Create consumer staff relationships by using the Relationship Manager responsibility. For more information, see Create a consumer staff relationship.
Household Staff Relationships	Relationships that have been created between staff members and households at this location. Create household staff relationships by using the Relationship Manager responsibility. For more information, see Create a household staff relationship.
Sold Products	Sold products that have been created for customers at this location. For more information, see Create and manage sold products for a business location.
Install Base Items	Install base items that have been created for customers at this location. For more information, see Create and manage install base items for a business location.

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Related topics

- Create an internal business location
- Service Model Foundation relationships

External Business Location form

In the Customer Service Management (CSM) application, the Service Model Foundation uses the External Business Location (EBL) form to store information about an external business location. This information includes the staff members assigned to that location, cases, sold products, and install base items created for customers.

External Business Location form fields

Field	Definition
Number	Automatically generated number of the external business location. By default, location numbers start with the prefix EBL.
Name	Name of the external business location.
Manager	Manager of the external business location. **Note:** Both internal and external users can be added as managers for external business locations.
Parent Business Location	Parent of the business location. Use this field to create a parent-child hierarchy.
Street	Street address of the external business location.
City	City where the external business location is located.
State/Province	State or province where the external business location is located.
Zip/Postal code	ZIP code or postal code for the external business location.
Customers served	Types of customers who are served at a business location. Customers served can be defined using two options: • **All Customers**: Allows service organization staff to create and resolve issues for all the customers. • **Criteria-based**: Allows service organization staff to create and resolve issues only for customers associated with the service organization using a criteria.
Website	Web address for the internal business location.

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External Business Location form fields (continued)

Field	Definition
Email	Email ID used by the internal business location.
Phone	Phone number for the internal business location.
Open date	Date on which the business location becomes operational and available for customers.
Close date	Date on which the business location becomes non-operational and unavailable for customers. **Note:** The closed date must not be earlier than the open date.
Status	Current status of the business location whether In progress, Operational, non-operational, or closed.
Description	Description of the business location.

External business location related lists

The External Business Location form includes the following related lists.

Related lists for the External Business Location form

Related list	Description
Members	Internal and external users who have been added as staff members at this business location. • Staff members can create cases for customers at their business locations. • Staff members can access customer cases and information where the **Service Organization** field on the Case form matches their business locations. For more information about adding staff members to an external business location, see Add staff members to a business location.
Child External Business Locations	List of external business location records. For more information about creating external business locations, see Create an external business location.
Assignment Groups	List of all associated assigned groups of the internal business location.

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Related lists for the External Business Location form (continued)

Related list	Description
	For more information, see Setting up assignment groups.
Available Services	List of services supported by the business location. For more information, see Setting up products and available services at a business location.
Customer Projects	List of all projects assigned to the business location. Select a project to see **Project Tasks**, **Sub Projects** and **Cases** assigned to the project. **Note:** • A location manager can see projects of their respective and child business locations. To learn more about roles, see Service Model Foundation roles. • List of project tasks under customer project tab is visible only if the **Visible to Customer** is selected during project task creation. To learn more about project creation, seeCreate customer projects. To learn more about project task creation, see Create a project task from a project.
Service Organization Customer Criteria	List of customers supported by an external business location. For more information about associating customer criteria to an external business location, see Define the configuration type for customers or business locations.
Cases Requested by Location	Cases that have been created and requested by this location. For more information about assigning cases to an external business location, see Create and manage cases for a business location.
Cases Assigned to Location	Cases that have been created and assigned to this location. For more information about creating and managing cases, see Create and manage cases for a business location.

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Related lists for the External Business Location form (continued)

Related list	Description
Account Staff Relationships	Relationships that have been created between staff members and accounts at this location. Account staff relationships are created using the Account Manager responsibility. For more information about creating an account staff relationship, see Create an account staff relationship.
Consumer Staff Relationships	Relationships that have been created between staff members and consumers at this location. Consumer staff relationships are created using the Relationship Manager responsibility. For more information about creating a consumer staff relationship, see Create a consumer staff relationship.
Household Staff Relationships	Relationships that have been created between staff members and households at this location. Household staff relationships are created using the Relationship Manager responsibility. For more information about creating a household staff relationship, see Create a household staff relationship.
Sold Products	Sold products that have been created for customers at this location. To learn more about creating and managing sold products for an external business location, see Create and manage sold products for a business location.
Install Base Items	Install base items that have been created for customers at this location. For more information about creating and managing install base items for an external business location, see Create and manage install base items for a business location.

Related topics

Create an internal business location

Service Model Foundation relationships

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Household form

Service Model Foundation uses the Household form to store information about a consumer household, including the household members; relationships created for the household and members; and cases, entitlements, and contracts created for the household and members.

Household form fields

Field	Definition
Name	The name of the household.
Number	The automatically generated number of the household. By default, household numbers start with the prefix HOLD.
Head of household	The consumer in charge of the household. • When creating a new household record, select a consumer from the Consumer table. • When updating an existing household record, select a consumer from the current members of the household.
Street	The street address of the household.
City	The city in which the household resides.
State/ Province	The state or province in which the household resides.
Zip/Postal code	The ZIP code or postal code for the household.
Country	The country in which the household resides.
Notes	Additional information about the household.

Household related lists

The Household form includes the following related lists.

Household form related lists

Related list	Description
Current Members	The consumers who are current members of the household.
All Members	Current and past members of a household. As members are added or removed from a household, the member history is retained in this related list.
Member Relationships	Relationships that have been created between members of this household. Member relationships are created using the Authorized Representative responsibility.

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Household form related lists (continued)

Related list	Description
	Household members that have an Authorized Representative relationship with another household member can act on behalf of that member and can manage cases for that member.
Household Team	Relationships that have been created between internal users and this household. Household staff relationships are created using the Relationship Manager responsibility. Internal users that have a Relationship Manager relationship with a household can manage all of the cases for that household.
Cases	Cases that have been created for this household and the members of this household.

Related topics

Create or update a household

Service Definition form

In the Customer Service Management (CSM) application, the Service Definition form displays information about a service definition configuration. This information record stores the details about a service that is provided to customers.

Service Definition form

Field	Description
Number (deprecated)	The unique number of the service definition record. **Note:** Starting with the Washington DC release, this field has been replaced with the **ID** field.
Name	The name of the service definition.
ID	The ID of the service definition. The system auto-populates the **ID** field with the name of the service definition and replaces the spaces with underscores. The ID can contain alphanumeric characters and underscores and can be up to 40 characters in length. **Note:** The value in this field must be unique.
Table	The table that the service definition is available for, either the Case table or a table that extends the case table.

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Service Definition form (continued)

Field	Description
	For example, if the service is available for the onboarding case type, select the Onboarding Case [sn_onboarding_case] table.
Customer service type	The type of service: • Pre-sale • Post-sale • General A service type enables the system to display services based on the context.
Playbook record generator	The playbook record generator associated with the service definition. If a service definition has an associated playbook, the agent can use the playbook in a tab on the case record. For more information, see Associate a playbook with a service definition.
Image	The image associated with the service definition. Service definitions appear in the case type selector or case task type selector in a card view. The image appears in the card for a service definition along with the name and description.
Order	This value determines the order in which the services are displayed in the case type selector or other workflows. Service definitions with the lowest order value are displayed first. The default value is 100. • Service definitions with no order value appear above the ordered service definitions. • If one or more service definitions have the same order value, the system displays the service definitions in alphabetical order.
Active	Enables the service definition.
Description	The description of the service definition. Service definitions appear in the case type selector in a card view. The card includes the name, description, and image for a service definition. Customer service agents can search for services by entering keywords found in the service definition name and description.
Default table field values	One or more fields and default values from the target table (the table that you selected in the **Table** field). When a record is created for the target table for service definitions, the system uses these values to automatically fill in the record fields.

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After creating and saving a service definition, the following related lists are available on the Service Definition form:

- Product Service Relationships
- Catalog Service Relationships
- Service to Service Relationships
- Service Definition Category Relationships
- Reports

Sold product form

Descriptions of the fields on the sold product form.

Sold Product

Field	Description
Name	Name of the product or service sold.
Parent Sold Product	Parent of the sold product, if applicable.
Account	Account that is associated with the sold product. **Note:** If you select an account, the **Household**, **Service Organization**, and **Consumer** fields are hidden. The **Consumer** field is active only when the B2B2C plugin is installed.
Contact	Contact that is primarily responsible for the sold product. **Note:** Only the contacts that belong to the chosen account are shown in the Contact column.
Consumer	Consumer that is associated with the sold product. **Note:** This field is active only when the B2B2C plugin is installed.
Product	Product model that the sold product belongs to.
Household	Household to which this sold product belongs to.

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Sold Product (continued)

Field	Description
	Note: If you select a household, the **Service Organization**, **Account**, and **Contact** fields are hidden.
Service Organization	Internal or external entity that is involved in providing a service to the customer. **Note:** If you select a service organization, the **Household**, **Account**, **Contact**, and **Consumer** fields are hidden. The **Service Organization** field is active only when the service organization plugin is installed.
Service Offering	Service offering that is associated with the sold product. **Note:** • The **Service Offering** field may not appear by default in the user interface. If it doesn't appear, add the **Service Offering** field by using the form layout. • If the product model already has a service offering that is associated with it, this field is automatically populated.
Product Offering	Product offering that is associated with a sold product. **Note:** The **Product Offering** field appears only to CSM agents, managers, and the contributor persona.
Quantity	Quantity of a product that is sold to a customer.
Unit of measurement	Measurement of entitlements and products that a customer has purchased. **Note:** The **Unit of measurement** field appears only to CSM agents, managers, and the contributor persona.
Offering type	Type of product offer that is associated to a sold product.

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Sold Product (continued)

Field	Description
	Note: Only the sold products that have an offering type as product appear in the sold product related lists on the Accounts page. The default value of the field remains as **Product**.
Relationship type	Relationship of a sold product that supports implicit entitlements. **Note:** The default value of the **Relationship** field is **None**.
Product location	The service location of the sold product.
Product specification	The product specification associated with a sold product. **Note:** The **Product specification** field is available only if you have the Product Catalog Management Core (com.sn_prd_pm) plugin and is not available on the form by default.
Provider service organization	The service organization that sells and supports the products or services owned by the customer.

Subscription & Pricing

Field	Description
Term (months)	Validity of a product or service in terms of number of months.
Subscription start date	Start date of access to a product or service.
Subscription end date	End date of access to a product or service.
Price list	Price list used to derive prices while purchasing a product or service.
Unit net price	Net price of a single unit of a sold product.
Pricing method	Pricing method associated to a sold product, whether recurring or one-time.
Periodicity	Frequency of the pricing method, whether it's weekly, monthly, annually, and so on.

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Subscription & Pricing (continued)

Field	Description
	Note: You can set periodicity only if the pricing method is recurring.
One time price	One-time price to be paid for the usage of a product or service.
Monthly recurring price	Price to be paid on a monthly basis for the usage of a product or service.
Annual recurring price	Price to be paid on a yearly basis for the usage of a product or service.
Cumulative one time price	One-time price to be paid for the parent line and all the child line items.
Cumulative monthly recurring price	Price to be paid on a monthly basis for the parent line and all child line items.
Cumulative annual recurring price	Price to be paid on a yearly basis for the parent line and all child line items.
Cumulative net price	Total value of the sum of cumulative one-time net price and cumulative monthly recurring price multiplied by term. Cumulative net price = Cumulative one time price +Cumulative monthly recurring price * Term
Unit base price	Allow users to capture the base price of the specific sold product.
Sales agreement line	Allow users to capture the sales agreement directly when creating a sold product.
Unit list price	Allow users to capture the list price of the specific sold product.

CSM Query Rules

Query rules are used to filter the records in CSM-related tables that are accessible by users with CSM roles. These filters, which are applied in query business rules and READ ACLs on CSM-related tables, are stored in a metadata table.

Starting with the London release, query rules and filters were defined in the CSQueryBRUtilOOBConstants script include. In the Quebec release, these filters have been moved to the Query Rule (sn_query_rule) table.

This change applies to Query business rules (QBRs) and read ACLs on CSM-related tables. Each data table that used QBRs prior to Quebec now has a new QBR that uses the new logic. Tables with read ACLs that used filters from the CSQueryBRUtilOOBConstants script include now have one more read ACL that uses the filters from the Query Rule table.

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Availability

The CSM query filters feature is active on zBoot instances. Existing customers must contact ServiceNow Customer Support to enable this feature.

Query rules property

The *sn_cs_queryrules.use_query_rules* property determines whether to use the Query Rule table or the CSQueryBRUtilOOBConstants script include. This property is set to true for zBoot instances and false for upgraded instances.

- If true, the instance uses rules and filters from the Query Rule table to determine read access to the CSM tables for the logged-in user.
- If false, the instance uses rules and filters from the CSQueryBRUtilOOBConstants and its extensions to determine read access to the CSM tables for the logged-in user.

Query Rule table

The Query Rule (sn_query_rule) table extends the sys_metadata table and stores filters for the following tables:

- Case (sn_customerservice_case)
- Affected Install Bases (sn_install_base_m2m_affected_install_base)
- Install Base Items (sn_install_base_item)
- Installed Products (sn_install_base_m2m_installed_product)
- Sold Products (sn_install_base_sold_product)
- Order Case (csm_order_case)
- Sold Product Covered (sn_install_base_m2m_contract_sold_product)
- Orders (csm_order)
- Asset (alm_asset)
- Entitlement (service_entitlement)
- Account (customer_account)
- Work Order (wm_order)
- Contact (customer_contact)
- Contract (ast_contract)

Components installed with Customer Service Management

Several types of components are installed with the Customer Service Management application.

Tables installed with Customer Service Management

Tables are added to your instance with the activation of the Customer Service Management (CSM) application.

Tables added with the activation of the Customer Service Base Entities plugin

The following tables are added with the activation of the Customer Service Base Entities plugin. This plugin is activated automatically by the Customer Service plugin.

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Different tables names installed with Customer Service Management

Table	Description
Account [customer_account]	Stores the customer account and partner records.
Account Address [account_address_relationship]	Stores the associations between the locations (addresses) and accounts.
Account Access [sn_csm_account_access]	Stores the records that restrict the contact access to CSM entities.
Account Relationship [account_relationship]	Stores the records for the relationships that have been created between the two accounts.
Address Type [cmn_location_type]	Stores the address types for the CSM entities, such as Billing or Shipping. Address types are typically used with order cases.
Consumer [csm_consumer]	Stores the consumer records.
Consumer User [csm_consumer_user]	Stores the consumer registration records that are created when the consumers complete the self-registration process from the Consumer Service Portal. This table extends the Users table (sys_user).
Contact [customer_contact]	Stores the customer contact records.
Contract Contact [contract_rel_contact]	Stores the relationships that are created between the contacts and contracts.
Household [csm_household]	Stores the consumer household records.
Entitlement [service_entitlement]	Stores the entitlement records.
Consumer Profile [sn_csm_consumer_profile]	Stores the references to the consumer and can be expanded to support multiple profiles within and across industries, with each profile having its own set of attributes in the extended table.
Consumer Profile Location [sn_csm_consumer_profile_location]	Stores the relationships between the consumer profiles and locations (addresses).

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Tables added with the activation of Customer Service plugin

The following tables are added with the activation of the Customer Service plugin.

Table names and their description

Table	Description
Account Relationship Access [sn_customerservice_account_relationship_access]	Stores the type of access for the account relationships.
Account Relationship Type [sn_customerservice_account_relationship_type]	Stores the relationship types that are created for the bi-directional account relationships.
Account Team Member [sn_customerservice_team_member]	Stores the team members that are assigned to the account teams.
Agent Token [sn_customerservice_agent_token]	This table isn't currently used.
Appointment [sn_customerservice_appointment]	Stores the appointments that have been created for the customer service cases.
Asset Contact [sn_customerservice_m2m_asset_contact]	Stores the asset contact relationship records.
Case [sn_customerservice_case]	Stores the customer service case records.
Case Report [sn_customerservice_case_report]	Stores the key performance indicators (KPIs) and metrics for the case records.
Channel Configurations [sn_customerservice_channel_config]	Stores the customer service email channel configuration records.
Contact Relationship [sn_customerservice_contact_relationship]	Stores the contact relationship records.
Customer Interaction [sn_customerservice_customer_interaction]	Stores the interaction records for Customer Service Management (CSM).
Customer Service Case Flow [sn_customerservice_sf_case]	Stores the customer service case state flows.
Escalation [sn_customerservice_escalation]	Stores the records created for escalated cases and accounts.

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Table names and their description (continued)

Table	Description
Escalation Severity [sn_customerservice_escalation_severity]	Stores the escalation severity definition records.
Escalation Template [sn_customerservice_escalation_template]	Stores the escalation template records.
Registration Request [sn_customerservice_registration]	Stores the self-registration requests for the Customer Service Portal.
Related Party [sn_customerservice_related_party]	Stores the entities (such as account, contact, or consumer) that are related to the customer service cases and the responsibilities assigned to each of the entities.
Related Party Configuration [sn_customerservice_related_party_configuration]	Stores the related party type that provides a default responsibility definition.
Responsibility Definition [sn_customerservice_responsibility_def]	Stores the responsibility definitions that are created to support the customer accounts.
Task [sn_customerservice_task]	Stores the tasks that have been created for the customer service cases.
Responsibility Access Configuration [sn_customerservice_responsibility_access_config]	Stores the metadata of the responsibility access configuration, which specifies the level of access and the entities that can be accessed by a particular responsibility.

Properties installed with Customer Service Management

Properties are added with the activation of the Customer Service Management application.

To open the System Property [sys_properties] table, enter `sys_properties.list` in the navigation filter. You can narrow the list results by using the **Application** field.

You can also navigate to **Customer Service** > **Administration** > **Properties** to view a list of the most frequently used properties that you can configure for Customer Service Management.

The following table lists the properties that are used for Customer Service Management.

System properties installed with Customer Service Management

Property	Description
glide.cs.email.case_queue_address	Email case queue address.

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System properties installed with Customer Service Management (continued)

Property	Description
	• **Type**: string • **Default value**: none • **Location**: **Customer Service** > **A**
glide.cs.email.new_case_prefix	Email subject prefix format for new • **Type**: string • **Default value**: Case: • **Location**: **Customer Service** > **A**
sn_customerservice.email.create_case_for_non_matched_user	Create case for non-matched user • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**
glide.cs.company_name	Your company name. • **Type**: string • **Default value**: none • **Location**: System Property [sys_
glide.ui.activity.email_roles	Roles that can view the mail in the "Sent/Received Emails. • **Type**: string • **Default value**: itil, sn_customers sn_esm_location_agent, sn_esm sn_csm_ocs.ext_agent, sn_custo sn_customerservice.relationship sn_customerservice.case_contri • **Location**: System Property [sys_
glide.ui.sn_customerservice_case_activity.fields	Case activity formatter fields. • **Type**: string • **Default value**: assigned_to,asse short_description, comments, en *Email*,work_notes • **Location**: System Property [sys_
sn_customerservice.FTS_flag_enabled	Enable the follow the sun flag on th

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System properties installed with Customer Service Management (continued)

Property	Description
	• Type: true | false • Default value: false
sn_customerservice.glide.script.block.client.globals	• **Type**: true | false • **Default value**:false • **Location**: System Property [sys_
sn_customerservice.shn_asset	Special Handling Notes for assets. • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Not**
sn_customerservice.shn_contact	Special Handling Notes for contact • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Not**
sn_customerservice.shn_product	Special Handling Notes for produc • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Not**
sn_customerservice.shn_account	Special Handling Notes for accoun • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Not**
sn_customerservice.shn_case	Special Handling Notes for cases. • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Not**
sn_customerservice.portal.chat_queue	• **Type**: string • **Default value**: none • **Location**: System Property [sys_

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System properties installed with Customer Service Management (continued)

Property	Description
csm.captcha.google.enabled	Enable the Google Captcha tool or portal self-registration form. • **Type**: true | false • **Default value**: true • **Location**: System Property [sys_
sn_customerservice.use_asset_contact_relationship	Restrict assets that are based on t assets. • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**
sn_customerservice.account_relationship_access_roles	Roles that need to be shown in the qualifier for the Account Relationsh [sn_customerservice_account_rela • **Type**: string • **Default value**: none • **Location**: **Customer Service** > **A**
sn_customerservice.contact_role_assignment	External roles that can be assigned Service Portal. The roles stored in **Available** column on the Edit Role • **Type**: string • **Default value**: sn_customerserv sn_customerservice.partner,sn_ sn_customerservice.customer • **Location**: **Customer Service** > **A**
sn_customerservice.registration_workflow_id	Default registration workflow sys_id • **Type**: string • **Default value**: 9b6cf2dac31302 • **Location**: System Property [sys_
sn_customerservice.consumer_max_products	Maximum registered products per • **Type**: integer • **Default value**: 25 • **Location**: **Customer Service** > **A**
com.snc.cs_base.last.generated.code.tree.path	Property that gets created by the s customer_account record is inserte

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System properties installed with Customer Service Management (continued)

Property	Description
	Account Code value for the most r in the Account [customer_account When a new customer account rec this property to determine a uniqu account. The property is then upda value so that the next account cod value for the next account record i property for more details. • **Type**: string • **Default value**: none • **Location**: System Property [sys_ **Note:** If this property is reset to the c attempts to create new accou already in use, which can resu
sn_customerservice.enable_knowledge_kcs	Knowledge Centered Services (KC Management. • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**
skills_management.migration	List of task tables to migrate to the when an administrator runs the **Mi** script. • **Type**: choice list • **Default value**: wm_task,custome • **Location**: System Property [sys_
sn_customerservice.rest.api.case_sla_async	Enable asynchronous processing using a REST API. • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**
com.snc.skills_management.task_skill_migrated_tables	List of tables where the **Skills** field Task Skills [task_m2m_skill] table. property, the data has been migrat

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System properties installed with Customer Service Management (continued)

Property	Description
	• **Type**: choice list • **Default value**: none • **Location**: System Property [sys_
sn_customerservice.case_fields_to_sync	Comma-separated list of fields tha child cases. • **Type**: string • **Default value**: priority,state,com resolution_code • **Location**: **Customer Service** > **A**
sn_customerservice.parent_child_case_sync	Synchronize fields from parent to c • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**
sn_customerservice.parent_child_case_sla_async	Processes SLA asynchronously du and synchronization. • **Type**: true | false • **Default value**: true • **Location**: System Property [sys_
glide.ui.sn_customerservice_escalation_activity.fields	Escalation activity formatter fields. • **Type**: true | false • **Default value**: false • **Location**: System Property [sys_
sn_customerservice.kcs.enable_template_on_case_workspace	Enables creation of knowledge arti template from a customer service • **Type**: true | false • **Default value**: false • **Location**: System Property [sys_
sn_customerservice.case.autoresponder.enable	Enables sending content as recom using the Auto-Responder feature. • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**

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System properties installed with Customer Service Management (continued)

Property	Description
sn_customerservice.case.autoresponder.customportal	Custom portal URL that contains th such as sys_kb_id or kb_number. Example: https://<instance-name> id=kb_article_view&sys_kb_id={sys • **Type**: string • **Default value**: none • **Location**: **Customer Service** > **A**
sn_customerservice.contact_relationship.restrict_within_account_hierarchy	Create a contact relationship with hierarchy. When set to **false**, users are allowe with any account. When set to **true** hierarchy will be shown. • **Type**: true | false • **Default value**: true • **Location**: System Property [sys_
sn_bus_loc.int_bus_loc.onboard_location_manager_as_contributor	Assign the sn_customerservice.svc role to the internal business locatio the system property is set to **true**. internal business location manage sn_customerservice.svc_location_ • **Type**: true | false • **Default value**: true • **Location**: System Property [sys_
enable_account_address_sharing	Enable an existing address to be a The associations are present in the table. Setting the property back to inappropriate behavior for accoun • **Type**: true| false • **Default value**: true • **Location**: System Property [sys_
sn_customerservice.create_case.description_enable_html_editor	Enable the flag to add description Create Case form page. • **Type**: true | false • **Default value**: true • **Location**: System Property [sys_

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System properties installed with Customer Service Management (continued)

Property	Description
sn_customerservice.emails.customportal	Base URL for custom portals. • **Type**: string • **Default value**: none • **Location**: System Property [sys_
sn_query_rules.number_of_nq_ops_zing_search_supports	Defines the number of query rules data. • **Type**: string • **Default value**: 10
sn_customerservice.consumer_max_new_cases_daily	Defines the maximum number of n create in a day. • **Type**: integer • **Default value**: 10 • **Location**: **Customer Service** > **A** **Note:** This restriction only applies to
sn_customerservice.consumer_max_comments_per_case_daily	Defines the maximum number of c add for a case in a day. • **Type**: integer • **Default value**: 25 • **Location**: **Customer Service** > **A** **Note:** This restriction only applies to
sn_customerservice.consumer_max_attachments_per_record	Defines the maximum number of a attach to a record. • **Type**: integer • **Default value**: 5 • **Location**: **Customer Service** > **A** **Note:** This restriction only applies to
sn_cs_queryrules.use_query_rules	Rules or filters from the sn_query_ access to customer service manag logged-in users through query bus the system property is set to **True**.

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System properties installed with Customer Service Management (continued)

Property	Description
	from the CSMQueryBRUtilOOB are used. • **Type**: true | false • **Default value**: true • **Location**: **Customer Service** > **A**

Roles installed with Customer Service Management

The Customer Service Management application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between users.

Primary roles

Customer Service Management provides several primary roles that support the following business models:

- Business-to-business (B2B): With this business model, you can support accounts and contacts. Additionally, you can create relationships and account teams to support your customers.
- Business-to-consumer (B2C): With this business model, you can support individual consumers.

These roles ensure access to data while maintaining data security for different types of business relationships.

CSM primary roles

Internal Roles	External Roles
Business-to-business (B2B) • sn_customerservice_agent • sn_customerservice_manager	**Business-to-business (B2B) Customer** • sn_customerservice.customer • sn_customerservice.customer_admin • sn_customerservice.customer_case_manager
Business-to-consumer (B2C) • sn_customerservice.consumer_agent • sn_customerservice_manager	**Business-to-business (B2B) Partner** • sn_customerservice.partner • sn_customerservice.partner_admin
	Business-to-consumer (B2C) sn_customerservice.consumer

For details about these roles, see CSM roles and descriptions below.

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Internal and external roles

Customer Service Management includes both internal and external user roles.

- Internal roles are assigned to users within your organization. These roles are for agents and managers using the Customer Service Management application to support customers.
- External roles are assigned to users outside your organization. These roles are for customers, customer partners, and consumers using the self-service portals.

With these roles, you can give both internal users and external users access to your instance. This role structure gives you the flexibility to provide different levels of access to different users. As an additional security measure, every user must have at least one role so that the instance can distinguish between internal and external users.

Base roles

The primary roles available in Customer Service Management are based on the following base roles:

- sn_esm_agent
- sn_esm_admin
- sn_esm_partner
- sn_esm_partner_admin
- sn_esm_user
- sn_esm_user_admin

For more information about these roles, see Roles installed with the Customer Service Base Entities plugin below.

For more information about the CSM primary role structure and included roles, see CSM roles and descriptions below.

Explicit roles

You may have business requirements that change the use of these roles. In addition, the Explicit Roles in CSM feature may assign both internal and external roles to external users. It is important to regularly review user role assignments to ensure that they are set according to your business requirements.

For more information about reviewing and updating user role assignments, see:

- KB0829930
- Fix external user role assignments

.

CSM roles and descriptions

Primary CSM roles

Role title [name]	Description	Contains roles
Customer service agent [sn_customerservice_agent]	An agent who assists customers and partners with questions, issues, and	• knowledge • chat_admin

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Primary CSM roles (continued)

Role title [name]	Description	Contains roles
	problems. This user creates cases, views and edits cases, and works with customers and subject matter experts to resolve cases. A customer service agent typically supports a specific set of products across one or more communication channels. An agent can belong to one or more agent groups.	• sn_customerservice.deescalation_requester • timecard_user • template_editor • sn_esm_agent • sn_shn.editor • domain_expand_scope **Note:** The sn_esm_agent role contains the cmdb_read role.
Customer service manager [sn_customerservice_manager]	Customer service agent with the additional responsibility for managing agents or agent groups and overriding agent actions.	• sn_customerservice_agent • timecard_manager • timecard_approver • skill_admin • sn_app_cs_social_social_profile_user • sam • sn_customerservice.consumer_agent • asset • sn_shn.admin • sn_publications.approver • contract_manager • sn_app_cs_social_log_user • awa_manager • sn_majorissue_mgt.major_issue_manager • email_client_quick_message_author • workspace_admin • skill_model_user • sn_templated_snip.template_snippet_writer • approver_user

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Primary CSM roles (continued)

Role title [name]	Description	Contains roles
		Note: For customers upgrading to Xanadu, the approver_user role replaces the approval_admin role. Users with the customer service manager role can approve the approval requests that are assigned to them. • notify_view **Note:** The notify_view role is added to the sn_customerservice_manager role only when the Chat Zoom Connector application is installed.
Consumer service agent [sn_customerservice.consumer_agent]	An agent who assists consumers with questions, issues, and problems. This user creates, views, and edits cases and works with consumers to resolve cases. An agent typically supports a specific set of products across one or more communication channels. An agent can belong to one or more agent groups.	• sn_esm_agent • chat_admin • sn_shn.editor • template_editor • knowledge
Customer [sn_customerservice.customer]	Customer role for researching questions, issues, or problems. Customers can create cases and view and edit existing cases for themselves. They can also view a list of assets belonging to their accounts.	• sn_esm_user • snc_external
Customer administrator [sn_customerservice.customer_admin]	Administrator role for a customer account. This user has access to data within the account.	• sn_customerservice.customer • sn_esm_user_admin
Customer case manager	Customer role for managing the cases in an account and	sn_customerservice.customer

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Primary CSM roles (continued)

Role title [name]	Description	Contains roles
[sn_customerservice.customer_case_manager]	any related child accounts. The customer case manager role includes the privileges of the customer role and adds the following privileges: • Create a case on behalf of another contact in the account. • View a list of cases belonging to the account. • Edit cases belonging to the account. **Note:** The customer case manager role is not automatically added to the **sn_customerservice.contact_role_assignment** system property. To expose this role to customer and partner administrators, navigate to **Customer Service** > **Administration** > **Properties** and add it to this property.	
Partner [sn_customerservice.partner]	Partner who is serving customer accounts. A partner can create a case for their own account or on behalf of a customer account. A partner can view and edit all of the cases that they have created: • For their own account. • On behalf of customer accounts that they are related to.	• sn_customerservice.customer • sn_esm_partner

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Primary CSM roles (continued)

Role title [name]	Description	Contains roles
	Note: If you are establishing a new relationship between a partner and a customer, the partner or partner admin does not have access to historic cases created for the customer. This is because the historic cases do not have the **Partner** or **Partner Contact** fields populated on the Case form.	
Partner administrator [sn_customerservice.partner_admin]	Administrator role for a partner account. The partner administrator can do the following: • Access the data within the partner account. • Access the data created by the contacts in their company in the customer account. • Manage users for the partner account and for customer accounts. • View all of the cases created by a partner.	• sn_customerservice.partner • sn_customerservice.customer_admin • sn_esm_partner_admin
Consumer [sn_customerservice.consumer]	Consumer role for researching questions, issues, or problems. Consumers can create cases and view and edit existing cases for products that they have purchased. They can also view a list of their products.	• sn_esm_user • snc_external

Additional CSM roles

Role title [name]	Description	Contains roles
Case contributor editor [sn_customerservice.case_contributor_editor]	This role provides limited write access to the fields on the Case form. It provides limited write access to those cases for which the user already has	

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
	read access provided by another role. Limited write access is available for the following fields: • Work notes • Additional comments • Attachments • State or stage changes • Contributor users • Contributor groups • Watchlist • Work notes list	
Case contributor viewer [sn_customerservice.case_contributor_viewer]	This role provides read-only access to all of the tables associated with a case. With this role, a user can view the information in the related lists for a case if: • The user has been added to the **Contributor User** field or the **Contributor Group** field on the Case form. • The user has read-only access to cases through another role, such as the case viewer role (sn_customerservice.case_viewer) or the case task agent role (sn_customerservice.case_task_agent). With this role, a user can access the following modules in CSM Agent Workspace:**All tasks I participate in**	• sn_shn.user • wm_read
Case task agent [sn_customerservice.case_task_agent]	This role provides access to case tasks and related case information. A user with this role can work on the following case tasks:	• sn_customerservice.customer_data_viewer • sn_customerservice.csm_workspace_user • sn_customerservice.case_contributor_editor

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
	• Tasks that are assigned to the user or to the user's assignment groups. • Tasks that have been created by the user. With this role, the user can: • View and update assigned case tasks. • Create case tasks and assign those tasks to other users. • View and update created case tasks. • Add work notes, comments, and attachments to case tasks. • Update the status of case tasks. • Perform additional actions from a case task such as sending email. With this role, users have read-only access to customer information for the case: • Account and contact records (for B2B cases) • Consumer and household records (for B2C cases) • Service organization records (business location cases)	
Case task viewer [sn_customerservice.case_task_viewer]	This role provides read-only access to all case task records. **Note:** When combined with the case viewer role (sn_customerservice.case_viewer), a user can access all customer service cases and all case tasks.	
Case viewer	This role provides read-only access to all cases.	

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
[sn_customerservice.case_viewer]		
Contact manager [sn_customerservice.contact_manager]	User who can manage contacts.	
Customer project manager [sn_customerservice.projectmanager]	A user who creates and manages projects for customer accounts. • Creates new projects. • Sets up project tasks and resource plans. • Identifies customer contacts who have access to projects and project tasks. • Assigns and manages tasks and dependencies. **Note:** This role is added with the Customer Project Management plugin (com.snc.csm_ppm)	sn_customerservice.customer_data_viewer
Customer project stakeholder [sn_customerservice.projectstakeholder]	A user who is responsible for activities that require viewing customer project details and project tasks. **Note:** This role is added with the Customer Project Management plugin (com.snc.csm_ppm)	
Data viewer [sn_customerservice.customer_data_viewer]	User with read-only access to customer data entities such as: • Install base items • Contracts • Entitlements • Accounts, contacts, and account team members • Assets	

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
	• Consumers • Sold product	
De-escalation requester [sn_customerservice.deescalation_requester]	User who can deescalate a case or account when the cause of the escalation is resolved.	sn_customerservice.escalation_requester
Escalation requester (sn_customerservice.escalation_requester)	User who can request an escalation for a case or account.	sn_customerservice.consumer_agent
Proxy case creator [sn_customerservice.proxy_case_creator]	Users with the proxy case creator role can create customer service cases directly from community questions created by contacts or consumers	
Proxy contact [sn_customerservice.proxy_contact]	Role that enables employees to create cases for customer accounts and contacts. Employees can also be proxy case contacts on behalf of customers. Assign this role to employees in your company who are not fulfillers or do not have other CSM-specific roles. Users with this role can: • Create customer service cases using a record producer. • Add work notes and comments to any case. • Update the watch list of any case. **Note:** The CSM Extension for Proxy Contacts (com.snc.csm_proxy_contacts) plugin adds this role.	
Workspace user [sn_customerservice.csm_workspace_user]	This role provides access to case tasks from the following modules in CSM Agent Workspace:	

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
	• My Case Tasks • My Group's Case Tasks Users can also: • Use Agent Assist to search for knowledge articles (if the User Criteria is set to provide access to knowledge). • Create email (if the user has write access to the record and the email_composer role). • View response templates (if response templates have been configured for the record. **Note:** By default, this role is added to the case task agent role (sn_customerservice.case_task_agent).	

Roles installed with the Customer Service Base Entities plugin

The following roles are installed with the Customer Service Base Entities plugin.

Customer Service Base Entities roles

Role	Contains roles
Service management agent [sn_esm_agent]	• assignment_workbench • wm_read • cmdb_read • agent_schedule_user • interaction_agent
Service management partner [sn_esm_partner]	sn_esm_user
Service management user admin [sn_esm_user_admin]	sn_esm_user
Service management admin	None

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Customer Service Base Entities roles (continued)

Role	Contains roles
[sn_esm_admin]	
Service management user [sn_esm_user]	• snc_external • sn_apptmnt_booking.appointment_booking_user
Service management partner admin [sn_esm_partner_admin]	• sn_esm_user_admin • sn_esm_admin
Role for REST APIs related to CSM web services [csm_ws_integration]	snc_internal

Related topics

Fix external user role assignments

Internal user data

Internal user data includes information about the users who are internal to your organization, such as managers, agents, and other employees. Internal users can also belong to user groups.

A user is an individual who can access your instance and a group is a set of users who share a common purpose. The users associated with a group are listed as group members.

User roles provide access to customer service features, capabilities, and data. The following user roles are available in the Customer Service Management application for internal users:

- Customer service agent [sn_customerservice_agent]
- Consumer service agent [sn_customerservice.consumer_agent]
- Customer service manager [sn_customerservice_manager]

For detailed descriptions about user roles, see Roles installed with Customer Service Management.

Business Stakeholder for Customer Service Management

Business Stakeholder for Customer Service Management includes plugins and roles that provide access to business stakeholder features.

Customers who have purchased the Customer Service Management Subscription product may provide Business Stakeholder users with the rights to the following actions:

- Create cases on behalf of a customer or a service organization.
- View cases, case tasks, and customer data.
- View and drill through reports.
- Approve requests.

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Roles for business stakeholder users

You can assign the following roles to any user who is a business stakeholder.

Create cases on behalf of customers

Role	Description	Contains roles	Plugin	User type
Account contributor [sn_customerservice.account_contributor]	This role enables users to create cases for any account.	sn_customerservice.case_contributor	CSM Contributor User (com.snc.csm_contributor_user)	Internal and external
Case authorized contributor [sn_customerservice.case_authorized_contributor]	This role enables users, when added to an individual case as a related party, to: • Add additional comments and attachments • Receive notifications on case updates • Update case tasks • Accept or reject a solution • Close a case	• sn_customerservice.case_write_granular • sn_customerservice.case_related_party_write_granular	CSM Contributor User (com.snc.csm_contributor_user)	Internal
Consumer contributor [sn_customerservice.consumer_contributor]	This role enables users to create cases for any consumer.	sn_customerservice.case_contributor	CSM Contributor User (com.snc.csm_contributor_user)	Internal and external
Relationship contributor [sn_customerservice.relationship_contributor]	This role enables users to create cases for those customers with which they have an established relationship.	sn_customerservice.case_contributor	CSM Base Extension Entities (com.snc.cs_base_extension)	Internal and external
Location Relationship Manager [sn_bus_loc.location_relationship_manager]	This role enables users to view cases across all the external business locations where they have sn_bus_loc.location_relationship_manager responsibility.	sn_customerservice.case_contributor	Business Location (com.snc.business_location)	Internal contributor

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Create cases on behalf of customers (continued)

Role	Description	Contains roles	Plugin	User type
Location Manager Contributor [sn_customerservice.svc_location_manager_contributor]	This role enables users to create, update, view, and approve cases. They can also register and remove staff across all business locations they manage.	• sn_customerservice.consumer_contributor • sn_customerservice.service_organization_contributor • sn_customerservice.account_contributor	Business Location (com.snc.business_location)	Internal and external

Create cases as proxy contact

Role	Description	Plugin	User type
Proxy contact [sn_customerservice.proxy_contact]	This role enables employees to create cases for customer accounts and contacts.	CSM Extension for Proxy Contacts (com.snc.csm_proxy_contacts)	Internal

For more information about the proxy contact role, see Create cases as a proxy contact.

Create cases on behalf of service organizations

Role	Description	Contains roles	Plugin	User type
Service organization contributor [sn_customerservice.service_organization_contributor]	This role enables users to create cases for their business location.	sn_customerservice.consumer_contributor	Business Location (com.snc.business_location)	Internal and external

Approve orders

Role	Description	Plugin	User type
Order approver [sn_csm_om.order_approver]	Users with this role can view customer orders and product catalog data and can approve customer orders. They cannot create, update, or delete orders.	Order Management (com.sn_csm_order_mgmt)	Internal

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Approve orders (continued)

Role	Description	Plugin	User type
	Note: This requires subscription to Order Management.		

View cases, case tasks, and customer data

Role	Description	Plugin	User type
Account order viewer [sn_csm_om.account_order_viewer]	This role provides read-only access to orders, order lines, and order tasks.	Order Management (com.sn_csm_order_mgmt)	Internal
Business location viewer [sn_bus_loc.viewer]	This role provides read-only access to business locations. **Note:** This role provides unrestricted access to view all business locations regardless of other access controls.	Business Location (com.snc.business_location)	Internal
Case viewer [sn_customerservice.case_viewer]	This role provides read-only access to all cases.		Internal
Case task viewer [sn_customerservice.case_task_viewer]	This role provides read-only access to all case tasks. **Note:** When combined with the case viewer role (sn_customerservice.case_viewer), a user can access all customer service cases and all case tasks.		Internal
Consumer order viewer	This role provides read-only access to	Order Management (com.sn_csm_order_mgmt)	Internal

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View cases, case tasks, and customer data (continued)

Role	Description	Plugin	User type
[sn_csm_om.consumer_order_viewer]	orders, order lines, and order tasks.		
Customer data viewer [sn_customerservice.customer_data_viewer]	This role provides read access to customer data, including account, consumer, and household data, and the information included in the related lists.		Internal
Household viewer [sn_csm_household.viewer]	This role provides read-only access to all households. **Note:** This role provides unrestricted access to view all households regardless of relationship or other access controls.	Customer Service Household (com.snc.household)	Internal
Service organization viewer [sn_service_org.viewer]	This role provides read-only access to service organizations. **Note:** This role provides unrestricted access to view all service organizations regardless of other access controls.	Service Organization (com.snc.service_organization)	Internal

View and drill into reports and dashboards

Role	Description	User type
Performance Analytics viewer [pa_viewer]	This role can: • View Analytics Hub. • Create thresholds and targets for indicators.	Internal

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View and drill into reports and dashboards (continued)

Role	Description	User type
	• Read, update, and delete the thresholds and targets that are created. • View text analytics widgets on dashboards.	

View projects and project tasks

Role	Description	Contains roles	User type
Project Stakeholder [sn_customerservice.projectstakeholder]	This role can: • View all projects. • View project information. • View project task information.	sn_customerservice.projectstakeholder	

Related topics

- Business stakeholder role for PPM
- Business stakeholder role for APM
- Installed with Business Stakeholder

Explicit Roles in CSM

You can give both internal users and external users access to your instance. However, you might not want both types of users to have the same level of access. To provide added security, every user must have at least one role so that the instance can distinguish between internal and external users.

As of the Paris release, no user can have both of the explicit roles (snc_internal and snc_external). Groups and role containment cannot include both roles, either, since that would cause any group member or user who is assigned to such a group or such a role to automatically have both roles. The ServiceNow AI Platform aborts any operation that would create such a scenario.

External users must obtain, at minimum, the snc_external role. The snc_external role indicates that the user is external to your organization. They should not have any access to resources unless explicitly allowed through ACLs for the snc_external role or additional roles that inherit the snc_external role. By default, users with the snc_external role cannot access:

- Scripted REST API resources that are not marked external.
- Tables without the role that inherits the snc_external role or the public role.
- Non-record type resources, such as processors and UI pages without granting access to the snc_external role or a role that inherits the snc_external role.
- Platform Analytics dashboards.

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Do not mark the snc_internal role as elevated. Otherwise, internal users cannot access the instance.

Recommended CSM roles for internal and external users

Customers (external users) using the Customer Service Management application should be assigned either the sn_customerservice.customer or the sn_customerservice.consumer role. Customer service agents (internal users) should be assigned either the sn_customerservice_agent or sn_customerservice_consumer_agent role. The system ensures that the same user is not assigned both a customer (external) and agent (internal) role.

Explicit Roles plugin

The Customer Service plugin (com.sn_customerservice) activates the Explicit Roles plugin (com.glide.explicit_roles), which adds the snc_external and snc_internal roles. When the plugin is activated:

- All users must have either the snc_internal role to access internal resources or the snc_external role to access external resources.
- All existing users are automatically assigned the snc_internal role. This role does not change existing access levels or system behavior. Instead, it provides a category to differentiate internal users from external users. All internal users maintain the same level of access as before the plugin was activated.

  Tip:
  To prevent changing existing functionality for users, activating the Explicit Roles plugin assigns the snc_internal user role to all existing users in the instance. This includes any external users added before the Explicit Roles plugin was activated. After the Explicit Roles plugin is activated, do the following for all external users added before the Explicit Roles plugin was activated:

  - Remove the snc_internal role.
  - Add the snc_external role.

  Doing the preceding ensures that external users added before activating the Explicit Roles plugin do not have access to internal resource that should be available only to internal users.

- Newly created users are automatically assigned the snc_internal role when they first attempt to log in to the instance, unless they have been explicitly assigned the snc_external role. You can add the snc_external role to a new user before they first log in to the instance to provide external user rights.

  Important:
  Activate this plugin during a maintenance window or when few users are logged in. Users currently logged in when the plugin is activated will not be dynamically assigned the snc_internal role. Rather, users must log out and log back in to be assigned the snc_internal role. Once the plugin is activated, you can add or remove the snc_internal and snc_external roles at any time to change user rights.

- All existing ACLs that do not have a role requirement are automatically assigned the snc_internal role. Because both existing ACLs and roles are assigned the snc_internal role, existing access levels do not change.
- Newly created ACLs that do not have a role requirement are automatically assigned the snc_internal role. This role assignment does not apply to a newly created ACL with a role assigned.

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- For all existing Processor [sys_processor] records or newly created Processor [sys_processor] records with **Type=script**, the snc_internal role is automatically added to the **Roles** field if the field is empty.
- To restrict access to UI pages to internal users, the plugin automatically assigns the snc_internal role to the * ACL with a **Type** of **ui_page**.
- To restrict access to processors to internal users, the plugin automatically assigns the snc_internal role to the * ACL with a **Type** of **processor**.
- External users must obtain, at minimum, the snc_external role to access the instance. This role is automatically assigned to external Customer Service Portal contacts. If the Customer Service Portal is not activated, this role must be manually granted to external users'. Access to records is granted through ACLs.

  Note:
  You can use the `isPublic()` function in scripts for Customer Service Portal to change the privacy setting for a single client-callable script include. For more detail, see Script includes.

- Content Management System site access is also affected. CMS is set up with Sites (content_site), Pages (content_page), and other resources. Some of the sites may have the **Login page** configured.
  - If CMS sites do not have the **Login page** configured, the public role is automatically added to the **Read Roles** field on Pages (content_page) if the field is empty.
  - If CMS sites have the **Login page** configured, the snc_internal role is automatically added to the **Read Roles** field on Pages (content_page) if the field is empty.
- Service Portal site access is also affected.

  The snc_internal role is not automatically added to sp_page, sp_widget or sp_instance records. If desired, you can give new records the role by assigning snc_internal as a default value in the **Roles** field for these records. For details on this process see Specify a default field value.

Do not move System update sets among instances with and without the Explicit Roles plugin enabled.

Note:
This plugin also requires the Contextual Security Manager plugin.

The glide.security.explicit_roles.internal_user_blacklist property

The Explicit Roles plugin assumes that all existing users in the sys_user table at the time the plugin is installed are internal customers. A fix script assigns the snc_internal role to all existing users and to any ACL that does not have a role.

The fix script may fail or may not finish in time for a user who has not been updated with the role and who attempts to access a resource. To bridge this potential gap, the Contextual Security Manager (CSM) auto-assigns the snc_internal role to any user who logs in and does not have an explicit role (either internal or external).

Additionally, CSM has a business rule process that assigns the snc_external role to a classification of their users. However, when importing large sets of CSM external customers, workflow is set to false, so business rules don't run. As those users attempt to access a resource, they do not have any explicit roles. The Contextual Security Manager assigns the snc_internal role through a scheduled job called On-Call Gaps Conflicts Report that runs every 7 days. When

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the Explicit Roles plugin is active, this job assigns the snc_internal role to the CSM external user, since the user does not have either the snc_internal or snc_external role.

To prevent inadvertently providing the snc_internal role to external users, the Explicit Roles plugin includes a *glide.security.explicit_roles.internal_user_blacklist* property to exclude user types from ever becoming snc_internal. If there are no users types in the glide.security.explicit_roles.internal_user_blacklist table, the Contextual Security Manager assigns all users the snc_internal role by default. If there are classnames in the blacklist table, and if the sys_user class type is in the blacklist table, CSM assigns the snc_external role. Otherwise, CSM assigns the default snc_internal role as usual.

For the Paris release, this property is enabled by default for zBoot instances and and disabled by default for upgrades.

Providing table access to external users

You can provide external users access to a table by adding a role to the table that inherits the snc_external role. For more information, see Provide external users access to a table.

The hasRoles() method

The `hasRoles()` method is still available, but is deprecated in the Geneva release. Use the `hasRole(role name)` method instead.

If you do use the `hasRoles()` method, note these changes:

- This method automatically excludes the default snc_internal role when it checks for roles. This means that if a user has only the snc_internal role, the `hasRoles()` method still returns **false**.
- If the user has the snc_external role, the method returns **false** because the instance considers external users to be without a role.

Mutual exclusion: snc_external versus snc_internal

The ServiceNow AI Platform prevents users from having both the snc_external role and the snc_internal role. The ServiceNow AI Platform applies this mutual exclusion everywhere in the system and writes error messages to the logs for each conflict.

Note:
ACLs can have both roles if the ACL resources should be accessible to all users.

Example: Adding both explicit roles to a user (direct collision):

1. Assign user Abel Tuter the snc_internal role.
2. Assign user Abel Tuter the snc_external role.

Result: Adding the snc_external role fails because Abel Tuter has the snc_internal role.

Example: Adding both explicit roles to a group (direct collision):

1. Consider a group called Test Group that currently has no explicit roles assigned to the group.
2. Add Abel Tuter to the Test Group.
3. Add the snc_external role to Test Group.

Result: Adding the snc_external role fails because Abel Tuter already has the snc_internal role and can't have both roles.

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Example: Adding an explicit role to a group where a group member has the conflicting explicit role (indirect collision):

1. Assign user Abel Tuter the snc_internal role.
2. Consider a group called Test Group that currently has no explicit roles assigned to the group.
3. Add Abel Tuter to the Test Group.
4. Add the snc_external role to the Test Group.

Result: Adding the snc_external role to the group fails because Abel Tuter would inherit the snc_external role through group membership. Both explicit roles would be assigned to the same user, which isn't allowed.

For other examples, see the following table:

Role	Attempted action	Result
Direct collision		
The user has the snc_internal role.	Add the snc_external role.	The action is aborted.
The user has the snc_external role.	Add the snc_internal role.	The action is aborted.
The user has no explicit role.	Add the snc_internal or snc_external role.	The role is added.
The user has both explicit roles (existing collision).	Add the user to a group with no roles.	The action is aborted.
A role not associated with any users contains the snc_internal role.	Add the snc_external role.	The action is aborted.
A role not associated with any users contains the snc_external role.	Add the snc_internal role.	The action is aborted.
A role contains both explicit roles (existing collision).	Add the role to a user, role, or group.	The action is aborted.
A group with no members has the snc_internal role.	Add the snc_external role.	The action is aborted.
A group with no members has the snc_external role.	Add the snc_internal role.	The action is aborted.
A group with no members has no roles.	Add the snc_internal or snc_external role.	The role is added.
Indirect collision		

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Role	Attempted action	Result
Role containment with collision	1. Grant a role called Test Role to a user with the snc_internal role. 2. Add the snc_external role Test Role.	The action is aborted.
Role containment without collision	1. Grant a role called Test Role to a user with no roles. 2. Add the snc_external role to Test Role.	The role is added to both the user and Test Role.
Group containment with collision	1. Add a user who has the snc_internal role to a group called Test Group 2 (child of Test Group 1). 2. Add the snc_external role to Test Group 2. 3. Add the snc_external role to a parent group called Test Group 1 (parent of Test Group 2).	The action is aborted.
Group containment without collision	1. Add a user with no roles to a group called Test Group 2 (child of Test Group 1). 2. Add the snc_external or snc_internal role to Test Group 1 (parent of Test Group 2).	The role is added to the parent group, the child group, and the user.
Group containment plus role containment with collision	Add contains_external to Test Group 1, the parent of Test Group 2.	Test Group 1 and Test Group 2 both get contains_external, but don't explicitly get the snc_external role.
	Add the snc_internal role to Test Group 2, the child of Test Group 1.	The action is aborted.
Group parent change plus group containment	1. Remove Test Group 1 as the parent of Test Group 2. 2. Add the snc_internal role to Test Group 1. 3. Add the snc_external role to Test Group 2. 4. In Test Group 2, set Test Group 1 as the parent group and save.	The action is aborted. Repeat for already nested groups, with the same expectation.

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The cause of an aborted action appears in the error message and must be addressed before another attempt succeeds.

For direct cases, such as adding an explicit role to an individual user, verify which explicit role the user should have. If the user has the wrong explicit role, it must first be removed, and then the correct explicit role must be added.

For indirect cases,such as adding an explicit role to a group (so that a group member would be assigned both explicit roles), evaluate whether that user should be in the group. Also determine whether the group should be given the explicit role, including any inheritance through group hierarchy and role containment.

Note that the ServiceNow AI Platform reports only the first potential collision encountered. If repeated attempts continue to fail after remediation, with a new root cause each time, re-evaluate the relevant user/group/role interdependence more broadly. You may want to rethink how groups and role containments are structured.

Provide external users access to a table

To enable users with only the snc_external role to access the list view of a table, you must create a series of ACLs.

Before you begin

Role required: security_admin

Procedure

1. Elevate to a privileged role.
2. Create an ACL rule with the following settings:
   - **Type**: ui_page
   - **Operation**: read
   - **Name**: {table_name}_list
   - **Required role**: snc_external
3. On the default **read** ACL for the table, add **snc_external** in the Required role list.
   Create the ACL if it does not already exist.
4. Use these settings to create another ACL:
   - **Type**: ui_page
   - **Operation**: read
   - **Name**: {table_name}
   - **Required role**: snc_external
5. Use these settings to create another ACL to give the user write access to a field in the table:
   - **Type**: record
   - **Operation**: create
   - **Name**: {table_name} {column_name}
   - **Required role**: snc_external

   Repeat this step for every field that you want to give the user write access to. Use an asterisk * instead of the column name to provide access to all fields at once.

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Creating custom user roles

System administrators can create custom roles or modify the access of existing roles by using script includes and extension points/instances.

The Customer Service Management application uses platform ACLs and query business rules to restrict data access based on user roles. If needed, users with the administrator role can create custom roles or modify the access of existing roles by using script includes and extension points/instances.

- The script includes store JavaScript functions and classes to handle the role access control logic.
- Extension points/instances designate places where custom scripts can be called and then processed to extend base functionality.

The administrator can use the extension points/instances to create their own role access constants file similar to CSQueryBRUtilOOBConstants.

The administrator can create an extension instance for the existing extension point and use it to define custom role configuration constants. The following items are included with the Customer Service Management application:

- global.CSQeryExtensionPoint: the provided extension point for CSM role configuration
- instance.CSQueryExtensioninstanceOOB: the provided extension instance for CSM role configuration

To create a role:

1. Create a constant file to hold the configurations for the new role similar to CSQueryBRUtilOOBConstants. For example:

```
CSQueryBRUtilOOBConstantstest.ROLE_PERMISSIONS_POOL = {

 'sn_customerservice.customer_new_role':{ 'sn_customerservice_c
ase':{'condition':['my_new_condition']},
} ,
```

2. Create an extension instance to hold the logic returning this new constant file to CSQueryBRUtil.
3. Make sure that this role is on the instance and contains the sn_esm_user role.
4. Assign this new role to a contact.
5. Create or modify the ACLs and query business rules for this role as necessary.

For more information about modifying ACLs and query business rules, see KB0685767.

Related topics

Using extension points to extend application functionality

Using scripted extension points in server-side scripts

Using UI extension points in server-side UI macros

Using client extension points in client-side UI scripting

Script includes installed with Customer Service Management

Script includes are added with activation of Customer Service Management.

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Script includes installed with Customer Service Management

Script include	Description
CSEMailUtil	Used for customer service case email actions and notifications.
CSPortalUtil	Helper functions for the customer self-service portal.
AccountTeamUtil	Util APIs for the Customer Service Management account team responsibility module.
AjaxCustomerServiceSearch	Ajax class that provides the knowledge base search results.

Client scripts installed with Customer Service Management

Client scripts are added with activation of Customer Service Management.

Client scripts installed with Customer Service Management

Client script	Table	Description
Channel and State readonly for customer	Case [sn_customerservice_case]	Sets the **Channel** and **State** fields to read only the Case form that the customer can view from the customer portal.
Check Contextual Security Installed	Contact [customer_contact]	Checks if the Contextual Security plugin (com.glide.role_management) is installed befo creating a customer contact.
Customer Case View	Case [sn_customerservice_case]	Hides certain elements in the Case form for ES view.
Empty Case form on Account Change	Case [sn_customerservice_case]	When you change the value in the **Account** fie on the Case form, the values in the following fields are cleared: **Partner**, **Partner contact**, **Asset**, **Entitlement**, **Contract**, and **Contact**.
Empty Partner Contact on Partner Change	Case [sn_customerservice_case]	When you change the value in the **Partner** fiel on the Case form, the **Partner contact** field is also cleared.
Hide Activity Stream	Contact [customer_contact]	Hides the activity stream on top of the form header.
Hide attachment icon	Registration Request [sn_customerservice_registration]	Hides the attachment icon on top of the form header.
Hide Icons Form Header	Case [sn_customerservice_case]	Hides the email icon from the more options me and the activity stream icon at the top of the fo header. Also hides the book icon next to the **Short Description** field on the form.
Hide Suggestion	Case	Hides the suggestion icon next to the **Short description** field.

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Client scripts installed with Customer Service Management (continued)

Client script	Table	Description
next to Short Description	[sn_customerservice_case]	
Make field readonly	Account Relationship Type [sn_customerservice_account_relationship_type]	Sets the **From** and **To** fields to read only once a record is created in the Account Relationship Type table (sn_customerservice_account_relationship_typ
Open the glide list for new appointment	Appointment [sn_customerservice_appointment]	Opens the glide list to select the user for an appointment for new records.
Populate Contact Company	Case [sn_customerservice_case]	When a user name is selected in the **Contact** field, the **Account** field is populated with the contact's account information.
Populate Contract	Case [sn_customerservice_case]	Populates the **Contract** field when the **Accoun** field is filled.
Populate contract and entitlement	Case [sn_customerservice_case]	Populates the **Contract** and **Entitlement** fields when the **Account** field is filled.
Populate Entitlement	Case [sn_customerservice_case]	Populates the **Entitlement** field when the **Account** field is filled.
Populate Product	Case [sn_customerservice_case]	When an asset is selected in the **Asset** field, the **Product** field is populated with the asset's product model.
Registration code read-only	Registration Request [sn_customerservice_registration]	Sets the **Registration code** field to read-only.
Set account read on load	Account Team Member [sn_customerservice_team_member]	Sets the **Account** field to read only for a new record when the account isn't empty on form load.
Set asset readonly	Asset Contact [sn_customerservice_m2m_asset_contact]	Set the **Asset** field to readonly for a new form when the asset value isn't empty.
Show partner field	Case [sn_customerservice_case]	Shows the **Opened by** field on the Case form.
Special Handling Notes for Case	Case [sn_customerservice_case]	Shows all the Special Handling Notes with disp type alert related to the current record.

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Client scripts installed with Customer Service Management (continued)

Client script	Table	Description
Validate Product Entitlement	Entitlement [service_entitlement]	Displays a field warning message for the **Per unit** field if a product is selected but the **Asset**, **Contract**, and **Account** fields are empty.

Business rules installed with Customer Service Management

Business rules are added with activation of Customer Service Management.

The following table describes the business rules and their related tables that are added with Customer Service Management.

Business rules added with Customer Service Management

Business rule	Table	Description
Account query for customer	Account [customer_account]	Queries the account for the customer contact.
Account relationship display rule	Account Relationship [account_relationship]	Displays the correct values in the bi-directional diagram on the Account Relationship form.
Add customer role to contacts	Contact [customer_contact]	Adds the customer role (sn_customerservice.customer) to a customer contact if the contact has no assigned roles or if the user ID for the contact is set.
Add snc external role to contacts	Contact [customer_contact]	Adds the snc_external user role to each contact.
Add Primary Contact to Asset Contact	Asset [alm_asset]	When an asset is assigned a new primary contact, the primary contact is added to the asset contact.
Approver query for customer	Approval [sysapproval_approver]	Queries the approver for a customer contact.
Asset query for customer	Asset [alm_asset]	Queries the assets for a customer contact.
Auto assessment business rule	Case [sn_customerservice_case]	Triggers a customer satisfaction survey when a case is set to **Closed**.
Case query for customer	Case [sn_customerservice_case]	Queries the cases for a customer contact.

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Business rules added with Customer Service Management (continued)

Business rule	Table	Description
Case display rule	Case [sn_customerservice_case]	A display business rule on the Case form which passes some values to the browser when a case is displayed.
Change Awaiting to Open	Case [sn_customerservice_case]	Changes the case state from **Awaiting Info** to **Open**.
Check duplicate	Asset Contact [sn_customerservice_m2m_asset_contact]	Checks for duplicate records before creating a new asset contact.
Check duplicate for responsibility	Contact Relationship [sn_customerservice_contact_relationship]	Checks for duplicate responsibilities before creating a new contact relationship.
Check duplicate for responsibility	Asset Contact [sn_customerservice_m2m_asset_contact]	Checks for duplicate responsibilities before creating a new asset contact.
Check snc_external roles exist	Contact [customer_contact]	Checks if the com.glide.security_schema plugin is activated.
Contact query for customer	Contact [customer_contact]	Queries the contacts for a customer.
Contract query for customer	Contract [ast_contract]	Queries the contracts for a customer.
Create bi-direction relationship	Account Relationship [account_relationship]	After an account relationship is created, this business rule creates the bi-directional account relationship record.
Delete Account Contacts and Assets	Account Relationship [account_relationship]	When an account relationship is deleted, this business rule deletes the corresponding account and asset contacts.
Delete relationship type	label [account_relationship_type]	Checks to see if any relationship records are using a relationship type before that relationship type is deleted.
Delete responsibility definition	Responsibility Definition [sn_customerservice_responsibility_def]	Checks to see if any account team members are using a responsibility definition before that responsibility definition is deleted.

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Business rules added with Customer Service Management (continued)

Business rule	Table	Description
Display request message	Registration Request [sn_customerservice_registration]	After registration request submittal, shows info message to user
Display rule	Registration Request [sn_customerservice_registration]	Shows message to remind users to enter a correct registration code
Entitlement query for customer	Entitlement [service_entitlement]	Queries the entitlements for a customer contact.
Insert Case Work Notes	Appointment [sn_customerservice_appointment]	Updates the case work notes with the appointment details when an an appointment is created.
Populate company for case	Case [sn_customerservice_case]	Populates the **Company** field on the Case form based on the name entered in the **Contact** field.
Set First Response Time	Case [sn_customerservice_case]	When a case is created or updated, this rule sets the current time in the first_response_time field. Also used when a case is set to **Resolved** or **Awaiting Info** or when comments or close notes are added. **Note:** The first_response_time field is not used.
Update account based on reg code	Registration Request [sn_customerservice_registration]	Validates the registration registration code and assigns the account associated with the registration code.
Update account relationship labels	Account Relationship Type [sn_customerservice_account_relationship_type]	When the labels for an account relationship type are updated, this business rule updates all of the related account relationship records.
Update case entitlement on Close	Case [sn_customerservice_case]	Updates the associated entitlement when the state of a case is set to **Closed**.
Update Case Work notes	Appointment [sn_customerservice_appointment]	Adds work notes to the case when an appointment for the case is updated.

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Business rules added with Customer Service Management (continued)

Business rule	Table	Description
Update Case Work Notes	Knowledge [kb_knowledge]	Adds work notes to the case when a knowledge article associated with the case gets updated.
Update Parent Case for new task	Task [sn_customerservice_task]	Updates the case when a new case task is created.
Update Parent case for state change	Task [sn_customerservice_task]	Updates the case when a new case task is changed.
Update relationship label	Account Relationship [account_relationship]	Updates the relationship labels for bi-directional account relationships.
Update User Task State	Case [sn_customerservice_case]	Calculates the work load for the agent based on the number of cases assigned to the agent. Also updates the last assigned time. This rule is used by the matching rule engine.
Validate registration	Registration Request [sn_customerservice_registration]	Checks if the registration is valid based on the user's email address. If the user exists in the system or a request has already been submitted and is in the pending state, the registration request is not allowed.

Components installed with CSM workspaces

Several types of components are installed with CSM workspaces.

Roles

The agent workspace user role (agent_workspace_user) is added to the Service Management agent (sn_esm_agent) role. The role is required to access Agent Workspace for CSM.

Form views

Customer service agents see forms in the CSM Workspace form view (workspace_csm), if they exist for certain record types. Otherwise, agents see forms in the Workspace form view.

Tables

In CSM workspaces, a number of Customer Service Management tables are provided with the Workspace and CSM Workspace view layouts.

Tables in Workspace view

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The Workspace view is provided for the following tables:

- Case (sn_customerservice_case)
- Consumer (csm_consumer)
- Account (customer_account)
- Contact (customer_contact)
- Account Relationship (account_relationship)
- Asset (alm_asset)
- Contract (ast_contract)
- Product Model (cmdb_model)
- Entitlement (service_entitlement)
- Task (sn_customerservice_task)
- Appointments (sn_customerservice_appointment)
- Contact Relationship (sn_customerservice_contact_relationship)
- Escalation (sn_customerservice_escalation)
- Order (csm_order)
- Order Case (csm_order_case)
- Special Handling Notes (sn_shn_notes)
- Order Line Item (csm_order_line_item)
- Asset Contact (sn_customerservice_m2m_asset_contact)
- Account Team Member (sn_customerservice_team_member)
- Social Profiles table (sn_app_cs_social_social_profile)
- Social Logs table (sn_app_cs_social_social_log)
- Knowledge Applied to Tasks table (m2m_kb_task)

Tables in CSM Workspace view

The CSM Workspace view (workspace_csm) is provided for the following tables:

- Interaction (interaction)
- Location (cmn_location)

The CSM Workspace view for these tables is similar to the respective default platform interface view.

Lists

The list categories and filtered lists that have been configured for customer service agents in CSM workspaces.

Lists and filtered lists for Customer Service agents

List Category	Filtered Lists	Description
Cases	My Cases	Cases assigned to the customer service agent.
	My Open	Open cases assigned to the customer service agent.

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Lists and filtered lists for Customer Service agents (continued)

List Category	Filtered Lists	Description
	Unassigned for my groups	Cases that belong to any of the customer service agent's groups but have not been assigned to an agent.
	All	All customer service cases.
Major Issue Management	Major Cases	Major cases that have been accepted.
Customer	Accounts	A list of customer accounts.
	Partners	A list of partner accounts.
	Contacts	A list of customer contacts.
	Consumers	A list of consumers.
Interactions	My Interactions	Interactions that are assigned to the customer service agent (agent's name appears in the **Assigned to** field on the interaction record).
Knowledge	My Knowledge Articles	Knowledge articles authored by the customer service agent (agent's name appears in the **Author** field). **Note:** This list appears in the list panel when the Knowledge Management Advanced Installer plugin (com.snc.knowledge_advanced.installer) is activated.
Catalog Tasks	Assigned to my groups	Catalog tasks assigned to the current agent's groups.

Note:
Additional filtered lists appear in the list panel when a customer service agent also has the itil role.

Components installed with additional plugins for Customer Service Management

Several types of components are installed with the additional plugins for the Customer Service Management application.

Components installed with additional plugins for CSM

Components installed with CTI Softphone	• Tables • Business rules • Script includes

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Components installed with additional plugins for CSM (continued)

Components installed with Customer Service CTI Demo Data	Business rules
Components installed with OpenFrame	• Tables • Roles • Business rules • Script includes • UI macros
Components installed with Special Handling Notes	• Tables • Roles • Properties • Business rules • Client scripts • Script includes
Components installed with Targeted Communications	• Tables • Roles • Properties
Components installed with Knowledge Product Entitlements	• Business rules • Properties
Components installed with Self Service Password Reset	Script includes

Components installed with CTI Softphone

Several types of components are installed with CTI Softphone.

Tables installed with CTI Softphone

Tables are added with activation of CTI Softphone.

Tables for activation of CTI Softphone

Table	Description
User CTI Status	Stores the agent's availability status.

Script includes installed with CTI Softphone

Script includes are added with activation of CTI Softphone.

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Script include	Description
CTIAjaxUtility	Ajax class that provides helper functions to set and get user states, get incoming call context, log a call, and queue and dequeue a call.

Business rules installed with CTI Softphone

Business rules are added with activation of CTI Softphone.

Business rule	Table	Description
Route available user for Incident Task	User CTI Status [user_cti_status]	Demo business rule to dequeue a call based on matching rules whenever an agent becomes available.

Components installed with Customer Service CTI Demo Data

Several types of components are installed with Customer Service CTI Demo Data.

Note:
Starting with the Yokohama release, Customer Service CTI Demo Data is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. ServiceNow Voice with Amazon Connect provides the latest experience for this functionality.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Business rules installed with Customer Service CTI Demo Data

Business rules are added with activation of Customer Service CTI Demo Data.

Business rule	Table	Description
Route available user for Case Task	User CTI Status [user_cti_status]	Used to dequeue a call whenever an agent becomes available.

Components installed with OpenFrame

Several types of components are installed with OpenFrame.

Tables installed with OpenFrame

Tables are added with activation of OpenFrame.

Tables installed with OpenFrame

Table	Description
Phone Log [sn_openframe_phone_log]	A log of the incoming and outgoing phone calls. This table can be used to log any phone call made or received.
OpenFrame Configuration [sn_openframe_configuration]	Stores the OpenFrame configuration. This is the configuration used to load the OpenFrame in the TopFrame.

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Roles installed with OpenFrame

The OpenFrame user role is automatically added when you activate OpenFrame.

Role	Description	Contains role
User [sn_openframe_user]	The OpenFrame user role.	None
User sn_openframe_api_user	The OpenFrame API user role	None

Script includes installed with OpenFrame

The OpenFrameAjaxUtility script include is added when you activate OpenFrame.

Script includes for OpenFrame

Script include	Description
OpenFrameAjaxUtility	OpenFrame AJAX utility class that provides functions to get the OpenFrame configuration and also to get and set the last opened frame location.

Business rules installed with OpenFrame

Some related business rules are added when you activate OpenFrame.

OpenFrame business rules

Business rule	Table	Description
Set Agent	Phone Log [sn_openframe_phone_log]	Sets the agent in the Phone Log [sn_openframe_phone_log] table as the current logged-in user if a phone call is logged without an agent.
One Default Configuration	OpenFrame Configuration [sn_openframe_configuration]	Checks that there's only one default OpenFrame configuration. You can't have two OpenFrame configurations if the default option is set to true.
Update Task Work Notes	Phone Log [sn_openframe_phone_log]	Updates the work notes for a specific task whenever a phone call is logged for that task.

UI macros installed with OpenFrame

Related UI macros are added when you activate the OpenFrame plugin.

The UI macros added when you activate OpenFrame plugin are supported under the following conditions:

- The *doctype* property is set to true and the device is not a tablet or mobile.
- The web browser is Internet Explorer 10 or above.

As a system administrator, you can add the following UI macro scripts:

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OpenFrame UI macro scripts

Script include	Description
`show_phone`	• This macro requires the activation of the OpenFrame plugin. • By configuring this UI macro using the `ref_contribution` parameter, you can display a phone icon next to the sys_user reference field if the phone field in the sys_user record is populated with the user's contact number.
`show_phone_customer_service`	• This macro requires the activation of the Customer Service Management and the OpenFrame plugins. • By configuring this UI macro using the `ref_contribution` parameter, you can display a phone icon next to the **Contact** customer_account reference field on the case form if the phone field in the Contact customer_account record is populated with the user's contact number.

Displaying the phone icon enables you to make calls using the click-to-call capability in the OpenFrame window. For more information on how to use OpenFrame, see OpenFrame overview.

Components installed with Special Handling Notes

Several types of components are installed with Special Handling Notes.

Tables installed with Special Handling Notes

The tables included with the Special Handling Notes plugin (com.sn_shn).

The Special Handling Notes plugin adds the following tables.

Table	Description
Special Handling Notes [sn_shn_notes]	Stores the special handling notes.
Special Handling Configuration [sn_shn_configuration]	Stores the special handling notes table configurations.

Roles installed with Special Handling Notes

Some user roles are included with the Special Handling Notes (com.sn_shn) plugin.

Special handling notes roles

Role	Description
sn_shn.admin	Can read, create, update, and delete special handling notes. This role contains the sn_shn.editor role. The sn_customerservice_manager role contains the sn_shn.admin role.

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Special handling notes roles (continued)

Role	Description
sn_shn.editor	Can read and update special handling notes. This role contains the sn_shn.user role. The sn_customerservice_agent role contains the sn_shn.editor role.
sn_shn.user	Can read special handling notes.

Properties installed with Special Handling Notes

Some properties are included with the Special Handling Notes (com.sn_shn) plugin.

The Special Handling Notes plugin adds the following properties.

Special handling notes properties

Property	Description
Maximum number of notes displayed in the Special Handling Notes pop-up window [sn_shn.max_num_alerts]	• **Type**: integer • **Default value**: 20 • **Location**: **Special Handling Notes** > **Properties**
Display special handling notes only once per session [sn_shn.note_preferences]	Special handling notes are displayed each time you access a record. Enable this property to display special handling notes only once per session. • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Notes** > **Properties**
Width of the Special Handling Notes pop-up window in pixels [sn_shn.popup_width]	The width of the Special Handling Notes pop-up window in pixels. The default width is 500. If you specify less that 300, the window automatically uses the minimum width of 300 pixels. • **Type**: integer • **Default value**: 500 • **Location**: **Special Handling Notes** > **Properties**

To learn more about the special handling notes properties, see Configure special handling notes properties.

Business rules installed with Special Handling Notes

The business rules included with the Special Handling Notes plugin (com.sn_shn).

The Special Handling Notes plugin adds the following business rules.

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Business rules installed with the Special Handling Notes plugin

Business rule	Table	Description
Updating the table field	Special Handling Notes [sn_shn_notes]	Populates the **Table** field with the table label rather than the whole table name.
SHN Cache Table Entry	Special Handling Notes Configuration [sn_shn_configuration]	Stores the entries in the configuration table in a cache to avoid repeated queries.

Client scripts installed with Special Handling Notes

The client scripts included with the Special Handling Notes plugin (com.sn_shn).

The Special Handling Notes plugin adds the following client scripts.

Client scripts

Client script	Table	Description
On Load Message	Special Handling Notes Configuration [sn_shn_configuration]	On Load Message describing what the Special Handling Notes Configuration table is for. Create a configuration by selecting a table for which special handling notes can be created and displayed. Include notes for related entities by selecting the desired fields and adding them to the configuration.

Script includes installed with Special Handling Notes

The script includes included with the Special Handling Notes plugin (com.sn_shn).

The Special Handling Notes plugin adds the following script includes.

Script includes for special handling notes

Script include	Description
SHNProcessor	A collection of APIs for special handling notes.
SHNTable	Provides a list of tables for which the user can create special handling notes.

Components installed with Targeted Communications

Several types of components are installed with the Targeted Communications application.

Tables installed with Targeted Communications

Tables are added with activation of Targeted Communications.

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Tables installed with Targeted Communications

Table	Description
Recipients (Users) [sn_publications_recipientslist_user_m2m]	Stores recipients lists of type Internal Users.
Recipients (Accounts) [sn_publications_recipientslist_account_m2m]	Stores recipients lists of type Accounts.
Recipients (Consumers) [sn_publications_recipientslist_consumer_m2m]	Stores recipients lists of type Consumers.
Publication Recipients [sn_publications_publication_contact_m2m]	Stores recipients lists of type Contacts.
Workflow Config [sn_publications_workflow_config]	Workflow configuration page.
Publication [sn_publications_publication]	Stores all publications.
Recipients List [sn_publications_recipients_list]	Stores the recipient lists.
Recurrence [sn_publications_recurrence]	Stores all of the publication recurrences.

Roles installed with Targeted Communications

Roles are added with activation of Targeted Communications.

Roles installed with Targeted Communications

Role title [name]	Description	Contains roles
Publications administrator [sn_publications.admin]	The publications administrator can: • read all publications • create, update, and delete publications • create recurring publications	• sn_publications.author • sn_publications.approver • workflow_publisher • image_admin

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Roles installed with Targeted Communications (continued)

Role title [name]	Description	Contains roles
	• create recipient lists • add or remove approvers to workflows	
Publications author [sn_publications.author]	The publications author can: • read all publications • create, update, and delete publications • create recurring publications • create recipient lists	• sn_publications_recipients_list_user • sn_publications_recipients_user • workflow_publisher • image_admin • sn_esm_agent
Publications approver [sn_publications.approver]	The publications approver can approve publications.	approver_user
Recipients list user [sn_publications_recipients_list_user]	The recipients list user can create and view recipient lists.	None
Recipients user [sn_publications_recipients_user]	The recipients user can view recipient lists.	None

Properties installed with Targeted Communications

Properties are added with activation of Targeted Communications.

Note:
To open the System Property [sys_properties] table, enter `sys_properties.list` in the navigation filter.

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Property	Description
sn_publications.max_email	Limits the number of email recipients. • **Type**: integer • **Default value**: 100000 • **Location**: System Property [sys_properties] table

Components installed with Knowledge Product Entitlements

Several types of components are installed with the Knowledge Product Entitlements application.

Business rules installed with Knowledge Product Entitlements

Business rules are added with activation of Knowledge Product Entitlements.

Knowledge Product Entitlements business rules

Business rule	Table	Description
Knowledge Product Entitlement	Knowledge [kb_knowledge]	Implements the needed access controls for users with the sn_customerservice.customer role.
KB Product Entitlements	Knowledge Base [kb_knowledge_base]	

Properties installed with Knowledge Product Entitlements

Properties are added with activation of Knowledge Product Entitlements.

Properties added with Knowledge Product Entitlements

Property	Description
kb_product_entitlement.knowledge_base.enable	Enable access control of Knowledge Bases based on product entitlements. If enabled, customers can access all of the knowledge bases related to the products for which they have entitlements. • **Type**: true/false • **Default value**: false • **Location**: **Knowledge Product Entitlements** > **Properties**
kb_product_entitlement.knowledge_base.allow_empty_products	Allow access to Knowledge Bases with empty **Related Products** field.

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Properties added with Knowledge Product Entitlements (continued)

Property	Description
	If enabled, customers can access all knowledge bases even if no products have been specified in the **Related Products** field on the Knowledge Base form. • **Type**: true/false • **Default value**: false • **Location**: **Knowledge Product Entitlements** > **Properties**
kb_product_entitlement.article.enable	Enable access control of Knowledge Articles based on product entitlements. If enabled, customers can access all of the knowledge articles related to the products for which they have entitlements. • **Type**: true/false • **Default value**: false • **Location**: **Knowledge Product Entitlements** > **Properties**
kb_product_entitlement.article.allow_empty_products	Allow access to Knowledge Articles with empty **Related Products** field. If enabled, customers can access all knowledge articles even if no products have been specified in the **Related Products** field on the Knowledge form. • **Type**: true/false • **Default value**: false • **Location**: **Knowledge Product Entitlements** > **Properties**

Components installed with Self Service Password Reset

Several types of components are installed with Self Service Password Reset.

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Script includes installed with Self Service Password Reset

Script includes are added with activation of Self Service Password Reset.

Script includes for self service password reset

Script include	Description
PasswordResetAJAX	AJAX Script to process a password reset from a UI Page as guest.
ResetPwdAjaxProcessor	

Components installed with Engagement Messenger

Several types of components are installed with activation of the Engagement Messenger application, including plugins, tables, and user roles.

Roles installed

Roles installed with the activation of the Engagement Messenger application

Role title [name]	Description	Contains roles
Engagement Messenger admin [sn_csm_ec.ec_admin]	Creates and edits configurations for Embedded Messenger modules	• sn_csm_ec.ec_read • snc_platform_rest_api_access • virtual_agent_admin • image_admin • sp_admin • ais_admin • catalog_builder_editor
Engagement Messenger read [sn_csm_ec.ec_read]	Can view existing configurations for Embedded Messenger modules **Note:** This role should only be assigned to internal users.	None

Tables installed

Tables added with the activation of the Engagement Messenger application

Table	Description
Chat Feature Instance [sn_csm_ec_chat_instance]	Stores configuration details of the Chat feature of the messenger modules.
Engagement Messenger Module [sn_csm_ec_engmnt_center_module]	Stores the list of all messenger modules.
Feature	Stores the feature definitions for the messenger.

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Tables added with the activation of the Engagement Messenger application (continued)

Table	Description
[sn_csm_ec_feature]	Every feature instance of a messenger module is created from its feature definition.
Feature Instance [sn_csm_ec_feature_instance]	Stores the details of feature instances of the messenger module.
Greeting Feature Instance [sn_csm_ec_greeting_instance]	Stores configuration details of the Greeting feature of the messenger modules.
Knowledge Feature Instance [sn_csm_ec_knowledge_instance]	Stores configuration details of the Knowledge feature of the messenger modules.
Search Feature Instance [sn_csm_ec_search_instance]	Stores configuration details of the Search feature of the messenger modules.

Properties installed with Engagement Messenger

Engagement Messenger properties

Property	Description
com.glide.cs.embed.csp_frame_ancestors	After activating the Glide Virtual Agent plugin (com.glide.cs.chatbot), you must use the *com.glide.cs.embed.csp_frame_an* system property to enable the configuration o frame-ancestors policy for the website where to host Engagement Messenger. Set the value of the *com.glide.cs.embed.csp_frame_an* system property 'self' `<your website URI` example, 'self' `https://www.example.c` • Type: string • Value: self • Location: System Properties
glide.authenticate.multisso.enabled	Set the *glide.authenticate.multisso.ena* system property to true to enable multiple pro SSO. • Type: true | false • Value: self • Location: System Properties

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Engagement Messenger properties (continued)

Property	Description
	Note: If you want to enable only a guest user ex for your customer service portal, you can this configuration.
User session time-out *glide.ui.session_timeout*	Set a user session timeout value for the *glide.ui.session_timeout* system pr to a value that is greater than or equal to your time-out. • Type: integer • Value: 30 • Location: System Properties **Note:** If you want to enable only a guest user ex for your customer service portal, you can this configuration.
sn_customerservice.emails.customportal	Set the URL of your third-party customer supp so that the notification emails that your custor contain URLs that redirect them to the exact re record that they submitted. These notification emails are sent in scenario submitting a case, requesting a service, reque field technician, or booking a walk-up appoint • Type: string • Value: None • Location: System Properties For example, if your customer support portal i `https://www.example.com/support` then set the property value to `https://www.example.com/support`.
sn_csm_ec.proactive_inactivity_time	Set the inactive period (in seconds) to trigger help in Engagement Messenger. • Type: integer • Value: 2 • Location: System Properties
glide.knowman.serviceportal.use_numbered_url	The property contains a comma-separated lis service portal record sys_ids. For any portal re specified in this property, the article link will b displayed with the sysparm_number URL para instead of sys_kb_id.

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Engagement Messenger properties (continued)

Property	Description
	• Type: string • Value: None • Location: System Properties

Plugins installed

- Customer Service (com.sn_customerservice)
- Integration - Multiple Provider Single Sign-On Installer (com.snc.integration.sso.multi.installer)

Contact form for Email Interaction for CSM

The Contact form enables you to add the customer contact to the interaction record.

Contact form

Field	Description
First name	First name of the customer contact.
Last name	Last name of the customer contact.
Account	Account with which the customer contact is associated.
Title	Title of the customer contact.
Language	Preferred language of the customer for all communications and interactions.
Email	Email address of the customer contact.
Business phone	Business phone number of the customer contact.
Mobile phone	Mobile phone number of the customer contact.
Time zone	Time zone of the customer contact.
Notification	Enable notifications for the customer contact using the drop-down list.

Related topics

Create a customer contact

Email interaction sections

The Email interaction sections enable you to manage information within the interaction record.

Contact form

Field	Description
Name	Name of the customer contact.
Mobile phone	Mobile phone number of the customer contact.
Business phone	Business phone number of the customer contact.

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Contact form (continued)

Field	Description
Email	Email address of the customer contact.
Street	Name of the street.
City	Name of the city.
State/Province	Name of the state or province.
Account	Account with which the customer contact is associated.

Contact lookup

Field	Description
Lookup by name, phone, or email	The contact lookup component enables agents to do the following: • Look up a contact by name, phone number, or email address. As the agent types characters in the search box, matching information appears in record cards below the search box. • Select a contact after searching by selecting the record card. The selected record card replaces the lookup component. You can also create a record to add a guest user as a contact. For more information, see Create a customer contact.

Interaction form

Field	Description
Number	Automatically created interaction number.
Type	Type of customer interaction, which is **Email**.
Account	Name of the customer contact's company. This field is filled in automatically if the information is available in the contact record.
Contact	Name of the customer contact.
Consumer	Name of the consumer.
Guest Email	Email ID of the guest user.
Verified	Option to mark the record as verified or validated.
State	Current state of the interaction. For more information, see Interaction states.
Assigned to	Name of the assigned user.
Consumer Profile	Information about the consumer.
Short description	Brief description of the customer issue.

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Interaction form (continued)

Field	Description
Work notes	Information about the interaction and the work being done to resolve the customer issue.

Compose and Activity stream

Application	Description
Work notes	Internal notes documented for agent's reference. These notes are visible only to agents and not to the customer. When a work note is created, it appears in the Activity stream. For more information on work notes, see Compose a work note for internal use.
Email	Compose and send emails without leaving the record. For more information, see Compose an email response. **Note:** The first email response that the agent sends is used to calculate the first response time duration, which is then populated in the **First response wait time** field.
Filters	Enables you to filter emails, work notes, and field changes on the interaction.
Activity	Enables agents to view the email conversations between the agent and customer. For more information, see Using Activity stream in an email interaction.

Apps on contextual side panel

Application	Description
Attachments	Displays files and documents associated with the current record or interaction.
Recommended Actions	Displays the most relevant next steps based on the current context. For more information, see Using the Recommended Actions application.
Consumer Verify	Confirms the identity or details of the consumer involved in the interaction. For more information, see Lookup and verify.
Contact Verify	Confirms the identity or details of the contact involved in the interaction. For more information, see Lookup and verify.
Response Template	Displays the response template required to respond to the customer. For more information, see Use a response template to compose an email or a work note.
Related Lists	Displays associated items such as emails, tasks, knowledge articles, and open cases linked to the current interaction.

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Apps on contextual side panel (continued)

Application	Description
	• Related Email Interactions: Lists the email interactions linked to the current interaction. • Emails: Displays all the emails associated with the interaction. • Draft Emails: Find emails that are currently being drafted and not yet sent. • Related Tasks: Lists all cases created out of an interaction. • Related Knowledge Articles: Displays relevant knowledge articles that can provide further information related to the interaction. • Open Cases: Shows any open cases that are related to the consumer or contact.
Customer History	Displays customer, consumer, or account history information, depending on the customer information provided on the interaction record. This tab includes a search field, filter, and date range selector that agents can use to find specific information in the history. For more information on the customer history, see Customer History component features.

UI Actions

Application	Description
Create Case	Enables the creation of a new case from the interaction.
Close	Closes the email interaction.
Save	Saves the updates made in the email interaction.
Associate Record	Enables associating the existing cases with the current interaction.
Assign to me	Assigns the interaction to the current agent. **Note:** Assign to me is visible only in interactions in the New state and with the Assigned to field as empty.

Related topics

Using the email interaction page

Feature context parameters supported in Engagement Messenger

Features for contextual launch capability enable you to set the default launch screen in Engagement Messenger.

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Embed code and parameters for a feature context

Feature	Embed code	Feature parameter description
CHAT	`{ feature: "CHAT", params: { "topic_id": "<sys_id>", "language": "<language_name>", "sysparm_<param_name>": "<param_value>" } }`	**<sys_id>** Identifies the Virtual Agent topic to be included in the chat. **<language_name>** Default chat language. For example, for French, specify `fr` **<param_name>:<param_value>** Any additional parameters to be passed to the Virtual Agent topic. The name of the parameter should start with `sysparm`. For example, `sys_param_product_name`.
WORK_ORDER	`{ feature: "WORK_ORDER", params: { "table": "wm_order", "sys_id": "<sys_id>" } }`	**<sys_id>** System identifier (sys_id) of a work order.
CASE	`{ feature: "CASE", params: { "table": "sn_customerservice_case", "sys_id": "<sys_id>" } }`	**<sys_id>** System identifier (sys_id) of a case.

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Embed code and parameters for a feature context (continued)

Feature	Embed code	Feature parameter description
NEW_CASE	`{ feature: "NEW_CASE", params: { } }`	None
CASE_LIST	`{ feature: "CASE_LIST", params: { } }`	None
VIEW_ARTICLE	`{ feature: "VIEW_ARTICLE", params: { "sys_kb_id": "<sys_id>" } }`	**<sys_id>** System identifier (sys_id) of a knowledge article.
SEARCH	`{ feature: "SEARCH", params: { "q": "<search_term>" } }`	**<search_term>** Term to be searched for in a search results query.
CASE_SEARCH	`{ feature: "CASE_SEARCH", params: { "q": "<search_term>" } }`	**<search_term>** Term to be searched for in a case results query.
CATALOG_ITEM	`{ feature: "CATALOG_ITEM", params: { "sys_id": "<sys_id>" }`	**<sys_id>** System identifier (sys_id) of a catalog item.

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Embed code and parameters for a feature context (continued)

Feature	Embed code	Feature parameter description
	`}`	
NEW_APPOINTMENT	`{ feature: "NEW_APPOINTMENT", params: { } }`	None
NEW_WORK_ORDER	`{ feature: "NEW_WORK_ORDER", params: { } }`	None
HOME	`{ feature: "HOME", params: { } }`	None

Related topics

Launch a feature in Engagement Messenger using custom code

Engagement Messenger translation tables

Engagement Messenger uses the [sys_translated_text] and [sys_ui_message] tables to store translated text.

Each translated field on every row has one or more entries in the this table, one per language for which ServiceNow provides a translation.

Translation tables used by Engagement Messenger

Table	Description
Translated Text [sys_translated_text]	Stores translations for configurable fields such as User Greeting and Search Message. These fields are configured in Engagement Messenger module configuration and have the field type `translated_text`. The main fields of this table are: • **Document**: Internal identifier of the feature instance record this translation applies to. • **Field name**: Title or subtitle field from feature instance record. • **Language**: Language the text is translated into.

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Translation tables used by Engagement Messenger (continued)

Table	Description
	• **Table Name**: Name of the feature instance. • **Value**: Translated text that the user sees. For details about translating text content into different languages, see Translated text table and Translating text fields.
Message [sys_ui_message]	Stores translations for static messages in Engagement Messenger. For more information about the Message table, see Message table.

Note:
For information about Virtual Agent chat translation, see Virtual Agent translation tables

Customer Contracts and Entitlements reference

Reference topics provide additional information on service contract life cycle and forms available within the Customer Contracts and Entitlements application.

What to explore next

To learn more about configuring and using Customer Contracts and Entitlements, see:

- Configure Customer Contracts and Entitlements
- Using Customer Contracts and Entitlements

Service contract life cycle

A service contract goes through the various states in each phase of its life cycle.

In each state, a service contract is enabled to perform certain actions as mentioned in the following table.

Service contract life cycle, related states, and actions that it can perform

Life-cycle	State	Action
A service contract is generated.	Draft	• The start and end dates of the service contract can be modified such that the child records' dates are within the date range. • The related contract lines and entitlements can be added, removed, or modified. • The sold product/install base item covered can be added or removed.
Service contract gets activated on the date of activation.	Active	• Modifications to the service contract can be done manually, via integration and via Sales Customer Relationship Management workflow. • The start date can't be modified.

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Service contract life cycle, related states, and actions that it can perform (continued)

Life-cycle	State	Action
		• The end date can be extended and should be greater than the current date. • Service contract line items can be added. • The sold product/install base item covered can be modified.
Service contract is deactivated on the date of expiration.	Expired	No action.
Service contract is canceled.	Canceled	No action.

The service contract line items and entitlements also perform similar actions in the respective states.

When a parent entity moves to the Expired state, the child entities inherit the same state. For example, when a service contract expires, the related contract lines and entitlements also expire.

However, the state change of a child entity doesn't affect it parent entity.

The sold product or install base item referenced either in the contract line or an entitlement must be in the same state as the entity where it's referenced.

Suspended state

When a sold product is suspended, the related service contract lines and entitlements, in the Draft or Active states, move to the Suspended state as well.

A suspended service contract line or entitlement is paused for any activity, except the following:

- Editing the field values.
- Creating records in the corresponding related lists.

On resuming the sold product, the related service contract line item or entitlement acquires the state depending on its start and end dates. For example, a resumed entitlement that has its start date in the past and its end date in the future, acquires the Active state.

Exceptionally, when a contract line or entitlement in the Suspended state has reached its end date, it moves to the Expired state automatically.

Date validations

A service contract line associated with a service contract must be created within the service contract's start and end dates. Any modification to the dates of service contract lines must comply with the date range of the parent service contract.

Service contract form

The Customer Contracts and Entitlements application uses the Service contract form to create service contracts.

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Service Contract form

Field	Description
Name	The name of the service contract.
Number	The internal unique identification number that is generated when the service contract is created. This number isn't editable.
Contract Reference	The externally assigned identification number assigned to the service contract.
Account	The name of the account associated with the service contract. **Note:** • A service contract can be associated with either an account or a consumer. • An account can be created if no account is found by selecting **New** on the Account form. For more information on the fields in the Account form, see Account form.
Consumer	The name of the consumer associated with the contract. **Note:** If no consumer record is found, you can create a consumer and add it to the service contract. For more information, see Create a consumer record.
State	The current state of the service contract: • Draft • Active • Expired • Canceled • Suspended
Start date	The activation date of the service contract.
End date	The date when the service contract ends.
Renewal root	A service contract can be renewed multiple times. Renewal root refers the service contract reference of the first or base service contract.
Renewed from	A service contract can be renewed multiple times. Renewed from field refers to the previous service contract that was renewed.

Service contract line form

You can create service contract lines in the Customer Contracts and Entitlements application by using the Service Contract Line form.

Service Contract Line form

Field	Description
Name	The name of the service contract line.

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Service Contract Line form (continued)

Field	Description
Contract	The internal unique identification number that is generated when the service contract is created. This number isn't editable.
Parent contract line	The internal unique identification number of the parent service contract line that is associated with the child service contract line.
Account	The name of the account associated with this service contract. **Note:** • A service contract can be associated with either an account or a consumer. • An account can be created if no account is found by selecting **New** on the Accounts form. For more information on the fields in the Account form, see Account form.
Location	The service or installation location.
Product specification	The product specification that is mapped to the sold product.
Number	The internal unique identification number of the service contract line that is generated when it is created. This number isn't editable.
Consumer	The name of the consumer associated with this contract. **Note:** If no consumer record is found, you can create a consumer and add it to the service contract. For more information, see Create a consumer record.
State	The current state of the contract line: • Draft • Active • Expired • Canceled • Suspended **Note:** • The state of the service contract line is inherited from its parent service contract. • Suspended state is only applicable when the contract line item is created via the Sales Customer Relationship Management workflow.
Start date	The date of activation of the service contract line.
End date	The date when the service contract line expires.
Product	The product model that is mapped to the product offering for the sold product.
Product offer	The product offering that is mapped to the sold product.

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Service Contract Line form (continued)

Field	Description
Sold product	The name of the sold product that is added to the contract line. **Note:** • When the service contract line item is created via the Sales Customer Relationship Management workflow, this field displays the sold product name from which the contract line is generated. • When service contract lines are created via integration, the field becomes invalid.
Renewal root	A service contract line can be renewed multiple times. Renewal root refers the service contract line reference of the first or base service contract line.
Renewed from	A service contract line can be renewed multiple times. Renewed from field refers to the previous service contract line that was renewed.

You can see the pricing information on a contract line for subscription contracts that helps you in reviewing your contract information.

Subscription & Pricing

Term (Months)	Validity period of having access to the service or product.
Subscription Start Date	Start date of the contract subscription.
Subscription End Date	End date of the contract subscription.
Price List	Price list associated for servicing the product.
Unit net price	The price for each unit within the product offering. The net price of a single unit of the sold product.
Pricing method	The pricing method for the selected sold product. It can be one-time or recurring. One-time pricing charges one fee for the product offering. Recurring pricing lets you set the pricing periodicity.
Periodicity	The frequency of the pricing method. It can be monthly, quarterly, semiannually, or annually. This field becomes valid only when the method in the **Pricing method** field is a recurring payment.
One Time Price	Represents one-time charges to be paid for the product or service.
Monthly Recurring Price	Represents the price that the customer is supposed to pay monthly during usage of the product.

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Subscription & Pricing (continued)

Annual Recurring Price	Represents the price to pay annually during usage of the product.
Cumulative one-time price	Represents one-time charges to be paid for the parent line and all the child line items.
Cumulative monthly recurring price	Represents monthly price for the parent line and all the child line items
Cumulative annual recurring price	Represents annual price for the parent line and all the child line items.
Cumulative net price	Represents the total price of the contract line by calculating the roll-up amount of all root lines.

Note:
When a service contract line item is created manually, the **Pricing method**, **Unit net price**, and **Periodicity** fields are invalid. They're only applicable when the contract line is created by the Sales Customer Relationship Management workflow or by integration. In that case, these fields are auto-populated with the details from the related sold product. The start and end dates of a child service contract line must be in between the start and end date of the associated parent service contract line.

Entitlement form

The Entitlement form can be used to create entitlements in Customer Contracts and Entitlements.

Entitlement form

Field	Description
Name	The name of the entitlement.
Product	The product associated with the entitlement.
Contract	The internal unique identification number that is generated when the service contract is created. This number isn't editable.
Account	The name of the account associated with this contract. **Note:** • A service contract can be associated with either an account or a consumer. • An account can be created if no account is found by selecting **New** on the Accounts form. For more information on the fields in the Account form, see Account form.
Location	The service or installation location.
Product specification	The product specification that is mapped to the sold product. **Note:** Configure this field manually on the entitlement form using form layout.

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Entitlement form (continued)

Field	Description
Consumer	The name of the consumer associated with this contract. **Note:** If no consumer record is found, you can create a consumer and add it to the service contract. For more information, see Create a consumer record.
Service contract line	The name of the related service contract line.
State	The current state of the entitlement: • Draft • Active • Expired • Canceled • Suspended **Note:** The state of the entitlement is inherited from its parent contract line.
Start date	The entitlement activation date.
End date	The date when the entitlement ends.
Sold entitlement	The name of the sold product that is added to the entitlement. **Note:** • If the entitlement is created manually, this field remains read-only. • The field must have the same state as its related entitlement. • The field becomes invalid when entitlements are created via integration.
Product offer	The product offering that is mapped to the order line item.
Renewal root	An entitlement can be renewed multiple times. Renewal root refers the entitlement reference of the first or base service entitlement.
Renewed from	An entitlement can be renewed multiple times. Renewed from field refers to the previous entitlement that was renewed.

You can see the pricing information on an entitlement for subscription contracts that helps you in reviewing your contract information.

Subscription & Pricing

Term (Months)	Validity period of having access to the service or product.
Subscription Start Date	Start date of the contract subscription.

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Subscription & Pricing (continued)

Subscription End Date	End date of the contract subscription.
Price List	Price list associated for servicing the product.
Unit net price	The price for each unit within the product offering. The net price of a single unit of the sold product.
Pricing method	The pricing method for the selected sold product. It can be one-time or recurring. One-time pricing charges one fee for the product offering. Recurring pricing lets you set the pricing periodicity.
Periodicity	The frequency of the pricing method. It can be monthly, quarterly, semiannually, or annually. This field becomes valid only when the method in the **Pricing method** field is a recurring payment.
One Time Price	Represents one-time charges to be paid for the product or service.
Monthly Recurring Price	Represents the price that the customer is supposed to pay monthly during usage of the product.
Annual Recurring Price	Represents the price to pay annually during usage of the product.
Cumulative one-time price	Represents one-time charges to be paid for the parent line and all the child line items.
Cumulative monthly recurring price	Represents monthly price for the parent line and all the child line items
Cumulative annual recurring price	Represents annual price for the parent line and all the child line items.
Cumulative net price	Represents the total price of the contract line by calculating the roll-up amount of all root lines.

Sold Product Covered form

The Customer Contracts and Entitlements application uses the Sold Product Covered form to add sold products or install base items that are covered to the Customer Contracts and Entitlements entities.

For information about adding sold products or install base items that are covered, see Add a sold product or install base item to a service contract.

Sold Product Covered form

Field	Description
Contract	The reference number of the associated service contract.

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Sold Product Covered form (continued)

Field	Description
Sold Product	The products that are sold to a customer. **Note:** • The list of sold products is filtered based on the account related to the contract or entitlement. • If a product is added, the **Install Base Items** field is automatically removed. • If a product isn't listed, you can add it. Select **New** in the Sold Products window. For more information, see Create a sold product.
Install Base Item	The related install base item. **Note:** • The list of sold products is filtered based on the account related to the contract or entitlement. • If an install base item is added, the **Sold Product** field is automatically removed. • If an install base item isn't listed, you can add it. Select **New** in the Install Base Item window. For more information, see Create an install base item.
Service contract line	The associated service contract line reference.
Entitlement	The associated entitlement reference.
Date added	The date that the product is added to the entity.
Date removed	The date until which the product is active on the entity.

Note:
The activation time period for the sold product or install base item covered must comply with the related entity's activation period.

Native Voice Control Taxonomy

Placeholder topic

Roles required for B2B2C data models

With the B2B2C model, organizations across industries can easily configure multi-level customer relationships and support business customers who, in turn, support their end consumers.

Role required: There are various different roles required for Customer Data Models for B2B2C based on the tasks that you perform.

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Roles required

Role	Tasks
sn_customerservice_agent (customer service agent)	Create a case for an account consumer from platform or Customer Service Management (CSM) workspaces to track issues. See Create cases for an account consumer.
awa_agent and sn_customerservice_agent	Accept a chat request on CSM workspaces and create a case from the chat interaction.
sn_customerservice_manager (customer service manager)	Associate consumers to an account to identify the end consumers who are using products or services. Associate install base items/sold products with account consumers to track the end consumer issues.
sn_acct_consumer.consumer (account consumer)	View sold products/install bases items to track the instances provisioned for your account and the products or services sold to your account. Create a case for install base items or sold products issues from the CSM portal. You get email notifications when a case is created, commented, resolved, or closed. See Create a case from the CSM portal.
sn_customerservice.customer (account contact)	View sold products/install bases items to track end consumer issues. SeeView install base information from the Customer Service Portal and View products information from the Customer Service Portal. Create a case for an account consumer to track consumer issues. See Create cases for an account consumer.

Roles for Outsourced Customer Service

Outsourced Service Providers (OSPs) are organizations that an enterprise engages to provide customer service to external customers. The OSPs manage cases for customers associated to their organization.

There are various roles required based on the tasks you perform.

Roles required

Role	Description
sn_csm_ocs.ext_manager (external OSP manager)	Onboard agents from service providers they belong to along with managing case assignments.

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Roles required (continued)

Role	Description
sn_csm_ocs.ext_agent (external OSP agent)	Agents can fulfill the cases belonging to the service provider organization they belong to.
sn_csm_ocs.manager (internal OSP manager)	Manages and monitors all the activities performed by OSPs. The manager can also access the OSP dashboards and act as an internal point of contact for the organization.

Note:
OSP agents and managers can perform their designated tasks using UI16 interfaces, as workspaces aren't supported at the moment.

Related topics

Set up Outsourced Customer Service

Outsourced Customer Service

Outsourced Service Provider dashboard

Customer Service Management roles

The Customer Service Management (CSM) application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between users. CSM is installed with certain basic and primary roles.

Customer Service Management provides several primary roles that support the following business models:

- Business-to-business (B2B): With this business model, you can support accounts and contacts. Additionally, you can create relationships and account teams to support your customers.
- Business-to-consumer (B2C): With this business model, you can support individual consumers.

These roles ensure access to data while maintaining data security for different types of business relationships.

Besides the Base and Primary roles (that are based on the Base roles), there are Explicit roles as well. You may have business requirements that can vary how you use the roles. The Explicit roles in CSM feature lets you assign both internal and external roles to external users. It is important to regularly review user role assignments to ensure that they are set according to your business requirements.

For more information about reviewing and updating user role assignments, see:

- KB0829930
- Fix external user role assignments

To learn more about managing Customer Service Management roles, see Components installed with CSM workspaces and Components installed with additional plugins for Customer Service Management.

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Service management agent [sn_esm_agent]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

- *assignment_workbench*
- *wm_read*
- *cmdb_read*
- *agent_schedule_user*
- *interaction_agent*

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Service management partner [sn_esm_partner]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

sn_esm_user

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Service management user admin [sn_esm_user_admin]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

sn_esm_user

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Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Service management admin [sn_esm_admin]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Service management user [sn_esm_user]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

- *snc_external*
- *sn_apptmnt_booking.appointment_booking_user*

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Service management partner admin [sn_esm_partner_admin]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

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Contains Roles

List of roles contained within the role.

- *sn_esm_user_admin*
- *sn_esm_admin*

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Customer service agent [sn_customerservice_agent]

Use this role to create cases, view and edit cases, and work with customers and subject matter experts to resolve cases. This role helps agents assist customers and partners with questions, issues, and problems.

Contains Roles

List of roles contained within the role.

- *knowledge*
- *chat_admin*
- *sn_customerservice.deescalation_requester*
- *timecard_user*
- *template_editor*
- *sn_esm_agent*

  Note:
  This role contains the cmdb_read role.

- *sn_shn.editor*
- *domain_expand_scope*

Groups

List of groups this role is assigned to by default.

Customer service agents.

Special considerations

Note:
A customer service agent typically supports a specific set of products across one or more communication channels. An agent can belong to one or more agent groups.

For more information see Roles installed with Customer Service Management.

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Customer service manager [sn_customerservice_manager]

Use this role with the additional responsibility for managing agents or agent groups and overriding agent actions. A customer service agent can also use this role with the additional capability of this role.

Contains Roles

List of roles contained within the role.

- *sn_customerservice_agent*
- *timecard_manager*
- *timecard_approver*
- *skill_admin*
- *sn_app_cs_social_social_profile_user*
- *sam*
- *sn_customerservice.consumer_agent*
- *asset*
- *sn_shn.admin*
- *sn_publications.approver*
- *contract_manager*
- *sn_app_cs_social_log_user*
- *awa_manager*
- *sn_majorissue_mgt.major_issue_manager*
- *email_client_quick_message_author*
- *workspace_admin*
- *skill_model_user*
- *sn_templated_snip.template_snippet_writer*
- *approver_user*
- *notify_view*

Note:
For customers upgrading to Xanadu, the approver_user role replaces the approval_admin role. Users with the customer service manager role can approve the approval requests that are assigned to them.

Note:
The notify_view role is added to the sn_customerservice_manager role only when the Chat Zoom Connector application is installed.

Groups

List of groups this role is assigned to by default.

Customer service managers, and Customer service agents with the additional responsibility for managing agents or agent groups and overriding agent actions.

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Special considerations

For more information see Roles installed with Customer Service Management.

Consumer service agent [sn_customerservice.consumer_agent]

Use this role to create cases, view and edit cases, and work with customers and subject matter experts to resolve cases. This role helps agents assist consumers with questions, issues, and problems.

Contains Roles

List of roles contained within the role.

- *sn_esm_agent*
- *chat_admin*
- *sn_shn.editor*
- *template_editor*
- *knowledge*

Groups

List of groups this role is assigned to by default.

All consumer service agents.

Special considerations

Note:
A consumer service agent typically supports a specific set of products across one or more communication channels. An agent can belong to one or more agent groups.

For more information see Roles installed with Customer Service Management.

Customer [sn_customerservice.customer]

Assign this role to customers for researching questions, issues, or problems. Customers can create cases, and view and edit existing cases. They can also view a list of assets belonging to their accounts.

Contains Roles

List of roles contained within the role.

- *sn_esm_user*
- *snc_external*

Groups

List of groups this role is assigned to by default.

All users with customer roles and access to a list of assets belonging to their accounts.

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Special considerations

For more information see Roles installed with Customer Service Management.

Customer administrator [sn_customerservice.customer_admin]

Use this Administrator role for a customer account. This user has access to data within the account.

Contains Roles

List of roles contained within the role.

- *sn_customerservice.customer*
- *sn_esm_user_admin*

Groups

List of groups this role is assigned to by default.

All users with an administrator role for a customer account.

Special considerations

For more information see Roles installed with Customer Service Management.

Role for REST APIs related to CSM web services [csm_ws_integration]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

snc_internal

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Customer case manager [sn_customerservice.customer_case_manager]

Assign this Customer role for managing the cases in an account and any related child accounts.

Contains Roles

List of roles contained within the role.

sn_customerservice.customer

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Groups

List of groups this role is assigned to by default.

All users with a case manager role for a customer account.

Special considerations

The customer case manager role includes the privileges of the customer role and adds the following privileges:

- Create a case on behalf of another contact in the account.
- View a list of cases belonging to the account.
- Edit cases belonging to the account.

Note:
The customer case manager role is not automatically added to the *sn_customerservice.contact_role_assignment* system property. To expose this role to customer and partner administrators, navigate to **Customer Service** > **Administration** > **Properties** and add it to this property.

For more information see Roles installed with Customer Service Management.

Partner [sn_customerservice.partner]

Assign this role to create a case for the partner's own account or on behalf of a customer account.

Contains Roles

List of roles contained within the role.

- *sn_customerservice.customer*
- *sn_esm_partner*

Groups

List of groups this role is assigned to by default.

All users serving customer accounts.

Special considerations

A partner can view and edit all of the cases they have created:

- For their own account.
- On behalf of customer accounts they are related to.

Note:
If you are establishing a new relationship between a partner and a customer, the partner or partner admin does not have access to historic cases created for the customer. This is because the historic cases do not have the Partner or Partner Contact fields populated on the Case form.

For more information see Roles installed with Customer Service Management.

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Partner administrator [sn_customerservice.partner_admin]

Assign this administrator role to a user with a partner account.

Contains Roles

List of roles contained within the role.

- *sn_customerservice.partner*
- *sn_customerservice.customer_admin*
- *sn_esm_partner_admin*

Groups

List of groups this role is assigned to by default.

All users with the admin role for a partner account.

Special considerations

The partner administrator can do the following:

- Access the data within the partner account.
- Access the data created by the contacts in their company in the customer account.
- Manage users for the partner account and for customer accounts.
- View all of the cases created by a partner.

For more information see Roles installed with Customer Service Management.

Consumer [sn_customerservice.consumersn_customerservice.consumer]

Assign this Consumer role to users for researching questions, issues, or problems.

Contains Roles

List of roles contained within the role.

- *sn_esm_user*
- *snc_external*

Groups

List of groups this role is assigned to by default.

All users with the assigned Consumer role.

Special considerations

Consumers can create cases and view and edit existing cases for products that they have purchased. They can also view a list of their products. For more information see Roles installed with Customer Service Management.

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Rate limit rule form for guest user access to catalog items

The REST API Rate Limit Rule form enables you to set the number of API requests in an hour by guest users.

REST API Rate Limit Rule form fields

Field	Description
REST API resource	Rest API resource. This field is auto-populated depending on the values entered in the other fields.
Name	Unique name for the rate limit rule.
REST API	REST API selected from the list of all external-facing REST APIs for the instance. Select **Service catalog**.
Version	Version of the REST API. Values listed depend on the REST API selected. Select **latest**.
Resource	Resource for the version. Values listed depend on the Version selected. For example, • Buy Item • Submit a Record Producer • Validate Variable Regex (If the item consists of a variable which requires Regex Validation) • Checkout Order Guide • Variable display value • Check requested for delegation on item
Active	Check box to indicate that the rate limit rule is active. Rate limit rules are activated by default as soon as you create them. You can deactivate rate limit rules to stop enforcing a rate limit or activate rate limit rules to resume enforcing a rate limit.
Request limit per hour	Maximum number of requests permitted in an hour.

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REST API Rate Limit Rule form fields (continued)

Field	Description
	Note: Whenever you update the value of this field, the ServiceNow AI Platform resets the count of requests to 0 and deletes all violations for the current hour.
Apply to	Users restricted by this rule: • **Single user** applies the rate limit to a specific user. • **Users with role** applies the rate limit to all users with a specific role. • **All users** applies the rate limit to all users. Select **Users with role**.
Role	Role to which the rate limit applies. Select **public**. **Note:** Appears only when you select **Users with role** at the **Apply to** field.

Data classification for Install Base Management

Enable customers to automatically classify sensitive data for their workflows. After data is classified, users can view the type of classification associated to different fields, whether internal, restricted, confidential, or public.

List of sensitive fields for sold products and install base

Table	Field	Plugin from which the field is coming	Classification
Sold product table (sn_install_base_sold_product)	offering_type	Product Catalog Management core (sn_prd_pm)	Internal
Sold product table (sn_install_base_sold_product)	relationship_type	Product Catalog Management core (sn_prd_pm)	Internal
Sold product table (sn_install_base_sold_product)	unit_of_measurement	Product Catalog Management core (sn_prd_pm)	Confidential
Sold product table (sn_install_base_sold_product)	product_specification	Product Catalog Management core (sn_prd_pm)	Internal

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List of sensitive fields for sold products and install base (continued)

Table	Field	Plugin from which the field is coming	Classification
Sold product table (sn_install_base_sold_product)	periodicity	Product Catalog Management core (sn_prd_pm)	Confidential
Sold product table (sn_install_base_sold_product)	pricing method	Product Catalog Management core (sn_prd_pm)	Confidential
Sold product table (sn_install_base_sold_product)	prd_offering	Product Catalog Management core (sn_prd_pm)	Internal
Sold product table (sn_install_base_sold_product)	service_offering	Customer Service with Service Portfolio Management (snc.csm_spm)	Internal
Sold product table (sn_install_base_sold_product)	household	Customer Service Household (com.snc.household)	Confidential
Sold product table (sn_install_base_sold_product)	service_organization	Service Organization (com.snc.service_organization)	Confidential
Sold product table (sn_install_base_sold_product)	provider_service_organization	Service Organization (com.snc.service_organization)	Confidential
Install base table (sn_install_base_item)	household	Customer Service Household (com.snc.household)	Confidential
Install base table (sn_install_base_item)	service_context	Proactive Customer Service Operations with Event Management (snc.proactive_cs_itom)	Internal
Install base table (sn_install_base_item)	health_status_last_updated	Proactive Customer Service Operations with Event Management (snc.proactive_cs_itom)	Internal
Install base table (sn_install_base_item)	service_context	Proactive Customer Service Operations with Event Management (snc.proactive_cs_itom)	Internal
Install base table (sn_install_base_item)	health_status	Proactive Customer Service Operations with Event Management (snc.proactive_cs_itom)	Confidential

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List of sensitive fields for sold products and install base (continued)

Table	Field	Plugin from which the field is coming	Classification
Install base table (sn_install_base_item)	service_organization	Service Organization (com.snc.service_organization)	Confidential

Workforce Optimization for Customer Service

Manage and maintain the productivity of your workforce from a single application using Workforce Optimization for Customer Service. With this application, you can efficiently route work to your team, manage your team's skills and schedules, and monitor their performance.

Watch this short video to see how managers use Workforce Optimization for Customer Service.

https://player.vimeo.com/video/1115317175?h=43792d01cd&badge=0&autopause=0&player_id=0&app_id=58479

The application is available on configurable workspaces. Administrators can configure and customize the workspace using the application capabilities to complete the service objectives efficiently.

Workforce Optimization for Customer Service

Customer Service Management (CSM) enables you to do these tasks:

- Assess real-time operations and performance of teams and agents across different channels and queues.
- Keep track of ongoing work and provide real-time help to team members for better customer experience.
- Helps organizations ensure that their managers only see the data and views of relevant teams
- Monitor and measure team performance and provide feedback using assessments.
- Predict and recommend skills for agents.
- Identify opportunities to coach and train your teams.

Key Features

Managing work using channels and queues

Manage pending work items from customers, daily work routine of agents, and balance work load between agents adhering to promised SLAs. Automatically route and assign work items to agents based on availability, capacity, and skills. Monitor the health of your queues reviewing real-time performance and jump in to help with escalations.

Automating employee coaching and training

Assess your team's performance#and set coaching plans to improve their skills.

Integrated application data

Drive workforce optimization effectively by managing schedules, shifts, and queues for your teams. You can assess skills, automate agent recommendations based on those skills, and provide mentoring opportunities for employees.

Scheduling

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Manage the scheduling for your organization from a central location. You can create shift plans, schedule plans, assign agents to shifts, and publish the schedules. Manage teams' approvals, swap agents' shifts, and forecast agent staffing scenarios.

Team performance

You can organize each of your teams into assignment groups. You can define a set of key Performance Indicators (KPIs) to analyze the performance of all groups within that team. From a central location, you can drill into the metrics for a group, an agent, or an incident within that team.

Get started

Explore	Configure	Use
Learn about how managers use Workforce Optimization for Customer Service.	Plan and configure your implementation.	Schedule, coach and train your agents to work on customer cases.

Exploring Workforce Optimization for Customer Service

Use Workforce Optimization for Customer Service to optimize your workforce and manage your teams efficiently.

Manage and monitor the real-time work being done by your agents across different channels and queues. Provide timely help to your team members to solve cases faster and help with complex customer issues. Coach your teams so that they gain the skills that let you address the demands from your customers. Efficiently schedule your teams to provide better coverage with integrated channel management.

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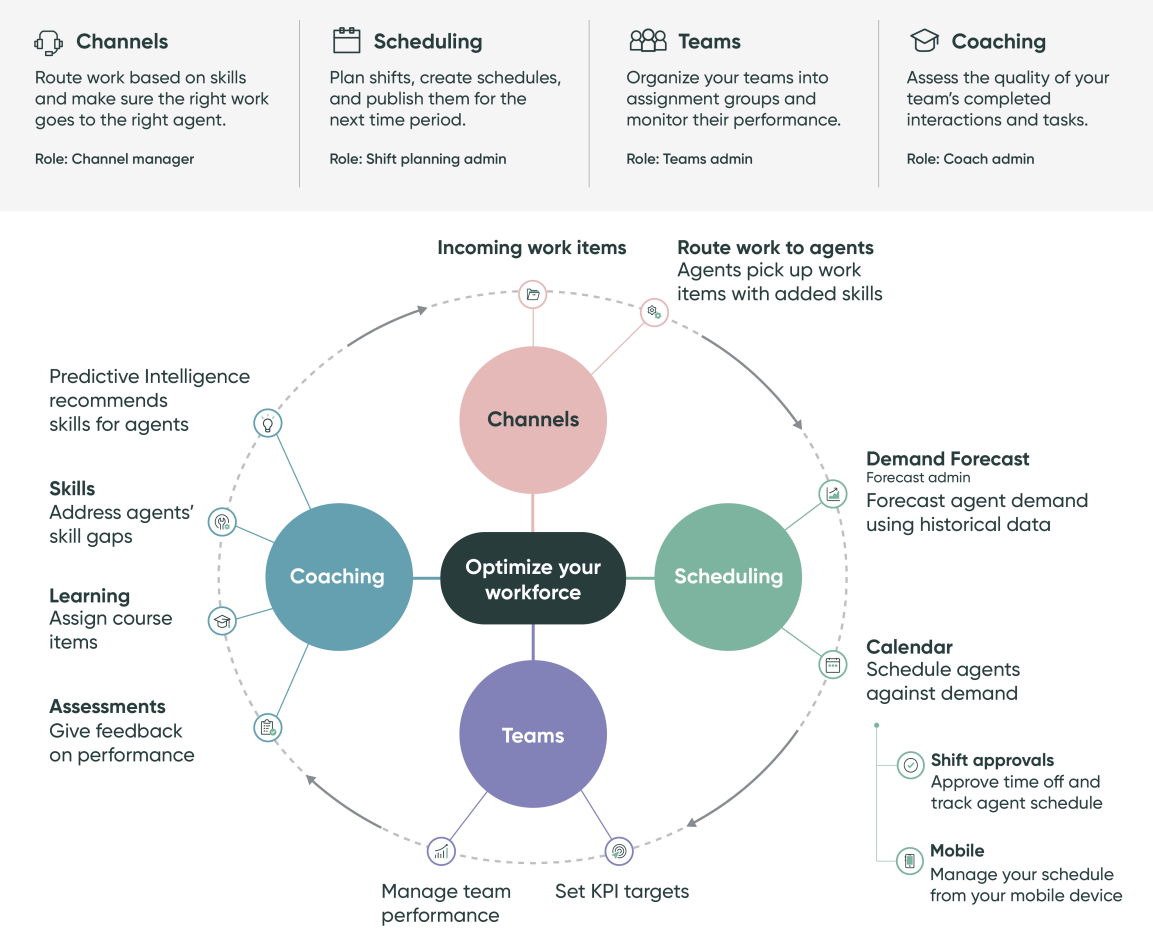

As a manager, you can monitor the demand for agents and skills in your organization to resolve issues. Assess agent skills, identify areas where they need improvement, and provide training to enhance their skills set. Track your teams performance, and manage the schedule of all agents in your assignment group—all from a unified location.

As an agent, you can manage your own schedule, access the schedule of your peers and request time off or shift swaps.

Legacy Manager workspace landing page

The landing page provides a real-time overview of the current workload and the team performance. View the following metrics using advance score cards, combo cards, and line charts having multiple data sets such as:

- KPIs: Number of cases resolved on first contact, Number of cases not updated last 30 days, Number of resolved cases re-opened, Number of escalated open cases
- Work Items: Total open cases, Waiting work items, and Help requested
- Agents: Total agents, Time-off requests, Shift swap requests
- Open Cases: Open case by backlog (graph of open and unassigned cases), Open case by age (graph of 10-15 days, 15-30 days, more than 30 days)
- Critical open cases: You can see the list of open critical cases that are refreshed every 60 seconds.

For more information, see Manager Workspace Landing Page.

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Manager workspace landing page

The landing page offers a real-time view of key performance metrics, team updates, and real-time alerts that improve collaboration. View metrics using various score cards, donuts, gauge, line charts, and bars having multiple data sets. For more information, see Manager Workspace landing page.

Channel management

Monitor your teams in real time and jump in their chat conversations to help when there's a need.

Using Channels, you can also:

- Review the real-time performance of your teams across various channels and queues.
- Review pending work items and manually allocate some of the work items to available agents.
- Monitor actual work being performed by your team members.
- Monitor the status of the queues.
- Track and change real-time presence and capacity utilization of your team members.

For more information, see Channel Management in Workforce Optimization for Customer Service.

Scheduling

Access your teams' calendar to see which agents are scheduled for coverage and which agents have taken time off.

Using Scheduling, you can also:

- Assign agents to shifts.
- Define break time.
- Preview and publish team schedule.
- Approve agent time-off or shift-swap requests.
- Create on-call shifts and assign primary, secondary rotation groups to handle escalation scenarios.

For more information, see Scheduling in Workforce Optimization for Customer Service.

Schedule Adherence

Access your teams' calendar to see which agents adhered to their planned schedules and make timely decisions to increase your team's performance by setting expected adherence targets.

Using Schedule Adherence, you can also:

- Configure and tweak the schedule adherence and conformance formulas and properties so that you can customize them for your organization.
- Access the schedule of all of your teams from one location and gain insights on whether your team is complying with published schedules.
- Analyze the historical time attendance of your team members.
- View planned versus actual historical data for your team and individual agents.

For more information, see Schedule Adherence in Workforce Optimization for Customer Service.

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Demand Forecasting

Forecast the demand for teams and predict resources based on historical data.

Using Demand Forecasting, you can also:

- View the agent staffing forecast at 15, 30, and 60-minute intervals on the team calendar.
- Adjust and prioritize schedules, tasks, breaks, and meetings for the agents without impacting service objectives.
- Use historical data and forecast the contact volumes (cases and interactions) at 15-minute intervals.

For more information, see Demand Forecast in Workforce Optimization for Customer Service.

Teams

Monitor performance trends for your teams using Key Performance Indicator (KPI) groups. Create a set of KPIs and apply them to all groups within a team and assess team performance from one location.

Using Teams, you can also:

- Identify all the teams you manage as well as the ones you have visibility into.
- Analyze the KPIs that are crucial for your team.
- Drill into agents within each team and monitor their performance.
- Access each agent's profile to view details such as their manager, peers, and assignment groups.
- Drill down into each agent's skills or suggest them for coaching.

For more information, see Teams in Workforce Optimization for Customer Service.

Coaching and Skills Assessment

Enhance the quality of work done by your agents using Coaching. Assess agent skills and recommend the ones that they require to resolve issues. Identify coaching opportunities based on the recommendation and train the agents to acquire those skills.

Using Coaching, you can also:

- Automate the scoring, grading, and assessment of agent skills.
- Use coaching opportunities to create assessments.
- Track training assigned to agents based on their assessments.
- Analyze the skill gap and recommend training.
- Assign courses to agents from third-party learning management systems (LMS), such as Udemy, Pluralsight, and Cornerstone OnDemand.

For more information, see Coaching in Workforce Optimization for Customer Service.

Legacy Manager Workspace landing page

The Manager Workspace landing page displays metrics of the on-going work and helps managers to take informed decisions.

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Get an overview of the Manager Workspace landing page and also learn on how to configure it using UI Builder as per your business needs.

Workforce Optimization for Customer Service Manager workspace landing age

The landing page provides the real-time data of the current workload and the team performance such as:

- KPIs

  Number of cases resolved on first contact

  Displays the number of cases that were resolved by agents on first contact by the customer.

  Number of cases not updated last 30 days

  Displays the number of cases that have been in the same state for 30 days.

  Number of resolved cases re-opened

  Displays the number of cases that have been re-opened by the customers after they were resolved.

  Number of escalated opdaaen cases

  Displays the number of open cases that are escalated by the customer or internally.

  Each score card also displays a graph that you can click to further analyze the cases.

- Work Items

  Total open cases

  Displays the total number of open cases. The combo card also displays the break-up of the open cases according to the current status: **New**, **Open**, and **Awaiting Info**.

  Waiting work items

  Displays the number of work items that haven't been assigned to agents yet.

  Help requested

  Displays the number of interactions where agents need manager's assistance to close the cases.

- Agents

  Total agents

  Displays the number of agents in the team and the break-up of agents according to current status: **Available**, **Offline**, **Break**, and **Away**.

  Time-off requests

  Displays the number of time-off requests by the agents that are pending the manager's approval.

  Shift swap requests

  Displays the number of requests by the agents to swap shifts that are pending the manager's approval.

- Open cases

  Open case by backlog

  Displays a graph of the open cases and unassigned cases in the last 12 months.

  Open case by age

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Displays the graph of open cases that were created in the last 10-15 days, 15-30 days, and more than 30 days.

You can click the line charts to view the list of cases.

- Critical open cases: Displays the list of open critical cases that were updated least recently. Click **View all** to view all the critical cases.

Related topics

Create a Manager Workspace landing page

Legacy Manager Workspace landing page

Manager Workspace landing page

The Manager Workspace landing page provides managers with real-time alerts and key metrics that reflect the overall health and performance of the organization. By consolidating work and resource management data, managers can effectively oversee team performance, optimize agent utilization, and drive continuous improvement.

The Manager Workspace landing page showcases the various available widgets.

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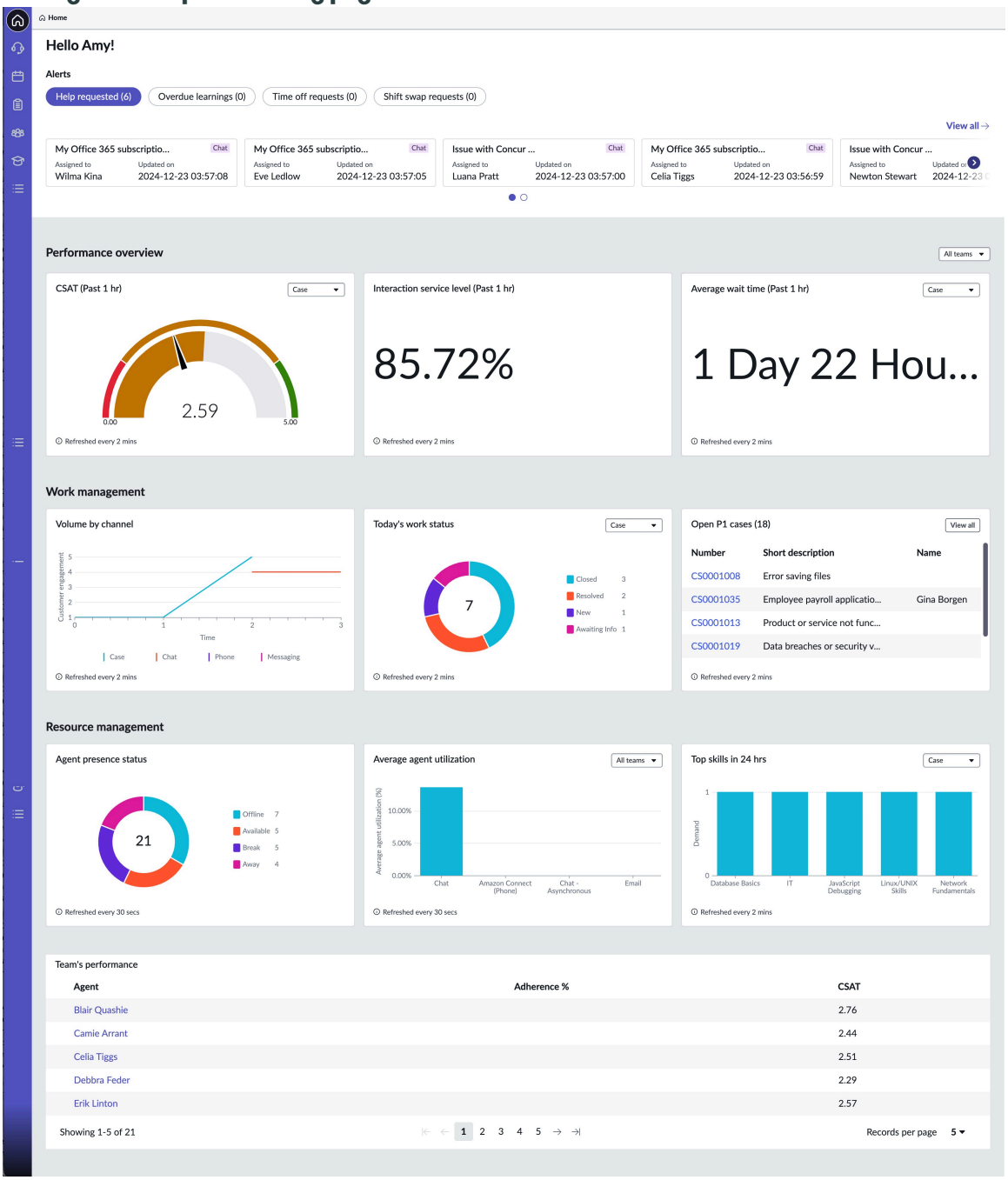
Manager Workspace landing page



The landing page provides the real-time data of the current workload and the team performance.

Alerts on the Manager Workspace landing page

Alert	Description
Help requested	View the help requests from agents and act on them. This feature improves visibility into ongoing challenges, facilitating quicker responses to team members and improving collaboration.
Overdue learnings	View the training tasks that remain incomplete past their deadlines. This feature helps you to identify training gaps and verify timely skill development.

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Alerts on the Manager Workspace landing page (continued)

Alert	Description
Time off requests	List of submitted time-off requests pending for approval. This feature helps in managing employee leave, making it easier to plan and coordinate within your team.
Shift swap requests	Access the submitted shift swap requests to approve, reject, or add comments as needed. Once a request is approved or rejected, it's removed from the list. This feature enables you to handle shift swap requests effectively.

Key metrics on the Manager Workspace landing page - Performance overview

Key metrics	Description
CSAT (Past 1hr)	Review customer satisfaction (CSAT) scores across various channels, including case, chat', voice and messaging. Additionally, you can filter CSAT by teams. This feature enables you to analyze customer feedback and improve service.
Interaction service level (Past 1hr)	Displays service level of customer interactions. This feature helps identify improvement areas and enhances overall service quality, resulting in increased customer satisfaction.
Average wait time (Past 1hr)	Monitor the average wait time for customer interactions across various channels, including voice, case, chat, and messaging. This feature helps you identify trends and make informed decisions to improve service efficiency.

Key metrics on the Manager Workspace landing page - Work management

Key metrics	Description
Volume by channel	Analyze the volume of interactions segmented by different channels, such as case, chat, voice, and messaging. This feature provides insights into customer engagement trends, helping you assess the resource needs.
Today's work status	Monitor the status of ongoing cases and interactions. This feature enables you to effectively track the progress ongoing work items.
Open P1 cases	Access the active priority 1 (P1) cases that require your immediate attention, listed with the longest-open cases first. Select **View All** to see all critical cases. This feature enables you to identify and address urgent issues.

Key metrics on the Manager Workspace landing page - Resource management

Key metrics	Description
Agent presence status	Check the current availability of your agents, indicating whether they're active, away, or offline. This feature helps you to monitor workforce engagement and optimize resource allocation for effective customer support.

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Key metrics on the Manager Workspace landing page - Resource management (continued)

Key metrics	Description
Average agent utilization	Track the current average utilization rate of agents to assess how effectively their time is spent on productive tasks. Additionally, you can also filter average utilization by teams. This feature helps you to balance your workload and optimize resource allocation.
Top skills in 24 hrs	View the most frequently utilized skills over the past 24 hours. This feature helps you identify high-demand skills and guide or plan training efforts.
Team's performance	View important metrics for individual team members, including agent adherence percentages and CSAT scores. This feature helps you evaluate each agent's contributions and confirms they meet scheduled commitments and customer expectations.

Related topics

- Create a Manager Workspace landing page
- Legacy Manager Workspace landing page

Channel Management in Workforce Optimization for Customer Service

Learn how you can use channel management capabilities to monitor important metrics across different channels and queues.

Monitor the real-time health of your channels and queues by reviewing waiting customers, available agents, the work being done by your team members (or agents in your teams) and collaborate with them to solve complex issues faster.

The following channel management snapshots provide you with a quick overview of the real-time performance monitoring and drill-down capabilities.

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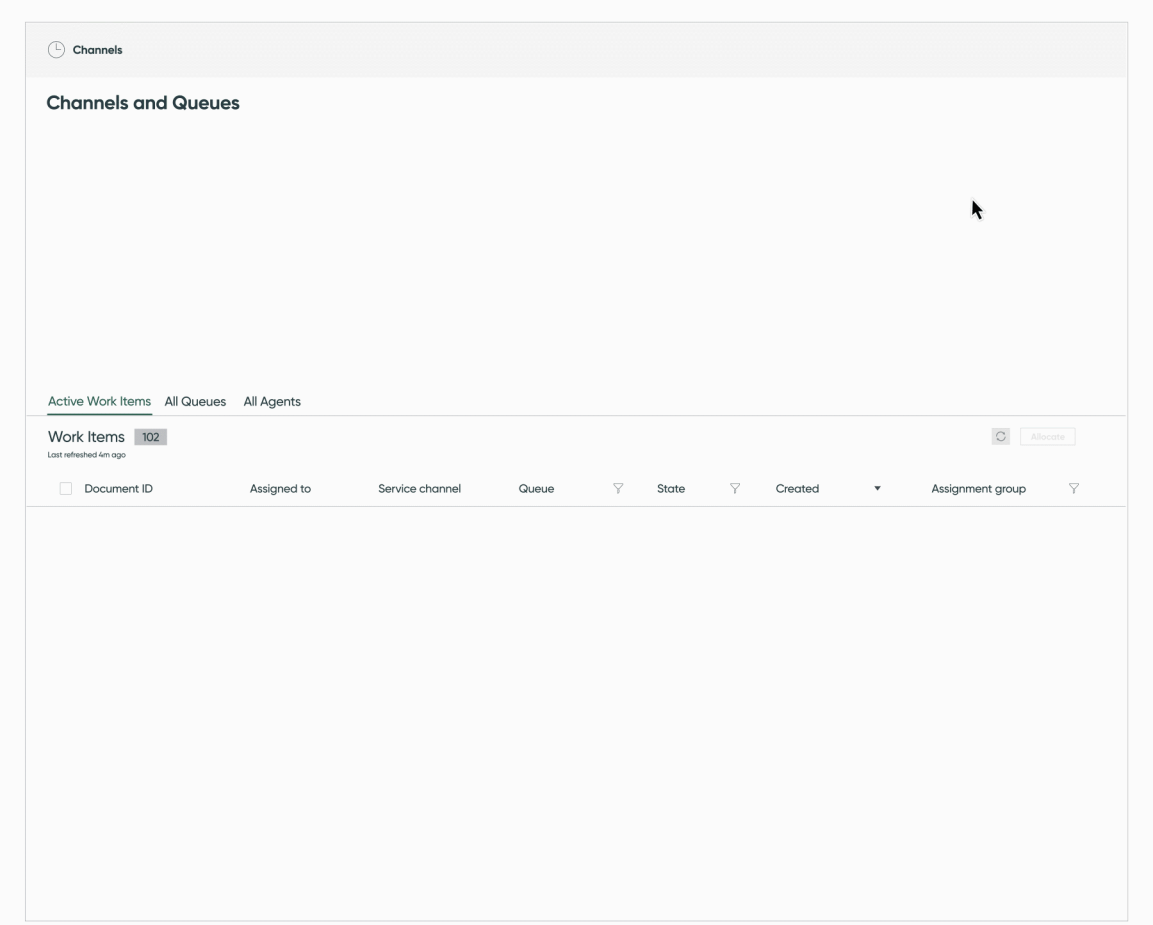

As a channel management user, you can:

- Track real-time performance of your teams using key performance indicator reports in service channels and queues.
- Review real-time performance as the team is actively working on tasks across channels and queues.
- Drill down on work items and jump in to provide timely help to team members via chat whisper or by adding work notes to a task.
- View agents' availability and their workload.
- Monitor pending work items in the queue and act when required.
- Assign work items manually to agents.
- Filter the applicable channels, KPIs, work items, queued work, and agents using the Assignment Group filter functionality.
- Track real-time performance of customer service on consumer messaging channels including WhatsApp, Facebook, LINE, Amazon Connect, and SMS.
- Track and change real-time presence of agents so that work items are routed more efficiently.
- Drill down the channel specific KPIs for further analysis.

As a channel management administrator, you can:

- Create service channels and queues.
- Associate assignment rules to queues.
- Configure KPIs for service channels and queues.

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- Configure the supervisor lists.
- Customize the channel management page according to your requirements using the UI Builder.

Related topics

Setting up service channels and queues

Using Channel Management in Workforce Optimization for Customer Service

Example- Channel management using Workforce Optimization for Customer Service

Understand how you can monitor important metrics (or key process indicators) across different channels and queues. Manage the work being done by your team members (or agents in your teams) and collaborate with them to solve complex issues for your end-customers.

The example employee manages Customer Service operations for a large organization and has 12 teams. Each team has anywhere from 8 through 15 agents. The employee must ensure that incoming work gets effectively routed to the right groups across all channels. This can be done by setting up Advanced Work Assignment as per the business requirement.

Once the employee has configured Advanced Work Assignment (AWA) appropriately, they can add key performance indicators (KPIs) to the channels and queues, and monitor the operational performance of the teams in real time.

The employee in this example can then keep a track the teams' ongoing work, assign pending work items manually to agents, and join chat conversations to assist agents.

Get an overview on how you can manually allocate work items.

Monitor work in Channel Management

Get an overview on how managers can monitor agents.

Monitor agents in Channel Management

Scheduling in Workforce Optimization for Customer Service

Learn how you can plan shifts that include break time for your agents to effectively manage their schedule in Workforce Optimization for Customer Service. Publish schedules to view the agent schedules on the team calendar.

Manage the scheduling for your organization from a central location. Scheduling makes managing team calendars transparent and collaborative between managers and agents. Use On-Call Scheduling with Workforce Optimization for Customer Service to have dedicated team members to resolve issues as they arise.

Managers can use demand forecasting feature to view their agent staffing forecast at 15-, 30-, and 60-minute intervals on the team calendar. Managers can monitor real-time schedule adherence of the agents using clock-in and clock-out events.

The image below provides a high-level overview of the Scheduling application.

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Scheduling

Manage on-call and regular shifts from a central location. Get the coverage you need and have dedicated agents to resolve issues as they arise.

Plan
Create shift plans that automatically stagger breaks to maximize coverage

Schedule
Create schedule plans, view them in real time, and publish the schedule for the next time period

Manage
Create time-off requests and swap shifts for your agents without going through an approval process

Forecast
Model demand scenarios to analyze agent forecast and view updated demand on the calendar

View team schedule
Know when your peers are working and when they are taking time off

Add events
Create events such as a meeting, training, or an ad hoc work shift

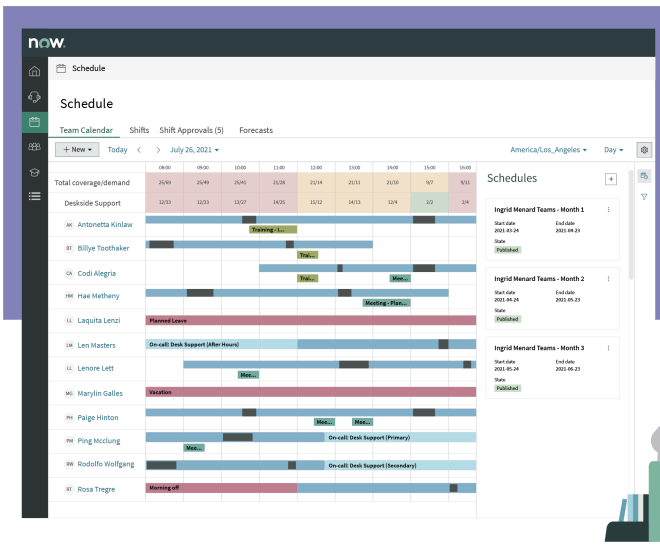
Request time off
Send a request for the span of time you want to take off

Swap shifts
Trade shifts with your peers

Scheduler
sn_shift_planning.admin

Agent
sn_shift_planning.agent

The image below provides a high-level overview of the tasks schedulers and agents can perform on the calendar.

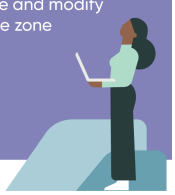


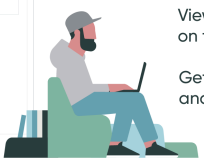
Scheduler

Assess planned coverage and see which agents cover regular and on-call shifts for your groups

Gain visibility into your teams' schedule and modify published schedules in the agents' time zone

See overall coverage and demand for each group you manage





Agent

View your regular and on-call shifts on the calendar and request time off

Get visibility into the schedule of your peers and swap shifts with them

As a manager, you can:

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- Create shifts to ensure customer coverage for the required span of time.
- Add breaks to the shifts that automatically stagger agent availability for those shifts.
- Preview the schedule and make necessary changes before publishing it to your agents.
- Access the schedule of all of your teams from one location.
- Modify the planned schedules when your team members inform you about their changed availability.
- Manage the schedules of team members working across different time zones.
- Monitor schedule adherence of your agents looking at the time worked summary and time attendance.
- Filter the members based on location, skills and assignment groups.
- Adjust the planned schedules and manage approvals through mobile application.
- Create on-call shifts and assign primary, secondary rotation groups to handle escalation scenarios.

As an agent, you can:

- Look up your schedule and request time off when required.
- Swap your shift with one of your peers.
- View your calendar and your team's calendar across the weeks to plan your work.
- Synchronize your team calendar and events with Microsoft Outlook.

Related topics

Setting up Scheduling in Workforce Optimization for Customer Service

Scheduling in Workforce Optimization for Customer Service

Example - Scheduling using Workforce Optimization for Customer Service

Understand how you can set up and publish agent schedules and how your agents can manage their own schedule based on an example.

A manager for a large Customer Service operation is responsible for 12 teams. Each team has from 8 through 15 agents. At any given point, the manager needs visibility into the teams' schedule. The manager must also be able to create shifts, and approve or reject shift-swap or time-off requests from the team.

The manager can manage the teams' schedule using **Scheduling**. Team members can also manage their own schedules effectively by requesting shift-swaps or time off.

The manager can review schedules by performing the following steps from one central location:

1. Create shift plan.
2. Create a schedule plan.
3. Assign agents to work shifts.
4. Publish the schedule.
5. Approve teams' requests.

Agents make requests to change the schedule or take time off. For more information, refer to Track and manage your teams' schedule.

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Get an overview of how to you can create shift plans and assign agents to the shifts using the schedule plan. For more information, refer to Create Shift Plans on YouTube.

Get an overview of how you can monitor shifts and schedule for your entire team from a single location. For more information, refer to Monitor Team Schedule on YouTube.

Get an overview of how agents use the workspace to manage their schedule. For more information, refer to Agent Schedule on YouTube.

For detailed information on creating and managing schedules using Workforce Optimization for Customer Service, refer to Scheduling in Workforce Optimization for Customer Service.

Schedule Adherence in Workforce Optimization for Customer Service

You can use schedule adherence to monitor whether your team members are adhering and conforming to the schedules and to improve the operational efficiency of your organization.

Clock-in and clock-out events are generated as agents change their availability status. The time between the clock-in and clock out events are aggregated to create schedule adherence and conformance reports.

Adherence measures how closely agents follow their schedule to complete their assigned work. Conformance measures the agents' total time at work compared to the total scheduled time period, regardless of adherence.

Schedule adherence helps your organization to do the following actions:

- Measure whether the effort spent on demand forecasting and scheduling team members is used in an optimal manner.
- Plan for more effective staffing needs in the future based on your insights into the historical use of agent resources.
- Discover coaching opportunities for your agents when there are gaps in their adherence. For more information, see Coaching in Workforce Optimization for Customer Service.

As a manager, you can do the following actions:

- Access the schedule of all of your teams from one location and gain insights on whether your team is complying with published schedules.
- Increase your team's performance by setting expected adherence targets.
- View the time attendance of your agents by looking at such details as clock-in and clock-out times.
- Analyze the historical time attendance of your team members.
- View planned versus actual historical data for your team and individual agents.
- Modify the clock-in and clock-out times of your agents.

As an administrator, you can set the threshold percentages and change the formulas for calculating schedule adherence and conformance.

Schedule Adherence for Customer Service in action

Watch this short video to understand how managers and agents use Schedule Adherence in Workforce Optimization for Customer Service

Schedule Adherence for Customer Service

Consider the following steps to determine the schedule adherence and conformance:

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1. The administrator sets the *Agent Time Work Event Trigger* business rule as active to record the clock-in and clock-out times of customer service agents.
2. An agent works for the Customer Service operations team and reports to a manager. Let's assume this scenario is a typical work day:
   a. The agent logs in to CSM Agent Workspace.
   b. The agent changes the presence status to **Available** and starts work. The clock-in event gets generated.
   c. The agent changes the presence status to **Break** and goes for lunch. The clock-out event gets generated.
   d. When the agent comes back from lunch and answers a phone call, the presence state becomes **Busy** and the clock-in event gets generated.
   e. The agent then logs out from CSM Agent Workspace or changes the presence status to **Offline**. The clock-out event gets generated.
   f. At the end-of-the-day, the agent's time worked summary is generated with key performance indicators (KPIs), such as Start Time, End Time, Planned Work, Time Not Worked, Available Non Planned Time, Time Worked, and Adherence%, Conformance %.
3. The agent's manager logs in to Manager Workspace to view the agent's time worked in the **Team Calendar**. The manager can also view the agent's actual time worked and working pattern for all historical days. If required, the manager can coach the agent to a desired performance that fits in with the team culture.

Related topics

Configure properties for schedule adherence and conformance

Monitor schedule adherence of your agents

Analyze adherence and conformance from the time worked summary

Work scheduler in Workforce Optimization for Customer Service

Manage the work of all your teams from a central location. You can get visibility into your entire teams' workload. From your team's calendar, you can assess the task complexity level and work capacity, and assign or reassign work.

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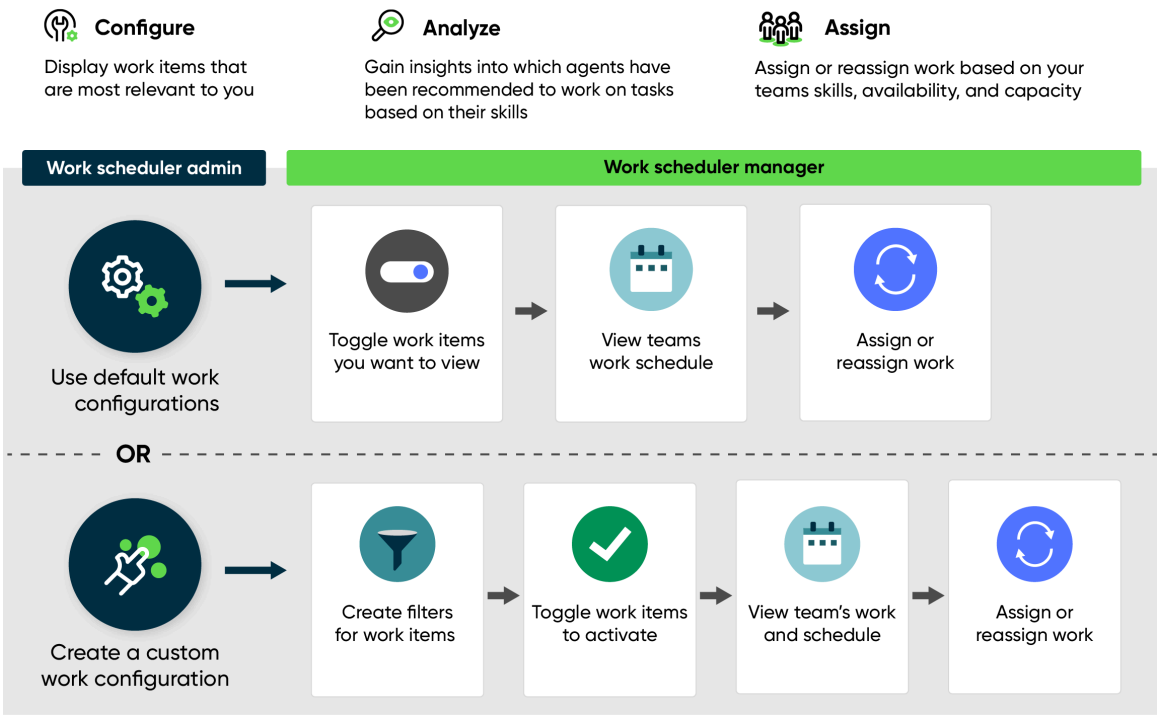
The following image provides a high-level overview of Work scheduler.



As an administrator, you can:

- Create work configurations that managers can view in their work queue. For information on setting up work configurations, see Set up a work configuration.
- Create work scheduler cards and configure them based on your needs. For more information, see Create a Work scheduler card using the Next Experience UI Builder.
- Associate the work scheduler cards with work configurations. For more information, see Associate a work scheduler card to the work configuration.

As a manager, you can:

- Create custom preset filters to prioritize your work items based on what's important for you.
  - You can define the filters based on task type. For example, you can set filters for incidents that are categorized as Priority 1 and Priority 2.
  - You can also define filters based on use cases. For example, if you want to prioritize catalog tasks from a VIP business unit over other units, you can define those conditions for the filter.
- Configure your work queue to display the most relevant work items.
- Assign or reassign work items based on your teams' shifts, and skill recommendation.
- Assign work items based on your teams' shifts.
- Add criteria for matching rules and then rank team members and assign work items based on those rules.

Getting started with Work scheduler in Workforce Optimization for Customer Service

Easily find tasks you need to complete in the Scheduling module.

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Work scheduler

Benefit	User	Finding tasks to complete in Work scheduler
Activate Work scheduler in Workforce Optimization for Customer Service.	admin	Activate Work scheduler
Refer to the components such as system properties used in Work scheduler.	Any Work scheduler role	Understand components used in Work scheduler in Workforce Optimization for CSM
Set up Work scheduler for the Work scheduler managers so that assign work items based on their teams' skills, availability, and capacity.	Work scheduler admin	Set up Work scheduler in Workforce Optimization for CSM
Manage your teams' work assignments easily by customizing your work queue to display the most relevant work items.	Work scheduler manager	Use Work scheduler in Workforce Optimization for CSM

Demand Forecast in Workforce Optimization for Customer Service

Demand Forecast enables managers to view their agent staffing forecast at 15-, 30-, and 60-minute intervals on the team calendar. This feature enables managers to adjust and prioritize schedules, tasks, breaks, and meetings for their agents without impacting service objectives. Learn how you can use Demand Forecast to predict resources based on historical data.

Overview of the Demand Forecast application. Demand Forecast

The 15-, 30-, and 60-minute intervals are color-coded to display the status of agent staffing such as understaffing, overstaffing, and well staffed. Understaffed slots are color-coded red, overstaffed slots are color-coded yellow, and well-staffed slots are color-coded green. Slots that do not need staffing are color-coded grey. Managers must ensure adequate staffing in understaffed slots and optimize the resources in overstaffed slots.

For example, a manager of the Service Support group can see that the slot between 07:00 and 07:15 is color-coded red and is understaffed. The demand is for nine resources and the coverage is eight resources. The slot is understaffed by one resource. That slot displays **9** and **-1**. To avoid the understaffing of that slot, the manager allocates a resource who is on a break. The manager reschedules the break of that resource from 07:00 to 07:30. The 07:00 to 07:15 slot is now well staffed and color-coded green.

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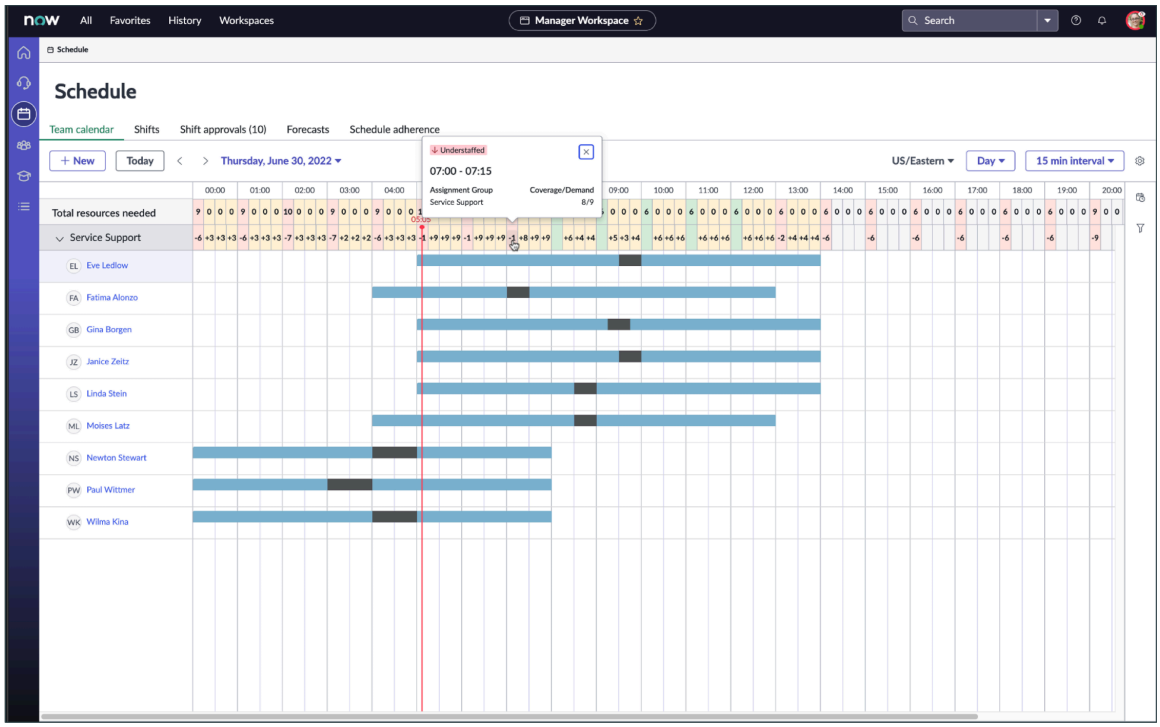
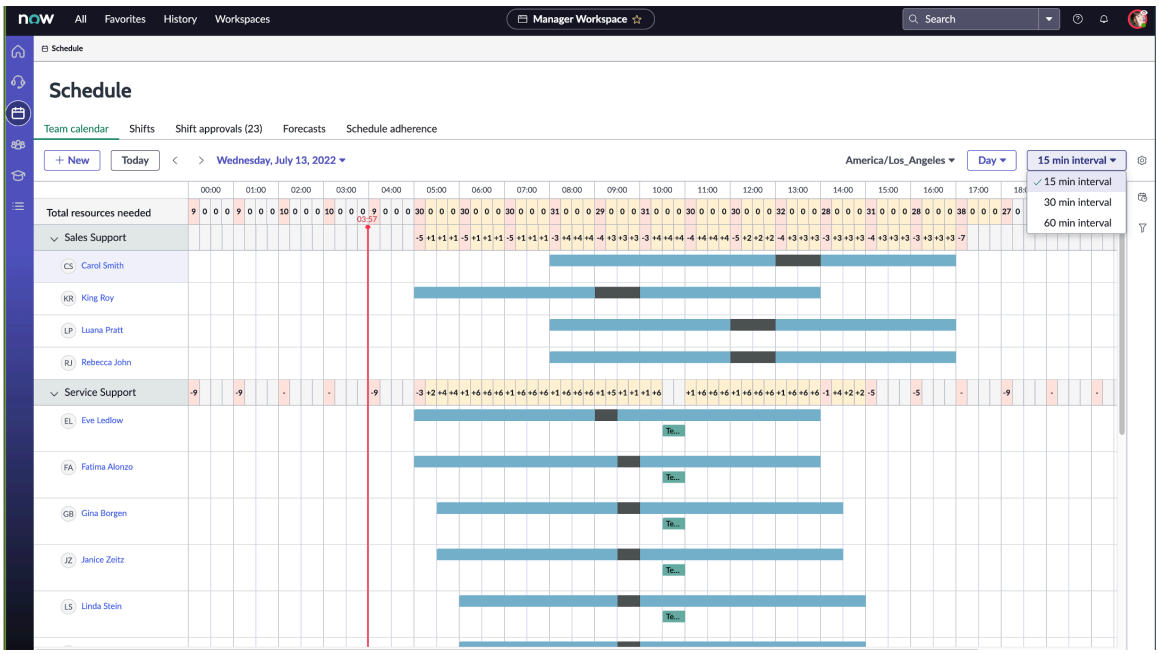
Demand Forecast view for a team



The manager of all the teams can view the staffing forecast of the teams and at the individual level in the 15-, 30-, and 60-minute intervals according to the requirement. This view helps managers to staff their teams adequately.

Demand Forecast view for all teams



The Demand Forecast application uses MetricBase to forecast the demand for teams.

When you create Demand Forecast configurations, the application creates these metrics:

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- Staffing forecast: The forecast on the number of agents that a manager must handle cases and interactions in 15-, 30-, and 60-minute intervals.
- Volume forecast: The historical data and the forecast of the contact volumes (cases and interactions) at 15-minute intervals.

Note:
You can create forecast configurations for any table.

Analyzing Demand Forecast resource prediction

Watch this video to see how you can model demand scenarios and view updated demand on the calendar.

Demand Forecast - model demand scenarios.

As a manager with the forecast admin role, you can create forecast parameters in the Manager Workspace. Modify forecast parameters to visualize forecast data and preview time-series data before publishing it. You can create any number of forecasts to preview the time-series data in real time.

You can also make manual adjustments to tweak the forecast and analyze the forecast pattern. Overlay the manual adjustments on the visualized forecast data and view the time-series data to analyze the forecast model. For example, you have a specific pattern for the upcoming week that has a national holiday in the middle of the week where you need more agents. Because you expect the sales to go up, you can manually tweak the forecast to increase it by 10% and analyze that data.

Demand Forecast

The Demand Forecast application includes the following modules:

Demand Forecast application modules

Module Name	Description
Data Collection Definitions	Set conditions to define the data that you want to collect for cases, interactions, or any table.
Formula Parameters	Add the parameters to be defined in the formula to calculate the resources from the forecast.
Resource Conversion Formula	Add formulas to convert forecast to resources at 15-, 30-, and 60-minute intervals.
Group Forecast Configuration	Associate the configured formula for resource conversion to groups.

As a user with the sn_agent_forecast.admin role, you can forecast the number of agents that you need for a shift.

To forecast the demand:

1. Collect data by defining data collection definitions.
2. Set values for forecast parameters and generate volume forecasts.
3. Create formulas to convert volume forecasts into the number of resources that you need at 15-, 30-, and 60-minute intervals.

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4. Associate the formulas to assignment groups.
5. View the predicted demand on the calendar.

Note:
See the Demand Forecast section in Components installed with Workforce Optimization for Customer Service for information on the default components and configurations.

Collect data by defining data collection definitions

Use the Data Collection Definitions module to define the data that you want to collect for forecasting agents.

- Use the *Collect daily data for automated forecast configurations* scheduled job to gather data for the metrics defined in the data collection definitions. The scheduled job fetches the records from the previous day for every 15-minute interval for all assignment groups and stores it in the MetricBase.

  You can access the time series for the collected data using the MetricBase `list` in the Group [sys_user_group] table. For more information on accessing MetricBase data, see Access MetricBase data using the list command.

- Use the *Collect historical data for automated forecast configurations* on-demand job to collect historical data at 15-minute intervals. This job collects data for the past three years.
- Use the *Forecast resources for future* scheduled job to forecast the resources based on the collected data and stores the data in the Agent Forecast metric in MetricBase. See Forecast properties to set the collection frequency such as the number of days that you must collect the data to calculate the forecast or the time period that you want to store the data for.

Note:
The time series metrics created for data collection definitions use the WFO Forecast retention policy. This policy stores data at a one-hour interval for the past three years.

Create forecast parameters

Managers can collect historical data at 15-minute granularity for generating accurate forecasts. The forecasts generated show the patterns in cases and interaction volume at 15-minute intervals. By default, the application uses the Seasonal Trend Loess (STL) algorithm.

For example, a manager can generate the volume forecast at 15-minutes intervals by providing the appropriate forecast parameters. Forecast parameters consist of the period length and periods to forecast that are most suitable for the pattern observed in the contact volumes.

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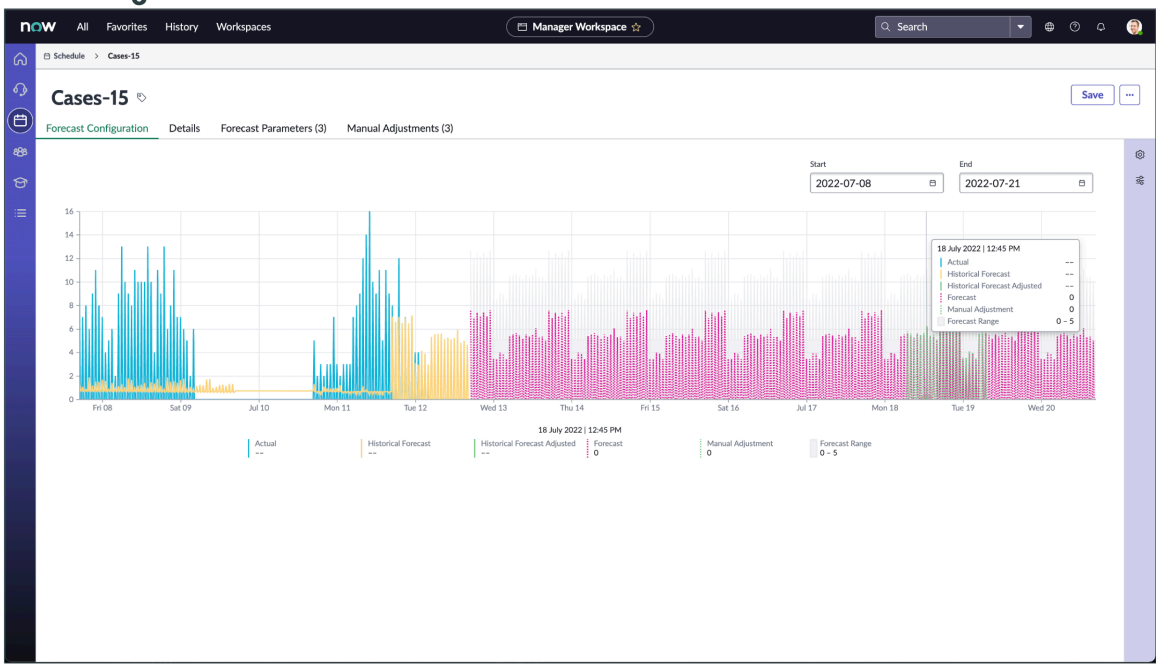
Generating volume forecast



Create formula parameters

Use numeric values or a script to be defined in the formula to calculate the resources from forecasts. Units in formula parameters can be specified in hours, minutes, or absolute numbers. See Formula parameters for the parameters that are available by default.

Create formulas to convert forecast to resources

Build formulas to convert the volume forecast to the staffing forecast at 15-, 30-, and 60-minute intervals. See Resource Conversion Formula for the configured resource forecast formulas that are available by default.

Associate formulas to assignment groups

Associate assignment groups with the resource conversion formula to convert the number of cases and interactions to the number of agents.

View the predicted demand on the calendar

The data collected by the Agent Forecast metric in MetricBase is used to forecast the agents that you need for each 15-, 30-, and 60-minute interval in a day on the team calendar. In a Week view for the calendar, it displays the staffing levels for a given week.

Related topics

- Configure the data collection to forecast the demand for resources
- Analyze staff alignment using Demand Forecast

Teams in Workforce Optimization for Customer Service

Learn how you can organize each of your teams into assignment groups. You can define a set of key Performance Indicators (KPIs) to analyze the performance of all groups within that team. Drill into the metrics for a group, an agent, or an incident within that team—all from a central location.

This video gives you an overview of how you set up your teams into assignment groups and add KPIs to measure performance. Organize your teams into assignment groups

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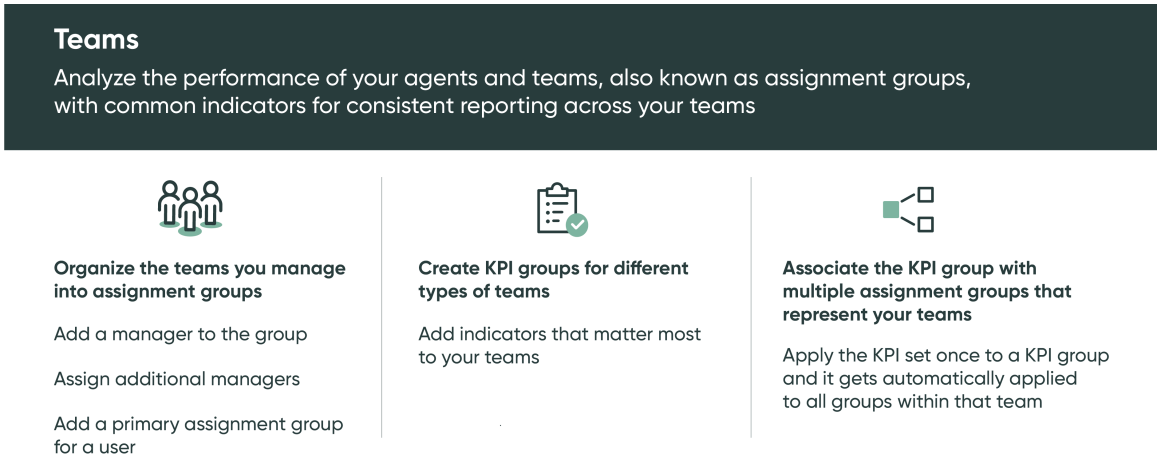
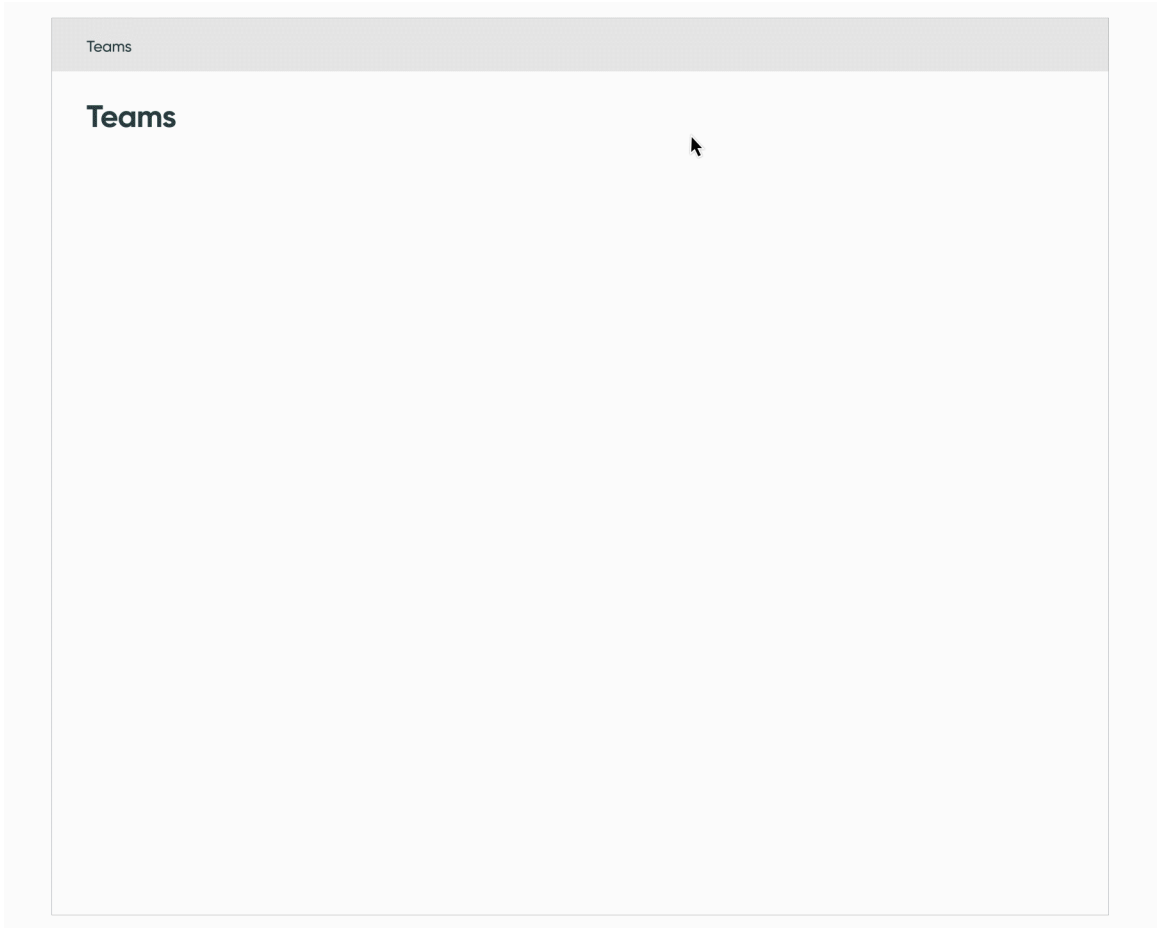


Drill down into your reports.



As an administrator for **Teams**, you can:

- Create a KPI group for a common set of indicators (KPIs) you use to measure your teams' performance.

  Note:
  Your teams are defined as **assignment groups** within the **Teams** application.

- Add the KPIs to the KPI group.

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- Add assignment groups to the KPI group.

> **Note:**
> Ensure that you have a manager added to each assignment group. The manager is the one that either directly manages the assignment group or one that needs visibility into the assignment group.

As a manager, you can:

- Analyze the performance trends for your teams.
- Drill down into the performance of teams, agents, or cases.

Related topics

Setting up Teams Workforce Optimization for Customer Service

Teams in Workforce Optimization for Customer Service

Example - Teams using Workforce Optimization for Customer Service

Understand how you can manage your teams from a single location using an example.

Our example employee is the manager of Customer Service Desk and manages 15 teams. The manager is also an additional manager of most teams and has visibility into the operations, although the agents don't directly report to them.

To effectively analyze the performance of each team from one location, the manager sets up the **Teams** as follows:

1. Organizes the teams into groups called assignment groups. The teams either directly report to the manager or the manager may have visibility into their performance.
2. Creates a KPI group with a set of indicators that matter most to measure the performance of the assignment groups.
3. Adds all assignment groups that use the set of KPIs to the KPI group.

With this set up, the manager can effectively analyze the performance of their teams grouped by KPI groups.

Managers can set up and use Teams by performing the following steps:

1. Create a KPI group
2. Add KPIs to that group
3. Add managers to assignment groups
4. Add assignment groups to the KPI group
5. Drill down into a KPI, agent, or an incident to analyze performance

Get an overview of how you can set up team performance and how KPI aggregates are calculated.

Workforce Optimization for Customer Service Set Up Team Performance

Get an overview of how you can analyze team performance in this video.

Workforce Optimization for Customer Service Analyze Team Performance

For detailed information on how to setup and use Teams, see teams.

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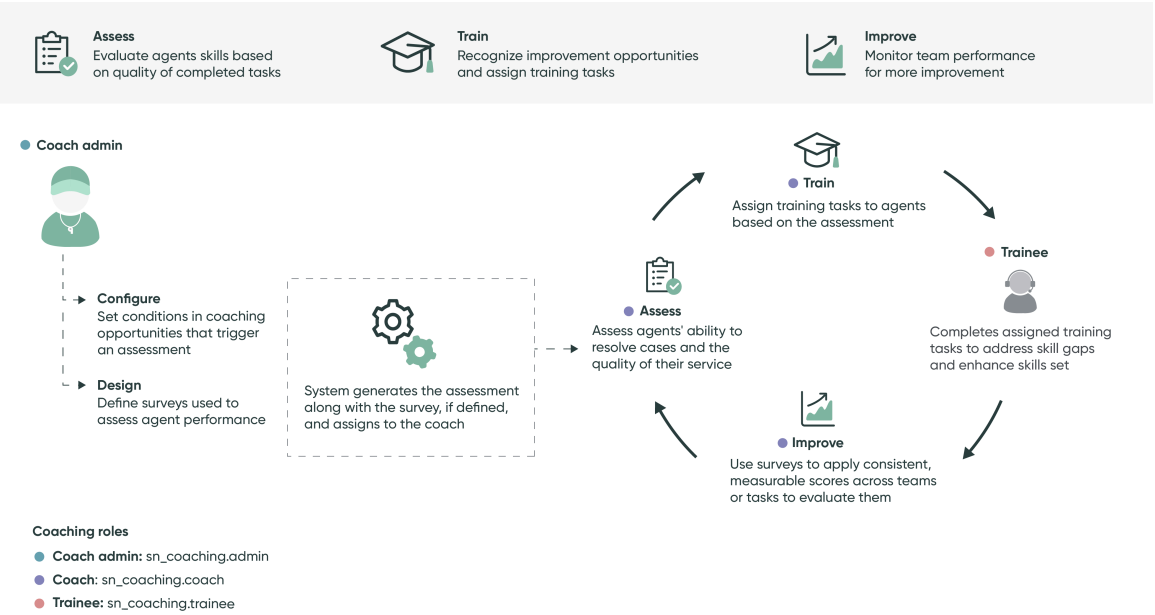
Coaching in Workforce Optimization for Customer Service

Learn how you can review and assess the quality of completed interactions and tasks. Enhance your teams' skills set by assigning them training based on the assessments and add skills to their profile when they get trained.



Here's an example of how Workforce Optimization for Customer Service uses Predictive Intelligence to recommend skills for agents:

Scenario for recommending skills using predictive intelligence

Step	Description	Example
1.	Predictive Intelligence associates the cases that were closed using similar skills and then groups the tasks by the agents who resolved them.	Predictive Intelligence looks at the similarity between the tasks that were resolved using the skill Firewall.
2.	When agents resolve cases, the Skill Recommendation application stores the skill and agent associations.	Agent A completes a task that requires the skill Firewall, but that skill is not in the agent's user profile yet.
3.	System administrators set the threshold for the skill and agent associations. When the threshold is reached, the Skill Recommendation application recommends to the agent's manager that the skill be added to an agent's profile.	The system administrator sets the threshold at 10. That means the agents have to complete at least 10 tasks that require a specific skill, before the predictive intelligence engine can recommend that specific skill for the agents. Agent A completes 10 tasks that required the skill Firewall, and currently Agent A is not assigned skill Firewall. The Skill Recommendation application

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Scenario for recommending skills using predictive intelligence (continued)

Step	Description	Example
		recommends the skill Firewall for Agent A to the agent's manager.
4.	The manager approves and adds the skill to the agent's profile.	Agent A's manager approves the skill Firewall and adds that skill to Agent A's profile.
5.	Advanced work assignment (AWA) uses the new skills that were added to the agent's profile, looks up tasks that require those skills, and assigns the agents to complete those tasks.	When a task requires the skill Firewall, Agent A is automatically considered for that task assignment.
6.	Over time, the Predictive Intelligence machine learning algorithms learn which skills were assigned to the agents to resolve the cases.	

The infographic shows how you can use Predictive Intelligence to recommend skills for your agents.

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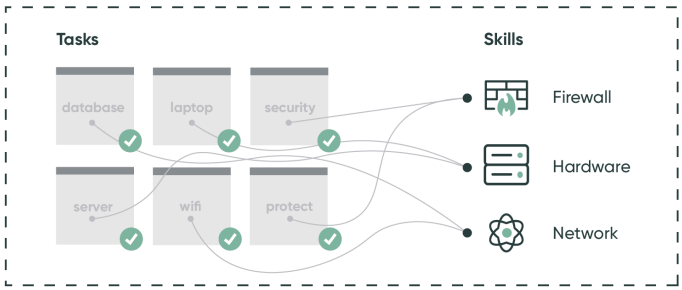
servicenow

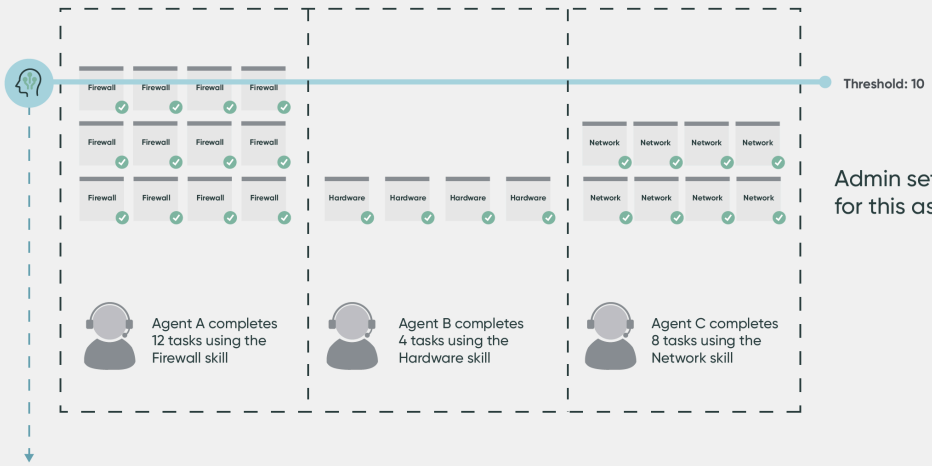
Skill recommendation using Predictive Intelligence

1. Predictive Intelligence (PI) compares cases closed in the last 90 days with skills data for similarity



PI groups the cases based on skills agents used to resolve them

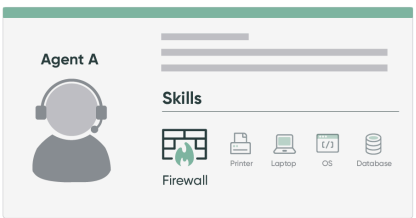
2. Skills Recommendation Application stores the skill and agent associations



Admin sets threshold for this association

3. When the threshold is met, Skill Recommendation Application recommends the skill to the agent's manager

4. Manager approves the recommendation



Skill assigned to the agent

5. Advanced Work Assignment starts routing tasks to agents based on newly assigned skills

6. PI algorithms learn from the repeated task to skill associations that agents use to resolve cases

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As a coach, you can:

- Use surveys to evaluate your team's performance.
- Recognize improvement opportunities and assign training tasks.
- Assess a trainee's ability to resolve cases.
- Assign training that is based on the assessments.
- Add skills to a trainee's profile that is based on a recommendation from Predictive Intelligence.

As a trainee, you can get trained to address your skill gaps.

Related topics

Setting up skill prediction in Workforce Optimization for Customer Service

Coaching in Workforce Optimization for Customer Service

Example- Coaching using Workforce Optimization for Customer Service

Understand how you can assess your agents performance, identify skill gaps, and train them to enhance their skill sets with Coaching.

For example, Amy Jones manages Customer Service operations for a large organization and has 12 teams reporting to them. Each team has anywhere from 8 through 15 agents. She is also added as a manager to other teams to increase visibility.

Amy Jones wants a single location to:

- Monitor the skills each team uses to solve issues
- Analyze metrics and monitor pending coaching assessments and training for the teams
- Add skills used for resolving issues or when Predictive Intelligence Workbench recommends them.

Amy Jones can manage all of these actions by doing the following:

1. Set conditions that trigger coaching opportunities.
2. Assess agents' skills and assign training.
3. Add skills to agent profile when they complete training or using recommendations from Predictive Intelligence.

Get an overview on coaching, creating assessments, taking surveys, assigning training, and adding skills.

Workforce Optimization for Customer Service Coaching Overview

Get an overview of how you can add skills manually or the ones recommended using Predictive Intelligence and the Skill Recommendation application.

Workforce Optimization for Customer Service Skill Recommendation

For detailed instructions to use Coaching in Workforce Optimization for Customer Service, see Coaching.

Configuring Workforce Optimization for Customer Service

Enable Workforce Optimization for Customer Service and configure settings to use the Channel Management, Scheduling, Teams, and Coaching applications.

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Activate Workforce Optimization for Customer Service

Workforce Optimization for Customer Service solution is highly modular, offering a wide range of capabilities such as Channel Management, Scheduling, Coaching, and Teams applications in CSM Manager Workspace. The Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) plugin activates all other dependent plugins to enable users to the Channel Management, Scheduling, Coaching, and Teams applications in Workforce Optimization for Customer Service.

Before you begin

The Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) plugin is available with the CSM Enterprise subscription package. To get access to all new features available with the new configurable workspace, activate the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) plugin.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

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

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Components installed with Workforce Optimization for Customer Service

Several types of components are installed with activation of the CSM Configurable Workspace (sn_csm_wfo_workspa) plugin, including user roles, key performance indicators (KPIs), scheduled jobs, properties, and tables.

Workforce Optimization for Customer Service

Roles

Role title [name]	Description	Contains roles
Workforce Optimization User [sn_wfo.user]	Grants read access to primary group and additional managers.	pa_analyst
Workforce Optimization Admin [sn_wfo.admin]	Grants administrative rights to create, read, update, and delete (CRUD) additional managers.	sn_wfo.user

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Roles (continued)

Role title [name]	Description	Contains roles
Workforce Optimization CSM Manager [sn_csm_wfo_workspa.manager]	Grants rights to create, read, or update, coaching, scheduling, teams, or channel management applications.	• sn_mgr_workspace.manager • sn_customerservice_manager • sn_wfo.user • sn_channel_mgmt.user • sn_shift_planning.admin • sn_coaching.coach • sn_sre.user • sn_team_perf.team_performance_user
Workforce Optimization CSM Admin [sn_csm_wfo_workspa.admin]	Grants administrative rights to create, read, update, and delete (CRUD) coaching, scheduling, teams, or channel management applications.	• sn_team_perf.team_performance_admin • sn_coaching.admin • skill_model_admin • sn_channel_mgmt.admin • sn_csm_wfo_workspa.manager • sn_mgr_workspace.admin • sn_sre.admin

Filter Configuration

Module Name	Module Tables / Database View
Manager Workspace	Stores filter configurations for all applications such as Channels, Schedule, and Coaching. [sn_mgr_workspace_filter_configuration]
Schedule	• User [sys_user] • User Skill [sys_user_has_skill] • Agent Schedule [sys_shift_planning_agent_schedule] • Schedule Event [sn_shift_planning_event] • Manager Groups database view [sn_wfo_manager_group]
Coaching	• Skill [cmn_skill] • Skill Category M2M [cmn_skill_m2m_category] • Group Member [sys_user_grmember]
Channels	Manager Groups database view [sn_wfo_manager_groups]

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Manager workspace

Roles

Role title [name]	Description	Contains roles
Manager Workspace User [sn_mgr_workspace.user]	Grants read access to home and list modules.	workspace_user
Manager Workspace Manager [sn_mgr_workspace.manager]	Grants read access to primary group, additional managers, and the approval button.	• sn_mgr_workspace.user • sn_wfo.user
Manager Workspace Admin [sn_mgr_workspace.admin]	Grants administrative rights to create, read, update, and delete (CRUD) all applications and settings in Manager Workspace.	• sn_mgr_workspace.manager • workspace_admin • ui_builder_admin

Properties

Properties	Description
cnm_skills.ws_max_users_swap_skill_matrix	The maximum limit for the number of users that allows you to swap axes in the skill matrix. • **Type:** Integer • **Default value:** 50

Reports

Indicator Name	Description
Total Open Cases	Total number of open that cases are waiting to be worked on by agents. The total count is divided into **New**, **Open** and **Awaiting info** cases.
Waiting Work Items	Total count of cases and interaction that are in queue to be assigned to agents.
Help Requested	Number of interactions for which agents requested for help.
Total Agents	All the agents that you manage. The total count is divided into **Available**, **Break**, **Away** and **Offline** agents.
Time-off Requests	Requests made by agents to take time-off from work.
Shift Swap Requests	Requests made by agents to swap shifts with other agents.
Open Cases	Graphs depicting cases waiting to be worked on, featured by open case type and age.
Critical Open Cases	Number of critical open cases.

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Performance Analytics Indicators

Indicator Name	Description
No. of cases resolved on first contact	Number cases resolved the first time it was handled.
No. of cases not updated in last 30 days	Number of cases that are not updated since 30 days.
No. of resolved cases reopened	Number of cases reopened because issues were not addressed properly.
No. of escalated open cases	Number of cases that are not worked on and are escalated.

Scheduled jobs

Scheduled job	Description
[CSM Manager Workspace] Daily Data Collection	Runs the job daily and collects data for all teams indicators.
[CSM Manager Workspace] Historic Data Collection	Runs the job and collects historic data for all teams indicators.
[CSM Manager Workspace] Weekly Data Collection	Runs the job weekly and collects data for all indicators in Manager Workspace.

Channel management

Roles

Role title [name]	Description	Contains roles
Channel Management User [sn_channel_mgmt.user]	Grants read access to channel reports, channel view, and queue report tables.	awa_manager
Channel Management Admin [sn_channel_mgmt.admin]	Grants administrative rights to create, read, update, and delete (CRUD) channel reports, channel view, and queue report tables.	• sn_channel_mgmt.user • awa_admin • sn_wfo.admin • report_admin

Interactive Filters for Reports

Interactive Filter Name	Description	Reference Table
Channel Management Agent Filter	Filters reports based on an agent.	[sys_user]
Channel Management Group Filter	Filters reports based on groups.	[sys_user_group]

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Interactive Filters for Reports (continued)

Interactive Filter Name	Description	Reference Table
Channel Management Queues Filter	Filters reports based on queues.	[awa_queue]
Channel Management Service Channel Filter	Filters reports based on service channels.	[awa_service_channel]

Reports for Service Channels and Queues

Report Name	Description
Agents available to take case work items	Number of available agents to take case work items.
Interaction Work Items Assigned Today	Number of interaction work items assigned on any given day.
Abandoned Interaction Work Items	Number of abandoned interaction work items.
Case Work Items Assigned Today	Number of case work items assigned on any given day.
Average CSAT Score	Average customer satisfaction score.
Case Work Items Resolved Today	Number of case work items resolved on any given day.
Interaction Work Items Resolved Today	Number of interaction work items resolved on any given day.
Average Handling time for Interaction Work Items	Average time for handling interaction work items.
Agents Available to take Interaction Work Items	Number of available agents to take interaction work items.
Case Work Items Closed Today	Number of case work items closed on any given day.

Reports for Agents

Report Name	Description
Active Chats	Number of ongoing chat conversations.
Chats Completed Today	Number of chats completed on any given day.
Chat Rejections Today	Number of chats rejected on any given day.
Active Cases	Number of ongoing cases.
Cases Resolved Today	Number of resolved cases on any given day.

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Reports for Amazon Connect (Phone)

Report Name	Description
Active Calls	Number of ongoing calls between customers and agents.
Agents Available	Number of agents online.
Abandoned Calls	Number of calls that the agents were not able to attend on any given day.
Handled Calls Today	Number of calls attended by the agents on any given day.
Average Wait Time	Average amount of time in minutes that the customers needed to wait before talking to an agent.
Contacts in ACW State	Number of customer calls in which the agent must take some action after the call is over.
Oldest Contact Age	Call during which the customer had to wait the longest before speaking to an agent.
Average Abundant Time (seconds)	Average time before the customer disconnects the call after waiting for the agent to respond.
Average Handling Time Today	The average duration, from beginning to end, that a contact is engaged with an agent. This metric includes talk time, hold time, and the time spent on After Contact Work (ACW).
Average Wait Time Today	The average duration (seconds) that a contact remains in the queue before being attended to by an agent.
Max Queued Time Today	The longest time a contact waits in the queue. This includes all contacts added to the queue, even those that didn't connect with an agent.
Average Hold Time Today	The average duration (seconds) that a contact spends on hold while waiting in the queue.
Average Interaction Time Today	The average time (seconds) that contacts are actively engaged and interacting with agents. This does not include the time spent waiting in the queue.
Average Wrap Up Duration Today	The average duration (seconds) that agents spend in the After Contact Work (ACW) state, within the specified time range.

Scheduled jobs

Scheduled job	Description
[Channel Management] Reset Temporary Capacity Override	Runs the job every two minutes check the invalid or expired overridden capacity and resets to the previous channel capacity.

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Properties

Property	Description
sn_channel_mgmt.list_auto_refresh.enable	Select to disable auto-refresh of lists in Channel Management. • **Type**: True or False • **Default value**: True
sn_channel_mgmt.channels_card_auto_refresh.enable	Select to disable auto-refresh of lists in Channel Management. • **Type**: True or False • **Default value**: True
sn_channel_mgmt.list_auto_refresh.interval.seconds	Defines the auto-refresh interval for the channel management list. • **Type**: Integer • **Default value**: 30
sn_channel_mgmt.kpi_auto_refresh.interval.seconds	Sets the frequency for refreshing data on channel management indicators. • **Type**: Integer • **Default value**: 5
sn_channel_mgmt.channel_card_auto_refresh.interval.seconds	Defines the auto-refresh interval for the cards on channel management overview container. • **Type**: Integer • **Default value**: 120
sn_channel_mgmt.filter_config.enable	Displays **Assignment Group** interactive filter in channels. • **Type**: True or False • **Default value**: True
sn_channel_mgmt.awa_agent_temporary_override_duration_in_minutes	Duration for the channel capacity that is overridden. • **Type**: Integer • **Default value**: 12 hours

Note:
Channel management properties are not visible by default in the [sys_properties] table. To use any of the channel management properties, you must add the required property to the System Property [sys_properties] table. For more information, refer to Add a system property.

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Scheduling

Roles

Role title [name]	Description	Contains roles
Shift Planning User [sn_shift_planning.user]	Grants read access for scheduling including the ability to view schedules and shifts.	None
Shift Planning Agent [sn_shift_planning.agent]	Grants agents access to their calendar and request shift swap or time-off.	sn_shift_planning.user
Shift Planning Admin [sn_shift_planning.admin]	Grants administrative access to create, read, update, and delete (CRUD) schedules and work shifts.	• sn_shift_planning.approver • sn_shift_planning.user • sn_shift_planning.agent

Tables

Table	Description
sn_shift_planning_time_worked_summary	Stores the time worked summary of an agent.
sn_shift_planning_agent_time_work	Stores the agent's time worked, such as clock-in and clock-out timings. If an agent logs in early or logs out late, then the shift start and shift end times are stored in place of clock-in and clock-out timings.
sn_shift_planning_agent_time_attendance	Stores the clock-in and clock-out timings of agents. Data is retrieved when an agent logs in, logs out or changes the presence state.

Properties

Property	Description
sn_shift_planning.number_of_days_to_cache	Number of days to cache agent schedules. • **Type:** Integer • **Default value:** 5
sn_shift_planning.enable_schedule_adherence	Calculates and displays schedule adherence information for your agents. • **Type:** Boolean • **Default value:** True
sn_shift_planning.early_clockin_threshold	Threshold settings indicate how many minutes early or late an agent can clock-in or clock-out to the scheduled time without being considered non-adherent. This is the acceptable duration of

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Properties (continued)

Property	Description
	time flexibility for an agent to start work before the scheduled start time. • **Type:** Integer • **Default value:** 60 min
sn_shift_planning.adherence_threshold	Set the percentage for a threshold in adherence. The agents who do not qualify to be above the defined threshold value (70%) are considered non-adherent agents. • **Type:** Integer • **Default value:** 70%
sn_shift_planning.conformance_lower_threshold	Set the lower threshold percentage for flexibility in conformance. The agents who don't qualify for the defined lower and upper conformance threshold values (80-120) are considered non-conformance agents. • **Type:** Integer • **Default value:** 80%
sn_shift_planning.conformance_upper_threshold	Set the upper threshold percentage for flexibility in conformance. The agents who do not qualify for the defined lower and upper conformance threshold values (80-120) are considered non-conformance agents. • **Type:** Integer • **Default value:** 120%
sn_shift_planning.auto_clockout_threshold	Threshold time for the system to wait and generate automatic clock-out events when agents forgets to clock-out. For example, if an agent's planned work shift is 8 AM to 5 PM and fails to clock out at 5 PM, the system waits for 60 min as threshold time and generates an automatic clock-out event. • **Type:** Integer • **Default value:** 60 min
sn_shift_planning.display_shift_name	Set this property to true to display the shift name. If the value is false, event type will be displayed. • **Type:** Boolean • **Default value:** True

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Properties (continued)

Property	Description
	Note: If you change the value of this property, the changes are effective after 24 hours. To view the changes immediately, run the *Shift Planning - Delete All Agent Schedules Cache* scheduled job.

Business rule

Business rule	Table	Description
Agent Time Work Event Trigger	Agent Presence [awa_agent_presence]	Sets the clock-in and clock-out events whenever there is a change in agent's presence state.

Scheduled Jobs

Name	Description
Shift Planning - Delete All Agent Schedules Cache	Deletes cache from the sn_shift_planning_agent_availability table. • Runs automatically everyday at 2:30 am • Run this job on-demand when you import data.
Clock-out event generation (For scenarios where clock-out event does not get triggered)	Generates clock-out events every 4 hours if agents haven't clocked-out. **Note:** Consider an agent's work shift timings are from 8 AM to 5 PM and *sn_shift_planning.auto_clockout_threshold* property value is set to 60 minutes. The agent clocks-in and fails to clock out, the scheduled job waits until 6 PM(5 PM+60 minutes) and if there's no clock out until 6 PM, the system generates a clock-out event with agent's shift end time.
Populate Agent Time Worked Summary	Runs daily to calculate the time worked, adherence and conformance based on agent's planned and actual work shift timings of the previous day. The values are stored in [sn_shift_planning_time_worked_summary] table.
Update Wrapper End Time for Actual Work Events	Runs daily to make sure the actual work wrapper end-time is equal to last clock-out time.
[Schedule Adherence] Daily Data Collection	Runs the job daily and collects data for all teams indicators.

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Scheduled Jobs (continued)

Name	Description
[Schedule Adherence] Historic Data Collection	Runs the job and collects historic data for all teams indicators.
[Schedule Adherence] Weekly Data Collection	Runs the job weekly and collects data for all indicators in Manager Workspace.

Setting the due date for time-off and shift-swap request approvals: Administrators can configure the due date logic for the Time Off Request and Shift Swap Request approval flows. The approval due date is set as the number of days before the request start date. The default is set to two days which means if the approval is not approved two days before the request start date, it will be auto-rejected. For information on configuring flows, refer to Build your first flow in Flow Designer.

Demand Forecast

Forecast configurations

Name	Description
Cases Assigned	Collects data for cases.
Chat Interactions Created	Collects data for chat interactions.

The **WFO Forecast** time series metric retention policy is available by default for all forecast configurations. By default, this retention policy stores data at a 15min interval for the past three years for all zBoot customers.

Resource conversion formula

Name	Formula to create this resource forecast configuration
Resources for Sales Support	`([FC:Chat Interactions Created] * [FP:Average Chat Work Time - Sales Support]`
Resources for Service Support	`([FC:Cases Assigned]*[FP:Average Case Work Time - Service Support]) + ([FC:Chat Interactions Created]*[FP:Average Chat Work Time -Service Support])`
Resources for Tech Support	`([FC:Cases Assigned]*[FP:Average Case Work Time - Tech support])+([FC:Chat Interactions Created]*[FP:Average Chat Work Time -Tech Support])`

Formula Parameters

Name	Description
Service Support: Average Case Work Time	Average time a service support agent worked on a case. Time is measured in hours. The default value is 0.5.

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Formula Parameters (continued)

Name	Description
Service Support: Average Chat Work Time	Average chat duration a service support agent had for each interaction. Time is measured in hours. The default value is 0.25.
Tech Support: Average Case Work Time	Average time a tech support agent worked on a case. Time is measured in hours. The default value is 1.
Tech Support: Average Chat Work Time	Average chat duration a tech support agent had for each interaction. Time is measured in hours. The default value is 0.5.
Sales Support: Average Chat Work Time	Average chat duration a sales support agent had for each interaction. Time is measured in hours. The default value is 0.5.

If you create forecast parameters for a forecast configuration, the values set in the configuration are used instead of the default forecast parameters listed in the forecast properties section. For information on configuring forecast parameters, see Modify forecast parameters to visualize forecast data.

Forecast Properties

Name	Description
sn_agent_forecast.forecast_interval	The smallest interval (in minutes) at which historical data is collected and forecasts are generated. Valid values are 15 and 60.
sn_agent_forecast.number_of_historical_days_in_timeseries_chart	The number of historical days that will be plotted in time series chart for 15-, 30-, and 60-minute intervals in Manager Workspace.
sn_agent_forecast.number_of_historical_days_in_daily_timeseries_chart	The number of historical days that will be plotted in time series chart for daily interval in Manager Workspace.

Roles for Demand Forecast

Role title [name]	Description	Contains roles
Forecast admin [sn_agent_forecast.admin]	Grants administrative rights to create, read, update, and delete (CRUD) forecast configuration tables.	• sn_agent_forecast.users • clotho_admin
Forecast user [sn_agent_forecast.user]	Grants read access to forecast configuration tables.	

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Tables for Demand Forecast

Table	Description
Forecast Configuration [sn_agent_forecast_configuration]	Define data collection definition and resource conversion formula configurations.
Forecast Parameter [sn_agent_forecast_parameter]	Define forecast parameters required for the formula.
Forecast Configuration group [sn_agent_forecast_configuration_m2m_sys_user_group]	Associate resource conversion formula with assignment groups.

By default, forecast configurations are available for the following groups:

- Sales Support
- Service Support
- Tech Support

Schedule jobs for Demand Forecast

Name	Description
Collect daily data for demand forecast data collection definitions	Runs daily at 2 am. For any table defined in the Data Collection Definition configuration, it counts the number of records from the previous day at 15-minute interval for every group and stores it in the MetricBase. Data collected at 15-minute interval is also aggregated at daily interval and stored in the MetricBase.
Forecast resources for future	Runs daily at 3 am. Calculates the forecast resources for the future based on the collected data and stores the data in the Agent Forecast metric in MetricBase.
Create cases and chats for previous day	Daily job that creates demo cases and chats for previous day.
Delete case demo data	Deletes cases older than 90 days. Not enabled by default.
Delete interaction demo data	Deletes chats older than 90 days. Not enabled by default.

On Demand jobs for Demand Forecast

Collect historical data for demand forecast data collection definitions	Runs on demand. Collects historical data daily for 15-minute interval and aggregates the data at daily interval for 1098 days (past three years) and stores it in the MetricBase. Once the job is executed, the **Daily Historical data duration** column displays the number of days for which historical data has been collected for daily interval. The **Duration** column displays the number of days for which historical data has been collected for 15-minute interval. Both the columns are

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On Demand jobs for Demand Forecast (continued)

	associated with the Forecast Configuration [sn_agent_forecast_configuration] table.
Generate forecasting demo data	Runs on demand. Collects data for data collection definitions for past 90 days. Runs Forecast resources for future jobs to generate volume forecasts and staffing plan for next 30 days. Activates Create cases and chats for previous day job to create cases and chats.

Teams

Roles

Role title [name]	Description	Contains roles
Teams User [sn_team_perf.team_performance_user]	Grants access to read KPI configuration.	• sn_wfo.user • pa_analyst
Teams Admin [sn_team_perf.team_performance_admin]	Grants access to create and configure KPIs, KPI groups, and assignment groups in the Teams module.	• sn_wfo.admin • sn_team_perf.team_performance_user

Properties

Property	Description
sn_team_perf.kpi_group.max_parent_kpis	The maximum number of parent indicators that you can add to one KPI group. • **Type:** Integer • **Default value:** 5
sn_team_perf.kpi_group.max_supporting_kpis	The maximum number of supporting KPIs you can define for a parent KPI. • **Type:** Integer • **Default value:** 10
sn_team_perf.ws.max_assignment_groups	The maximum number of assignment groups prioritized by order number to display on the Teams application in Manager Workspace. • **Type:** Integer • **Default value:** 15
sn_team_perf.default_date_range	The default date range set in the date range picker.

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Properties (continued)

Property	Description
	• **Type:**Integer • **Default value:**30

Performance Analytics Indicators

Indicator Name	Description
# of cases resolved on first contact	Number of cases resolved on first contact.
# of P1 cases resolved on first contact	Number of P1 cases resolved on first contact.
# of P2 cases resolved on first contact	Number of P2 cases resolved on first contact.
# of P3 cases resolved on first contact	Number of P3 cases resolved on first contact.
# of P4 cases resolved on first contact	Number of P4 cases resolved on first contact.
MTTR for Cases	Mean time to resolve the cases.
MTTR for P1 Cases	Mean time to resolve the P1 cases.
MTTR for P2 Cases	Mean time to resolve P2 cases.
MTTR for P3 Cases	Mean time to resolve the P3 cases.
MTTR for P4 Cases	Mean time to resolve P4 cases.
CSAT for Cases	Customer satisfaction score for cases.
CSAT for P1 Cases	Customer satisfaction score for P1 cases.
CSAT for P2 Cases	Customer satisfaction score for P2 cases.
CSAT for P3 Cases	Customer satisfaction score for P3 cases.
CSAT for P4 Cases	Customer satisfaction score for P4 cases.
Number of Closed Cases	Number of closed cases.
Number of Closed P1 Cases	Number of closed P1 cases.
Number of Closed P2 Cases	Number of closed P2 cases.
Number of Closed P3 Cases	Number of closed P3 cases.
Number of Closed P4 Cases	Number of closed P4 cases;
Average Wait Time for Chats	Average waiting time for chats.
Number of Chats Handled	Number of chats handled.
Average Handling Time for Chats	Average handling time for chats.
Number of Abandoned Chats	Number of abandoned chats.
Number of Incoming Cases	Number of incoming cases.
Schedule Adherence	Agents schedule adherence percentage.
Schedule Conformance	Agents schedule adherence percentage.
Summed duration of Time Worked	Agents total duration of time worked.

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Performance Analytics Indicators (continued)

Indicator Name	Description
Summed Duration of Planned Time	Agents total duration of planned time.
Summed duration of Time Not Worked	Agents total duration of time not worked.
Summed duration of Available Non Planned Time	Agents total duration of available non planned time.

Coaching

Roles

Role title [name]	Description	Contains roles
Coaching Admin [sn_coaching.admin]	Grants administrative rights to create, read, update, and delete (CRUD) coaching opportunities, assessments, training, and skills.	• sn_coaching.coach • sn_lc.learning_admin
Coaching Coach [sn_coaching.coach]	Grants administrative rights to create, read, or update coaching opportunities, assessments, training, and skills.	• sn_coaching.trainee • pa_viewer • sn_lc.catalog_manager
Coaching Trainee [sn_coaching.trainee]	Grants access to add training, assessments, and skill records.	• skill_user • pa_viewer • survey_reader

Important:
This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Business rule

Business rule	Table	Description
Calculate coaching survey score	Assessment Instance [asmt_assessement_instance]	Sets the feedback rating based on the survey score.

Coaching opportunities

Coaching Opportunity Name	Description	Table
Coaching Opportunity for SLA Breach	Coaching opportunity for the agents who worked on the critical and high priority cases that breached SLA.	Task SLA [task_sla]

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Coaching opportunities (continued)

Coaching Opportunity Name	Description	Table
Coaching Opportunity for low CSAT	Coaching Opportunity for the agents who worked on cases that has a customer satisfaction score less than 4.	Case Report [sn_customerservice_case_report]
Coaching Opportunity for skills award verification	Coaching Opportunity for verification of skills awarded to agents.	Case [sn_customerservice_case]
Knowledge Management Process: Coaching on quality of knowledge articles	Coaching Opportunity for the agents who need to improve the quality of a knowledge article by reviewing the assessment.	Case [sn_customerservice_case]
Coaching Opportunity for high TTR	Coaching Opportunity for the agents who worked on a case that had time to resolution more than 3 days.	Case Report [sn_customerservice_case_report]
Interaction: Coaching Opportunity for Handling Time	Coaching Opportunity for the agents who worked had handle time more than 10 mins on an interaction.	Interaction [interaction]

Note:
You can customize the coaching opportunities for low CSAT, high TTR, SLA breach, and handling time based on your business needs.

Important:
This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Coaching Surveys

Name	Description
Chat Quality Survey	Survey associated with the Chat Interaction coaching opportunity. The coach assess the agent using this survey after the agent completes a chat interaction.
Case Quality Survey	Survey associated with the Case Interaction coaching opportunity. The coach assess the agent using this survey after the agent completes a case interaction.

Properties

Property	Description
sn_coaching.learning_default_duration	Number of days to read the knowledge article or complete training. The admin (sn_wfo.admin) sets the number of days for the trainee to complete reading the

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Properties (continued)

Property	Description
	article or complete the training. The number of days is converted to the due date for the trainee to complete the training. It is calculated from the current date taking the trainee's time zone into consideration. • **Type:**Integer • **Default value:**5
sn_coaching.exclude_weekends_on_training_due_date	Excludes weekends when the due date is set for trainees to complete training. • **Type:**true | false • **Default value:**true

Coaching with Learning

Important:
This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Roles

Role title [name]	Description	Contains Roles
Learning admin [sn_lc.learning_admin]	Grants administrative rights to create, read, update, and delete (CRUD) catalog, learning content, roles, and configure learning source.	• sn_lc.catalog_manager • sn_hr.integr_fw.admin
Learning catalog manager [sn_lc.catalog_manager]	Grants administrative rights to create, read, or update learning catalogs.	• sn_lc.task_creator • sn_lc.content_writer
Learning catalog group manager [sn_lc.catalog_group_manager]	Grants administrative rights to create, read, or update learning catalogs based on groups.	• sn_lc.task_creator • sn_lc.content_writer
Learning content creator [sn_lc.content_creator]	Grants administrative rights to create, read, or update internal courses.	sn_lc.content_reader
Learning content writer [sn_lc.content_writer]	Grants read or write access for learning courses.	sn_lc.content_creator
Learning content reader [sn_lc.content_reader]	Grants read access for learning courses.	

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Roles (continued)

Role title [name]	Description	Contains Roles
Learning content advisor [sn_lc.learning_advisor]	Can assign learning tasks.	
Learning task creator [sn_lc.task_creator]	Grants read or write access for learning tasks.	

Tables

Table	Description
Learning External Content [sn_lc_external_content]	Stores details of external course items that are pulled from third-party systems.
Learning User Course Activity [sn_lc_user_course_activity]	Stores details of learning course activities such as user to whom the course is assigned, status, due date, and name of the learning course.
Learning Content [sn_lc_content]	Stores details of internal learning content such as knowledge articles, videos that are created in ServiceNow.
Learning Course Item [sn_lc_course_item]	Stores details of learning course items, such as the source to which the learning course belongs.
Learning Catalog [sn_lc_catalog]	Stores details of learning catalog items with its course items.
Learning Task [sn_lc_learning_task]	Stores details of learning tasks, such as user to whom the learning task assigned, and due date by when the learning task must be completed.
Learning System Configuration [sn_lc_learning_system_configuration]	Stores configuration parameters of sources (third-party learning management systems).

Properties

Property	Description
glide.ui.sn_coaching_assessment_activity.fields	Edits coaching assessment activities. • **Type:** string • **Default value:** assigned_to,cmdb_ci,state,impact,priority,opened_by,work_notes,comments,*Attachme
sn_coaching.recommended_learning_dependent	Coaching Plan dependent Trainings is being deprecated and replaced with the Learning Tasks and course items from Coaching with Learning.

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Properties (continued)

Property	Description
	• **Type:** string • **Default value:** true
sn_coach.lrn.exclude_weekends_property	Enable to exclude weekends while setting the due date for learning tasks. • **Type:** true|false • **Default value:** true
sn_coach_lrn.learning_task_menu_properties	List of properties for the now-list-menu component on the Learning Tasks tab, coaching module. • **Type:** string • **Default value:** script for data array
com.glide.transform.json.max-partial-length	Transforms JSON objects to internal objects and sets the word limit for records fetched through an API call. • **Type:** integer • **Default value:** 16384 **Note:** You must Add this system property to set the desired value. When you synchronize third-party learning content with your ServiceNow instance, if the word count of the content being pulled into your instance exceeds the value set for this property, the synchronization fails.
com.snc.process_flow.serialized_vars.limit	Specify the allowed values limit for runtime values in each step in the flow execution details. To prevent truncation, set the value to an integer equal to or less than zero. • **Type:** integer • **Default value:** 16384 **Note:** When you synchronize third-party learning content with your ServiceNow instance, if the word count of the content being pulled into your instance exceeds the value set for this property, the synchronization fails.

Important:
This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

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Skill Recommendation

Roles

Role title [name]	Description	Contains roles
Skill Recommendation User [sn_sre.user]	Grants rights to view skill recommendation tables.	wfo.user
Skill Recommendation Admin [sn_sre.admin]	Grants administrative rights to edit the properties for skill recommendation.	• wfo.admin • sn_sre.user

Navigate to **Skill Recommendation** > **Configuration** to configure these properties.

Properties

Property	Description
Enable skill recommendation. sn_sre.enable_skill_recommendation	Enable this property to start recommending skills for agents. • **Type:**true | false • **Default value:**true
Maximum number of skills to predict based on supervised learning. sn_sre.max_supervised_skills	Using supervised learning, the maximum number of skills to predict for each incident ordered by confidence of prediction. • **Type:**Integer • **Default value:**3
Maximum number of skills to predict based on supervised learning. sn_sre.max_unsupervised_skills	Using unsupervised learning, the maximum number of skills to predict for each incident ordered by confidence of prediction. • **Type:**Integer • **Default value:**3
Number of times Predictive Intelligence must predict the same skill for an agent before recommending it for the agent. sn_sre.user_predicted_skill_threshold	The number of times Predictive Intelligence must predict the same skill for an agent before recommending the skill for the agent. • **Type:**Integer • **Default value:**20
Similarity solution definition to recommend skills from similar cases. sn_customerservice.unsupervised_solution_definition_for_cases	Name of the Predictive Intelligence solution definition used for predicting skills to resolve cases using unsupervised learning. If you have created your own solution definition, you can replace the default one with the one you have created.

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Properties (continued)

Property	Description
	• **Type:**String • **Default value:**ml_sn_sn_customerservice_global_recommend_similar_
Similarity solution definition to recommend skills for cases. sn_customerservice.supervised_solution_definition_for_cases	Name of the Predictive Intelligence solution definition used for predicting skills to resolve cases using supervised learning. If you have created your own solution definition, you can replace the default one with the one you have created. • **Type:**String • **Default value:**ml_sn_sn_customerservice_global_recommend_skills_fr

Scheduled job

Scheduled job	Description
Start skill prediction	Runs the job every day at 1 AM on all incidents that were closed the previous day. Recommends the skills used to close the incidents to resolve similar open incidents.

Tables

Table	Description
User Predicted Skill [sn_sre_user_predicted_skill]	• Stores how many times a skill has been predicted for the user. • Skills not recommended in the last 60 days are automatically deleted from this table.
Task Predicted Skill [sn_sre_task_predicted_skill]	• Stores the skills predicted to resolve each type of incident. • Records created over 60 days ago are automatically deleted from this table.

Work Scheduler components in Workforce Optimization for Customer Service reference

Workforce Optimization for ITSM has properties to configure the Work scheduler default behavior.

Properties

Enter *sys_properties.list* in the Workspace filter navigator and search for the work scheduler properties listed below.

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Properties

Property	Description
sn_wfo_work_sched.csm_allowed_tables	Defines the list of tables that a Work scheduler admin (sn_wfo_work_sched.admin) can use to create configurations for work assignments in the Workforce Optimization for Customer Service manager workspace. • **Type**: string • **Default value**: sn_customerservice_case
sn_wfo_work_sched.shift_data_categories	Comma separated sys ids for event categories that display in the Work scheduler calendar in the manager workspace. **Type**: string
sn_wfo_work_sched.should_fetch_shift_data	Enables the display of shift spans in Work scheduler in Workforce Optimization for Customer Service manager workspace. • **Type**: true|false • **Default value**: true
sn_wfo_work_sched.recommend_criteria_limit	Defines how many matching criteria can be created for each matching rule in Work scheduler when suggestions are enabled. • **Type**: integer • **Default value**: 10
sn_wfo_work_sched.match_criteria_threshold	Defines which users are shown in Work scheduler when suggestions are enabled and the matching criteria percentage is greater than the value indicated. • **Type**: integer • **Default value**: 0

Domain separation in Workforce Optimization for Customer Service

Domain separation is supported in Workforce Optimization for Customer Service. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data. Domain separation in Workforce Optimization for Customer Service is configured to apply to all features of the application. Separation of data is configured along with separation of logic and process.

Support level: Basic

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

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

How domain separation works in Workforce Optimization for Customer Service

Domain separation in Workforce Optimization for Customer Service does not require any setup or configuration.

Domain separation for Channel Management in Workforce Optimization for Customer Service

The work items, such as cases, interactions, and their associated actions, appear based on the selected domain. For information on how work assignments are routed based on domain in Channel Management, refer to Domain separation and Advanced Work Assignment

The domain-separated tables for Channel Management are as follows:

- Service Channel Reports [m2m_awa_service_channel_report]
- Queue Reports [m2m_awa_queue_report]

Domain separation for Scheduling in Workforce Optimization for Customer Service

When an agent schedule is generated and assigned to an agent, the schedule is only available in the domain that agent belongs to.

The domain-separated tables for Scheduling are as follows:

- sn_shift_planning_agent_schedule
- sn_shift_planning_agent_schedule_request
- sn_shift_planning_break
- sn_shift_planning_day
- sn_shift_planning_event
- sn_shift_planning_schedule_plan
- sn_shift_planning_schedule_shift
- sn_shift_planning_schedule_shift_agent
- sn_shift_planning_shift_plan
- sn_shift_planning_shift_swap_request

Domain separation for Teams in Workforce Optimization for Customer Service

The *sn_wfo_add_manager* table is domain separated. When users are added as additional managers, those users can only view users within that domain.

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Domain separation for Skill Recommendation in Workforce Optimization for Customer Service

Domain separated tables for Skill Recommendation

- sn_sre_task_predicted_skill
- sn_sre_user_predicted_skill

Domain separation for Coaching in Workforce Optimization for Customer Service

For information on how domain separation works in Coaching for Workforce Optimization for ITSM, refer to Domain separation and Coaching.

Related topics

Domain separation for service providers

Create a Manager Workspace landing page

Create a landing page based on your business requirement.

Before you begin

Create reports and key performance indicators that are required to set up the landing page.

Role required: sn_mgr_workspace.admin

About this task

The landing page displays a set of reports that are the initial view of your workspace. You can enhance the Workforce Optimization experience by customizing the landing page to monitor metrics and trends that matter most to you. Use the User Interface (UI) Builder to add data visualization components to display widgets and reports that you want to track and monitor. For more information, see Creating custom landing pages for workspaces.

Using UI Builder, you can:

- Clone the existing CSM landing page.

  Note:
  The application scope can be set to CSM Workspace, CSM Manager Workspace or Workforce Optimization. The **Clone Page** action is not available in the Global scope.

- Add or edit containers in the page.
- Add or edit visualizations for each container.
- Edit the layout of a page or container.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Administration** > **Landing Pages**.
2. Click the **CSM Landing Page**.
3. Click **Clone Page**.

   Note:
   The **Clone Page** action is available when the application scope is CSM workspace.

4. Fill out the form.

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The settings in the **Layout** and **Available Child Slots** fields determine how the content renders on the page.

Landing page attributes and layout

Field	Description
Name	The name of your landing page.
Component	The component defaults to sn-page and is read-only.
Order	The order for the landing page. If you have multiple landing pages, the order determines the landing page precedence. Pages with a lower-order value take precedence over pages with a higher-order value.
Active	Determines whether the landing page is active. Enable for a landing page to be displayed.
Optional Page Title	A title to display on the page.
Available Child Slots	A predefined style of child slots.
Layout	The layout of the columns on the page.

5. Click **Update** to save your landing page.
6. **Optional:** Configure permissions for users to access the landing page.
   a. Click the **UX Page Element Permissions** related list.
   b. Click **New**.
   c. Select the role or group for the landing page to be visible.
   d. Click **Submit** to save your permissions.
   Any page element (including sub elements) can have a restriction to a given set of roles or groups. If there are no element permissions set on roles or groups, then all users see the element. If there are some element permissions set, then a user needs just one role or group assignment to see the element.
7. Configure a container:
   a. Click the **UX Page Elements** related list.
   b. Click **New Container** or select an existing container.
   c. Fill out the form.

Container attributes and layout

Field	Description
Name	The name of your container.
Component	The component defaults to sn-page-container and is read-only.
Parent element	The landing page your container resides.
Slot	The component placement within the parent element's slot configuration.

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Field	Description
Order	The order the page shows.
Border	Enable if you want a border around your container.
Optional Container Title	A title to display on the container.
Type	Select a type of styling for your visualization.
Available Child Slots	A predefined style of child slots.
Layout	The layout of the columns on the page.

8. Configure a widget:
   a. Click **New Visualization** or select an existing widget.
   b. Fill out the form.

Widget attributes and layout

Field	Description
Name	The name of your widget.
Component	The component defaults to sn-page-widget-visualization and is read-only.
Parent element	The container that your widget resides in.
Slot	The component placement within the parent element's slot configuration.
Order	The order the component shows.
Report	Select the report you want to render: ○ Single score ○ Trend by ○ List **Note:** Choose and populate either **Report** or **PA Widget**, but you cannot display both.
PA Widget	Select the PA widget you want to render: ○ Single score ○ Time series **Note:** Choose and populate either **Report** or **PA Widget**, but you cannot display both.
Optional Widget Label	A label to display on the widget.
Size Variant	Select the size of the widget. Choices include:

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Field	Description
	○ Small ○ Medium ○ Large ○ Extra Large **Note:** Not all size variants apply to all widgets.
Border	Check if you want a border around your widget.
Refresh Interval	Determines the number of minutes before a widget refreshes with new data. The interval begins when a user navigates away from a landing page, and ends when the user comes back to the landing page. **Note:** There is no auto-refresh, but a user can click a refresh button at any time.
Additional Details	Any additional information to note about the widget.
Visualization SysID [Read Only]	Designated ID for the widget.
Report Type [Read Only]	The type of report that renders.

9. Click **Update** or **Submit** to save changes to the page element.
10. Click **Update** to save changes to the landing page.

Set the default landing page

You can set a default landing page to surface the information that is most relevant for your business.

Before you begin

Role required: sn_mgr_workspace.admin

Procedure

1. Navigate to **All** > **Workspace Experience** > **Administration** > **All Workspaces**.
2. Click **Manager Workspace**.
3. Drag and drop the PA indicators or containers.
4. Set the refresh rate interval for the reports or indicators.
5. In the Landing Pages related list, set the value of the **Order** field of the landing page that you want to set as the default to minimum.

Note: The landing page with the minimum order value is considered to be the default landing page.

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6. **Optional:** Verify the default landing page assignment by navigating to **Workspace Experience** > **Administration** > **Landing Pages**
   Ensure the landing page that you want to set default has the minimum **Order** value.

Set the enhanced Manager Workspace landing page

Set the enhanced Manager Workspace as the default landing page for an improved user experience.

Before you begin

Role required: sn_wfo_cfg_ws.manager

Procedure

1. Navigate to **All** > **UI Builder** > **Experiences**.
2. In the search field, enter `Manager Workspace`.
3. Select **Manager Workspace**.
4. On the Manager Workspace page, in the Landing Page section, select **Settings** for the Manager Dashboard.
   The Settings page appears for the Manager Dashboard.
5. On the Settings page, in the **Availability** field, select the **Active** check box.

   Note:
   If a message appears about the application scope, select **Edit in original scope** to be able to edit the record.

6. In the **Order** field, enter the minimum value of the landing page.

   Note:
   Verify the landing page that you want to set default has the minimum Order value.

7. Select **Save**.

Result

You can access the enhanced Manager Workspace as the default landing page.

Manager Workspace properties

Modify the Manager Workspace configuration by customizing the system properties to set the Alerts card limit and the widget refresh interval.

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

Alternatively, in your instance, enter `sys_properties.list` in the filter navigator and view the system properties.

Workspace system properties

Property	Description
sn_csm_wfo_workspa.alerts_cards_limit	Enable or disable interaction creation for a non-matched user.

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Workspace system properties (continued)

Property	Description
	• Type: Integer • Value: 15 • Location: **All> System Properties> All Properties**.
sn_csm_wfo_workspa.widget_refresh_interval_long	Set the inactivity period (in days) after which an interaction is closed if no email is received from the customer. • Type: Integer • Value: 120 • Location: **All> System Properties> All Properties**.
sn_csm_wfo_workspa.widget_refresh_interval_short	Set the inactivity period (in days) after which an interaction is closed if no email is received from the customer. • Type: Integer • Value: 30 • Location: **All> System Properties> All Properties**.

Configuring filters for Manager Workspace

Configure filters for scheduling and coaching applications and use the default filter for channel management to refine your search results.

Before you begin

Role required: sn_csm_wfo_workspa.admin

About this task

View and analyze data in scheduling and coaching applications based on the filters configured. You can only use the default filters for channel management and cannot configure new filters.

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Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Manager Workspace Configuration** > **Filter Configurations**.
2. Click **New**.
3. On the form, fill in the fields.

Filter Configuration form

Name	Description
Filter Name	Unique name for the filter configuration.
Table	Table for which the filter is configured. **Note:** You can filter only on specific tables or database views for each module. Refer to Filter Configuration Tables in Manager Workspace for a list of tables and database views you can use for each application.
Field	Field on which to filter.
Filter Query	Query to narrow down the filter options.
Type	○ **Choice:** choice type field. ○ **Reference:** reference type field.
Order	Filter display order in Manager Workspace.
Workspace Module	Workforce Optimization for Customer Service module that displays the filter configuration.
Active	Enables the filter configuration in Manager Workspace.
Macroponent	Metadata defined seismic component.

4. Click **Submit**.

Setting up service channels and queues

You can set up service channels, queues, and key performance indicators (KPIs) to route work items automatically to agents based on an agent's availability, capacity, and skills.

With Workforce Optimization for Customer Service, you, as a channel administrator, can set up service channels and work item queues so that managers can view the real-time operational metrics for the work that is being done by their teams and the specific items that their teams are working on. You can also configure real-time refresh intervals for the metrics and lists so that managers can always see the latest information about their teams.

Configure filters to refine the search and view targeted results. Filters are persisted across all channel management pages in the session. To view a list of the default interactive filters and the KPI reports for channels, queues, agents, and groups that you can map to the interactive filters, see Interactive Filters under the Channel Management section. By default, the assignment group filter is applied to all lists and groups that you manage. You can disable interactive filters by using the *sn_channel_mgmt.filter_config.enable* property.

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Add service channels and queues

Add service channels and queues to automatically route incoming work items to agents.

Before you begin
Role required: sn_channel_mgmt.admin

About this task
A service channel is a means of assigning a specific type of work items to agents. You can modify the existing service channels or create your own custom service channel.

Procedure

1. To create a service channel, do the following:
   a. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Service Channels**.
   b. Click **New** and see Create a service channel to create the service channel.
   c. Click **Submit**.
   The service channel is created.
2. To create a queue, do the following:
   a. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Queues** or select the service channel and click the **Queues** tab.
   b. Click **New** and see Create a work item queue to create the queue.
   The queue is created in the service channel.

Create assignment rules and groups

Define agent assignment rules and specify groups of agents who are eligible to receive overflow work assignments for a queue.

Before you begin
You must first create a new assignment rule before you create a service channel. For more information, see create a service channel. Use Advanced Work Assignment (AWA) to route work items automatically to agents based on an agent's availability, capacity, and skills.

Role required: sn_channel_mgmt.admin

About this task
An eligible assignment group can consist of one or more groups of agents available to work on items in the queue.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Queues**.
2. Click the queue to which you want to define an assignment rule.
3. In the **Assignment Eligibility** tab, click **New**.
4. On the form, fill in the fields.

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Assignment Eligibility form

Field	Definition
Agent assignment rule	Name of the rule that determines how work items are to be assigned. Select an assignment rule from the list.
Eligible at	Length of time in seconds before AWA considers the next set of agents for assignment.
Groups	Groups that are eligible for assignment. ○ Click the lock ( ) icon to unlock it and select the agent groups in the eligible assignment pool. ○ Click the ( ) icon to lock it.

5. Click **Submit** to create the eligible or **Update** if modifying an eligible assignment pool. The Queues [awa_queues] table is updated with the eligible assignment group.

Note:
For a new service channel, you must first create a new assignment rule and then create a service channel.

Configure KPIs for service channels

Configure key performance indicators (KPIs) in service channels to your teams to track the ongoing work and real-time performance of teams.

Before you begin
Role required: sn_channel_mgmt.admin

About this task
Add the channel Management reports that are by default configured with Workforce Optimization for Customer Service or create a new KPI report that matters the most to you. Key performance indicators help managers perform the following actions:

- Review real-time performance as the team is actively working on tasks across channels and queues.
- Track progress against KPIs and drill down into agents, team, and individual performance.
- Drill down into all queues and monitor ongoing cases, interactions, and tasks.
- Jump in and support agents for help-requested work items using chat whisper or add work notes to a task.
- Refine data in the dashboard using the Assignment Group interactive filter without modifying the reports. For more information, see Interactive Filters.

The KPI scores are automatically refreshed at an interval of five seconds. However, you can modify the refresh interval by adding the *sn_channel_mgmt.kpi_auto_refresh.interval.seconds* property or choose to not automatically refresh using the *sn_channel_mgmt.channels_card_auto_refresh.enable* property. Also, the service channel cards refreshes automatically in 2 minutes as configured in the

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sn_channel_mgmt.channel_card_auto_refresh.interval.seconds system property or you can manually refresh by clicking the Refresh ( ) icon.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Service Channels**.
2. Click the service channel to which you want to add KPIs.
3. In the **Reports** tab, click **Edit**.

   Note:
   You must add the Reports related list if you do not see the **Reports** tab.

4. Select and add the Channel Management reports that are by default configured with Workforce Optimization for Customer Service.

   Note:
   Review the report's definition and add the corresponding filters that are applicable to the service channel that matters the most to you.

5. Click **Save**.
6. **Optional:** To create a KPI report that is explicitly applicable to your teams, do the following:

   a. Navigate to **Reports** > **Create New**.

   b. Fill in the details.
   For more information, see Create a single score report.

   c. Click **Save**.
   The KPI report is created.

   d. Navigate to **Reports** > **Administration** > **Interactive Filters**.

   e. Click **Channel Management Groups Filter**.

   f. Select the Interactive filter references related list and click **New**.
   The Interactive Filter Reference - Channel Management Groups Filter page appears.

   g. Select the KPI report's table name and field name.
   For more information, see Create a reference field interactive filter.

   h. Click **Submit**.

   i. Repeat steps 1 to 4 for each KPI report to be added in the service channel.

   - KPI reports are added with an **Order** being shown as 100, 200 and so on. You can also change the order of a KPI report during selection.
   - By default, the report name is considered as the **Name**. However, you can change the display name per your business needs.

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Result

The KPIs are added to the service channel and appear in the Channels page. The first five KPIs with the lowest order number appear in the service channel cards.

Configure KPIs for queues

Configure key performance indicators (KPIs) for queues so that you can track the incoming work by category in a service channel.

Before you begin

Role required: sn_channel_mgmt.admin

Procedure

1. To add KPIs to a queue, do one of the following.

2. In the **Reports** tab, click **Edit**.

   Note:
   You must add the Reports related list if you do not see the **Reports** tab.

3. Add the Channel Management reports that are by default configured with Workforce Optimization for Customer Service.

   Note:
   Review the report's definition and add the corresponding filters applicable to the service channel that matter the most to you.

4. Click **Save**.

5. **Optional:** To create a KPI report that is explicitly applicable to your teams, do the following:

   a. Navigate to **Reports** > **Create New**.

   b. Fill in the details.
   For more information, see Create a single score report.

   c. Click **Save**.
   The KPI report is created.

   d. Navigate to **Reports** > **Administration** > **Interactive Filters**.

   e. Click **Channel Management Queues Filter**.

   f. Select the Interactive filter references related list and click **New**.
   The Interactive Filter Reference - Channel Management Queues Filter page appears.

   g. Select the KPI report's table name and field name.
   For more information, see Create a reference field interactive filter.

   h. Click **Submit**.

   i. Repeat steps 1 to 4 for each KPI report to be added in the queue.

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Result

The key performance indicators are added to the queue and appear in the **All Queues** tab in the Channels page. By default, the KPI scores are automatically refreshed at an interval of five seconds. However, you can modify the refresh interval by adding the sn_channel_mgmt.kpi_auto_refresh.interval.seconds property.

Configure KPIs for agents

Configure key performance indicators (KPIs) in service channels for your agents so that you can track the agents' ongoing work and real-time performance.

Before you begin

Role required: sn_channel_mgmt.admin

About this task

Add key performance indicators to channels to help managers perform the following actions:

- Review real-time performance of agents who are actively working on tasks across channels and queues.
- Track progress against KPIs and drill down into agents and individual performance.

The KPI scores are automatically refreshed at an interval of 30 seconds. However, you can modify the refresh interval by adding the *sn_channel_mgmt.kpi_auto_refresh.interval.seconds* property. Also, the service channel cards refreshes automatically in 2 minutes as configured in the *sn_channel_mgmt.channel_card_auto_refresh.interval.seconds* system property or you can manually refresh by clicking the Refresh ( ) icon.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Service Channels**.
2. Click the service channel that you want to add KPIs to.
3. Click the Agents Reports related list.
4. Add the Reports for Agents in Channel Management that are by default configured with Workforce Optimization for Customer Service.

   Note:
   Review the report's definition and add the corresponding filters that are applicable to the service channel that matters the most to you.

5. Click **Save**.
6. **Optional:** To create a KPI report that is explicitly applicable to your teams, do the following:

   a. Navigate to **Reports** > **Create New**.

   b. Fill in the details.
   For more information, see Create a single score report .

   c. Click **Save**.
   The KPI report is created.

   d. Navigate to **Reports** > **Administration** > **Interactive Filters**.

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e. Click **Channel Management Agent Filter**.

f. Select the Interactive filter references related list and click **New**.
The Interactive Filter Reference - Channel Management Agent Filter page appears.

g. Select the KPI report's table name and field name.
For more information, see Create a reference field interactive filter.

h. Click **Submit**.

i. Repeat steps 1 to 4 for each KPI report to be added in the service channel.

- KPI reports are added with an **Order** being shown as 100, 200, and so on. You can also change the order of a KPI report during selection.
- By default, the report name is considered as the **Name**. However, you can change the display name per the business needs.

Result
The KPIs that are configured in the service channel appear in the Current Work section of the agent's Overview page. For more information, see Track and analyze agents' performance.

Configure supervisor lists for service channels

Configure supervisor lists in a service channel to view the list of active work items across service channels and queues.

Before you begin
Role required: sn_channel_mgmt.admin

About this task
A database view that defines table joins is used for generating reports for a supervisor list. For example, you can create a database view that can join the Case table to the Interaction and Metric tables. When you use this database view, and create a supervisor list to report on the active work items, you may include fields from any of these three tables. For more information, see Database views.

Note:
You can configure three supervisor lists for each service channel. The first three lists with the lowest order number appear in Channel Management.

Procedure
1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Service Channels**.
2. Select the service channel to which you want to add a supervisor list.
3. Click the **Supervisor Lists** tab.

Note:
You must add the Reports related list if you do not see the **Supervisor Lists** tab.

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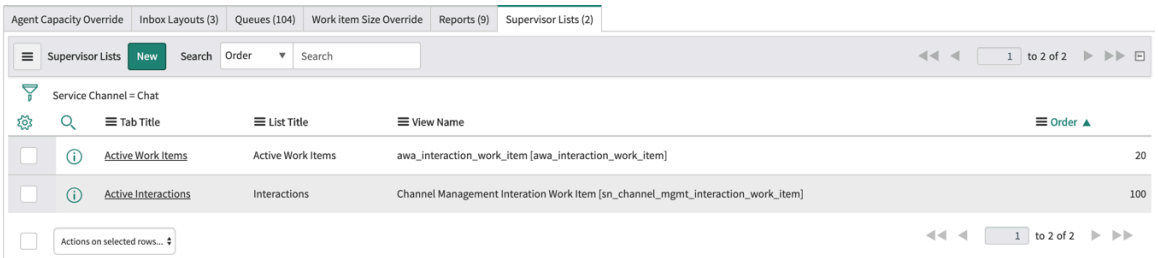
4. Click **New**.



5. On the form, fill in the fields.

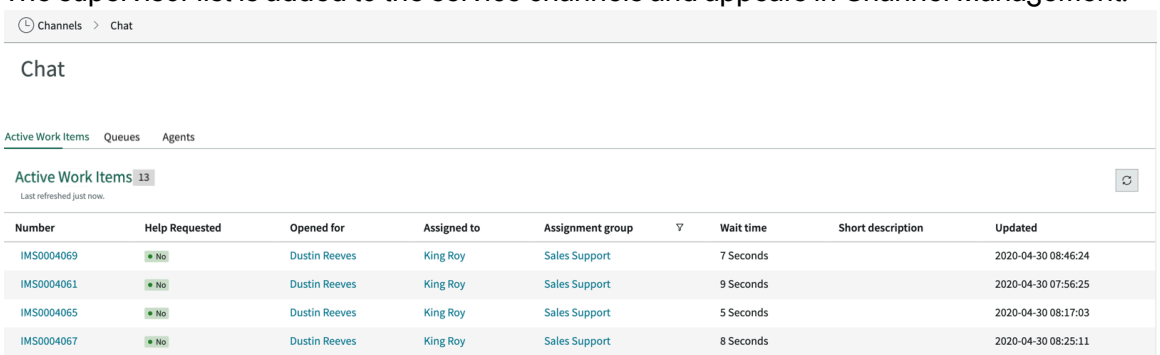
Supervisor Lists form

Field	Description
List Title	Display name for the list.
Tab Title	Title for the tab that appears in the manager workspace.
Service Channel	Service channel in which the list appears.
View Name	Database view for the service channel.
Order	Number that displays the order. **Note:** The first three lists with the lowest order number appear in Channel Management.

6. Click **Submit**.

Result

The supervisor list is added to the service channels and appears in Channel Management.



Use extension points to configure the sort order

Use scripted extension points to configure the sort order for the columns in the All Agents and All Queues lists for Channel Management.

Before you begin

Role required: admin

About this task

Use the *sn_channel_mgmt.ChannelMgmtExtensionPoint* extension point and create an implementation to configure the sorting mechanism for the All Agents and All Queues lists in Channel Management. You can create multiple implementations; however, the implementation with the lowest order number is executed.

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Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for `sn_channel_mgmt.ChannelMgmtExtensionPoint`.
3. On the form banner, click the link **here** to edit the record.
4. Click **Create Implementation** in the related links to create your sorting mechanism extension point script.
5. Add or modify the columns and sort directions in the `vardata` section.

```
    /*
        This method is used to define the default sort order for Agents list in 'Channel & Queue Management' module in
Manager workspace. Please specify the columns and direction of sort in appropriate format.
        Eg: var data = [{
                column: 'can_take_work',
                direction: 'DESC'
            }, {
                column: 'presence_state',
                direction: 'ASC'
            }, {
                column: 'utilization',
                direction: 'ASC'
            }];
    */
    getDefaultSortOrderForAgentsList: function(){
        var data =[];
        return data;
    },
```

6. Click **Update**.

Result

The sorting mechanism is applied to the defined columns in the All Queues and All Agents lists in Channel Management.

Example:

The Presence State column with **ASC** as a sort direction in the extension script displays the Presence State records in an ascending order in the All Agents list. For more information, see Track and analyze agents' performance.

Configure columns in the All agents list

Use scripted extension points to configure the columns in the All agents list for Channel Management.

Before you begin

Role required: admin

About this task

Use the *sn_channel_mgmt.AgentListColumns* extension point to modify the current implementation to configure the columns for the All agents list in Channel Management.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for *sn_channel_mgmt.AgentListColumns*.
3. On the form banner, click the link **here** to edit the record.
4. Click **AgentListColumnsOOBImpl** in the related list to configure the columns for All agents.
5. Add or modify the columns in the `getColumns` section.

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Example

```
    * {Object}:  object containing the following properties:
    *   columns - list of columns for 'Agents' List. Each column has the following properties
            label: Column Label
            internalType: Internal type of a column
            columnOrder: Order at which this column appears in the UI (default: 100000)
            active: Used to show/hide a column (default: active)
            table: Table name for columns with internal type as reference
            useRelativeTime: set to true, in order to display the relative time for columns with internal type as glide_date_
            selectedTabIndex: used to specify the tab index to navigate to. Used in case of reference fields
            isSortable: used to enable/disable sorting
            isFilterable: used to enable/disable filtering
    *   rows - data for all the defined columns against each <Agent, Service Channel>
    */
    getColumns: function(agentIds, channelIds) {
        var rows = {};
        var columns = {};

        return {
            "columns": columns,
            "rows": rows
        };
    },

    type: 'AgentListColumns'
```

6. Click **Update**.

Configure columns in the All queues list

Use scripted extension points to configure the columns in the All queues list for Channel Management.

Before you begin

Role required: admin

About this task

Use the *sn_channel_mgmt.QueueListColumns* extension point to modify the current implementation to configure the columns for the All queues list in Channel Management.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for *sn_channel_mgmt.QueueListColumns*.
3. On the form banner, click the link **here** to edit the record.
4. Click **QueueListColumnsOOBImpl** in the related list to configure the columns for All agents.
5. Add or modify the columns in the `getColumns` section.

Example

```
    * {Object}:  object containing the following properties:
    *   columns - list of columns for 'Queues' List. Each column has the following properties
            label: Column Label
            internalType: Internal type of a column
            columnOrder: Order at which this column appears in the UI (default: 100000)
            active: Used to show/hide a column (default: active)
            table: Table name for columns with internal type as reference
            useRelativeTime: set to true, in order to display the relative time for columns with internal type as glide_date_
            selectedTabIndex: used to specify the tab index to navigate to. Used in case of reference fields
            isSortable: used to enable/disable sorting
            isFilterable: used to enable/disable filtering
    *   rows - data for all the defined columns against each queue
    */

    getColumns: function(queueIds, queueGroups) {
        var rows = {};
        var columns = {};
        return {
            "columns": columns,
            "rows": rows
        };
    },

    type: 'QueueListColumns'
```

6. Click **Update**.

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Schedule a daily report

Generate and distribute a daily scheduled report that summarizes the agent's work performance via email.

Before you begin
Role required: sn_channel_mgmt.admin

About this task
The scheduled job *Send Daily Agents Report* executes the event *sn_channel_mgmt.agents_report*, which then triggers the *Daily Agents Report* notification. Next, the notification *Daily Agents Report* executes an email script *daily_agents_reports* to send an email to all managers. To change the existing report, modify the *daily_agents_reports* email script.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search and click **Send Daily Agents Report**.
   The scheduled script *Send Daily Agents Report* form appears.
3. Click the link **here** to edit the record.
4. Select the **Active** check box.
5. In the **Run** field, ensure that the option **Daily** is selected.
   The script, by default, sends the agents' work summary report daily to the managers.
6. Select the **Time zone**.
7. Click **Update** to update the scheduled job or **Execute Now** to execute the scheduled script immediately.

Result
All managers and additional managers of the teams receive an email notification that summarizes their agents' performance.

Setting up Scheduling in Workforce Optimization for Customer Service

Manage events using the team calendar. Create different types of event categories. Use scripted extension points to customize event types.

Configure event categories for Manager Workspace

Add an event category. Create or update field configurations for events. You can also specify if an event category must be excluded when the shift coverage for agents are calculated.

Before you begin
Role required: sn_shift_planning.admin

The following event category configurations are available by default:

- Work
- Meeting
- Training
- Time Off
- Break

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Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Scheduling** > **Event Categories**.
2. In the **Event Categories** list, click **New**.
3. In the **Name** field, enter a name for the event category.
4. If you want to exclude this event category for agent coverage calculation, enable the **Exclude from coverage** check box.
5. In the **Event field configuration** dialog box, edit the following configuration as necessary:

Note:
You can remove any property that does not apply to a type of event.

```
{
           "create": {                //Creates an event type
form
               "attendees": {         //Adds the Attendees
field
               "mandatory": true,     //Sets this field as
mandatory
               "readOnly": false,     //Sets this field as
read-only
               "allowAllUsers": false //Allows you to only add
users managed by the logged-in user; to add any user, set this
value to true
               },
               "startDate": {
               "mandatory": true,
               "readOnly": false
               },
               "endDate": {
               "mandatory": true,
               "readOnly": false
               },
               "additionalSelectors": [    //Add custom fields
to the form
               {
                   "fieldLabel": "Select Shift", //Name of the
field that displays on the form
                   "table":
"sn_shift_planning_shift_plan", //Name of the table referenced
by the field
                   "field": "name", //Any field from the
selected table whose display values must be shown in the
custom field
                   "value": "",
                   "mandatory": true,
                   "additionalQueryString": ""
               }
               ]
           },
           "edit": {                   //Edit an event type
form
               "attendees": {
               "mandatory": true,
```

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```
                "readOnly": false,
                "allowAllUsers": false
                },
                "startDate": {
                "mandatory": true,
                "readOnly": false
                },
                "endDate": {
                "mandatory": true,
                "readOnly": false
                },
                "additionalSelectors": [
                {
                    "fieldLabel": "Select Shift",
                    "table": "sn_shift_planning_shift_plan",
                    "field": "name",
                    "value": "",
                    "mandatory": true,
                    "additionalQueryString": ""
                }
                ]
            }
        }
```

6. Click **Submit**.

Create event types to display them on the team calendar

Create multiple events from the same category and add them to the team calendar.

Before you begin

Role required: sn_shift_planning.admin

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Scheduling** > **Event Configuration**.
2. Click **New**.
3. On the form, fill in the fields.

Event configuration form field

Field	Description
Name	Unique name for the event type.
Priority Order	Priority of the event type that you want to exclude from the coverage. The higher the number means the higher the priority. For example, let's say you are attending a work event for four hours in a day. You have marked that time window as both a time off and as a meeting event type. If time off has a higher order of priority, then the application excludes that event type from coverage.
Color	Color that identifies this type of event in the team calendar.
Active	Option that when enabled, displays the event type on the calendar.

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Field	Description
Category	Type of event, for example, meeting, break, or time off.

4. Click **Submit**.

> **Note:**
> After an event type is assigned to a shift, that event type cannot be deleted.

Configure properties for schedule adherence and conformance

Configure schedule adherence properties to calculate the adherence and conformance of your agents so that you can improve the operational efficiency of your organization.

Before you begin
Role required: admin

About this task
The threshold settings for adherence and conformance indicate how many minutes early or late an agent can clock in or clock out to a scheduled work shift without being considered as non-adherent.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Schedule Adherence** > **Settings**
2. On the form, fill in the fields.

Schedule Adherence properties form

Field	Description
Enable Schedule Adherence	Calculation and information about the agents' adherence to the schedules.
Threshold for early checkin for planned shift (in Minutes)	Time that you can set for early check-in. This time is the acceptable time for an agent to start the work shift before the actual shift time. The default value is 60 minutes. For example, if an agent's planned work shift is 08:00 to 17:00 and the agent clocks in at 07:00, the threshold time allows flexibility and the agent isn't considered as a non-adherent agent.
Threshold for adherence % of Time Worked Summary	Percentage that you can set for a threshold in adherence. The agents who don't qualify to be above the defined threshold value (70%) are considered non-adherent agents.
Lower threshold conformance % of Time Worked Summary	Lower threshold percentage that you can set for flexibility in conformance. The agents who don't qualify for the defined lower and upper conformance threshold values (80-120) are considered as non-conformant agents. The default value is 80%.
Upper threshold for conformance % of Time Worked Summary	Upper threshold percentage that you can set for flexibility in conformance. The agents who don't qualify for the defined lower and upper conformance threshold values (80-120) are considered as non-conformant agents. The default value is 120%.

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Field	Description
Default threshold time for clock-out event generation (in Minutes)	Default threshold time to generate an automatic clock-out event if an agent fails to clock out. The default value is 60 minutes. For example, if an agent's planned work shift is 08:00 to 17:00 and the agent fails to clock out at 17:00, the system waits for 60 minutes as the threshold time and generates an automatic clock-out event.

3. Click **Save**.

Related topics

Scheduling in Workforce Optimization for Customer Service

Monitor schedule adherence of your agents

Analyze adherence and conformance from the time worked summary

Modify schedule adherence and conformance formulas by using extension points

Configure and tweak the schedule adherence and conformance formulas using scripted extension points so that you can customize them for your organization.

Before you begin

Role required: admin

About this task

Use the *sn_shift_planning.ScheduleAdherenceExtPt* extension point and create an implementation to configure the formulas. You can create multiple implementations. However, the implementation with the lowest order number is executed.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for `sn_shift_planning.ScheduleAdherenceExtPt`.
3. On the form banner, click the link **here** to edit the record.
4. To create your extension point script, click **Create Implementation** in the related links.
5. Modify the formulas for calculating the schedule adherence and conformance in the `getAdherencePercentage` and `getConformancePercentage` methods.

```
var ScheduleAdherenceExtPtImp = Class.create();
ScheduleAdherenceExtPtImp.prototype = {
    initialize: function() {
    },

    getAdherencePercentage: function(plannedTime, timeNotWorked, availableNonPlannedTime, totalTimeWorked){
        var adherencePercentage = ((plannedTime - timeNotWorked) / (plannedTime + availableNonPlannedTime)) * 100;
        return adherencePercentage;
    },

    getConformancePercentage: function(plannedTime, timeNotWorked, availableNonPlannedTime, totalTimeWorked){
        var conformancePercentage = (totalTimeWorked / plannedTime) * 100;
        return conformancePercentage;
    },

    type: 'ScheduleAdherenceExtPtImp'
};
```

6. Click **Update**.

Result

The schedule adherence and conformance calculations are based on the formulas in the implementation.

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Event type extension points in Workforce Optimization for Customer Service

Use extension points to call scripts for event categories such as meeting, time off, or work time.

To see a list of extension points that you can use for Workforce Optimization for Customer Service, navigate to **System Extension Points** > **Scripted Extension Points**. In the Extension Points list, open the `sn_shift_planning.EventManager` extension point.

Use scripted extension points to integrate customizations without altering the core components in the application code. When customizing a base application, you implement the scripted extension points by creating the custom script includes and registering them against the scripted extension points.

Extension points for event types

Extension point name	Description
`sn_shift_planning.EventManager`	Implement this extension point to customize the logic for the event categories that you create.

You can use extension points to create events such as meeting, training, and time-off requests. For example, for extension point implementations, see the following extension instances in the Implementations related list:

Extension scripts for creating events

Category	Extension Script
Meeting	`AgentScheduleMeetingEventManager`
Break	`AgentScheduleBreakEventManager`
Training	`AgentScheduleTrainingEventManager`
Time off	`AgentScheduleTimeOffEventManager`
Work	`AgentScheduleWorkEventManager`

Related topics

Using extension points to extend application functionality

Synchronize team calendar with Microsoft Outlook

Managers and agents can synchronize their calendars and events with Microsoft Outlook.

As a user with admin role, you can enable this feature by installing Microsoft Exchange Online Spoke. See Set up.

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Note:
Ensure that you grant the following Graph API permissions to synchronize Microsoft Outlook with team calendar.

Graph API permissions

Permission	Type
Calendars.ReadWrite	Delegated
Calendars.ReadWrite.Shared	Delegated
Calendars.ReadWrite	Application

After installing Microsoft Exchange Online Spoke, set the *sn_wfo_outlook.enable_outlook_sync* system property to `true` in the System Properties [sys_properties] table. Add the email IDs that you want to synchronize in the User [sys_user] table.

Setting up Teams Workforce Optimization for Customer Service

Organize your teams into assignment groups and create reports for those groups so that you can gain visibility into the team's performance.

As an administrator, you can configure KPIs as well as child KPIs. The child KPIs appear when you drill-down into top level KPIs. For example, Closed Cases KPI has P1 Cases, P2 Cases as child KPIs.

Create KPI groups to monitor team performance

Create key performance indicator (KPI) groups with the KPIs that matter most to your teams. When you associate your KPI groups with assignment groups, you can monitor your team's performance.

Before you begin
Role required: sn_team_perf.team_performance_admin

About this task
By default, the KPIs that are associated with your KPI assignment groups are scheduled to collect data daily. The KPIs must have the following indicator breakdown:

- Assignment groups
- Assigned to

Procedure

1. Create a KPI group.
   a. Navigate to **Workforce Optimization for Customer Service** > **Team Performance** > **KPI Groups**.
   b. Click **New**.
   c. In the **Name** field, enter a name for the KPI group.
   d. In the **Type** menu, select **Teams**.
   e. Right-click the form header and click **Save**.

   You can add up to five KPIs to a KPI group. For more information about KPIs and how the aggregates are calculated, see the overview video in the Teams example section.

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2. Add KPIs to a KPI group.
   a. In the **KPIs** related list, click **New**.
   b. In the **KPI** field, select the KPI to apply for this group.
   c. Click **Submit**.
3. Add KPI assignment groups to the KPI group.

   Note:
   - You can associate a KPI assignment group only to one KPI type.
   - You can add additional managers to each assignment group.
   - You can associate a user with a KPI group as the primary assignment group for that user.

   a. In the **Assignment Groups** tab, click **Edit**.
   b. Move the desired assignment groups from the Collection to the Assignment Groups list.
   c. Click **Save**.

Add managers to a KPI assignment group

Assign one or more managers to each KPI assignment group so that they can gain visibility into the group and monitor the team's performance.

Before you begin
Role required: sn_wfo_admin or admin

About this task
You can associate a user with a primary assignment group by selecting the group in the user record.

Procedure
1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Team Performance** > **Additional Managers**.
2. Click **New**.
3. In the **Assignment Group** field, select an assignment group.
4. In the **Manager** field, select a manager you want to add for this assignment group.
5. Click **Submit**.

What to do next
Analyze the performance trends for your teams.

Setting up Coaching in Workforce Optimization for Customer Service

Manage agent skills and assess the quality of completed tasks. Use predictive intelligence to recommend skills for agents. Train your agents with internal and external learning content.

Configure an indicator to display in the Coaching Overview tab in Workforce Optimization for Customer Service

Add a system property to display the desired indicator in the Coaching Overview tab in the Coaching application.

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Before you begin

Important:
This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Set the map application scope to **Coaching**. For information on how to set the scope, see Set map application scope.

Role required: admin

About this task

Replace the existing indicator with any Performance Analytics indicator that has the Assigned to and Assignment group breakdowns to display in the Coaching Overview tab in the Coaching application.

Procedure

1. In the application navigator, enter `sys_properties.list`.
2. Click **New**.
3. Enter the following field values.

System property form field

Field	Value
Name	sn_coaching.coaching_overview_default_quality_indicator
Application	Coaching
Type	string
Value	{"title": "<name>", "sys_id": "<sys id>"} where <name> is the name of the indicator that you want to display in the Coaching Overview tab and <sys id> is the unique record identifier (sys_id) of the indicator. Example: ○ Name: % of P1 incidents resolved on first call. ○ Sys ID: 0423e59387401010ca99e12397cb0bbb {"title": "% of P1 incidents resolved on first call", "sys_id": "0423e59387401010ca99e12397cb0bbb"}
Read roles	sn_coaching.coach

4. Click **Submit**.
   The configured indicator replaces the existing indicator in the Overview tab in the Coaching application in Workforce Optimization for Customer Service.

Setting up skill prediction in Workforce Optimization for Customer Service

Collect skill data based on skills agents have used for case resolution. Use supervised learning to recommend these skills for agents to resolve similar open case. You can also find patterns in how skills are used for case resolution and use unsupervised learning to recommend skills for agents.

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Before you begin

Set up skills. For more information, see Skills Management.

Predictive Intelligence must be set up and configured on your instance to train the models. For more information, see Predictive Intelligence.

Activate the Skill Recommendation application plugin (com.snc.sre) to use predictive intelligence for recommending skills.

Role required: sn_sre.admin

Procedure

1. Configure the properties for the Skill Recommendation application.
2. Run the solution definition models such as *`Recommend similar skills for cases`* or *`Recommend skills from similar cases`* to train the supervised and unsupervised solutions.
   For more information on training a solution, refer to Create and train a similarity solution.
3. Run the *`Start skill prediction`* scheduled job everyday to start predicting skills for cases or agents.
   This scheduled job is inactive by default. When you activate it, the job runs daily at 1:00 AM on all cases resolved the previous day. The job then adds the skills to the User Predicted Skill [sn_sre_user_predicted_skill] table and Task Predicted Skill [sn_sre_task_predicted_skill] table.

> **Note:**
> Recommended skills will start appearing once the number of records in [sn_sre_task_predicted_skill] table exceeds the value defined in the [sn_sre.user_predicted_skill_threshold] Components installed with Workforce Optimization for Customer Service.

Use extension points for skill prediction

Use scripted extension points to customize skill prediction for tasks.

Before you begin

Role required: admin

About this task

You can create multiple implementations for each extension point and provide an order number for each implementation. The implementation that has the lowest order number is executed.

Note that the Skill Recommendation extension point is included with the Skill Recommendation (com.snc.sre) plugin.

Procedure

1. Navigate to **All** > **System Extension Points** > **Client Extension Points**.
2. From the Extension Points list, select **Skill Recommendation** (sn_sre.SkillPredictionAPI).
3. Either create a new skill recommendation implementation or modify an existing one.
   - To create a new skill recommendation implementation, click **Create Implementation**.
   - To modify an existing implementation, from the Implementations related list, select a class.
4. Modify the script as required.
5. Click **Update**.

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Configure a list menu to display in the Learning tab in Workforce Optimization for Customer Service

Add list or list categories to modify the list menu for Coaching with Learning in the Coaching application in Workforce Optimization for Customer Service.

Before you begin

Important:
This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Set the map application scope to **Coaching With Learning**. For information on how to set the scope, see Set map application scope.

Role required: admin

Procedure

1. In the application navigator, enter `sys_ux_list_menu_config.list`.
2. Click **Learning list** record.
3. Under UX list category, click **New**.
4. Enter the following field values.

Learning list form field

Field	Value
Title	Enter the name of the list category.
Description	Enter a short description about the list category.
Order	Enter a value to set the position of the list category in the current list.
Active	Select the check box to make the list category visible.

5. Click **Submit**.
6. Under UX Lists, click **New** to create lists under that list category.
7. Enter the following field values.

UX lists form field

Field	Value
Title	Enter the name of the list.
Table	Select the table for the data that you want to display in the list.
Configuration	Select **Learning List**.
Columns	Select the columns that you want to display for the table.

8. Click **Submit**.
9. Click **Update**.

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Integrate Coaching With Learning with third-party learning management systems

Connect your ServiceNow instance with third-party learning sites to pull learning content into your repository.

Before you begin

Important:
This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Role required: learning_admin

About this task

Applications to integrate third-party learning sites

Activating the Coaching with Learning (sn_coach_lrn) plugin enables the following applications from the ServiceNow Store:

- Enterprise Service Management Integrations Framework
- Cornerstone spoke
- Pluralsight spoke
- Udemy spoke

Procedure

1. Create the integration source for each of your third-party systems.

   Note:
   Cornerstone, Pluralsight, and Udemy integrations are available by default.

   a. Navigate to **Integrations Framework** > **Source**
   b. Click **New**.
   c. In the **Name** field, enter the name of the integration source, for example, Pluralsight.
   d. Right-click the form header and click **Save**.
   e. In the Integration Services related list that appears, click **New**.
   f. On the form, fill in the fields:

Integration service form field

Field	Description
Name	Name of the integration service, for example, Pluralsight.
Import set tables	List of intermediate tables which store records from the third-party system. **Note:** This field is enabled only when a Scheduled pull service is selected in the **Service type** field.
Flow	Flow that interacts with the third-party system to pull the required data.

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Field	Description
Active	Option to indicate that the integration service is available for use.
Application	Application which includes the integration service record.
Source	Name of the third-party system with which you want to integrate your application.
Order	Order in which you want to run transformation scripts.
Service type	Option to indicate the type of service **Scheduled pull** or **Ondemand Push**.
Retry policy	Configuration set to push a record if the last push fails. **Note:** This field appears only when an Ondemand Push service is selected in the **Service type** field.

g. Click **Submit**.

2. Integrate your ServiceNow instance with your third-party learning source accounts.
The records from the third-party content are pulled into your ServiceNow instance using and API call. To successfully run this API call, you must do the following:
   a. In the application navigator, enter `sys_properties.list`.
   b. For each of the following properties, set the value to **1638400**:
      - com.glide.transform.json.max-partial-length
      - com.snc.process_flow.reporting.serialized.val_size_limit

   For more information on these system properties, see Coaching With Learning System Properties.
3. Activate schedule flows to integrate third-party learning content.
   a. Navigate to **Process Automation** > **Flow Designer**
   b. In the **Flows** section, select each of the following flows and click **Activate**:
      - Trigger Cornerstone Learning Sync
      - Trigger Pluralsight Learning Sync
      - Trigger Udemy Learning Sync
   c. Navigate to **Learning** > **Administration** > **Learning System Configuration**
   d. Select each of the third-party learning sources and set the **Active** field to **true**.
   Schedule flows automatically run on a scheduled basis to synchronize third-party learning content into your ServiceNow instance.
4. After configuring the third-party integration sources, you can refresh the entire third-party content or synchronize new and updated services into your ServiceNow instance.
   - To refresh the entire content, set the *full_pull* property to **true**.

     Note:
     We recommend that you periodically refresh the entire content.

   - To synchronize new and updated services, set the *full_pull* property to **false**.

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a. Open any integration source for which you want to pull content.

b. Click **Run Job**.
The integration framework pulls the corresponding third-party learning courses into the Learning External Content [sn_lc_external_content] table on your ServiceNow instance.

When synchronizing new and updated services, the content is populated as described in the table.

Third-party learning courses

Third-party content	New and Updated Services synchronized
Udemy	○ Courses ○ User activity
Cornerstone	○ Users ○ Courses ○ User activity
Pluralsight	○ Courses ○ Course progress such as percentage

What to do next

Add external courses to Coaching With Learning

External Content Integration Sources

When you integrate Coaching With Learning with third-party learning management systems, the source record for Cornerstone OnDemand, Pluralsight, and Udemy applications are automatically created in the Enterprise Service Management Integrations Framework. These source records contain a predefined set of properties and integration services.

Integration source record for Cornerstone Ondemand

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Cornerstone.
Properties	Set of properties that are predefined for Cornerstone OnDemand application. • **page_size**: Number of records that are pulled through an API call from Cornerstone OnDemand application. • **full_pull**: When set to **True**, all the active users and learning courses from the Cornerstone OnDemand system are pulled into the ServiceNow instance. When set to **False**, modified users, modified transcripts, and updated courses are pulled from the Cornerstone OnDemand system into the ServiceNow instance. • **url_prefix**: Deep link prefix to pull learning objects from Cornerstone OnDemand system during run time.

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Integration source record for Cornerstone Ondemand (continued)

Field	Description
	• **pull_offset_hours**: The time, in hours, calculated from the last successful run for the next synchronization to occur For example, the last successful run was on 12/12/2021 at 17:00:00, pull_offset_hours is set to 5, and full_pull is set to False. The next pull fetches all the records that have been modified from 12/12/2021 12:00:00 until current date and time.
Integration Services	Services interact with Cornerstone Ondemand application to pull or push learning courses. • **Course assign service**: Assigns a course to an employee in the Cornerstone Ondemand application. • **Sync users**: Maps users in the Cornerstone OnDemand system to users in the ServiceNow system using email Ids. **Note:** If you want to use user_id or user_name field for mapping users, then override**getCornerstoneUser method** in the sn_lc.UserMappingUtil script. • **Courses**: Pulls learning courses from Cornerstone OnDemand system into ServiceNow. • **User activity**: Pulls details of user activity on learning courses from Cornerstone OnDemand system into ServiceNow.

Integration source record for Pluralsight

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Pluralsight.
Properties	Set of properties that are predefined for the Pluralsight system. • **page_size**: Number of records that are pulled through an API call from Pluralsight. • **full_pull**: When set to **True**, all the learning courses are pulled from Pluralsight into the ServiceNow instance. When set to **False**, updated learning courses progress is pulled from Pluralsight into the ServiceNow instance. • **pull_offset_hours**: Value that is considered for pulling modified records. For example, the last successful run was on 12/12/2021 at 17:00:00, pull_offset_hours is set to 5, and full_pull is set to False. The next pull fetches all the records that have been modified from 12/12/2021 12:00:00 until current date and time.

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Integration source record for Pluralsight (continued)

Field	Description
Integration Services	Integration services interact with Plural sight application to pull learning courses into ServiceNow. • **Courses**: Pulls learning courses from Pluralsight into ServiceNow. • **Course progress**: Pulls the progress of learning courses from Pluralsight into ServiceNow.

Integration source record for Udemy

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Udemy
Properties	Set of properties that are predefined for the Udemy system. • **page_size**: Number of records that are pulled through an API call from Udemy into ServiceNow. • **full_pull**: When set to **True**, all the learning courses are pulled from Udemy into the ServiceNow instance. When set to **False**, updated learning courses and learning course progress are pulled from Udemy into the ServiceNow instance. • **pull_offset_hours**: Value that is considered for pulling modified records. For example, the last successful run was on 12/12/2021 at 17:00:00, pull_offset_hours is set to 5, and full_pull is set to False. The next pull fetches all the records that have been modified from 12/12/2021 12:00:00 until current date and time.
Integration Services	Integration services interact with Udemy application to pull learning courses into ServiceNow. • Pull Courses: Pulls learning courses from Udemy into ServiceNow. • Pull user activity: Pulls details of user activity on learning courses from Udemy into ServiceNow.

Setting up Demand Forecast in Workforce Optimization for Customer Service

Configure the data that you want to collect, modify forecast parameters, and calibrate manual adjustments using Demand Forecast.

Configure the data collection to forecast the demand for resources

Define the data you want to collect for cases, interactions, or any table to forecast the number of agents that you require for your staffing needs.

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Before you begin

You must have the MetricBase plugin [com.snc.clotho] enabled to use Demand Forecast in Workforce Optimization for Customer Service. For more information, see Requesting the MetricBase product.

Note:

- When you change the forecast parameters or resource conversion formula, the new values for resource forecasts will not reflect on the team calendar until the **Forecast resources for future** scheduled job is executed. Your administrator can run the scheduled job on-demand to view the changes in the team calendar.
- Once the **Historical data collection** job is run for specific data collection definitions, the column **Is historical data collected** in the Forecast Configurations [sn_agent_forecast_configuration] table is set to **true**. Hence, the historical data collection will not run even if you add data for the past dates from the back-end. Historical data is stored for 1098 days for forecasts set at daily interval. Beyond three years, historical data is cleaned and cannot be saved.

Role required: sn_agent_forecast.admin

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Demand Forecast**.
2. Define the data you want to collect for forecasting agents to resolve cases.
   a. Click **Data Collection Definitions**.

      See the Forecast Configuration table in Scheduling for the list of configurations that are available by default.

   b. Click **New**.
   c. On the form, fill in the fields:

Forecast Configuration form

Field	Description
Name	Unique name for the collection forecast configuration.
Type	Data Collection Definition type is set to **Collection** by default and collects data using a scheduled job.
Table	Table that is used for collecting data. From the list, do one of the following: ▪ To collect data to forecast cases, select **Cases**. ▪ To collect data to forecast interactions, select **Interactions**.
Condition	Conditions that you can set so that you can capture the data that you need.
Date Field	Data that you can add to forecast for the future.

   d. Click **Submit**.
   e. Create an index for the table you have created using the date field and the conditions you have added to the table. For information on creating a table index, see Create a table index.
3. Add parameters to be defined in the formula to calculate agent count per hour in a day.

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a. Click **Formula Parameters**.

b. In the **Name** field, enter a name for the parameter.

c. Do one of the following:

- If you need to add a value to be calculated for the formula, in the **Value** field, enter the value.
- If you want to use the performance analytics score card API or a custom API, click **Advanced,** and add the script.

The Average Case Work Time and Average Chat Work Time forecast parameters provided by default are examples of how you can use scripts to add the parameters. For a list of parameters provided by default, see Forecast Parameters in Scheduling.

d. Click **Submit**.

4. Configure the resource conversion formula.

a. Click **Resource Conversion Formula**.

b. Click **New**.

c. On the form, fill in the fields.

Forecast Configuration form

Field	Instructions
Name	Name for the resource forecast configuration.
Type	Type is set to **Resource Conversion Formula**.
Formula	Formula to calculate the forecasted number of agents that you need. In the Related Links section, do the following: ▪ Click **Browse Forecast Configuration**, select the forecast configuration to add to the formula and click **Add**. ▪ Click the Browse Forecast Parameter, select the forecast parameter to add to the formula and click **Add**. **Note:** **FC** refers to Forecast Configuration and **FP** refers to Forecast Parameter.

d. Click **Submit**.

5. Associate an assignment group with a Resource Conversion Formula.
You can assign a forecast configuration to multiple assignment groups, but an assignment group can have only one forecast configuration.

a. Click **Group Forecast Configurations**.

b. Click **New** and do the following:

- In the **Assignment Group** field, click the search icon and select the group to which you want to associate a forecast configuration.
- In the **Forecast Configuration** field, click the search icon and select a **Resource Conversion Formula**.

What to do next

Run the *`Collect historical data for demand forecast data collection definitions`* scheduled job. For more information, see Schedule jobs for Demand Forecast.

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Related topics

Use Demand Forecast

Modify forecast parameters to visualize forecast data

Configure and tweak forecast parameters to see how the forecast behaves when you vary the period length, periods to forecast, or algorithm. You can view the modified forecast on the time-series visualization at intervals of 15-, 30-, and 60-minute intervals and daily interval.

Before you begin

Role required: sn_agent_forecast.admin and sn_csm_wfo_workspa.manager

The user with these roles must also be a manager of the assignment group that is associated with the resource conversion formula.

About this task

You can define the start and end dates for which you want to create the forecast data. The start date is always the current date. The end date is calculated based on the period length and the periods to forecast. The periods to forecast is represented in days or hours. For example, if the period length is 1 day and the period to forecast is 30 days, then the end date is 30 days including the current day.
For 15-, 30-, and 60-minute intervals, managers can generate forecast up to 28 days. For daily interval, managers can generate forecast up to 365 days.

Forecast results are displayed with the historical data so that the user can compare the patterns of historical data with the forecast. The historical data of 14 days prior to the current date will be displayed with forecasts of 15-, 30-, and 60-minute intervals. The historical data of four weeks to the prior date will be displayed with forecasts of daily intervals. You can customize and configure historical data to be displayed using the *sn_agent_forecast.number_of_historical_days_in_timeseries_chart* and *sn_agent_forecast.number_of_historical_days_in_daily_timeseries_chart* system properties..

The published forecast is reflected on the team calendar only when the **Forecast resources for future** job is executed.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.
3. Click **Forecasts**.
4. Select the forecast model for which you want to view the time-series data.
   You can visualize each of the forecast parameters that were created for the forecast model.
5. Click the gear ( )icon.
6. Click the plus (+) sign.
7. Configure the forecast parameter.
   a. From the **Period length unit** list, select the unit for the length of the period to forecast.
   b. In the **Period length** field, enter the duration of the period to forecast.
   c. In the **Periods to forecast** field, enter the number of seasons, which is the period length, for which you want to forecast.

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d. In the **Interval** field, select 15-, 30-, and 60-minute intervals or Daily interval value of the period to forecast.

e. Click **Update**.
The forecast is created in **Draft** state. The forecast is calculated and displays in the forecast model. You can analyze the forecast with the new forecast parameters before you publish it.

8. To preview a forecast before publishing it, click **Preview**.
he forecast is calculated using the algorithm and parameters configured in the forecast parameter. When you create a manual adjustment to predict future resources, Demand Forecast overlays the adjustment in the time-series chart.

9. Publish the forecast parameters.

a. To publish a newly created forecast parameter, click **Save** and then click **Publish**.

b. To publish an active forecast parameter, click **Publish**.

Note:
You can only have one forecast in **Published** state, which is used to calculate the resources.

When the forecast parameter is published:

- The state of the record changes to **Published**.
- The **Forecast resources for future** job runs daily and uses the published forecast parameters to calculate the agent forecast. The calculation uses the resource conversion formula to calculate the forecast data from the current point forward. You can view the updated resources in the team calendar.
- Any other forecast parameters that were created would be unpublished and inactive.

What to do next

Create a manual adjustment for a forecast

Adjust forecasts manually to fine-tune them for greater accuracy. Create the adjustment for a specified time period and analyze how it impacts your forecast.

Before you begin

Role required: sn_agent_forecast.admin and sn_csm_wfo_workspa.manager

The user with these roles must also be a manager of the assignment group that is associated with the resource conversion formula.

About this task

Managers can make manual adjustments to the forecasts for 15-, 30-, and 60-minute intervals and daily interval. Managers can generate forecasts with manual adjustments at daily interval and can view the adjustments at a more granular level for that same period at 15-, 30-, and 60-minute intervals.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.
3. Click **Forecasts**.
4. Select the forecast model for which you want to make a manual adjustment.

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5. Click the Manual Adjustments ( ) icon.
6. Make a manual adjustment.
   a. Click the plus (+) sign.
   b. Fill in the following fields.

Manual adjustment form field

Field Name	Description
Name	Unique name for the manual adjustment.
Start Date Time	Date and time when the manual adjustment for the forecast must start.
End Date Time	Date and time when the manual adjustment for the forecast must end.
Adjustment Unit	Unit for the manual adjustment. Available values: ▪ Percentage—adjustment value percentage. For example, if the forecast data shows case count and if the adjustment value is 15, the manual adjustment shows a 15% increase in case count than the forecast data. ▪ Number—adjustment value count. For example, if the forecast data shows case count and if the adjustment value is 15, the manual adjustment shows 15 more cases than the forecast data.
Adjustment Value	The numeric value for which you want to adjust the forecast. The value is applied to each group in the Groups [sys_user_groups] table. The manual adjustment visualization on the time-series chart displays the data for your groups. For example, let's assume that the value is 15 and the unit is number. If you have two groups for a forecast model and both have 2 agents each before you do the manual overlay, when you enter the value as 15, it is applied to each of the two groups and the total value displays as 34. This is calculated as follows: ▪ Two agents for group A + the adjustment value 15 = 17 ▪ Two agents for group B + the adjustment value 15 = 17 The total is 34. If you have two groups for a forecast model and both have a volume (for example: Cases/ Chats) of 2 before you do the manual overlay, when you enter the value as 15, it is applied to each of the two groups and the total value displays as 34. This is calculated as follows: ▪ Two cases/chats for group A + the adjustment value 15 = 17 ▪ Two cases/chats for group B + the adjustment value 15 = 17 The total is 34.

   c. Click **Save**.

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The manual adjustment is created in **Draft** state. The manual adjustment is calculated and displays as a green line in the forecast model. You can analyze or update the forecast with this manual adjustment before you publish it.

7. Publish the manual adjustment.
   a. Click the saved manual adjustment that you want to use for forecasting resources.
   b. Click **Publish**. The state changes to **Ready to Publish**.
   When the **Forecast resources for future** job is run, it calculates the forecast, checks for manual adjustments, applies those values if any, and moves it to the **Published** state.

Note:

- When you unpublish a forecast, it moves to **Draft** state. You can delete a forecast that is in **Draft** state.
- If you want to end a manual adjustment after it has started and before its end date, you can click **End Now**.

The forecast will no longer be used in the resource conversion formula.

When the manual adjustment is published:

- The state of the record changes to **Published**.
- The adjusted values will be used in the resource conversion formula and the demand forecast displayed on the calendar.
- Any other manual adjustment configurations that were created would be unpublished and moved to **Draft** state.

Migrate to 15-minute forecasting

Migrate to 15-minute demand forecasting that enables managers to view their agent staffing forecast at 15-minute intervals on the team calendar.

Before you begin

Role required: admin

About this task

Starting with the Tokyo release, 15-minute forecasting is the default forecasting feature. Existing customers can migrate from the 60-minute forecasting to 15-minute forecasting using the following procedure.

Procedure

1. Set the *sn_agent_forecast.forecast_interval* system property value to `15`.
   a. Set the application scope to Agent Forecast using the application picker.
   b. Enter `sys_properties.list` in the navigation filter, and then open the *sn_agent_forecast.forecast_interval* property.
   c. In the **Value** field, enter `15`.
   d. Click **Update**.
2. Deactivate the existing demo data definitions.
   a. Navigate to **All** > **Workforce Optimization** > **Demand Forecast** > **Data Collection Definitions**.
   b. Set the **Active** value of **Cases Assigned** and **Chat Interaction Created** demo definitions to **false**.
3. Create new data collection definitions, formula parameters, and group forecast configuration.

   For more info, see Configure the data collection to forecast the demand for resources.

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4. Run the *Collect historical data* on-demand job to collect historical data at 15-minute interval.
   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
   b. Search for *Collect historical data* and select it.
   c. Click **Execute Now**.
5. Run the *Forecast resources for future* scheduled job for staffing forecast that can be viewed on team calendar.
   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
   b. Search for *Forecast resources for future* and select it.
   c. Click **Execute Now**.

Setting up Work scheduler in Workforce Optimization for Customer Service

Customize an existing work scheduler card based on your need. You can also create a work configuration and work scheduler card from scratch and associate them so that managers can view the cards in their work queue.

Customize a Work Scheduler card using the Next Experience UI Builder

Customize the Work Scheduler card components, such as adding an extra field, or changing the color or order of a field, to display them in the Work scheduler queue.

Before you begin
Role required: admin, workspace_admin, or ui_builder_admin

About this task
You can duplicate an existing work item variant such as an Incident, Problem, Change Request and customize it based on your needs.

Procedure
1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the **My experiences** list, select **Manager Workspace**.
3. Select the Pages icon.
4. In the **Page** menu, select **Work scheduler**.
5. In the left pane, go to the **Content** section and navigate to **Body (Flex)** > **Work queue (Flex)** > **Sidebar**.
6. In the right pane, select the icon ( ) in the **Work item cards default** sub-page.
7. In the left pane, select **Body (Flex)** > **Viewport1**.
8. In the right pane, select the icon ( ) next to a card, for example, **Incident default**, that you want to configure.
9. To duplicate the selected variant, in the left pane, in the **Variants** section, hover over the variant you want to duplicate, select the ( ) icon and select **Duplicate**.
10. Hover over the variant you have duplicated, select the ( ) icon and select **Edit conditions**.
11. In the **Order** field, set the order to be the lowest value so that this variant will display in manager workspace.

Tip:
You can only display one variant for a work item type.

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12. Click **Save**.
13. Customize the variant you've created using any of the tasks or steps listed in Create a Work scheduler card using the Next Experience UI Builder.

Example:

If you'd like to configure this in the Work Scheduler card	Refer to
Add fields	Create page scripts for Work scheduler and refer to the Create the **Transform workItem to cardProps** page script steps.
Add an avatar	Configure an avatar component for Work scheduler

Related topics

Create a page in UI Builder

Set up a work configuration

Create a work configuration for a work item. Add filters that display key information that the manager wants to analyze. This work configuration will determine how the work items display on the Work scheduler calendar in manager workspace.

Before you begin

Role required: sn_wfo_work_sched.admin

Procedure

1. Navigate to **All** > **Work Scheduler** > **Work Configurations**.
2. Click **New**.
3. On the form, fill in the fields.

Field	Description
Name	Unique name for the work configuration.
Table	Table for which you want to create the work configuration. Case table is available by default to create work configurations.
Description field	The field from the selected table that you want to use for describing the work item.
Assigned to field	The field from the selected table that you want to use for assigning an agent to the work item.
Assignment group field	The field from the selected table that you want to use for assigning a group to the work item.
Start date field	The field from the selected table that you want to use to display the start date for the work item.
End date field	The field from the selected table that you want to use to display the end date for the work item.

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Field	Description
Default color	The preferred color to display the work item card in the manager workspace.
UX app route	The route where the card layout is defined for this work item type. The route displays in UI Builder in the list of experiences. This UX app route determines the layout of the work item card. By default, it is set to **Default card**, which displays the following fields: ○ Description field ○ Assigned to field ○ Assignment group field ○ Start date field ○ End date field If you need additional fields, you must add them in the **Extra fields** field. For information on defining a card layout, see Create a Work Scheduler card using UI Builder.
Order	The display order of the work item.
Extra fields	**Important:** If you need additional fields on the selected table that you would like to display in the work item card in the manager workspace, you must add it in this field.
Matching rule	Select a matching rule for the work configuration.

4. Right-click the form header and click **Submit**.
5. Create a work configuration filter.
   a. In the **Work Configuration filters** related list, click **New**.
   b. In the **Name** field, enter a unique name for the filter.
   c. Right-click and save the form to add the selected table.
   d. Add the desired conditions for the work configuration filter.
   For information on adding conditions, see Condition builder.
   e. Select **Update**.

Create a Work scheduler card using the Next Experience UI Builder

Create a work scheduler card and add the components that you want to display based on your needs in the Work Scheduler application in manager workspace.

Before you begin

Role required: admin, workspace_admin, or ui_builder_admin

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Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the **My experiences** list, select **Manager Workspace**.
3. Select the Pages icon.
4. In the **Page** menu, select **Work scheduler**.
5. In the left pane, go to the **Content** section and navigate to **Body (Flex)** > **Work queue (Flex)** > **Sidebar**.
6. In the right pane, select the icon ( ) in the **Work item cards default** sub-page.
7. In the left pane, select **Body (Flex)** > **Viewport1**.
8. In the right pane, select **+Add** and enter a name for the card.
   The **Path** field is automatically populated.
9. Select **Create**.
   A new card is created.

> **Important:**
> After you create the work scheduler card, you must select the name of this card in the **UX app route** field in the work configuration you have created. For information on setting up a work configuration, see Set up a work configuration .

10. Select **Done**.
    Follow the steps listed in each of the topics below in the given sequence to customize Work scheduler.

Related topics

Create a page in UI Builder

Create a client state parameter for Work scheduler

Add custom client state parameter values to add properties to the card components.

Before you begin

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. Select the Client state icon ( ).
2. In the Client state parameters section, click **+Add**.
3. Create the client state parameter.
   a. In the **Name** field, enter *cardProps*.
   b. From the **Type** menu, select *JSON*.
   c. In the **Initial value** field, select **Edit**.
   d. In the **Initial value** pop-up screen, enter the following code:

```
{
    "tagline": {},
    "heading": {},
    "dropdowns": [],
    "content": [],
    "assignedTo": null,
```

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```
    "aria": {}
  }
```

e. Select **Apply**.

Here's a demo on how to create client state parameters. Create client state parameters

What to do next

Create page scripts for Work scheduler

Related topics

Create and bind a client state parameter to a component

Create page scripts for Work scheduler

Add custom page scripts for the Work scheduler so that you can update the client state through events or update transform workItem object to properties.

Before you begin

Role required: admin, workspace_admin, or ui_builder_admin

About this task

Add the *Handle card clicked* and the *Handle card action clicked* page scripts to handle events that are generated when the card and its actions are clicked.

Add the *Transform workItem to cardProps* page script to transform the *workItem* object in the Work queue to properties for the card components.

Note:
If you have customized a Work scheduler card, you can follow the steps below to add client scripts.

Procedure

1. Select the Client Scripts icon (</>).
2. Create the *Handle card clicked* page script.
   a. In the **Page scripts** section, click **+Add**.
   b. In the **Script name** field, enter *Handle card clicked*.
   c. In the **Script Includes** section, add the following script:

```
/**
* @param {params} params
* @param {api} params.api
* @param {any} params.event
* @param {any} params.imports
* @param {ApiHelpers} params.helpers
*/
function handler({api, event, helpers, imports}) {
  const {workItem} = api.context.props;
  api.emit('CARD_CLICKED', {workItem});
}
```

3. Create the *Handle card action clicked* page script.
   a. In the **Page scripts** section, click **+Add**.
   b. In the **Script name** field, enter *Handle card action clicked*.

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c. In the **Script Includes** section, add the following script:

```
/**
* @param {params} params
* @param {api} params.api
* @param {any} params.event
* @param {any} params.imports
* @param {ApiHelpers} params.helpers
*/
function handler({api, event, helpers, imports}) {
  const {workItem} = api.context.props;
  const {action: actionItem} = event.payload;
  api.emit('CARD_ACTION_CLICKED', {workItem, actionItem});
}
```

4. Create the **Transform workItem to cardProps** page script and attach the *WorkSchedulerUIBCardUtils* script include.

   a. In the **Page scripts** section, click **+Add**.

   b. In the **Script name** field, enter *Transform workItem to cardProp*.

   c. In the script editor, add the following script:

```
/**
* @param {params} params
* @param {api} params.api
* @param {any} params.event
* @param {any} params.imports
* @param {ApiHelpers} params.helpers
*/
async function handler({api, event, helpers, imports}) {
    const {workItem} = api.context.props;
    const {mappingFields, recordFields} = workItem;
    const cardUtils =
 imports['sn_wfo_work_sched.WorkSchedulerUIBCardUtils']();
    const fallbackValueLabel = await helpers.translate('<not
 defined>');
    const dropdownItems = workItem.tableMetadata.canDelete
        ? [{id: 'delete', label: await
 helpers.translate('Delete')}]
        : [];
    // Fields for getContent() and getAria()
    const contentFields = [{
        name: 'assigned_to',
        label: await helpers.translate('Assigned to')
    },
    {
        name: 'assignment_group',
        label: await helpers.translate('Assignment group')
    },
    {
        name: 'start_date',
        label: await helpers.translate('Start date')
    },
    {
        name: 'end_date',
        label: await helpers.translate('End date')
    }];
```

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```
    // Create cardProps
    const cardProps = {};
    cardProps.tagline = {
        label: workItem.recordFields._row_data.displayValue
|| null
    };
    cardProps.heading = {
        label: mappingFields.description ?
mappingFields.description.displayValue : fallbackValueLabel
    };
    cardProps.dropdowns = dropdownItems.length > 0
        ? [{id: 'dropdown1', items: dropdownItems, icon:
'ellipsis-v-outline'}]
        : [];
    cardProps.content = await cardUtils.getContent(helpers,
contentFields, workItem, null, null, true);
    cardProps.aria = await cardUtils.getAria(helpers,
contentFields, workItem, null, true);
    cardProps.assignedTo = mappingFields.assigned_to ?
mappingFields.assigned_to.displayValue : null;
    api.setState('cardProps', cardProps);
}
```

To customize the display of the fields, refer to https://developer.servicenow.com/dev.do#!/reference/next-experience/utah/now-components/now-label-value-stacked/overview.

5. Click **Save**.

Here's a demo on how to create page scripts for Work scheduler. Create page scripts

What to do next

Define the workItem property in the Work scheduler page configuration

Related topics

Define and bind client scripts to components

Define the workItem property in the Work scheduler page configuration

Add the *workItem* property to the Work scheduler page configuration to receive the *workItem* object provided by the work queue.

Before you begin

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. In the **Page configuration** section, select the **Config** tab.
2. In the **Properties** section, select **Edit**.
3. In the **Edit properties** pop-up window, select **+Add**.
4. In the **Property name** field, enter *workItem*.
5. From the **Type** menu, select *JSON*.
6. Select **Add**.
7. Select **Save**.
   The *workItem* property is created.
8. Hover over the *workItem* property and select the Dynamic data binding icon ( ).

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9. In the *workItem* field, type *@state.workItem*.
10. Click **Save**.

    Here's a demo on how to define the workItem property in the Work scheduler page configuration. Define the work item property in the Work Scheduler page configuration

What to do next

Define event mappings for Work scheduler

Define event mappings for Work scheduler

Add event mappings required for card interactions and for the card properties transformation to the page configurations in Work scheduler.

Before you begin

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. In the **Page configuration** section, select the **Events** tab.
2. Attach the *Transform workItem to cardProps* to the **Page ready** event.
   a. In the **Page ready** menu, select **+Add a new event handler**.
   b. In the pop-up screen, go the Scripts section and select *Transform workItem to cardProps*.
   c. Select **Add**.
3. Attach the *Transform workItem to cardProps* to the **Page ready** event.
   a. In the **Page ready** menu, select **+Add a new event handler**.
   b. In the pop-up screen, go the Scripts section and select *Transform workItem to cardProps*.
   c. Select **Add**.
4. Attach the *Transform workItem to cardProps* to the **Page property changed** event.
   a. In the **Page property changed** menu, select **+Add a new event handler**.
   b. In the pop-up screen, go the Scripts section and select *Transform workItem to cardProps*.
   c. Select **Add**.
5. Attach the *CARD_CLICKED* and *CARD_CLICKED (Work item cards)* events.
   The **Create an event** popup screen displays.

   Here's a demo on how to define event mappings for the Work scheduler. Define event mappings for the Work Scheduler

What to do next

Configure container components for Work scheduler

Related topics

Events in UI Builder

Configure container components for Work scheduler

Present information in an intuitive format using the Card Base Container component.

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Before you begin
Role required: admin, workspace_admin, or ui_builder_admin

Procedure
1. In the **Content** section, select **+Add component**.
2. In the **Components** pop-up screen select **Card Base Container**.
3. In the **Config** tab, set the interaction and aria properties.
   - From the **Interaction** menu, select *`Click`*.
   - In the Accessibility section, select the Dynamic data binding icon
   - From the **ARIA Properties** list, select *`@state.cardProps.aria`*.
4. Select the **Events** tab.
5. In the **Card clicked** menu, select **+Add a new event handler**.
   The Event handler preview pop-up screen appears.
6. In the **Scripts** section, select *`Handle card clicked`*.
7. Select **Add**.
8. Select **Save**.

Here's a demo on how to configure container components in Work scheduler. Configure container components for Work Scheduler

What to do next
Configure a Work scheduler card heading component

Configure a Work scheduler card heading component

Customize the Work scheduler heading component to display the title based on your needs.

Before you begin
Role required: admin, workspace_admin, or ui_builder_admin

Procedure
1. In the **Content** section, select **+Add component**.
2. In the **Components** pop-up screen select **Card Base Header**.
   The selected container displays in the right pane.
3. Configure the header component.
   a. In the **Config** tab, hover over the **Dropdowns** section and select the Dynamic data binding icon .
   b. From the **Dropdowns** menu, select *`@state.cardProps.dropdowns`*.
   c. Hover over the **Heading** section and select the Dynamic data binding icon .
   d. From the **Heading** menu, select *`@state.cardProps.heading`*.
   e. Hover over the **Tagline** section and select the Dynamic data binding icon .
4. Add **Handle card action clicked** to the **Card header action clicked** event.
   a. Select the **Events** tab.
   b. In the **Card header action clicked** section, select **+Add a new event handler**.
   c. From the **Tagline** menu, select *`@state.cardProps.tagline`*.

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d. In the **Event handler preview** pop up screen, from the **Scripts** section, select **Handle card action clicked**.

e. Click **Add**.

5. Click **Save**.

Here's a demo on how to configure a Work scheduler card heading. Configure a Work Scheduler card heading component

What to do next

Configure a display type component for a Work scheduler card

Configure a display type component for a Work scheduler card

Add the *Label value stacked* display work item fields within the card.

Before you begin

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. In the **Content** section, navigate to **Body(Flex)** > **Card Base Container (Flex)** > **Card Base Header**.
2. Right-click **Card Base Header** and select **Add component after**.
3. In the pop-up screen, select the **Label value stacked** component.
4. In the left pane, select **Label value stacked**.
5. In the right pane, select the **Config** tab and configure the size, alignment, and items.
   a. In the Alignment menu, select *Horizontal-equal*.
   b. In the Size menu, select **Small**.
   c. Hover over **Items**and select the Dynamic data binding icon .
   d. In the **Items** menu, enter *@state.cardProps.content*.
   e. In the **Item min, width** field, enter `75 px`.
   f. Enable **Wrap text** and **Truncated** options.
   g. Click **Save**.

Here's a demo on how to configure a display type component for a Work scheduler card. Configure a display type component for a Work Scheduler card

What to do next

Configure an avatar component for Work scheduler

Related topics

Manage the visual style of UI Builder experiences

Configure an avatar component for Work scheduler

Use the *Container* component to add an avatar and the user name of the work item assignee.

Before you begin

Role required: admin, workspace_admin, or ui_builder_admin

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Procedure

1. In the **Content** section, navigate to **Body(Flex)** > **Card Base Container (Flex)** > **Card Base Header**.
2. Right-click **Card Base Header** and select **Add component after**.
3. In the pop-up screen, select the **Label value stacked** component.
4. In the left pane, right-click **Label value stacked** and select **Add component after**.
5. Configure the component.

   a. In the **Components** pop-up screen, select **Container**.

   b. In the **Config** tab, do the following:

      i. Select the Edit component visibility icon ( ).

      ii. Hover over the **Hide component** field and select the Dynamic data binding icon .

      iii. In the **Hide component** field, enter `!@state.cardProps.assignedTo`

      iv. In the **Direction** menu, select **Row**.

      v. In the **Styles** tab, in the **Align items** field, select the center icon.

      vi. Select **Save**.

6. To add the Avatar component, select **Container(Flex)** > **+Add component**.
7. Select **+Add component**
   The Components pop-up screen appears.

   Here's a demo on how to configure an avatar component for Work scheduler Configure an avatar component for Work Scheduler

Associate a work scheduler card to the work configuration

Associate the work scheduler card that you've created to the work configuration to display the card in the Work scheduler sidebar.

Before you begin

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. Navigate to **All** > **Work Scheduler** > **Work configuration**.
2. Select the work configuration to which you want to associate the work scheduler card.
3. In the **UX app route** field, select the name of the work scheduler card.
4. Select **Update**.
   The work configuration card displays in Work scheduler in manager workspace.

   For information on setting up a work configuration, see Set up a work configuration .

   For information on creating the work scheduler card, see Create a Work Scheduler card using UI Builder .

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Create extension points for Work scheduler

Create extension points to customize your implementation in Work scheduler. For example, if you want your team members to work on an on-site task, you can configure the location of your team members to the work items assigned to them so that they can get to the tasks quickly.

Before you begin

Role required: admin

You must set the application scope to Work scheduler (sn_wfo_work_sched).

About this task

The *WorkItemSkillsRecommendationManager* extension point is available by default.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Open the *sn_wfo_work_sched.WorkItemRecommendationManager* extension point.
3. In the Related Links section, select **Create Implementation**.
4. Define the functions based on your needs to customize your implementation.

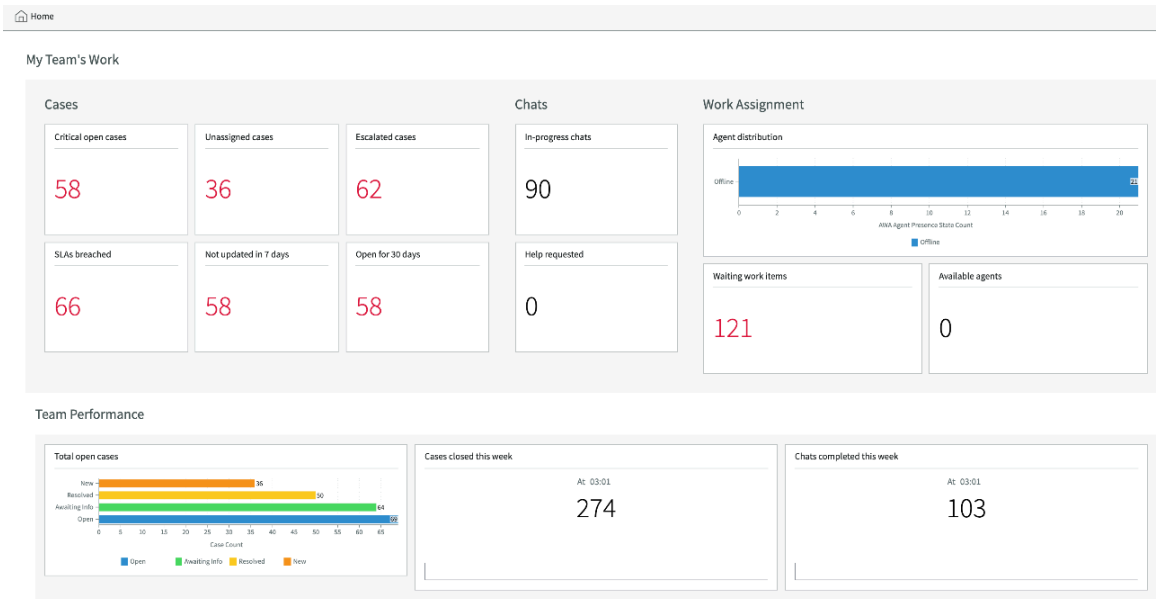
Using Workforce Optimization for Customer Service

Enhance the quality and efficiency of your teams using channel management capabilities, smart scheduling, team structure, and real-time refreshing single scores. Monitor chat conversations and help agents on cases. Assess the quality of tasks completed, recommend skills for agents, and train them to address skill gaps.

Legacy Workforce Optimization for Customer Service manager workspace landing page

Monitor your teams' work and organizational performance using Workforce Optimization for Customer Service.

Home tab



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End user and roles

User goals and roles

End user and goal	Required role
As a workspace manager, you can: • Analyze the cases your team is currently working on or cases that have not yet been assigned. • Monitor cases with SLAs that have been breached, escalated, or the ones not been open since 30 days. • Track team's work, chats, and work assignments to analyze the performance of your whole organization.	sn_mgr_workspace.manager

Use case

Monitor your agent's work when you start your day, view reports that need your attention, and navigate to the cases on which you want to take action.

Indicators

Cases closed

Number of closed cases.

Chats completed

Number of chats completed.

Breakdowns

Assignment Group.

Data visualizations

Home tab KPIs

Title	Type	Description
Open Cases By State	Single score	Number of open cases based on the state such as new, on-hold, queued, work in progress, and pending accept.
Critical Open Cases	Single score	Top priority cases.
Unassigned Cases	Single score	Cases not assigned to agents.
Escalated Cases	Single score	Cases that are escalated to other agents.
SLA Breached	Single score	Cases that breached the service level agreement of your business.

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Home tab KPIs (continued)

Title	Type	Description
Open Cases not updated for 7 days	Single score	Cases that are not updated for the last 7 days.
Open Cases older than 30 days	Single score	Cases that are in open state for the last 30 days.
In-Progress Chats	Single score	Number of chats that are in progress with agents
Help requested interactions	Single score	Number of work items that requested help from manager
Agent Distribution by Presence State	Horizontal Bar	Current status of agents distributed on work assignments (Available, Lunch, and Offline).
Waiting Work Items	Single score	Number of work items in waiting state.
Available Agents	Single score	Number of available agents.
Total open cases	Horizontal Bar	Number of cases categorized by state such as new, resolved, awaiting info, and open cases.

Workforce Optimization for Customer Service manager workspace landing page

Monitor your teams' work and organizational performance using Workforce Optimization for Customer Service.

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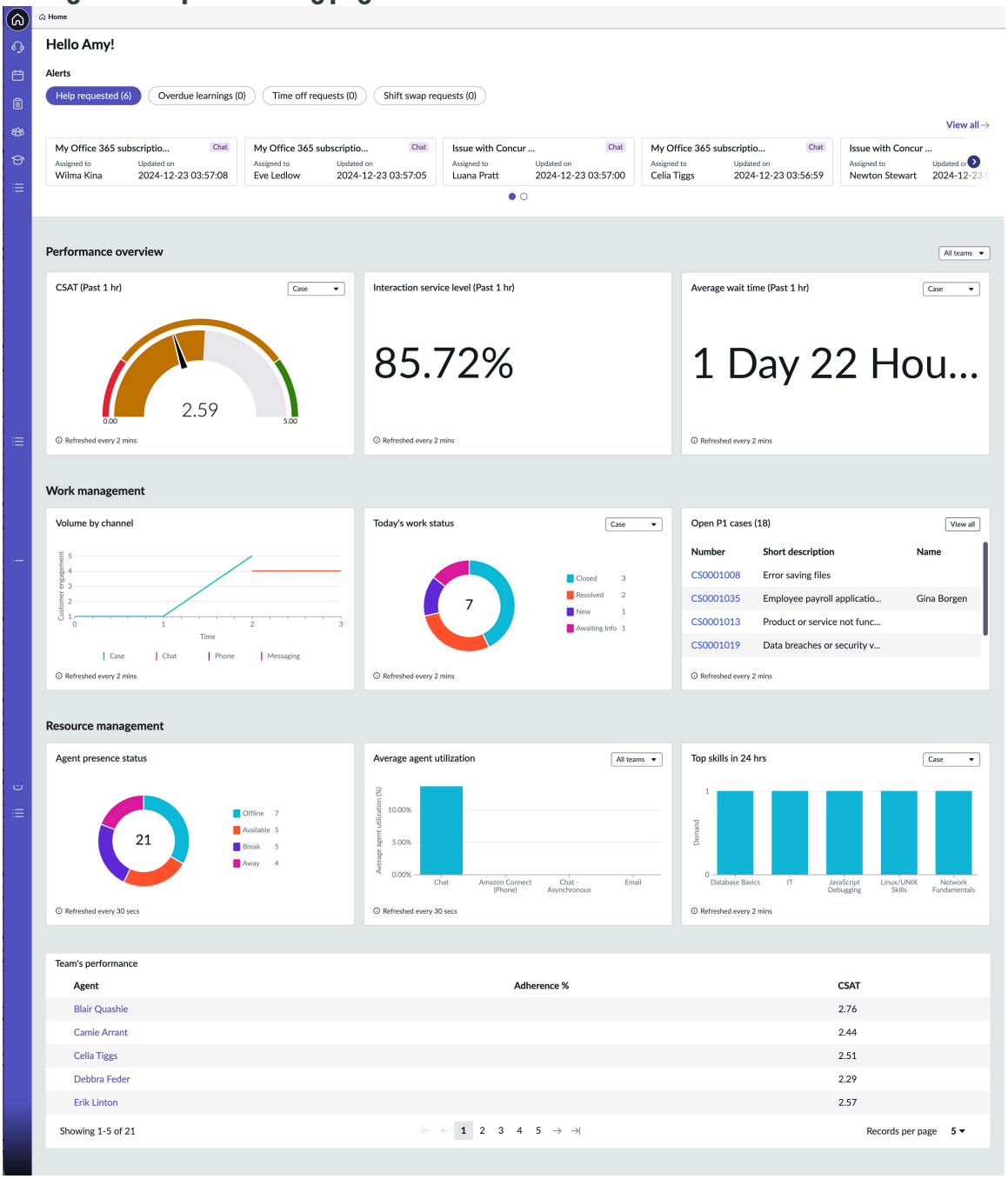
Home tab

Manager Workspace landing page



End user and roles

User goals and roles

End user and goal	Required role
As a workspace manager, you can:	sn_mgr_workspace.manager

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User goals and roles (continued)

End user and goal	Required role
• Act on alerts requesting help, overdue training tasks, and time-off requests from the team. • Review customer satisfaction (CSAT) metrics to evaluate the performance of your team. • Monitor ongoing cases and interaction volumes to verify effective progress tracking. • Assess agents' availability, productivity, and key skills to optimize resource allocation and support targeted training.	

Use case

Monitor your agent's work at the start of your day, act on urgent alerts, assess key performance areas, review ongoing tasks, and evaluate each agent’s performance.

Data visualizations

Home tab KPIs

Title	Type	Description
Help Requested	Alert card	Notifications for assistance needed.
Overdue learnings	Alert card	Overdue training items.
Time off requests	Alert card	Requests from agents for time off.
Shift swap requests	Alert card	Shift swap requests by agents.
CSAT (Past 1 hr)	Gauge	Customer satisfaction score.
Interaction service level (Past 1 hr)	Single score	Adherence to target response time.
Average wait time (Past 1 hr)	Single score	Average duration customers wait for a response.
Volume by channel	Line	Analysis of workload across different communication channels.
Today's work status	Donut	Current status of tasks and responsibilities.
Open P1 cases	Table list	List of high-priority cases that require immediate attention.
Agent presence status	Donut	Current availability of agents.
Average agent utilization	Bar	How effectively agents time is being used.

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Home tab KPIs (continued)

Title	Type	Description
Top skills in 24 hrs	Bar	Highlights of agent skills in demand.
Team's performance	Presentation list	Assessment of individual agent effectiveness using key metrics like Adherence and CSAT.

Channel Management in Workforce Optimization for Customer Service

Use Channel Management to keep a track of the real-time performance of work done by your team members through channels and queues views. You can also drill down into specific cases and chats and collaborate with your team members to achieve better results.

Using Channel Management in Workforce Optimization for Customer Service

Route work items to assigned groups using channels. Use skill-based routing to ensure that the right work goes to the right agent. Review real-time performance as your team is actively working on tasks across channels. When you see escalations, you can help your agents resolve issues without the requester being aware of it.

Monitor ongoing work and track your agents' performance of your direct reporting teams and teams that you manage additionally. Work items are allocated to qualified agents using work item queues, routing conditions, and assignment criteria that you define.

Review real-time performance as your team is actively working on tasks across channels in the following sections.

- The **Overview** section displays the most important key performance indicators (KPIs) for each of the service channels in the form of cards. The KPIs appear as per the configuration order in the service channels. The KPI scores are real-time information and automatically refreshed at a regular interval of 5 seconds or as configured in the *sn_channel_mgmt.kpi_auto_refresh.interval.seconds* system property. Also, the service channel cards refreshes automatically in 2 minutes as configured in the *sn_channel_mgmt.channel_card_auto_refresh.interval.seconds* system property or you can manually refresh by clicking the Refresh ( ) icon.
- **Assignment Group** refines reports on all pages of channels and queues as per the groups selected. Interactive filter based on the assignment group configuration, you can select the assignment group on which you want to refine the data directly from the dashboard. You can disable the **Assignment Group** interactive filter using the *sn_channel_mgmt.filter_config.enable* system property.
- The **Queued Work** tab displays the active work interactions being done within each service channel and queues.
- The **All Queues** tab displays the list of work items from queue-based routing. You can drill into specific queues and see the active interactions, work items and agents. Track real-time performance of your teams using key performance indicator reports in service channels and queues. Respond to incoming support requests by changing queues as per the priorities.
- The **All Agents** tab displays your agents' ongoing work, presence statuses, channels, work load, and open capacity. You can drill into specific agents to view the agent's profile, on-going tasks, presence state's history, and override channel capacity.

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Note:

- All lists display the real-time information and are automatically refreshed at a regular interval of 30 seconds or as set in the *sn_channel_mgmt.list_auto_refresh.interval.seconds* system property. You can also refresh the service channel cards manually by clicking the Refresh ( ) icon.
- The **All Queues** and **All Agents** lists offer a default sorting and filtering mechanism that lets you to view the records of the selected fields based on a default sort order. Click a column heading to toggle between ascending and descending order. The sorting order turns to the default configuration as you leave the page. Administrator can customize the default sort order by creating an implementation using the extension points. For more information, see Use extension points to configure the sort order.
- You will also receive an email notification of your agents' work summary at the end of each day if a scheduled report is configured.

Assist agents by joining their chat conversations with their end users

Assist agents in real time by joining their chat conversation and collaborate on any record by connecting with the right people instantly to achieve faster resolution.

Before you begin

Role required: sn_csm_wfo_workspa.manager

About this task

View the work-in-progress chat interactions and see if any of the agents has set the **Help Requested** flag as **Yes**. You can then open the interaction record and view all messages exchanged between the end user and agent, gain the context and choose to join the conversation by either sending private messages or joining the conversation in public.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Do one of the following:
   - Click the **Help Requested** indicator's score on the landing page.
   - Click the Channels ( ) icon, select a queue and then click the **Active Interactions** tab.
   - In the **Lists** page, click **Conversation Monitoring** > **Help Requested**.
3. Click the interaction record for which you want to join the conversation.
4. Click **Join Conversation** to start an interaction with the agent or click **Send Private Message** to send a private message only to the agent.

Result

A chat conversation is established.

Track and analyze the queue health

Monitor your agents' workload and the status of their work items against each service channel and queue so that you can get an idea of how efficiently work is moving through the queue and to your agents.

Before you begin

Role required: sn_csm_wfo_workspa.manager

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About this task

Track the real-time performance of each queue within your service channels. You can drill into specific queues so that you can see the real-time reports, waiting work items, available agents, and status of the on-going work. This information can give you an idea of how efficiently work moves through the queue and to your agents. With this information, you can determine which queues are doing well and which queues could use a few more agents on board. For example, if you see lots of agents and not much work, you can recommend skills for your agents for other queues.

Note:

- The records in the list appear based on the column's default sort order. Click a column heading to toggle between ascending and descending order. The sorting order turns to the default configuration as you leave the page. For example, the **Available agents** column is by default in descending sort order. The administrator can change it to ascending order by creating an implementation using the *sn_channel_mgmt.ChannelMgmtExtensionPoint* extension point. For more information, see Use extension points to configure the sort order.
- The records in the list refresh at a regular interval of 30 seconds. The administrator can change the interval using the *sn_channel_mgmt.list_auto_refresh.interval.seconds* property.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Channels ( ) icon.
3. Click the **All Queues** tab.

Records for tracking agents' workload and status

Field	Description
Name	Queue name that was used to assign and route the work to the agent. Click to view the work items and agents that are associated with the queue.
Service Channel	Service channel name to which the queue is categorized. Click to view the work items and agents that are associated with the channel.
Waiting work items	Number of waiting work items in the queue.
Average wait time	Average amount of time that the work items are waiting for an agent.
Available agents	Number of available agents.
Agents not available	Number of non-available agents.
Work items assigned today	Number of work items that were assigned on a particular day.
Work items canceled today	Number of work items that were canceled on a particular day.

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Field	Description
Average Agent Utilization	Agent workload/capacity in percentage. The percentage is calculated from the **Total Capacity** and **Total Capacity in Use**.
Service Level	Number of work items that were accepted faster than the Queue's Target Wait Time.

Allocate work items manually to agents

Allocate pending work items to agents to complete the work.

Before you begin

Role required: sn_csm_wfo_workspa.manager

Ensure that the agent has the relevant skills, availability, and access to at least one queue in the service channel.

About this task

The active work items remain in the queue and are pending manual allocation for one of the following reasons:

- The agent has already reached the maximum capacity.
- Available agents have not accepted the allocated work items.
- Agents with required skills are not available.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Channels ( ) icon.
3. Select the work item using one of the following actions.
   The list of available agents appears with details such as presence state, availability, capacity, assignment groups (common groups between manager and agents), and matching skills.

   Note:
   The availability hours are the current shift timings of an agent, excluding the break time. However, if the shift hasn't started, then the next shift available hours are displayed.

4. Select the agent that you want to assign the work item to.
   For example, if the capacity is 0/4, it means that the agent's maximum capacity is four work items.

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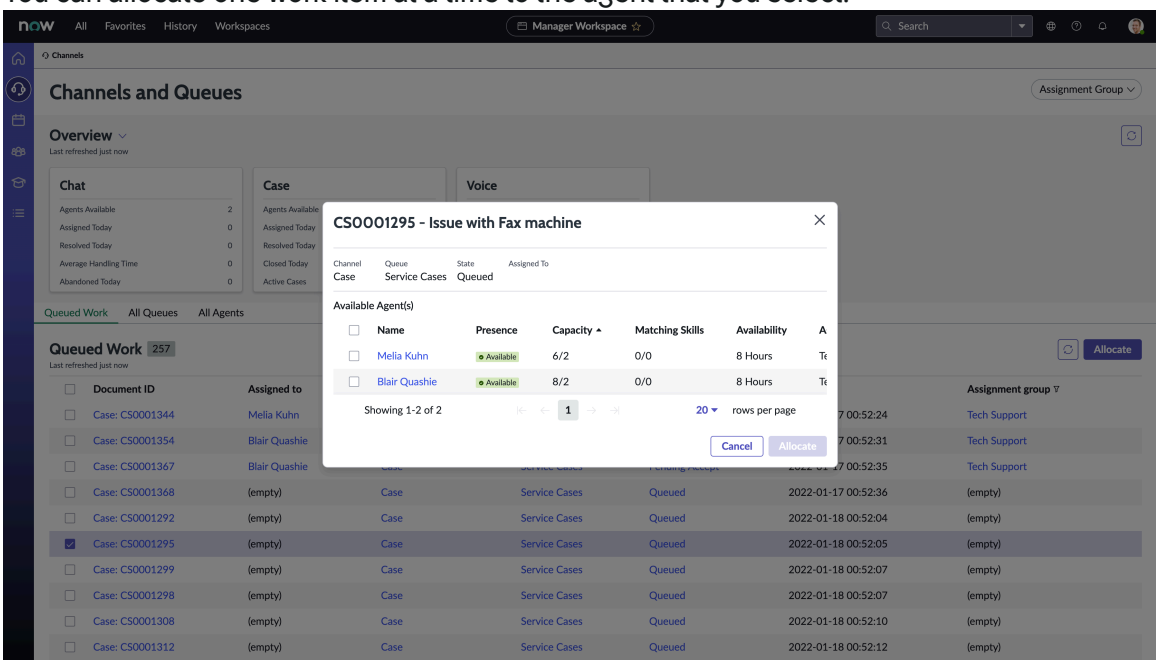
Note:
You can allocate one work item at a time to the agent that you select.



5. Click **Allocate**.
   A confirmation message appears that shows that the work item is allocated to the selected agent. You can customize the confirmation message by adding the [glide.awa.manual_assignment_message] system property to the sys_properties.list [sys_properties] table. The agent gets an alert on the assigned work item as follows:
   - If the agent accepts the work item, the status changes from **Pending Accept** to the **Accepted** state. The **Assigned To** field is updated with the agent's name and the relevant KPI is updated.
   - If the agent rejects the work item, the status changes to the **Queued** state.
   - If the agent does not accept the work item for a long time, the status remains in the **Pending Accept** state. You then need to reallocate the work item.

Track and analyze agents' performance

Track your agent's performance in overview so that you can analyze and review how that agent is doing.

Before you begin
Role required: sn_csm_wfo_workspa.manager

About this task
View all agents and their real-time status. Drill down into a specific agent to view the following details.

- Real-time information of KPIs such as active cases, interactions, and other rejections.
- Override channel capacity.
- Agents' availability and their presence states' history.
- Work items which are in **Pending Accept** state.
- Interactions that are new, work in progress, and on hold states.
- Cases that are in new, open, and awaiting info states.

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- Skill set, schedule, and profile.
- Assigned training tasks.
- User details and groups assigned.

Note:

- The records in the list appear based on the column's default sort order. Click a column heading to toggle between ascending and descending order. The sorting order turns to the default configuration as you leave the page. For example, the agent's **Presence State** column is by default in ascending sort order. The administrator can change it to descending order by creating an implementation using the *sn_channel_mgmt.ChannelMgmtExtensionPoint* extension point. For more information, see Use extension points to configure the sort order.
- The records in the list refresh at a regular interval of 30 seconds. The administrator can change the interval using the *sn_channel_mgmt.list_auto_refresh.interval.seconds* system property.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Channels ( ) icon.
3. Click the **All Agents** tab.
4. Track and analyze agents' performance.

Field	Description
Agent	First and last name of the agent. Click the agent's name to view the agent's profile summary.
Service Channel	Agent's associated service channel, so you know what type of work the available agent can handle. Click the channel to view the list of work items.
Total Capacity	Number of maximum work items that can be automatically assigned to agents (pending overrides). ○ Chat: The default is 4. ○ Incident: The default is 2.
Capacity in use	Number of ongoing work items. Click the score to view the ongoing work of an agent.
Utilization	Agent workload/capacity in percentage. The percentage is calculated from the **Total Capacity** and **Capacity in Use**.
Presence State	Agent's current presence status. For example, Online or Offline.
Can Take Work	Agent's status to accept the work item.
Time in State	Amount of time the agent has been in the current presence status.

5. Select an agent to drill down to view the details.
   Agent profile page appears. The **Current Work** displays the data of the configured key performance indicators (KPIs). For more information, see Configure KPIs for agents.

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Override channel capacity for an agent

Change the default number of work items that an agent can handle for a service channel.

Before you begin

Role required: sn_csm_wfo_workspa.manager

About this task

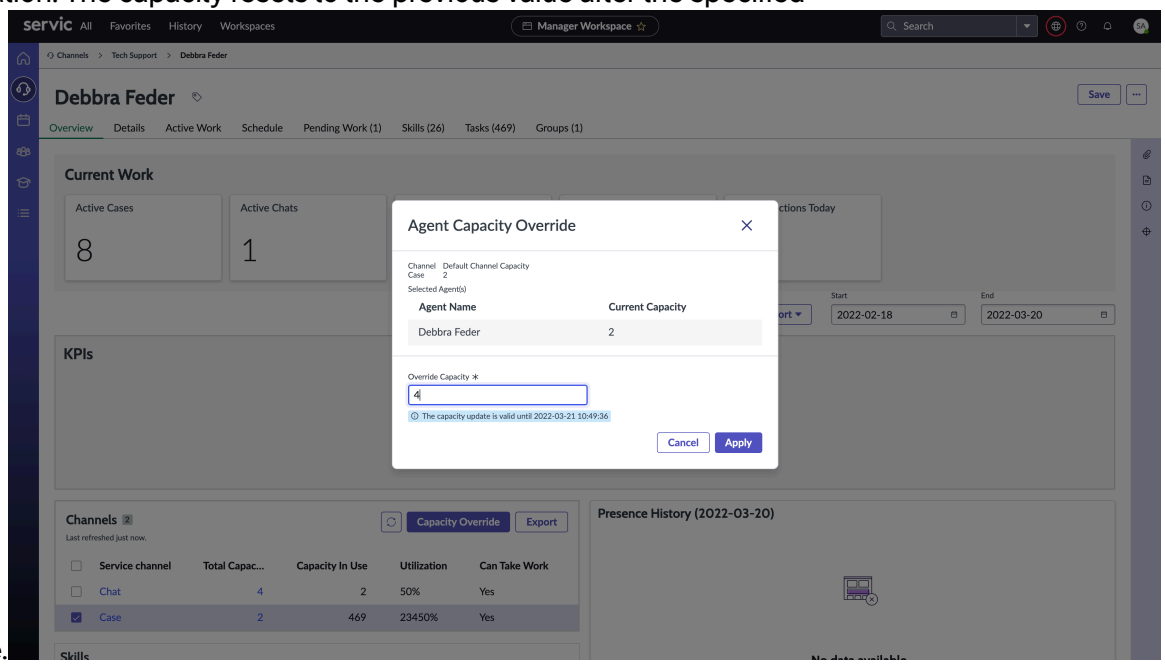
By default, the override capacity is valid for 12 hours. Administrator can change the duration using the *sn_channel_mgmt.awa_agent_temporary_override_time.minutes* system property. The capacity resets to the previous value after the specified time. The scheduled job Reset Temporary Capacity Override is executed every two minutes to check the invalid or expired overridden capacity and resets to the previous value. You can override the channel capacity for a single agent at a time. Ensure that an agent to whom you want to override the channel capacity needs to be associated with Advanced Work Assignment and the required channels.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Navigate to an agent's profile page.
   The agent profile page appears.
3. Click the **Overview** tab.
4. In the **Channels** section, select the service channel for which you want to override the capacity.
5. Click **Capacity Override**.
   The **Agent Capacity Override** page appears.
6. In the **Override Capacity** field, enter the new capacity.
7. Click **Apply**.

Result

The following snapshot shows an example of an agent' capacity override. A message appears indicating the capacity update is valid for the defined duration. The capacity resets to the previous value after the specified time.



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Using Voice with Workforce Optimization for Customer Service

Use Voice to deflect cases away from your human agents using bots. You can record phone interactions when agents resolve issues. Also, you can monitor those interactions to evaluate and improve the quality of case resolutions.

With the Voice application, you can:

- Enable your workforce to work using the voice channel and get call recordings, call transcripts, and reports of sentiment analysis when agents interact with callers. You can visualize all of this information within the Channel Management application in Workforce Optimization for Customer Service.
- Analyze the call transcripts and sentiments of users after an interaction is complete so that you can create assessments, provide feedback, and training for agents.
- Synchronize agent presence within the queue.
- View the Amazon Connect channel on Channel Management. You can view the performance metrics and reports of the agents using the voice channel. To access the reports, your application administrator must install Amazon Connect Spoke.

  Note:
  The following reports on the Amazon Connect channel are chargeable:
  - Contacts in ACW State
  - Oldest Contact Age
  - Average Abandon Time

  These reports are collected from Amazon Connect using *`GetMetricData`* and *`GetCurrentMetricData`* APIs. For more information on the prices of these reports, see Amazon CloudWatch Pricing.

Note:
You can integrate any third-party telephony service with the ServiceNowVoice application. By default, ServiceNowVoice provides you with the ability to integrate with the Amazon Connect application.

You can visualise the metrics from the Amazon Connect phone queues that are routed through Voice using the Channel Management application in Workforce Optimization for Customer Service. The Voice application uses Advanced Work Assignment to report data from the Amazon Connect queues.

Voice Amazon Connect integration workflow

Here's how the Voice integrates with Amazon Connect:

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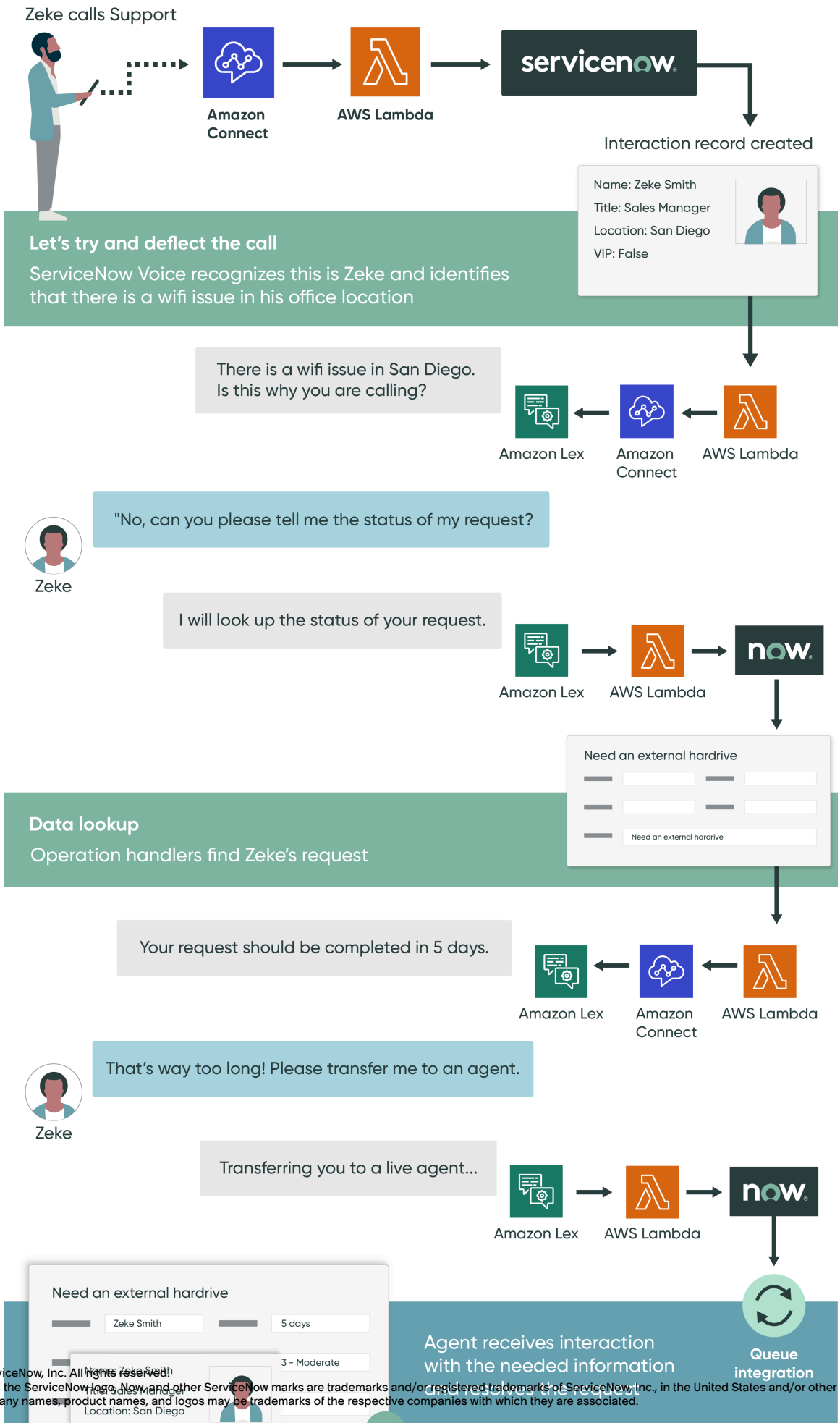
servicenow



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Benefits of using Voice with Workforce Optimization for Customer Service

As a manager, you can:

- Monitor your agent's calls as they resolve customer issues.
- View synchronized agent presence states within the Channel Management application in Workforce Optimization for Customer Service.
- Assess your agents by reviewing recordings of agent interaction and call transcripts.
- Analyze sentiments from the call transcripts and use that to coach and train your agents.

As an agent, you can:

- Get information about the caller before you answer an incoming call.
- Analyze call transcripts and listen to recordings after you complete an interaction.
- Place outbound calls using automated outbound dialing.

Associate Amazon Connect queues for CSM to a ServiceNow instance

Set up phone queues for Amazon Connect to gain visibility into the queues using Workforce Optimization for Customer Service.

Before you begin

Enable the Advanced Work Assignment plugin (com.glide.awa) to create the Amazon Connect queues. You must activate this plugin before you activate the Cloud Call Center Core (sn_cti_core) plugin so that you can successfully integrate the two applications.

After you Install ServiceNow Voice applications, when you enable the Advanced Work Assignment plugin (com.glide.awa), the Amazon Connect (phone) service channel appears in the Workforce Optimization for Customer Service.

Role required: sn_csm_wfo_workspa.admin and sn_cti_amzn_cct.admin

About this task

After an agent completes a call, using Workforce Optimization for Customer Service, you can learn:

- Who was on hold and how long they were on hold
- How long calls are taking
- Which agents are available and when
- How many agents are available and what is their current utilization

You can see the Basic queue when you install the demo data with the sample contact flow:

Amazon Connect Phone Queues

Calls get routed to this queue	When
Basic Queue	An utterance is generic, such as, "I want to talk to an agent."
VIP Queue	A user who has the VIP field enabled calls Support.
IT Equipment Support	An utterance includes IT equipment support or hardware issues.
Application Support	An utterance includes application support.

For example, the Basic queue is available when you install the demo data to get the calls routed to this queue when an utterance is generic, such as, "I want to talk to an agent".

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A routing profile links queues to agents. Every agent must have a routing profile in the Amazon Connect instance that is integrated with the ServiceNow instance. For more information, see create a routing profile.

Note:

- You can associate each profile with multiple Amazon Connect agent queues.
- You must associate each of these agent queues with the corresponding agent queue in your ServiceNow instance using an Amazon Connect ARN number. This association enables you to report on queue statistics and call metrics within Workforce Optimization for Customer Service.

Procedure

1. Create placeholder queues for an Amazon Connect (phone) service channel if you need additional queues.
   For more information on creating the queue, refer to Create a work item queue.

   Note:
   Do not add work item routing conditions when you create the placeholder queues.

2. Associate the ServiceNow Advanced Work Assignment (AWA) queue record with the Amazon Web Services (AWS) queue ARN.
   a. In the Amazon Connect instance, navigate to **Routing** > **Queues**.
   b. Select a queue.
   c. Copy the ARN for the queue.
   d. In the ServiceNow instance, navigate to **Advanced Work Assignment** > **Queues** and select the corresponding queue.
   e. In the **Cloud Call Center Source ID** field, enter the ARN number.
   f. Click **Update**.
   g. Repeat these steps for each queue.
3. Add assignment groups to a queue.
   a. Select a work item queue.
   b. Click **Group Queue Priorities** related list.

      Note:
      You must configure the form to display this related list.

   c. Click **New**.
   d. In the **Group** field, add an assignment group that include agents who can handle this queue.
   e. In the **Order** field, select the order number for the assignment group. This is the order of assignment group priority in which the incoming calls are handled.
   f. Click **Submit**.

Listen in to an agent call

Monitor your customer service agents' calls when they are resolving issues for external callers by using Workforce Optimization for Customer Service.

Before you begin

Role required: sn_csm_wfo_workspa.manager

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You must also have an active session with Amazon Connect and be able to monitor live conversations. For more information, refer to Monitor live conversations

About this task

When the Amazon Connect application answers a call from an external source, an interaction record is created.

Procedure

1. Monitor your agent's call queue when an agent is talking to an external caller in Workforce Optimization for Customer Service.
2. Open the active interaction when the phone call is in progress.
3. Click **Monitor Call** and listen into the call in Amazon Connect.

Analyze transcripts and sentiments for the Amazon Connect phone channel

Analyze your agent's call recordings, transcripts, and sentiment reports. With this information, you can assess the call quality and train your agents to handle calls better in the future.

Before you begin

Role required: sn_cti_core.user_manager

About this task

When an agent interacts with an external caller, the call gets recorded and transcribed. The application tags every statement within a transcript with a sentiment score. After a call has been completed, a sentiment report is automatically generated.

Note:
The manager must have an active session with Amazon Connect to view the transcripts and sentiments. The transcripts and sentiments are generated in the Amazon Connect application. They are then displayed in the Channels application in Workforce Optimization for Customer Service.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select an interaction record to analyze transcripts and sentiments.
3. Click **Call Analysis**.
   The Amazon Connect application generates the interactions and sentiment analysis of those interactions and displays them as a report in Workforce Optimization for Customer Service.
4. **Optional:** Analyze transcripts and sentiments for the Amazon Connect phone channel and assign training to coach the agents.

Analyze skills for your teams in Workforce Optimization for Customer Service

Add skills to groups and view skill assignments for your teams.

Before you begin

Role required: skill_admin

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Teams icon ( ).

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3. Select a team for which you want to analyze skills.
4. Add a skill to the team.
   a. In the **Skills** tab, click **New**.
   b. Select a skill in the **Skill** field.
   c. In the **Skill level** field, select a level for the selected skill.
   d. In the **Inherited from** field, select the skill from which this skill is inherited.
   e. Click **Save**.
   You can click on a skill to analyze skill data such as the number of users or tasks with that skill, the overall skill coverage, and how many experts you currently have with that skill.

Assigning work using Work Scheduler in Workforce Optimization for Customer Service

Manage your teams' work assignments easily by customizing your work queue to display the most relevant work items.

Gain insights into which agents have been recommended to work on a task based on the mandatory and optional skills they have.

Assign work based on your teams' skills and capacity

Plan your teams' work and assign work items such as incidents, problems, change requests, or interactions to them based on their skills, availability, and capacity. View your teams' shifts, events, and work assignments and assign or reassign the work items from a central location.

Before you begin

Note:
Your administrator must add sys ids for event categories that you want to display in the calendar to the *sn_wfo_work_sched.shift_data_categories* system property. For more information, see Work Scheduler components in Workforce Optimization for Customer Service reference.

Role required: sn_wfo_work_sched.manager

About this task

Analyze the tasks that your agents are assigned to and their actual shift plans. If the agent doesn't work during the duration the task has to be completed, you can reassign the task based on agent availability.

Note:

- Each type of task is displayed in the color defined in the queue configuration.
- You can enter keywords in the **Search** field in the sidebar to search a card.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select the **Work Scheduler** icon.

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- You can view the work shifts of all of your agents for all teams you manage. When you select the shift, the pop-up displays the shift details such as the shift time span and agent break times.
- In the contextual side panel, select the Filter icon ( ) and then select any filter, add the desired criteria, and select **Apply** to narrow down the display of the team members in the calendar. You can filter based on your team's assignment group, skills, location, schedule plan, or shift plan.

3. **Optional:** If you don't have any queue configurations in the Work scheduler, select the queue settings icon ( ) and then enable up to five work item types.
   The application creates a queue configuration and corresponding filters for each enabled work item type.
4. **Optional:** Create a queue configuration.

   a. Select **Queue configurations**.

   b. In the **My queue configurations** list, select **New**.

   c. On the form, fill in the fields.

Name	Description
Name	Name for the queue configuration.
Work configuration	The type of work configuration you want to use for the queue configuration.
Color	The work item color that displays in the calendar.
Order	The order number in which you want the queue configuration displayed in Work scheduler.
Matching rule	The matching rule for the work item type.

   d. Select **Save**.

5. Analyze your teams' work and schedule.

   a. From the **Queue** menu, select a work item to view related tasks.

   For example, if you select **Unassigned Incidents**, you can see all tasks related to the Unassigned Incident queue.

   You can select a time zone to view the agent schedule in that time zone.

   b. Analyze the tasks and work shifts for each agent in the calendar.
   You can use the pagination to scroll through the work shifts.

6. Assign a work item to an agent.

   a. Select a task that you want to assign to an agent.

   When you enable the **Show suggested only** option, by default, you can choose to display team members based on their availability, skills, or time zone. The ranking of the team

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members are based on matching assignment rules set for each criteria. Work scheduler uses Assignment workbench to evaluate agents to work on tasks.

You can select one or more of these criteria and the ranking of the team members will be based on the selected criteria:

- **WFO - Availability**—The number of hours the team member is available.
- **WFO - Mandatory skills**— If the task has mandatory and optional skills associated with it, the work scheduler displays agents who have all of the mandatory skills first and then the agents who have the optional skills.
- **WFO - Optional skills**— If the task only has optional skills associated with it, then the list displays the agents with the optional skills.
- **WFO- Timezone overlap**—The delta between the task time zone and the user's time zone. For example, if the user is located in the Pacific time zone and if the task location is in the Eastern time zone, then it will display as **+3**; if the task location is Hawaii, then it will display as **-3**.

To add your own matching rule, see Create a criteria for a matching rule in Work scheduler.

All of these criteria are based on the **More is better** ranking method where a higher value is better. For example, when the WFO-Mandatory skills criteria is enabled, team members that have more skills that are mandatory to work on the work item will be ranked higher.

For each criteria, if there is 100% match, then the values are displayed in green color; if not, the values are displayed in yellow color. If all criteria match a 100% then the matching details are displayed in green color; if not, they're displayed in yellow color.

b. Select an agent from the work scheduler calendar to whom you want to assign the task.

c. Click and drag your mouse device for the time span on the calendar for which you want the agent to work on the task.
The task is assigned to that agent. You can also edit the duration of the time span or drag the time span and reassign the task to another agent.

Note:
From the work queue, when you select a task that has been assigned to an agent, the application auto-scrolls to the page that has the time span for the task and displays the schedule for the agent.

7. Optional: Update a work item from the calendar.

a. Select a desired task on the calendar that you want to update.

b. Select the Edit icon to access a work item record.

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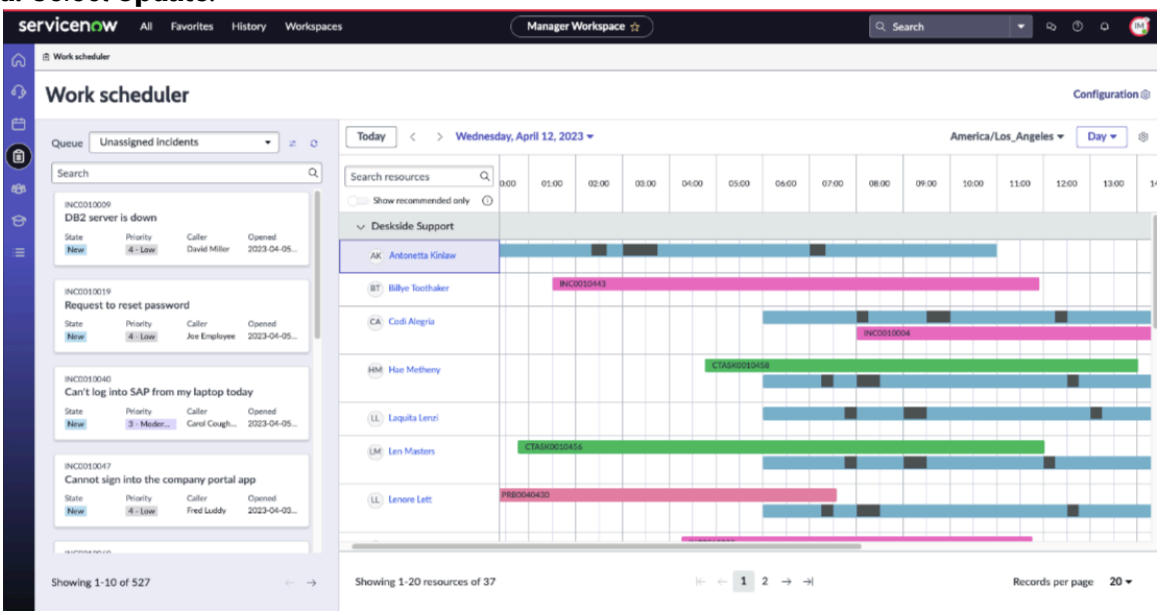
c. On the form, make the necessary updates.

d. Select **Update**.



Create a criteria for a matching rule in Work scheduler

Add a criteria for a matching rule to enable assignment of work items to team members based on the rule.

Before you begin

Role required: admin

About this task

The following matching rules, which are available by default, are based on the selection criteria matching type:

Rule name	Work configuration name	Table	UX app route
Incident Matching rule	Incidents	Incident [incident]	Incident
Problem Matching rule	Problems	Problem [problem]	Problem
Requested item Matching rule	Requested items	Requested Item [sc_req_item]	Requested item
Request Matching rule	Requests	Request [sc_request]	Request
Catalog Task Matching rule	Catalog Task	Catalog Task [sc_task]	Catalog task
Change Request Matching rule	Change Request	Change Request [change_request]	Change requests
Change Task Matching rule	Change Task	Change Task [change_task]	Change task

For information on how matching criteria works, see Matching criteria for work items in Work scheduler.

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The following four criteria are available by default:

- WFO-Mandatory skills
- WFO-Availability
- WFO-Optional skills
- WFO-Timezone overlap

Procedure

1. Navigate to **All** > **Work scheduler** > **Matching Rules**.
2. In the Matching Rules list, select a matching rule; for example, the **Incident matching rule**.
3. In the Select Criteria related list, select **New.**
4. Fill in the fields on the form.
   For information on creating a new matching criteria, see Create assignment workbench matching criteria.
5. Select **Submit**.

Matching criteria for work items in Work scheduler

The assignment workbench uses configurable matching criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking.

There are three types of matching criteria:

- **Simple Match**: creates one-to-one matching, such as matching the time zone of an agent with the time zone of a task location.
- **Aggregate**: uses a simple query and returns an aggregate result. For an aggregate type, select a table and create a filter, and then select an aggregate field such as the **Assigned to** field. This type of query returns a set of users.
- **Scripted**: uses a scripted query which returns a list of users.

Several matching criteria are provided with the assignment workbench:

- **Availability Today**: Availability is calculated based on the agent's work schedule, assigned work, and personal time off. The more availability an agent has, the higher the contribution to the agent's overall rank.
- **Matching Skills**: The number of agent skills that match the skills required for the incident. The more skills that match, the higher the contribution to the agent's overall rank.
- **Matching Skills - Mandatory Skills Support** Calculates the number of agent skills that match the mandatory skills. It does this by filtering out all agents who do not have the mandatory skills and ranks the remaining agents. The more skills that match, the higher the contribution to the agent's overall rank.

  Note:
  If using the mandatory skills feature, use the **Matching Skills - Mandatory Skills Support** criterion to match agents with the Configuring the mandatory skills feature identified for an incident.

- **Assigned Incidents**: The number of incidents already assigned to this agent. The more incidents assigned, the lower the contribution to the agent's overall rank.
- **Last Assigned**: For the sake of balancing assigned work, prioritized the agent based on the last assigned work.

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To create matching criteria, select the type and use the fields related to that type to build the query. After creating matching criteria, you can create a configuration for the assignment workbench by creating a matching rule of the type **Selection criteria** and selecting the desired matching criteria.

As part of selecting the matching criteria for the workbench configuration, you can specify the following settings for each individual criterion:

- ranking and display usage
- ranking method
- ranking weight
- threshold
- active/inactive

Ranking and display usage

In the **Use for** field, specify how you want that matching criterion to be used:

- Ranking and display: uses the criterion to determine agent ranking and displays it in a column on the workbench.
- Display only: displays the criterion in a column on the workbench but does not use it to determine agent ranking.
- Ranking only: uses the criterion to determine agent ranking but does not display it on the workbench.

Ranking method

There are two ranking methods:

- More is better: for example, more availability is better when determining the agent ranking.
- Less is better: for example, fewer assigned incidents are better when determining agent ranking.

Weight

Each matching criterion has an assigned weight. By default, the matching criteria has an assigned weight of 10. You can assign a higher weight to the criteria that's more important.

Threshold

A threshold sets a minimum requirement for a criterion. For example, set the threshold of the Matching Skills criterion to 3 if you want to see only those agents who have at least three of the required skills for a task. For availability, set the threshold to the desired number of hours to display only those agents who have that minimum number of work hours available. You can set the threshold in the **Select Criteria** related list on the Matching Rule form. If necessary, personalize the list and add the **Threshold** column.

Active/Inactive

There can be several matching criteria associated with the matching rule that determines the assignment workbench configuration. Each individual criterion can be set to active or inactive. Changing this setting has an immediate impact on the agent ranking. You can make this change in the **Select Criteria** related list on the Matching Rule form. If necessary, personalize the list and add the **Active** column.

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Calculating the agent ranking

The assignment workbench adds the values of the matching criteria and their respective weights and uses these values to determine the overall agent ranking.

1. Calculate a number for each criterion.
2. Multiply that number by the criterion weight.
3. Divide the result by the total of all criterion.
4. Repeat for each criterion and add the results.

The following example shows how the ranking is determined for an agent with these matching criteria values:

- Matching Skills with Mandatory Skills Support: 5/6
- Availability Today: 7 hours
- Assigned Incidents: 2

Calculations:

- **Matching Skills**: `2 / 3 = 0.666` (with 3 being the maximum number of skills)
- **Availability Today**: `7 / 8 = 0.875` (with 8 being the maximum number of hours)
- **Assigned Incidents**: `2 / 26 = 0.0769` (with 26 being the total number of tasks in the table)
- **Weight**: each matching criteria has an equal weight of 10

```
((0.666 x 10) / Total of criterion weight (10+10+10)) + ((0.875
 x 10) / Total of criterion weight (10+10+10)) + ((0.0769 x
 10) / Total of criterion weight (10+10+10))
```

```
(6.66 / 30) + (8.75 / 30) + (0.769 / 30)
```

```
0.222 + 0.291 + 0.0256 = 0.53
```

This calculation is performed for each agent in the assignment group. Agents are ranked based on the value of this calculation, with the highest number earning the highest ranking.

Scheduling in Workforce Optimization for Customer Service

By using Scheduling, you can manage your workforce resources efficiently by planning and managing schedules, staffing, and shifts across your teams all from one location. You can also integrate with on-call scheduling and create shifts and schedule for on-call rotations.

With Scheduling, you can do the following:

- Add meetings, training, time-off requests, or ad hoc work shifts by using the team calendar.
- Filter agents in the team calendar based on their location, region, assignment groups, or any field in the agent's record.
- Create shift and schedule plans for agents.
- Approve or reject agents' time-off and shift-swap requests.
- Track and manage the team's schedule on the team calendar by viewing the planned shifts versus the actual clock-in and clock-out times for the selected day or week.

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- Analyze whether your team members are following the schedules. If you see a potential issue, you can easily alert your team so that they can take immediate action.
- Use historical adherence reports to analyze and recommend coaching opportunities for your agents.

To delve into more information behind your key performance indicators, filters and sidebars, see Exploring indicators with KPI Details

Create a shift plan

Schedule shifts for your team so that you can make sure that you are covering all work assignments and breaks. You can also specify the days of the week that you might need to override scheduled shifts.

Before you begin
Role required: sn_shift_planning.admin

About this task
In the **Shifts** tab, the shifts are grouped by active and inactive shifts. The contextual side panel displays the active and then the inactive shifts in the order it is displayed in the **Shifts** tab.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.
3. Click the **Shifts** tab.
4. Click the plus (+) icon.
5. Create a shift.
6. Click **Submit**.

Create a schedule plan

Manage your team's schedule by creating a schedule plan that covers a span of time and includes your team's work shifts. You can also assign agents to shifts based on their skills and availability. This way, you can make sure that you are using your resources in the best way possible for your organization.

Before you begin
Role required: sn_shift_planning.admin

About this task
You can set the number of days to cache agent schedules using the *sn_shift_planning.number_of_days_to_cache* system property. The **Total coverage/demand** row displays the number of agents covering each shift in a day. The day view displays the demand for the number of agents forecast for every hour in a day. For example, 4/5 shows that you have four agents scheduled for an hourly time slot, 11 AM to 12 PM and the agent demand forecast for that hour is 5.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.

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3. Create a schedule plan.
   a. Click the **Team Calendar** tab.

      Note:
      You can analyze the staff alignment for a day or for the week.

   b. In the contextual side panel, click the show schedules icon to display the schedules.
   c. In the Schedules panel, click + icon.
   d. In the **Name** field, enter a name for the schedule plan.
   e. From the **Start Date** field, select a date to start the schedule plan and click **OK**.
   f. From the **End Date** field, select a date to end the schedule plan and click **OK**.
   g. Click **Save**.
   You can view the schedule of all agents in the assignment group that you directly or additionally manage.
4. Add a work shift to the schedule plan.

   Note:
   To add more shifts to an existing schedule plan, select the schedule plan and then add the work shift.

   a. In the contextual side panel, click **Add Shift**.
   b. In the **Shift** field, select the work shift that you want to add to the schedule plan.
   c. In the **Event type** field, select the work event that categorizes the work shift.
5. Add agents to the work shift.
   a. In the **Agents** field, search for agents and add one or more agents to add to the shift.
   b. Click **Save**.

   Note:
   It may take a few minutes for the screen to refresh.

Publish a schedule plan for visibility into team coverage

Generate a preview of your schedule plan and publish it so that your agents can see their shifts and schedules ahead of time. You can unpublish a schedule to make changes and then publish it again.

Before you begin
Role required: sn_shift_planning.admin

About this task
You can make a copy of a schedule and update it to create a new schedule. Updates could include modifying the schedule start and end dates as well as adding or removing shifts or agents.
When you make a copy of the schedule, the following updates are automatically made to the schedule copy:

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- The start date is set to the current date and the end date to 30 days from the current date.
- The schedule state changes to **Draft**. You can make the necessary changes to the shift and click **Save**.
- The schedule only displays agents in the assignment group of the current logged in user.

You can also unpublish a schedule make updates, and then publish it again.

- If the start date is the either the current date or had occurred in the past, the schedule state remains as **Published** and the end date changes to tomorrow.
- If the start date is in the future, the scheduler changes the schedule state and agent schedules to **Draft**.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule icon ( ).
3. Generate a schedule preview.
   a. Click the **Team Calendar** tab.
   b. Click the Show Schedules ( ) icon to display in the contextual side panel.
   The team calendar refreshes and generates the preview when you save a work shift.
4. Publish a schedule.
   a. Select a schedule and edit the schedule if necessary.
   b. Edit the schedule if necessary and click **Save**.
   c. Click **Publish**.

> **Note:**
> You can click **Delete** in **Draft** state and delete the schedule if you no longer need it.

Result

All the schedules that are in **Draft** state move to **Published** state. You can view the published schedule in the team calendar. Agents can view their published schedules and approved leaves on MS Outlook after synchronizing their team calendars and events with Microsoft Outlook.

Track and manage your teams' schedule

Create, update, or monitor your teams' schedule from one location. You can approve or reject requests for swapping shifts or time off for agents within your assignment group.

Before you begin

Role required: sn_shift_planning.admin

About this task

Using the calendar, you can do the following:

- View all of your agents by assignment group.
- Get insights into team compliance with published schedules.
- View an agent's work schedule that is actual shift time vs clock-in and clock-out times.
- Filter the team calendar based on the **Assignment Group**, **Location**, **Skills**, **Shift Plan**, and **Events** for a customized view.
- Modify the agent's shift, clock-in, and clock-out timings, if necessary.

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Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select the Schedule ( ) icon.
3. Modify an agent's shift.
   The schedule that includes this shift must be in **Preview** or **Published** state.
   a. In the **Team Calendar** tab, navigate and hover over the shift for the agent that you want to modify the schedule for.
   b. In the shift pop-up window, select the Edit ( ) icon.
   c. Modify the agent's shift or the shift time.

      Note:
      If the existing shift has a break, you can add more breaks to the shift.

      - Select **Select shift times** and modify the **Start time** or **End time** fields to change the timing of the shift.
      - Select the **Select preset shift** option and from the Shift plan list, select an existing shift to assign another shift plan to the agent. For more info on creating a shift plan, see Create a shift plan.

   d. Select **Save**.
4. Approve or reject an agent's time off or shift-swap with another agent.

   Note:
   You must approve a request two days before the time-off or shift-swap start date. If not, the approval is auto-rejected. An administrator can change this default setting. For more information, see Setting the due date for time-off and shift-swap request approvals in Components installed with Workforce Optimization for Customer Service Overlapping time-off requests by an agent is rejected.

   If you approve the request, the schedule gets updated in the team calendar based on the approvals.

Create recurring meetings

Set recurring meetings or training sessions for your team from the Schedule tab. You can create daily, weekly, monthly, or yearly meetings.

Before you begin

Role required: sn_shift_planning.admin

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select the Schedule ( ) icon.
3. Navigate to **+New** > **Meeting**.
4. Enter the title of the meeting in the **Title** field.
5. Enter the name of the participants in the **Attendees** field.
6. Enter the start and end dates of the meeting in the **Start date** and **End date** fields.
7. Enter the start and end time of the meeting in the **Start time** and **End time** fields.

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8. Select the **All day** option if the meeting duration is for the entire day.
9. Select one of the following options from the Repeats list.
10. Enter some details and agenda about the meeting in the **Description** field.
11. Select **Save**.
    The meeting invite is sent to the participants selected in the Attendees field.

What to do next

You can view the meeting series on your team calendar. You can select the meeting invite on the team calendar and edit the whole meeting series or a particular meeting in the whole series.

Monitor schedule adherence of your agents

Use schedule adherence to evaluate whether or not your agents are adhering to their assigned schedules. You can look for areas where low-value activity can be eliminated or reduced and further analyze staffing levels throughout the day.

Before you begin

Role required: sn_shift_planning.admin

About this task

- Adherence is a metric to analyze how closely agents follow their schedule in completing the work assignments. Conformance measures the work completed, regardless of when it was completed.
- A high adherence rate indicates that agents are sticking to their schedules and offering customer service when expected. Low adherence suggests changing the processes or decisions to manage the team efficiently. The numbers are highlighted in red for non-adherent agents.
- Schedule adherence and conformance calculations are based on the formulas, agents' actual and planned work timings. The following are the default formulas that are used to calculate adherence and conformance for agents. However, your administrator can change the formulas, as required. The following components and formulas are used to calculate adherence and conformance:
  - The *shift_planning_clock-in* and *shift_planning_clock-out* scripts generate the agents' clock-in and clock-out events from the login and logout sessions. The business rule *Agent Time Work Event Trigger* generates clock-in and clock-out events whenever there is a change in agent's presence state.
  - **Schedule Adherence**= (Minutes worked in shift/Scheduled shift time in minutes + Overtime)
  - **Conformance**= (Minutes worked in shift + Overtime)/Scheduled shift time in minutes
- The ideal adherence percentage by default is above 70, and conformance is between 80 to 120. However, your administrator can change the threshold values. For more information, see Configure properties for schedule adherence and conformance. The agents who do not qualify to the defined threshold values are considered as non-adherent and are highlighted in red.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule icon ( ).
3. Monitor the schedule adherence of your agents.

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To	Do this
View schedule adherence at the organization or team level	**a.** Click the **Schedule Adherence** tab. The bar chart appears with the schedule adherence percentage and conformance percentage of your teams. **b.** View the graph and drill down further to view the analytics of your team members by clicking on the bar.
Analyze planned vs. actual scheduling for your team members	**a.** Click the **Team Calendar** tab. **b.** Select the date. **c.** View the **Time Worked** summary by clicking on the bar representing the agent's actual time worked. **Note:** The clock-in and clock-out timings are the actual work timings of your agents. The events are generated based on the agent's login, logout actions, and presence state. If an agent forgets to clock out, the system automatically generates the clock-out event after 60 minutes by default. However, your administrator can change it using *`Default threshold time for clock-out event generation (in Minutes)`* system property. Example: A clock-in event gets generated when an agent logs in or changes the presence status to **Available**. Similarly, a clock-out event gets generated when an agent logs out of the system or changes the presence status to either Offline or Break. If an agent fails to clock-out past 60 minutes of the shift end time, the system automatically generates the clock-out event.

The following team calendar snapshot illustrates how to measure how well your team members are adhering to their work schedules. The blue bar indicates the planned work shift time and next to that is the actual worked time. The default representations are purple for clock-in

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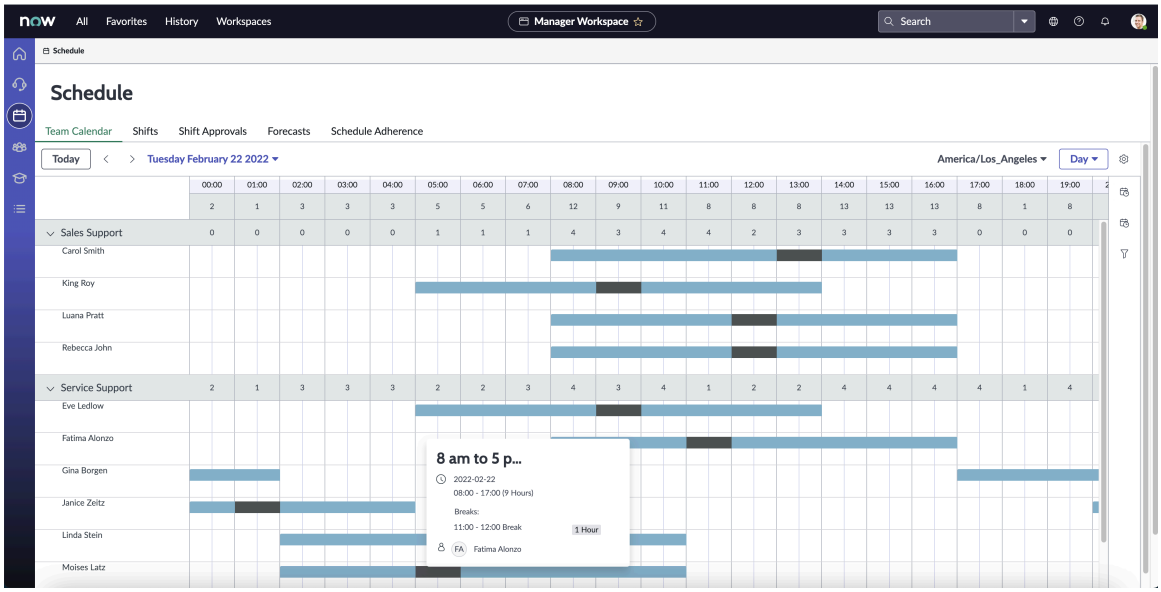
time, green for agent's available duration, red for the clock-out time, and grey for agent's non-available time.



Analyze adherence and conformance from the time worked summary

View the time worked summary of your team members to determine if your teams are adhering to the planned schedules. You can also use historical adherence, which is a reporting view of real-time adherence, to see how well your agents have followed their schedules in the past.

Before you begin

Role required: sn_shift_planning.admin

About this task

Adherence and conformance calculations are based on the defined configuration and your agents' actual and planned work schedules.

> **Note:**
> Your administrator can disable schedule adherence or change the configuration for adherence and conformance. For more information, see Configure properties for schedule adherence and conformance.

For information about schedule adherence, see the "Schedule adherence" section of Scheduling in Workforce Optimization for Field Service.

Procedure

1. Navigate to **All** > **Workspaces** > **Manager Workspace**.
2. Drill down to view the time attendance and time worked summary of your agents.

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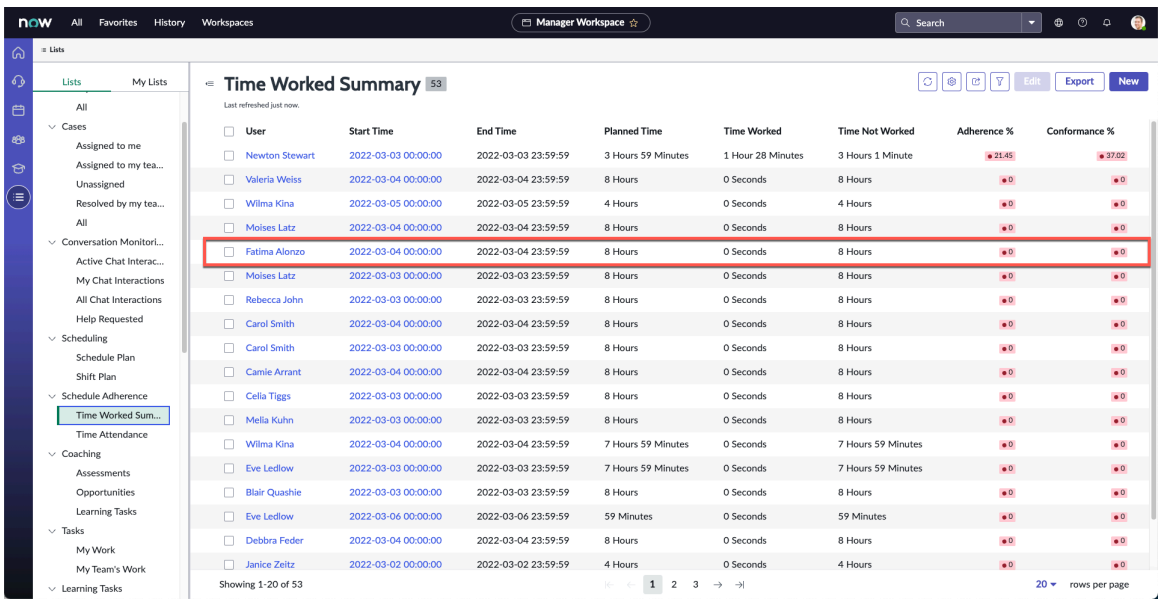
To	Do this
Analyze time worked summary of your team	**a.** Click the Lists icon (☰). **b.** Under Schedule Adherence, click **Time Worked Summary**. **Note:** The **Available Non Planned** time captures the time the agent was available and clocked in outside of the agent's scheduled work events. For example, if an agent is scheduled to attend a training from 13:00 to 14:00 but forgets to clock out that attendance, that time is considered the clocked-in time. The training time from 13:00 to 14:00 is captured as the available non-planned time.
View your agents' time attendance	**a.** Click the Lists icon (☰). **b.** Under Schedule Adherence, click **Time Attendance**.

The following schedule adherence example shows how to measure how well your team is adhering and conforming with their work schedules.



Example:
To understand the computations of the fields in a time worked summary, consider Fatima Alonzo's work day:

- Shift time begins at 8 a.m. and goes to 4 p.m. = 8 hours
- Planned time = 8 hours = 480 minutes
- Clocks in 8 a.m. and clocks out at 12 p.m. for a break. Back from the break, clocks in at 12:30 p.m. and clocks out at 4 p.m.
- Minutes worked in shift = 480 - 30 = 450 minutes

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- Schedule adherence= (minutes worked in shift/scheduled shift time in minutes + overtime) = 450/(480+65) = 82.57%
- Conformance= (minutes worked in shift + overtime)/scheduled shift time in minutes = (450 + 65) / 480 = 107.29 percent.

Note:
Fatima Alonzo is adherent because the schedule adherence and conformance are within the threshold. To see which agents are non-adherent, look for the numbers highlighted in red.

Analyze staff alignment using Demand Forecast

Use Demand Forecast to plan the number of staff members that you require so that you have enough agents to do the job.

Before you begin
Role required: sn_agent_forecast.user

About this task
Using Demand Forecast, you can:

- Monitor agent or team shift coverage for any day or week.
- Analyze if you are overstaffed, understaffed, perfectly staffed, or not aligned well with your staffing needs.
- Adjust the staff alignment depending on the coverage you need and the schedule of your teams.
- Analyze staff alignment as you are creating a schedule.
- You can analyze the agent coverage you have and the actual demand for the number of agents based on assignment groups and work shifts in a day.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.
3. Click the **Team Calendar** tab.
4. Analyze staff alignment for each shift.
   You can click the filter icon and select the assignment groups and shift plans for which you want to view the staff alignment.
   The following scheduling snapshots provide you an example to analyze staff alignment using Demand Forecast. The misaligned staffing indicator in the pop-up shows that the forecast

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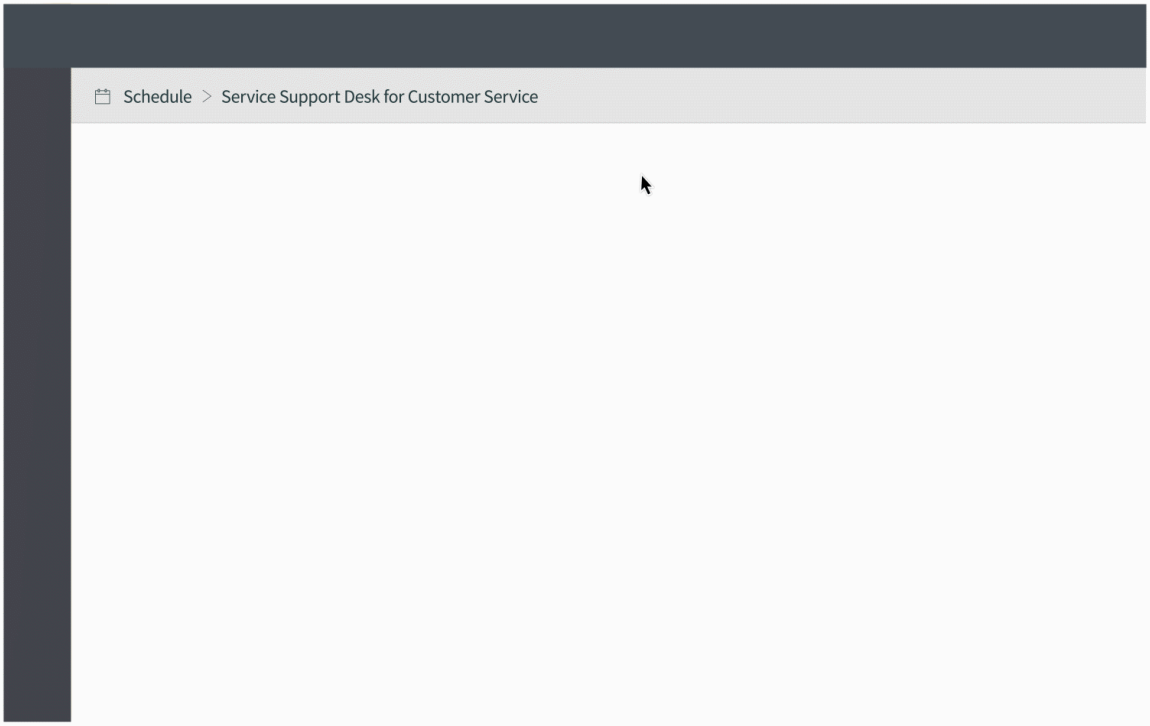
manager has scheduled certain number of agents for each shift but they need more agents to cover them.



Add events to the team calendar

Create a meeting, training, time-off request, or an ad hoc work event from the team calendar.

Before you begin

Role required: sn_shift_planning.admin

About this task

You can create custom event types and add or remove the desired fields. For more information, see Create event types to display them on the team calendar.

Procedure

1. Navigate to **All** > **Workspaces** > **Manager Workspace**.
2. Click the Schedule icon ( ).
3. Click the **Team Calendar** tab.
4. Click **+New**.
5. Create an event.
6. Click **Save**.

Swap your agents' shifts in Workforce Optimization for Customer Service

Swap an agent's shift in your assignment group with another agent who can work on that shift and skip the approval process.

Before you begin

Role required: sn_shift_planning.admin

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Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule icon ( ).
3. In the **Team Calendar** tab, navigate and point to the shift for the agent that you want to swap with another agent.
4. In the shift pop-up window, click the Shift Swap icon ( ).
5. In the **Requested Shift** section, click the **Agent** field and select the agent who can work on that shift.
6. Click **Submit**.
   The team calendar displays the updated schedule.

Enable your teams to sign up for work shifts

Empower your teams to sign up for work shifts based on their availability and preference.

Before you begin

Role required: sn_shift_planning.admin

About this task

When a schedule plan is enabled for sign-up, you can receive notifications. You can also receive notifications when the schedule plan that's open for sign up is due on the current day or when it's due soon.

Important:
Your administrator must set the value in the *glide.ui_notification.max_recipients* property to the maximum number of agents for which you want to send the notifications.

Procedure

1. Navigate to **All** > **Workforce Optimization for CSM** > **Manager Workspace**
2. Select the Schedule icon ( ).
3. Add a schedule plan.
   a. Select the **Team Calendar** tab.
   b. In the Contextual side panel, click the Show Schedules icon to display the schedules.

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Tip:

Select the filter icon ( ) and then select the desired sign-up state and sign-up dates to narrow down the schedule plans enabled for sign-up.

In the filters, to add the desired	Do this
Sign-up state	i. Double-click one or more sign-up states in the **Available** column to move them to the **Applied** column. ii. Select **Apply**.
Sign-up dates	i. Select a predefined option such as **Last 7 days** or select the start and end date for which you want to see the schedule plans enabled for sign-up. ii. Select **Apply**

c. In the Schedules panel, select the + icon.

You can duplicate an existing schedule to create another one. After you duplicate a schedule that has the shift sign up enabled, you can update the start date, end date, and the date for which the agents must sign up for the schedule.

Note:

If there are no agents associated with the schedule, then the shifts associated with the schedule aren't duplicated.

d. Fill in the required fields on the form.
The image below shows an example of a filled-in Schedule form.

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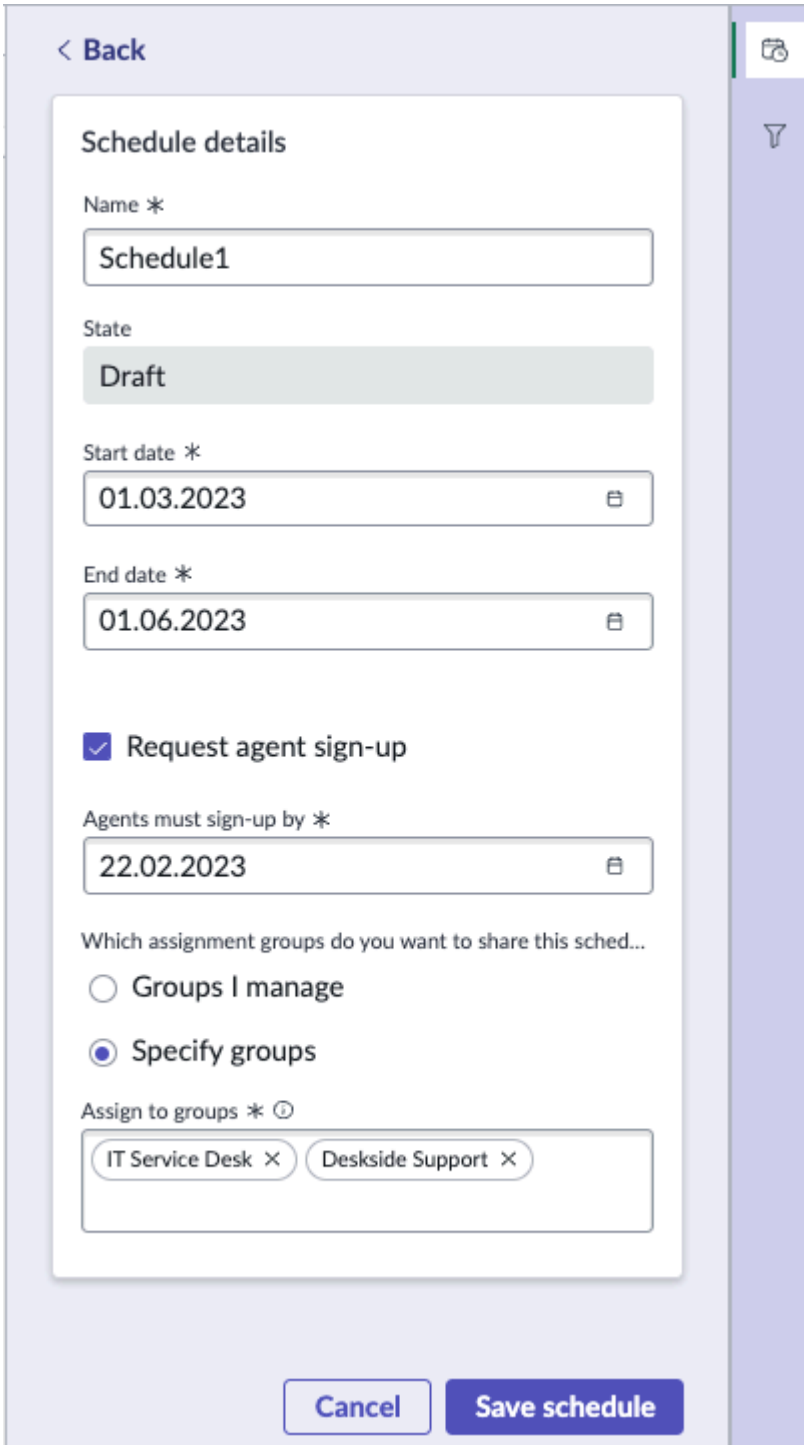

e. To enable your agents to sign up for work shifts, do the following:

i. Enable the **Request Agent Signup** check box.

ii. In the **Agents must sign-up by** field, enter the date by which they must sign up for shifts within that schedule.

Tip:
If your agents have signed up for their preferred shifts, the **Assigned To** field is auto-populated with those agents.

f. Select **Save schedule**.

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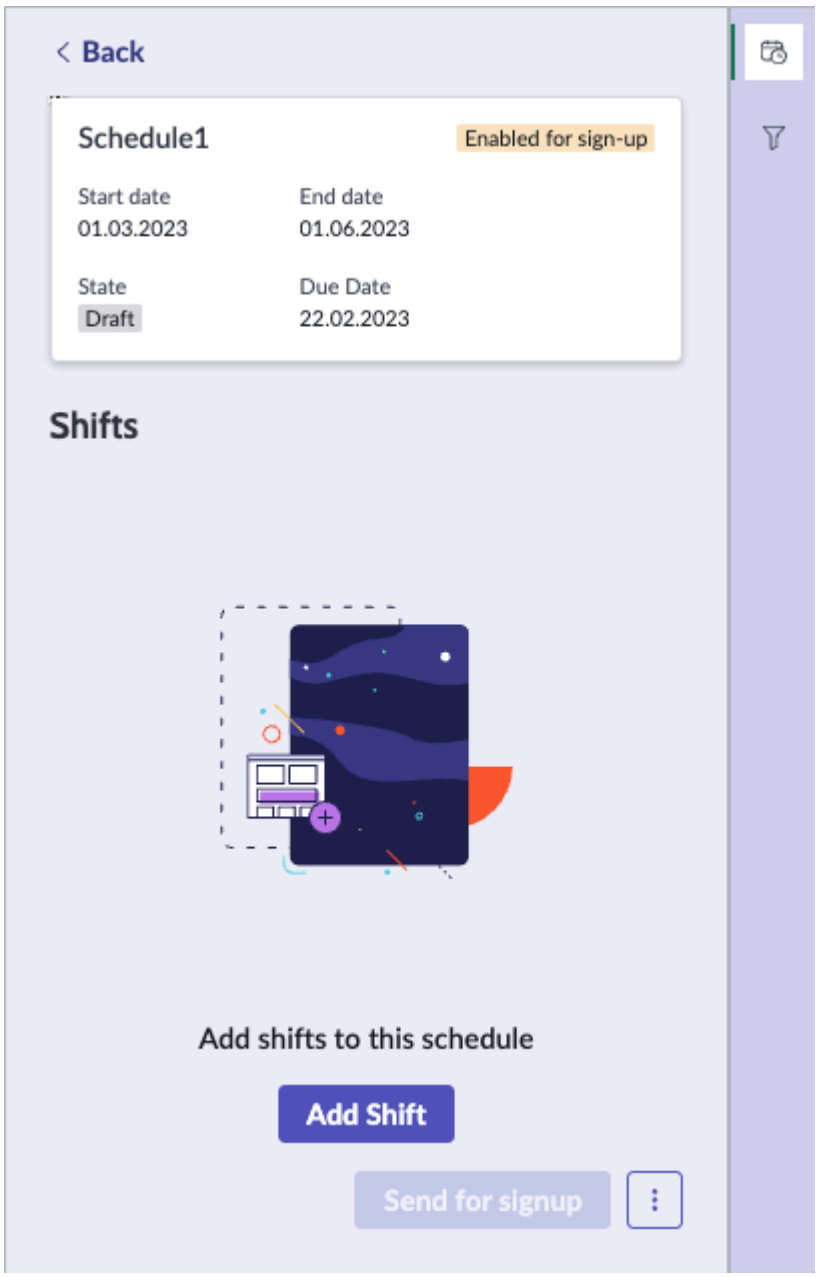
4. Add a work shift to the schedule plan.

   a. Select the schedule plan you've created.
   The image below displays the schedule plan that was created.



   b. Select **Add Shift**.
   The image below provides an example of a form to enter the details for a shift.

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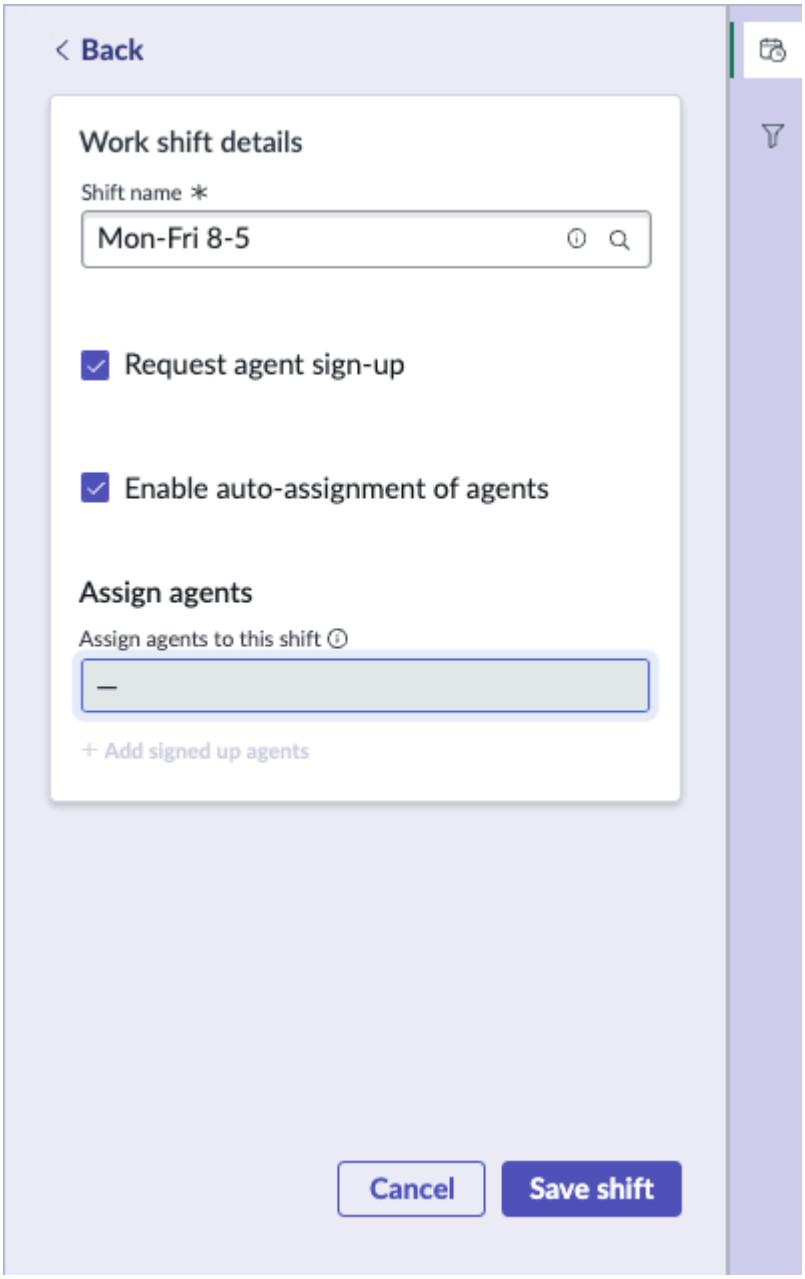

c. In the **Shift** field, select the work shift that you want to add to the schedule plan.

Note:
If the schedule plan has been enabled for agents to sign up for shifts, the following fields are automatically enabled:

- **Request agent sign-up**
- **Enable auto-assignment of agents**

If you want to assign agents manually, you can disable these check boxes at any time.

d. If the shifts are enabled for sign-up, you can select **Send for signup**.
All shifts that have been enabled for sign-up are sent to the agents to sign up for their shifts. You can select **Close sign-up** to close agent sign-up for a shift before the sign-up due date and manually assign the agents.

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- The **Enabled for sign-up** highlighted label changes to **Closed for sign-up**.
- The system will automatically close the sign ups after the sign-up due date.

5. Add agents to the work shifts.

6. Select **Save shift**.
   The state for the schedule plan changes to **Generating Preview**.
7. To publish the schedule plan, select **Publish**.

Note:
It may take a few minutes for the screen to refresh.

The table describes the different shift sign-up states in the schedule plan.

Schedule plan sign up state	Description
Sign-up not enabled	The schedule plan isn't enabled for sign-up.
Enabled for sign-up	○ Schedule plan is enabled for sign-up but isn't yet ready for agents to sign up for shifts. ○ Schedule plan can't be published when enabled for sign-up.
Open for sign-up	○ Schedule plan is enabled for sign-up and is ready for agents to sign up. ○ Schedule plan can't be published or deleted when it's open for sign-up. ○ When open for sign-up: ▪ The sign-up due date can't be changed. ▪ The work shift details can't be changed. ▪ New shifts can't be added. ▪ If enabled for auto-assign, the agent assignment in a shift can't be changed.
Closed for sign-up	Schedule plan is closed for agents to sign up.

Sign up for your preferred shifts

Specify one or more shifts in a schedule plan for which you would prefer to sign up.

Before you begin
Role required: sn_shift_planning.agent

About this task
You can receive notifications when your manager makes a schedule plan available for sign up. You can also receive notifications when the schedule plan that's open for sign up is due on the current day or when it's due soon.

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Procedure

1. Navigate to **Workspaces** > **Service Operations Workspace**.
2. Select the Schedule icon ( ).
3. Select the **Sign up shifts** tab.

   You can use keywords to search the schedule plans, and view all schedules with active shifts for your assignment groups that you can sign up for. Use the pagination to scroll through all available schedule plans.

   The current state of each schedule plan displays as a highlight in each card. The table below describes the highlighted value.

Highlighted value	Description
Available	Shifts for the schedule plan are available for sign up.
Draft	Shifts you've considered for sign-up but have not completed the sign-up process.
Completed	Submitted one or more preferred shifts within the schedule plan.
Closed Incomplete	The schedule plan currently does not have shifts for which you could sign up.
Closed Complete	The schedule plan has at least one preferred shift for which you've signed up.

4. Select the Overlapping time off icon ( ) to analyze if the time off you have requested or the ones that have been approved overlap with the schedule plan available to you for sign up.
5. To sign up for your preferred shifts, select **Add shifts**.
   You can only sign up for shifts in the schedule plan that have not been published yet.
   The Add shifts pop-up appears. You can search for shift using the search bar and select shifts to save as draft.

   You can sign up for a maximum number of shifts that your administrator has set up in the *sn_shift_planning.max_shifts_allowed_for_signup* system property.
6. To save the selected shifts for sign-up, select **Save Shifts** and then select **Save as draft**.
7. Select the plus (+) sign and sign up for additional shifts.
   When you have more than one shift, you can reorder them by using the up or down arrows in card for each shift.
8. Select **Submit**.
   All shifts you have added for sign up will be submitted.

Understanding user criteria for event types in Workforce Optimization for Customer Service

Manage user access for any event type such as meeting, training, and time-off requests in the team calendar.

You can include or exclude Create, Read, Write or Update, and Delete (CRUD) rights for event types using the inclusion and exclusion user criteria access. You can perform the CRUD operations for users, groups, or roles.

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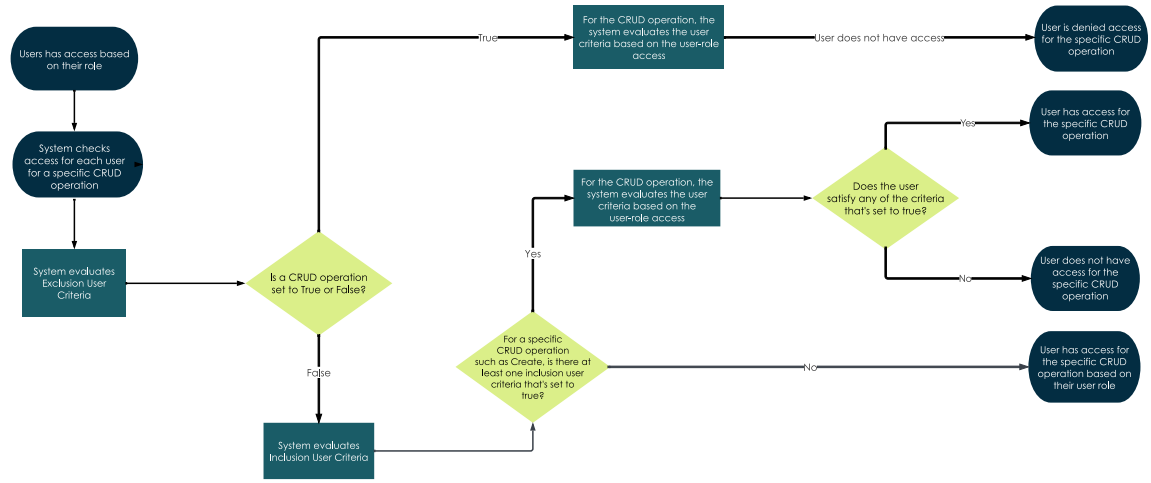
Note:
By default, team members don’t have read-access to events of type **Actual work**.

For additional flexibility around managing the CRUD access, you can set the user criteria for each event type. For example, if team members don't have access to edit their work shifts using their role-based access, you can set that access using user criteria. You can set this access for specific team members or for the whole group.

Inclusion and exclusion logic for event types



How inclusion and exclusion user criteria access works

When the user criteria rules get evaluated, it's done in the following order:

1. The system first evaluates the exclusion access for each criteria.
   - If the exclusion access for a CRUD operation is set to **true**, then the system evaluates the user criteria.
     a. If the user doesn’t have access based on their role, then the user is denied access for the specific CRUD operation.
     b. If the user isn’t denied access, then the system evaluates the inclusion criteria.
   - If the exclusion access for a CRUD operation is set to **false**, then the system evaluates the inclusion criteria.
2. For the inclusion access, for a specific CRUD operation such as Create, the system checks if at least one of the inclusion user criteria is set to **true**. If yes, then the system evaluates the user criteria based on the user's role access.
   - If the user:
     - Has access for the CRUD operation based on their user role, then the user can perform that action. For example, if the event type is training and the CRUD operation is **Create** then the user can create the training event types.
     - Doesn’t have access for the CRUD operation based on their user role, then the user can’t perform that action.
   - If at least one of the inclusion criteria isn’t set to **true**, the user doesn’t have access to the specific CRUD operation. In this example, the user can’t create the training event types.

Note:
The exclusion access always takes precedence over the inclusion access. If no inclusion or exclusion access is set, then the role-based access is used for managing event types.

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Create user criteria for event types in Workforce Optimization for Customer Service

Add a user criteria record to specify which users, roles, and groups can access event types in Workforce Optimization for Customer Service.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **User Criteria**.
2. Select **New**.
3. On the form, fill in the fields.

User criteria form field

Field	Description
Name	Unique name for the user criteria
Users	Users who can access event types.
Groups	Groups who can access event types.
Roles	Roles who can access event types when you apply the user criteria.
Advanced	Option to create a script for the user criteria.
Active	Enabling the check box makes the user criteria available.
Companies	Companies who can access event types.
Location	Locations that can access event types.
Departments	Departments that can access event types.
Match All	Option to make every condition that is set required when the user criteria are applied.

4. Select **Submit**.

Include or exclude user access for event types

Add or remove access to users for any event type so that they can view event types that are relevant only to them.

Before you begin

Role required: sn_shift_planning.admin

Procedure

1. Navigate to **All** > **Workforce Optimization for CSM** > **Scheduling** > **Event Configuration**.
2. Select an event.
3. Exclude or Include specific CRUD access for users to events.
4. Click **Update**.

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Verify access criteria for a group or a team member in Workforce Optimization for Customer Service

Check what create, read, update, and delete rights your groups or your team members have for events to make sure that they have the correct permissions that they need.

Before you begin

Role required: sn_shift_planning.admin

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. In the lists module, go to **Scheduling** > **Event type**.
3. Select an event for which you want to verify user access.
4. Select the **User access** tab.
5. Do any of the following.
   The screen displays the create, read, write, and delete columns as **true** for each team member that has access to the specific type of access to the selected event.

Teams in Workforce Optimization for Customer Service

Use Teams to track and analyze performance trends for your teams from a single location. You can monitor the trends for each agent within your team and compare your agents or team members with one another.

With Teams, you can do the following:

- Identify skill gaps so that you can recommend which skills are needed to coach your agents.
- Organize your teams into assignment groups. You can add a set of key performance indicators (KPIs) to help you measure team performance consistently across the groups. For example, the Customer Service Desk unit contains multiple teams, such as Hardware and Network Support. You can create a KPI group for the Customer Service Desk unit and then add Hardware and Network Support as assignment groups to this KPI group. Next, you add a set of KPIs to the KPI group. With this data, you can measure the performance trends across the Hardware and Network Support teams.
- Compare KPIs between multiple teams belonging to the same KPI group.
- View the KPIs between the selected date range.
- Drill down into a Team level KPI to view the split of KPIs across all individual team members.
- View the KPI trend to analyze the future forecasts for each of the KPIs, if the date range has the latest values.
- Targets can be set on the KPIs through the team performance page at the global or individual level. When such targets are set, the trendline reflects the targets.
- Drill down to the individual agent level to view a 360 degree view of the current work, historical KPIs, presence history, channel capacity utilization, skills, and upcoming time-offs.

Analyze the performance trends for your teams

Analyze trends to monitor your team's performance and adherence within a KPI group.

Before you begin

Role required: sn_csm_wfo_workspa.manager

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About this task

Analyze the data by drilling down into the data for a team, a specific team member, an indicator, or a case.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Teams icon.
3. Select a date range to view your teams' performance for that time period.
   You can set the default date range using the *sn_team_perf.default_date_range* system property.
4. Analyze team performance.
   a. Select a team.
   b. In the **Performance** tab, track and analyze the overall indicator performance for all members in the team.
   c. Drill down into the data for this team:

Performance indicators

To	Do this
Analyze indicator performance	▪ To analyze the indicator performance for the team, click an indicator value for the team in the header row. ▪ To analyze indicator performance for a team member, click an indicator value for the team member.
Track cases	Click the **Tasks** tab and analyze all cases related to the team. ▪ To view the cases details, select a case. ▪ To view the a team member's details, select a team member.

You can also review cases, details of assignment groups, additional managers, and information relevant to the team.

Related topics

Setting up Teams Workforce Optimization for Customer Service

Coaching in Workforce Optimization for Customer Service

By using Coaching in Workforce Optimization for Customer Service, you can assess your team's abilities to efficiently resolve cases by reviewing their work at critical moments of customer service.

With Coaching, you can do the following:

- Recommend training for your agents to address skill gaps.
- Use the coaching opportunities that are available by default to coach your agents. You can also create a coaching opportunity using the Coaching application specific to your agent needs.
- Use assessments and surveys to apply consistent, measurable scores across teams.
- Use Predictive Intelligence to recommend skills for your agents and provide training to address those skill gaps.

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Skills Overview in Workforce Optimization for Customer Service

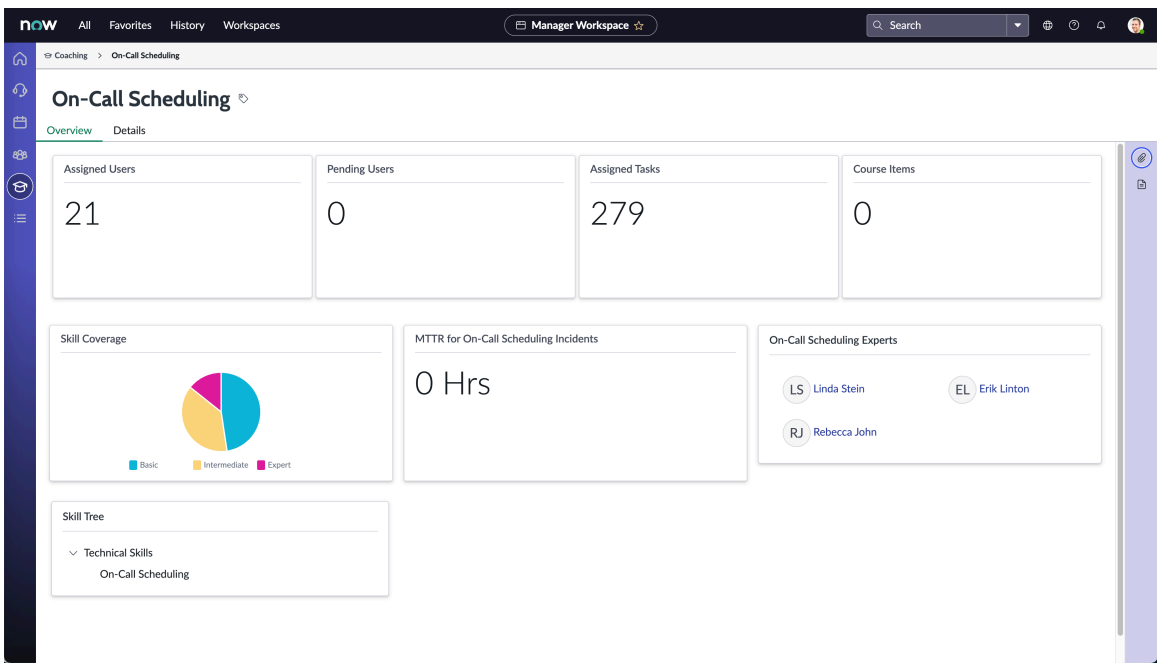
Use Skills Overview to analyze skill data such as how many skills are assigned to users and tasks. You can also see how many experts you have for a particular skill and the overall skill coverage by your teams.

Access Skills Overview from the Teams application:

1. Go to **Workspaces** > **Manager Workspace**.
2. Click the Teams icon .
3. Select a team.
4. Click the **Skills** tab.
5. Select a skill.

You can access the Skills Overview page when you click on a skill in a user profile page in any Workforce Optimization for Customer Service application.

Note:
You must enable the Coaching With Learning application to view the reports from the application. For enabling this application, see Activate Workforce Optimization for Customer Service.



Use cases

Use Cases

User	Landing page use
Skill Admin [skill_admin]	• Analyze all experts available for each skill. • Drill down into the skill hierarchy. • Number of skills assigned to users and tasks.

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Use Cases (continued)

User	Landing page use
	• The mean time taken to resolve incidents for that skill. • Visualize how many users you have at different skill levels.

Indicators

MTTR of incidents of skill - Mean time taken to resolve incidents with this skill.

Breakdowns

The indicator is broken down by Skill.

Components

Components

Component Name	Type	Description
Skill Overview Container [sn-manager-skill-overview-container]	Visualization components	Contains the following components: • Reports • Mean Time to Resolution (MTTR) indicator • Skill Coverage pie chart • Content tree • Skill Experts components
Skill Tree Connected [sn-manager-skill-tree-connected]	Tree	Displays the skill hierarchy. If the selected skill does not have a skill hierarchy then the component will not display on the Skill Overview page.
Skill Experts [sn-manager-skill-experts-connected]	List	Displays all users who are at the expert level for the skill.
Skill Coverage [now-uxf-visualization-connected]	Pie-chart	Displays the percentage as well as the number of users with different levels of expertise for the skill.

Reports

Important:
The Pending Users and Assigned Tasks reports display when you enable the Coaching with Learning application from the ServiceNow® Store. To enable this application, see Activate Workforce Optimization for Customer Service.

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KPIs

Title	Type	Source table	Description
Assigned Users	42	User Skill [sys_user_has_skill]	The number of users who have the selected skill assigned to them.
Assigned Tasks	42	Task Skill [task_m2m_skill]	The number of tasks for which this skill has been assigned.
Pending Users	42	Pending Users [sn_lc_learning_task]	The numbers of users who are yet to be assigned the selected skill from the learning task.
Course Items	42	Learning Course Item [sn_lc_course_item]	The number of internal and external courses that have the skill associated with the course item.

Assess the quality of completed tasks

Assess the ability of your agents to resolve cases or the quality of their completed tasks.

Before you begin

You can create an assessment from an interaction or any task type.
When you manually create an assessment, you can add a survey to it. Coaching assessments also get created and assigned to the coach based on the trigger conditions that are defined in coaching opportunities.

Role required: sn_coaching.coach

Watch this short video to get an overview on coaching, assessments, and trainings.

Workforce Optimization for Customer Service Coaching Overview.

About this task

If the coaching opportunity includes a survey, you can opt to take the survey and the assessment. When you use a survey to assess a trainee, the score for the survey is automatically calculated when you complete the survey. The assessment rating is then updated based on that score.

The Coaching Overview screen displays the average quality of the tasks that were completed in the past 30 days for your assignment groups.

- The donut chart displays the number of assessments in various states of completion. You can point to one of the states and click to open all assessments in that state.
- The bar chart displays assessments created by coaching opportunities. You can click on any of the data in the graph to access the assessments.
- You can click on the graph that displays the indicator data and access detailed information on the indicator.

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Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Do any of the following.
4. On the form, fill in the fields to assess the agent.

Assessment form

Field	Description
Opportunity	Coaching opportunity that is associated with the coaching assessment.
State	State of the assessment. ○ **Open**: New coaching opportunity ○ **Work in progress**: Trainee is being coached ○ **Resolved**: Trainee is assigned coaching programs and training modules. ○ **Closed Complete**: Assessment has been resolved and closed. ○ **Closed Incomplete**: Assessment that has been closed but not completed, typically because the coaching assessment **Due Date** has expired.
Assessment Rating	How well the agent resolved the incident. The Coaching application automatically populates this field when a coach completes a survey for the trainee.
Follow up	Whether the coach must take further action to improve the trainee performance.
Comments	Notes, if any, to add about the assessment.
Survey taken by coach	Survey for the trainee taken by the coach. You can add a survey for an assessment when you create the assessment manually or when the coaching opportunity triggers an assessment that does not have a survey. When a coaching opportunity triggers an assessment and contains a survey, the survey is automatically added to the assessment and cannot be changed by the coach.
Survey taken by trainee	Survey for the coach taken by the trainee.
Add skills	Skills to add to the trainee profile when the assessment is complete. When you click this field, it displays all skills and the skill levels that are not in the trainee profile.
Add training	Training to assign to the trainee. You can also assign learning tasks from course items.

5. Do the following:

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- To complete the adhoc assessment, click **Save**.
- To complete assessments creating using coaching opportunities, click **Complete assessment**.

Manage skills using Workforce Optimization for Customer Service

Add or update skills for an agent. You can approve predicted skills if the skill is necessary for the agent to complete assigned tasks. You can also reject a skill if it doesn't apply to the agent.

Before you begin

Role required: skill_manager

About this task

The Predictive Intelligence application for skills displays the recommended skills on each agent's profile. The application uses sample cases that the agent has worked on to recommend skills for an agent.

You can view skills for all users grouped by assignment group and the overall skill coverage for each group.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Click the **Skills** tab.
   You can view the list of all assigned skills and the skill level for each agent on your team. For more information on skills and skills levels, see Skills Management .

   You can also filter the skill matrix based on users, groups, skill type, skill level, or skill category. Reset the filter if you want to view the skills for all users.
4. Add a skill or skill level.
5. Approve or reject a skill that is recommended by Predictive Intelligence.
   a. In the skill matrix, click **Recommended** to approve and recommend a skill for the user.
   b. In the **Details** tab, review the request for skill approval, the sample case resolutions that were used to predict the skill, and the activity stream.
   - To approve a skill, click **Approve**. The skill is added to the agent and the lowest level for the skill is automatically associated with the added skill. The state for the request changes to **Approved** and the skill is added to the agent.
   - To reject a skill, click **Reject**. The state for the request changes to **Rejected**. Predictive Intelligence does not recommend the skill for the user again and the field changes to **Add**.
   - Click the More Options ( ) icon and select **Save**.

   The application assigns the skill to the user. If the assigned skill does not have a skill level, the application adds the basic skill level to the user.

Coaching with Learning

Use Coaching with Learning to train your agents with internal and external learning content. Organize similar content in catalogs. Assign learning tasks and track completion.

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Important:
Coaching with Learning is available when you enable the Coaching with Learning application from the ServiceNow® Store. To enable this application, see Activate Workforce Optimization for Customer Service.

Coaching with Learning

Create a learning catalog

Create a catalog to organize related content into categories.

Before you begin
Role required: sn_lc.catalog_manager

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Click the **Learning** tab.
4. Click **Learning Catalogs** and select **My Catalogs**.
5. Create a catalog.
   a. Click **New**.
   b. In the **Title** field, enter a unique name for the catalog.
   c. In the **Description** field, enter a description for the catalog.
   d. Click **Save**.

   Note:
   The catalog is visible to all groups that you directly or additionally manage.

6. Add course items to the catalog.
   a. Click the **Content** tab.
   b. Click **Add**.
   c. In the **Add Learning Courses** pop-up window, select all course items you want to add to the catalog.
   d. Click **Add**. The course items are added to the catalog.

   Note:
   To remove any course item you have added, select the course item and click **Remove**.

7. Add a group to a catalog.
   a. Click the **Applicable Groups** tab.
   b. Click **New**.
   c. In the **Group** field, select a group that you want to associate with the catalog.
   d. Click **Save**.

Create a learning task

Create learning tasks for agents to keep track of their learning activities.

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Before you begin
Role required: sn_lc.task_creator

About this task
Set learning task completion due dates to include or exclude weekends using the *exclude_weekends_on_learning_task_due_date* system property. For more information, see Workforce Optimization for Customer Service Reference.

Procedure
1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Click **Learning Tasks** and select **All Tasks**.
4. Create a learning task.
   a. Click **New**.
   b. Fill in the following fields.

All tasks form fields

Name	Description
Assigned to	Name of the agent to whom you want to assign the learning task.
Course item	The course that needs to be completed by the agent.
Due date	Date when the agent must complete the course. Default is 5 days after the creation of the learning task. This value is calculated from the **Days to Complete** field for the course item. The due date field is highlighted as follows: ▪ Green—if the task is due before the current day. ▪ Yellow—if the task is due on the current day. ▪ Red—if the task is due after the current day.
Catalog	The catalog that contains the course item for the learning task.

5. Click **Save**.

Create internal learning content
Add internal courses so that agents can learn new content and enhance their skill set.

Before you begin
Role required: sn_lc.content_creator

Procedure
1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Click **Learning Courses** and select **Internal Courses**.
4. Create an internal learning course.
   a. Click **New**.
   b. Fill in the following fields in Details tab.

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Internal courses form field

Name	Description
Title	Name of the course.
Internal source	Select the type of content for the course. Here are the available types of courses: ▪ URL—Youtube, Vimeo, or any link for a video ▪ Knowledge article ▪ Free form
Days to complete	The number of days required to complete the course. Default value is set to 5.
Estimated duration	Length of time when the course has to be completed. For example, for a video, it is the duration of the video. For a KB article, the duration is estimated based on the length of the article.
Description	Description of the course.

5. Click **Save**.
6. Add a skill to the internal content.
   a. Click the **Associated skills** tab.
   b. Click **New**.
   c. In the **Skill** field, select a skill you want to associate with the internal content.
   d. In the **Skill level** field, select a skill level for the selected skill.
   e. Click **Save**.
7. Add a learning task to the internal content.
   a. Click the **Learning Tasks** tab.
   b. Click **New**.
   c. In the **Assigned to** field, select a trainee to whom you want to assign the learning task.
   d. In the **Catalog** field, select the catalog to associate with the learning task.
   e. In the **Due date** field, click the calendar icon and select the date and time when you want to trainee to complete the learning task.
   f. Click **Save**.

Add external courses to coaching with learning

Add courses from external sources such as Udemy, Pluralsight, or Cornerstone to enable your users to gain skills from external content.

Before you begin

Role required: sn_lc.learning_admin

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.

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3. Click the **Learning** tab.
4. Go to **Learning Courses** > **External Courses**.
5. Select a course.
6. Click **Go to course**.
   You can review and learn the external course.

Mobile experience for Workforce Optimization for Customer Service

Manage customer service cases from your mobile device with the Now Mobile Agent application. You can stay connected and access information in real time so that you can complete your tasks quickly.

If you're an agent (sn_customerservice_agent) or a manager (sn_wfo_csm.manager), you both can use real-time notifications from the application to take action on an issue. Before you can do so, you must activate the Customer Service Mobile Plugin (com.sn_csm_mobile). For more information about the Now Mobile for Customer Service Management, see Mobile experience for Customer Service Management

- To get started with this application, follow the instructions in Get started with the Customer Service mobile application.
- You can learn about the agent and manager tasks that you can perform in Use the mobile application to perform agent and manager tasks. Additionally, you can also perform the following tasks for Workforce Optimization for Customer Service.

Agent tasks

Agent tasks	Action	Description
Approve or reject shift-swap request	• Tap the notification. • **Approve** or **Reject** the shift-swap request.	Agent receives notification that the shift swap request is either approved or rejected.

Manager tasks

Manager tasks	Action	Description
Approve or reject time-off request	• Tap the notification. • **Approve** or **Reject** the time-off request.	Agent receives notification that the time-off request is either approved or rejected.
Approve or reject shift-swap request	• Tap the notification. • **Approve** or **Reject** the shift-swap request.	Agent receives notification that the shift swap request is either approved or rejected.
View critical and high priority cases that breached SLA	Tap the notification. The case record appears.	Review the case record and take appropriate action.

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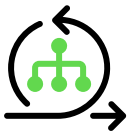
Now Assist for Customer Service Management (CSM)

Use the ServiceNow® Now Assist for Customer Service Management (CSM) application to summarize the case information, generate the case resolution notes, and summarize the chat for an interaction. You can enable your agents to understand the chat and case context so that they can propose quicker resolutions to your customers.

Get started

Explore Learn more about Now Assist for CSM	Configure Configure the Now Assist for CSM application to get started	Use Customer Service Management generative AI  Use generative AI capabilities offered by Now Assist for CSM
	Use CSM AI agent collection Use the AI agent use cases in Now Assist for CSM	

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.

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Troubleshoot and get help

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

AI limitations

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

Data processing

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

Data collection

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

For more information, see the Now Assist documentation.

Exploring Now Assist for Customer Service Management (CSM)

With the Now Assist for Customer Service Management (CSM) application, your agents can use generative AI to summarize the customer chat conversations and case details to get the context of the case. They can also generate the case resolution notes to share with the other agents and wrap up cases faster.

Summarize a chat with Now Assist for Customer Service Management.

Now Assist for Customer Service Management (CSM) overview

The following generative AI capabilities are available for an agent:

- An interaction chat summary provides the context about the chat conversation between your agents and customers at different points of the handoff, such as when a Virtual Agent chat history is handed off to a live agent, or when one live agent hands off a chat history with a customer to another live agent.
- A case summary enables an agent to gather the case context on long-running or complex cases. Because these cases can contain a lot of information, including the conversations with the customer or other agents, an agent can generate a summary to gain understanding faster.
- The case resolution notes can assist an agent to help wrap up cases faster and provide the context about the case resolution to the other agents who might encounter similar issues.
- A call summary assists an agent with obtaining the key details that were discussed during the conversations between the live agents and customers. It provides a high-level overview of the conversation in a clear format.

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- 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.
- Sidebar summary captures discussions between agents, requesters, and experts, and can be posted to case notes for further troubleshooting.
- Chat recommendation generates reply suggestions for agents using the Now Assist context menu.
- Email response generates reply suggestions for agents from existing or new emails using the Now Assist context menu.
- Sentiment analysis helps reduce escalated cases by providing agents with the most current sentiment on a case, based on customer interactions and the latest trends. It also offers insights into why the sentiment is what it is today.
- Suggested steps generation resolves cases and boosts agent productivity by automatically outlining the next best actions for unfamiliar cases in the Recommended Actions tab.
- Sentiment analysis on an account uses filters and sorting dashboards to track sentiment, providing valuable insights and reducing escalated cases.
- Conversational subflows and actions in the Now Assist panel use natural language to trigger subflows or actions, improving agent productivity and allowing them to complete tasks efficiently within the panel.
- The Portal case form guides requesters through a self-service flow using Genius Results, helping them find solutions and reducing the number of cases created.

Now Assist for Customer Service Management (CSM) skills

The Now Assist for CSM application includes the generative AI skills that enable your agents to understand the chat and case context so that they can propose resolutions to the customer more quickly.

Chat summarization

Provides an agent with a summary of a customer's Virtual Agent chat history, live agent chat history, and the interaction history. Agents can view or create the following summaries:

- Virtual Agent chat handoff summary: Summarizes the conversation when Virtual Agent hands off a chat to a live agent and displays the summary in the Active Chat window. An agent can view a summary of the actions that were taken by a customer before engaging with a live agent.
- Live Agent to Live Agent handoff summary: Summarizes the conversation when a live agent hands off a chat to another live agent and displays the summary in the Active Chat window. An agent can view a summary of the actions that were taken by a customer before hand off to another live agent.
- Quick action summary: Provides a summary when an agent uses the `/summarize` quick action in the Active Chat window.
- Chat wrap up summary: Populates the **Chat Summary** and **Short description** fields on the interaction record when a live agent wraps up a chat with a customer.

> **Note:**
> If a chat summary isn't available for the interaction, the **Chat Summary** field doesn't appear on the interaction record.

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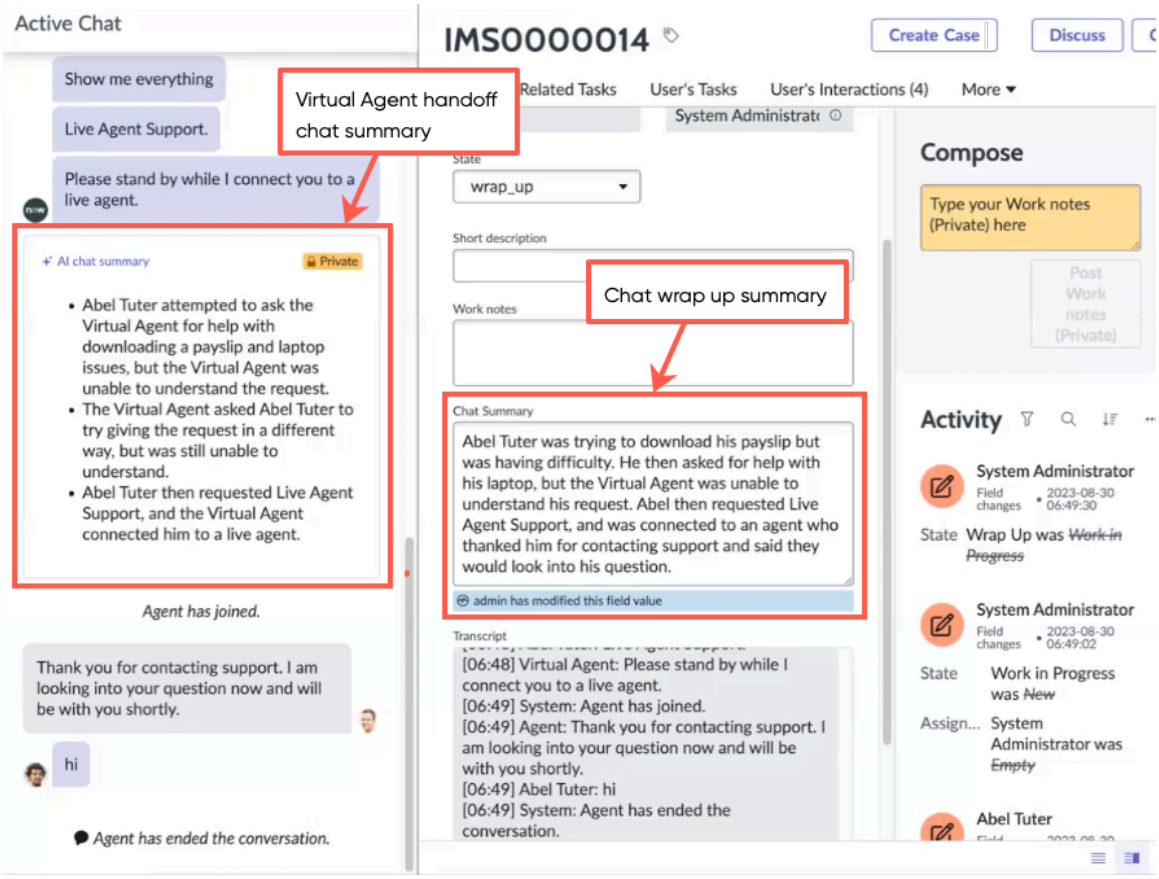
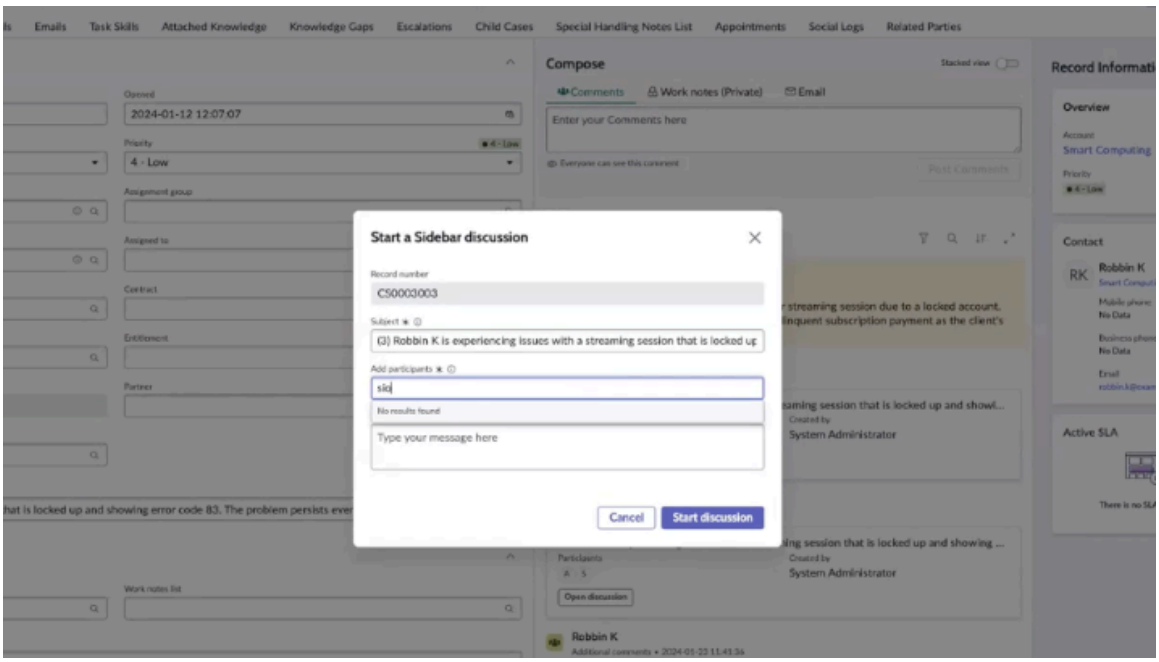
Interaction record with chat summaries



Sidebar discussion summarization

Provides an agent with a summary of the sidebar discussions between agents, requesters, and subject matter experts. An agent can also post the summary to the case work notes for further troubleshooting before or after the chat ends.

Sidebar discussion modal



Chat reply recommendation

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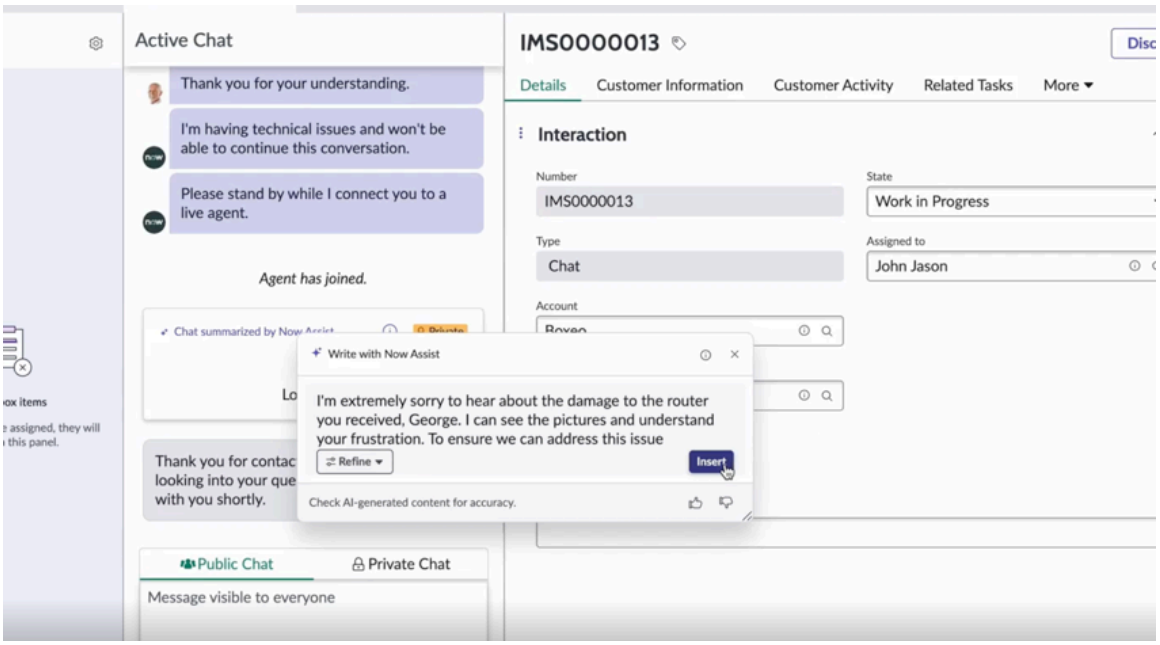
Enables an agent to generate a reply recommendation from a chat using Now Assist context menu.

The chat reply recommendation skill displays a pop-up window that an agent can use to generate a recommendation and review it before sending it as a reply.

Now Assist context menu



Case summarization

Provides an agent with a summary of a customer service 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 case summarization skill generates a case summary and displays it above the activity stream. The summary includes the information that the agent enters in the following case record fields:

- Short description
- Description
- Work notes
- Additional comments
- Email
- Service level agreement (SLA)

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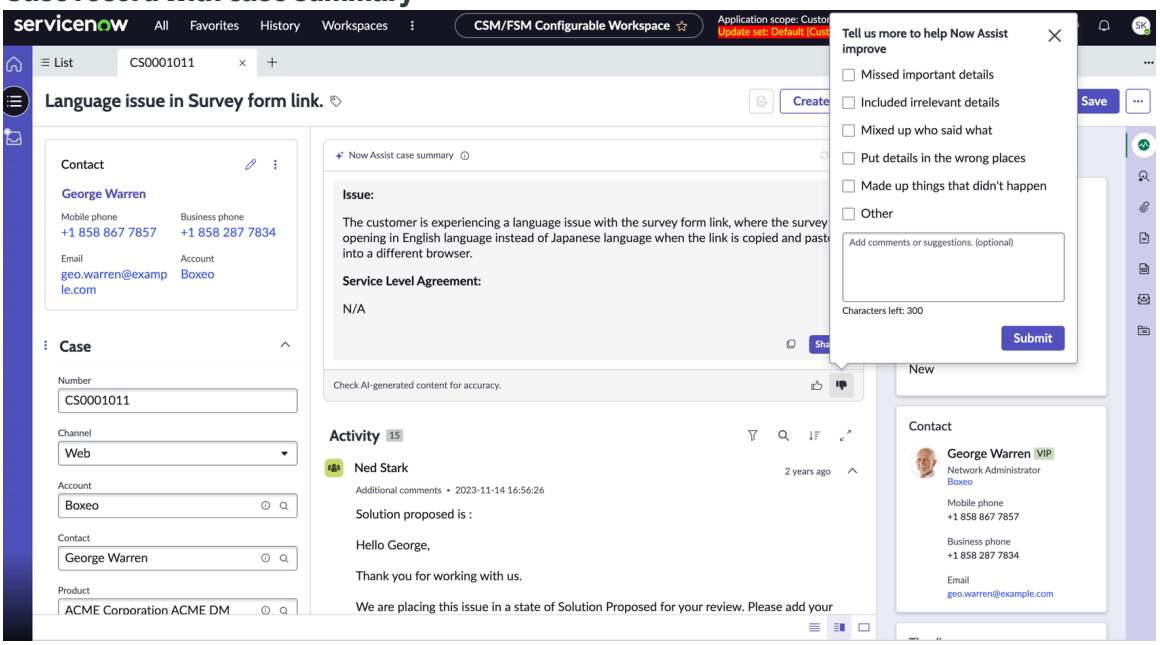
Case record with case summary

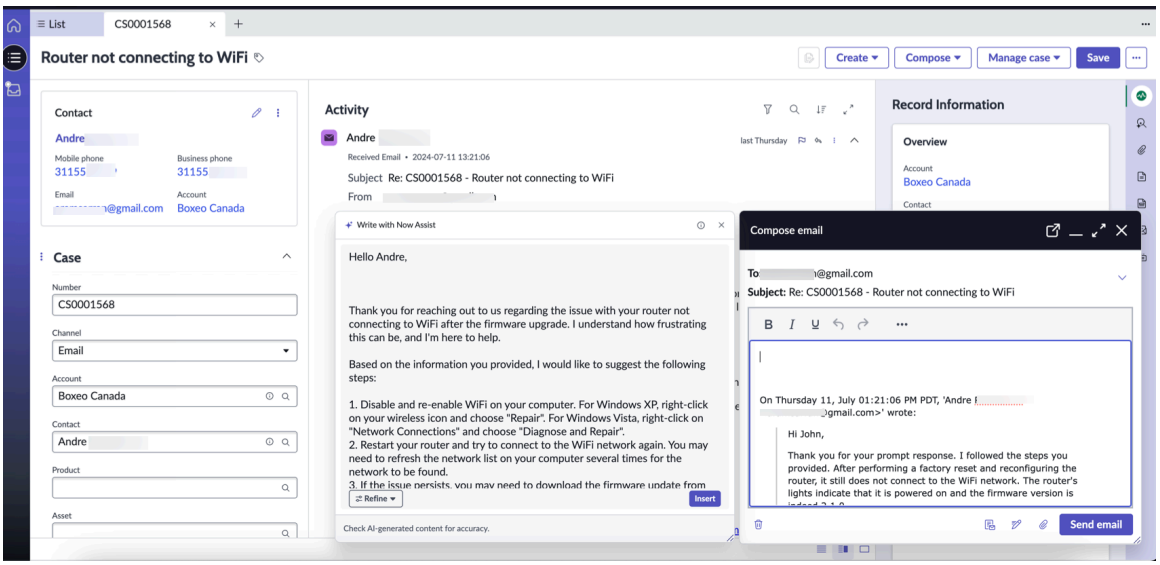


Email response

Enables an agent to generate an email response from an existing or new email using Now Assist context menu.

The email response skill displays a pop-up window that an agent can use to generate a recommendation and review it before sending it as a reply.

Now Assist context menu modal



Resolution notes generation

Enables an agent to generate the resolution notes for a case, propose the resolution to the customer, and add the information to the case record.

The resolution notes that generation skill displays a pop-up window that an agent can use to select a resolution code and review the resolution notes text before proposing a resolution to a customer.

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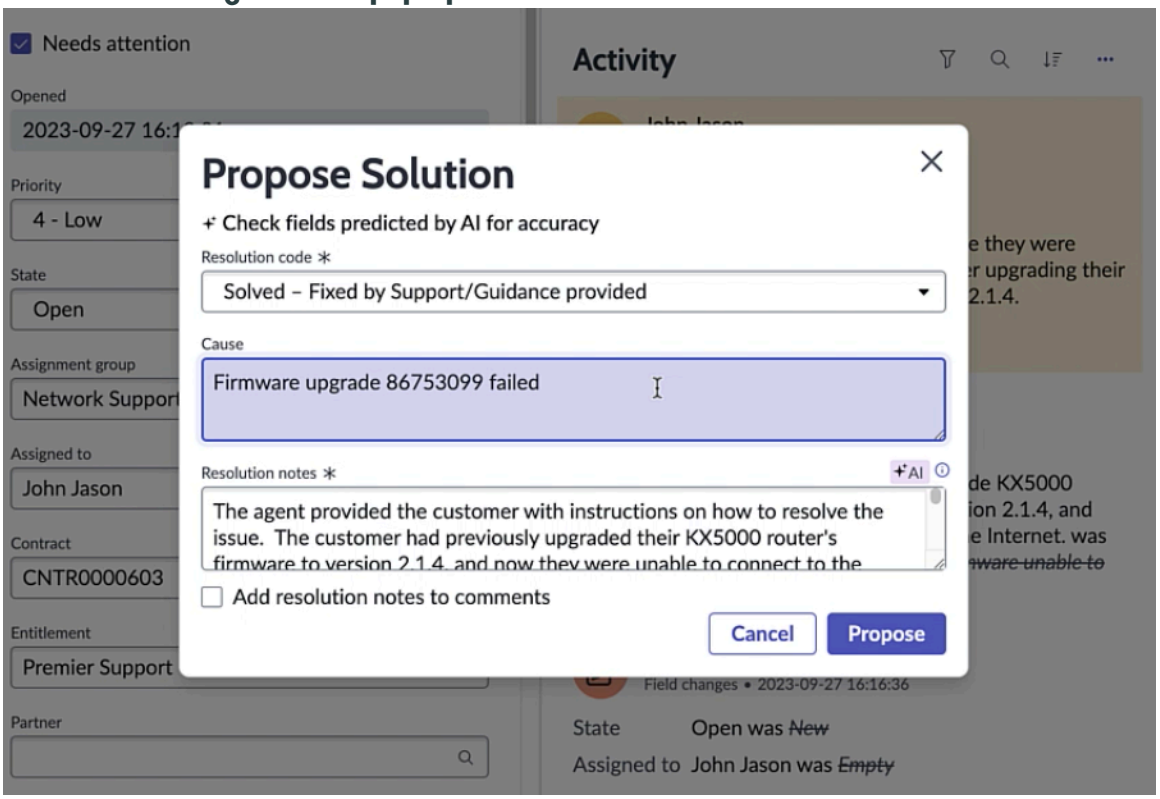
Resolution notes generation pop-up window



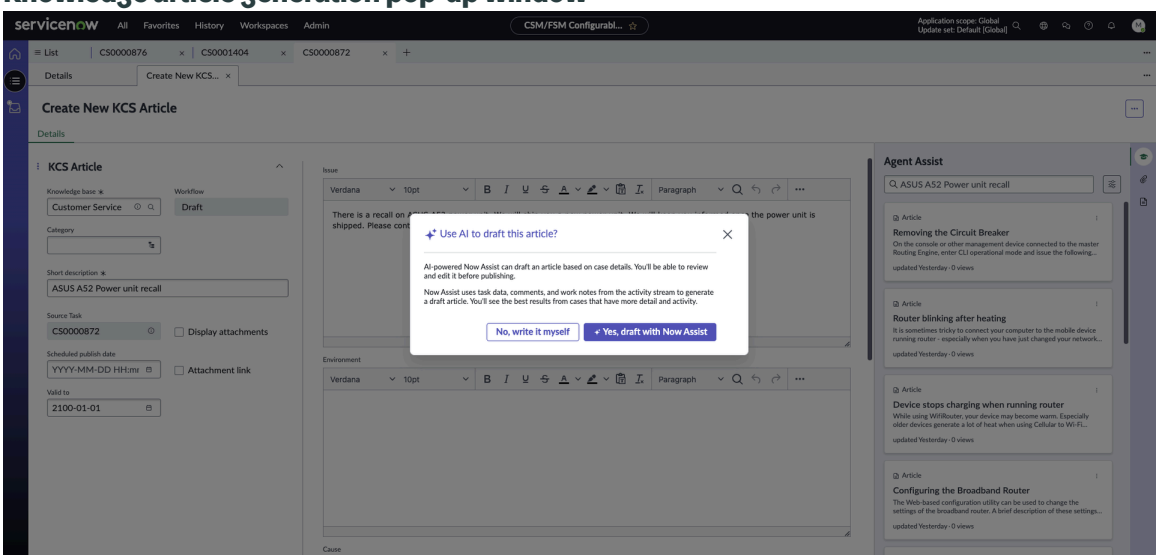
Note:
The resolution notes generation skill requires a minimum of 50 words in the case record to generate the resolution notes. If the resolution notes can't be generated, the system displays a message below the **Resolution notes** field.

Knowledge generation

Enables an agent to generate 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.

Knowledge article generation pop-up window



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Call summarization

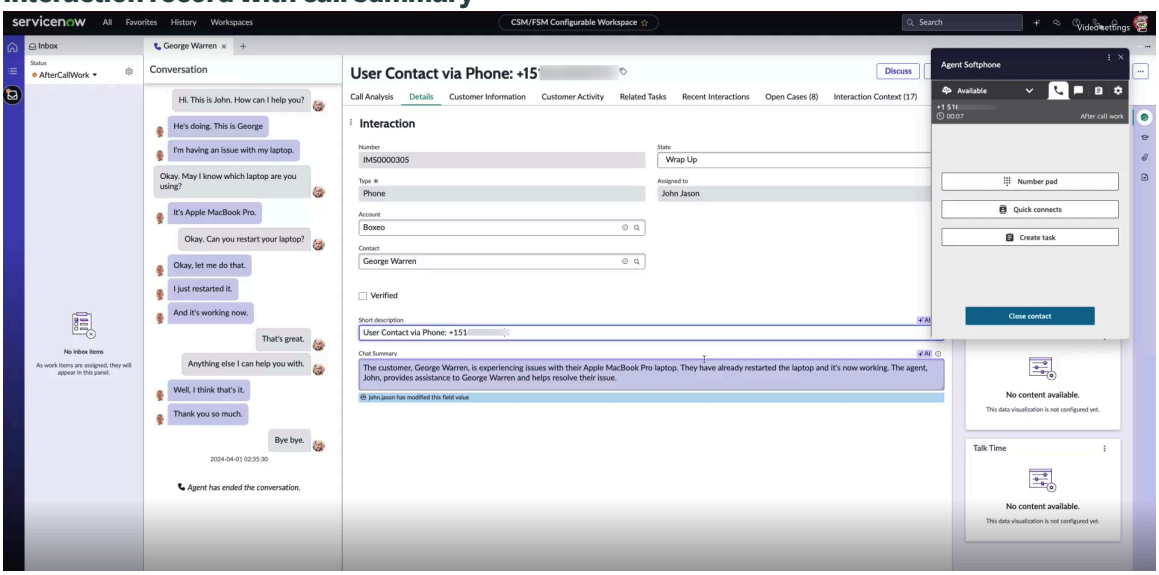
Provides an agent with a call summary when the call ends and includes the main points discussed during the call, including the issue and the actions taken. An agent can generate a call summary of the interaction to understand the case context and post the summary to the case work notes. An agent can view or create the following summaries:

- Chat wrap up summary: Populates the **Chat Summary** and **Short description** fields on the interaction record when a live agent wraps up a chat with a customer.

  Note:
  If a call summary isn't available for the interaction, the **Chat Summary** field doesn't appear on the interaction record.

- Call summary from the Now Assist panel: Creates a summary of the conversation between the agent and customer from the Now Assist panel by selecting **Summarize conversation**.

Interaction record with call summary



Sentiment analysis on a case

Sentiment analysis helps reduce escalated cases by providing agents with the most current sentiment on a case, based on customer interactions and the latest trends. It also offers insights into why the sentiment is what it is today.

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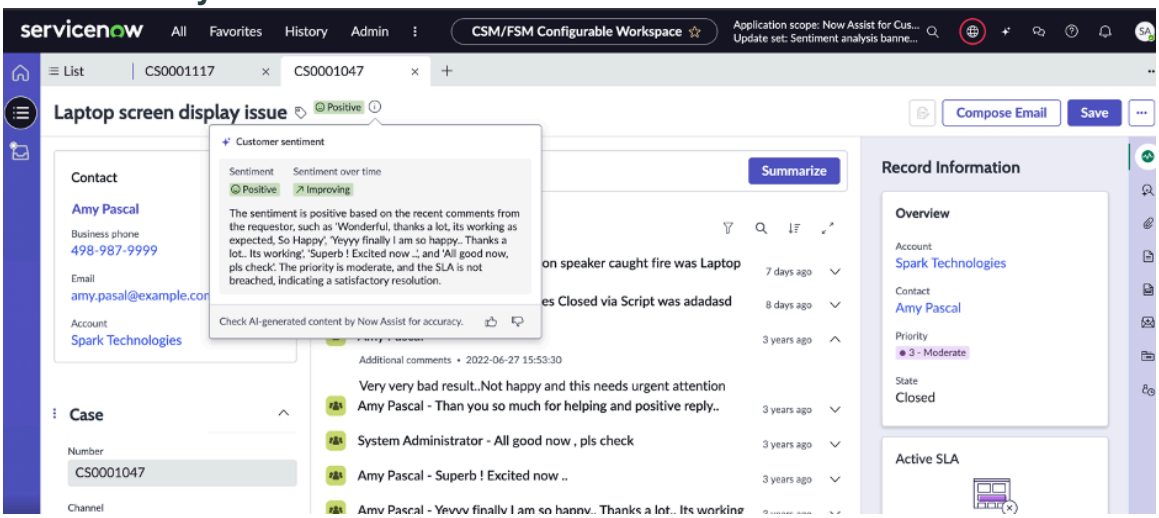
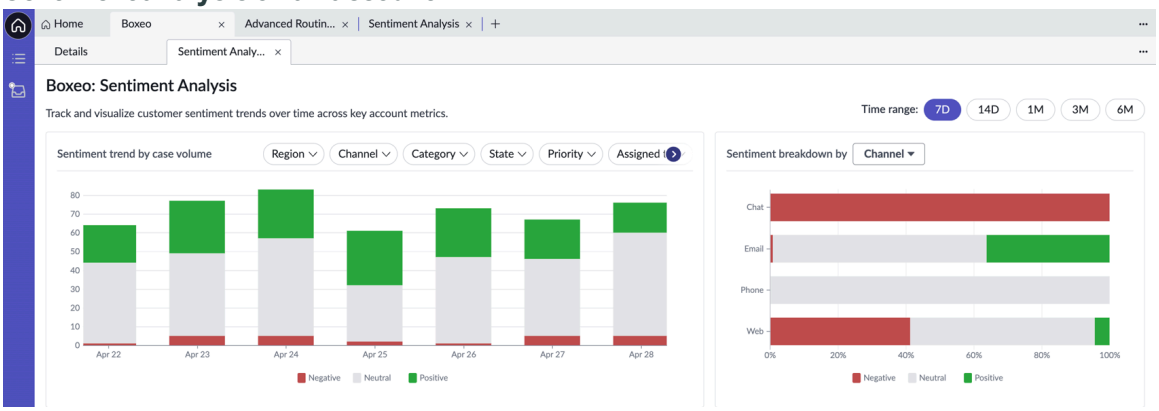
Sentiment analysis on a case



Sentiment analysis on an account

Track the sentiment of a business-to-business account using filters and sorting dashboards to gain valuable insights and reduce escalated cases.

Sentiment analysis on an account



Conversational subflows and actions in Now Assist panel

Use natural language to trigger subflows or actions, enhancing agent productivity and allowing them to complete tasks efficiently within the Now Assist panel. For more info, see Request the generative AI capabilities in Customer Service Management by using the Now Assist panel.

Now Assist in Portal case form

Guide requesters through a self-service flow using Genius Results to find solutions and reduce the number of cases created. For more info, see Using Now Assist in portal case form.

Suggested steps generation

Suggested steps generation may help resolve cases and boost agent productivity by outlining the next best actions for unfamiliar cases in the Recommended Actions tab.

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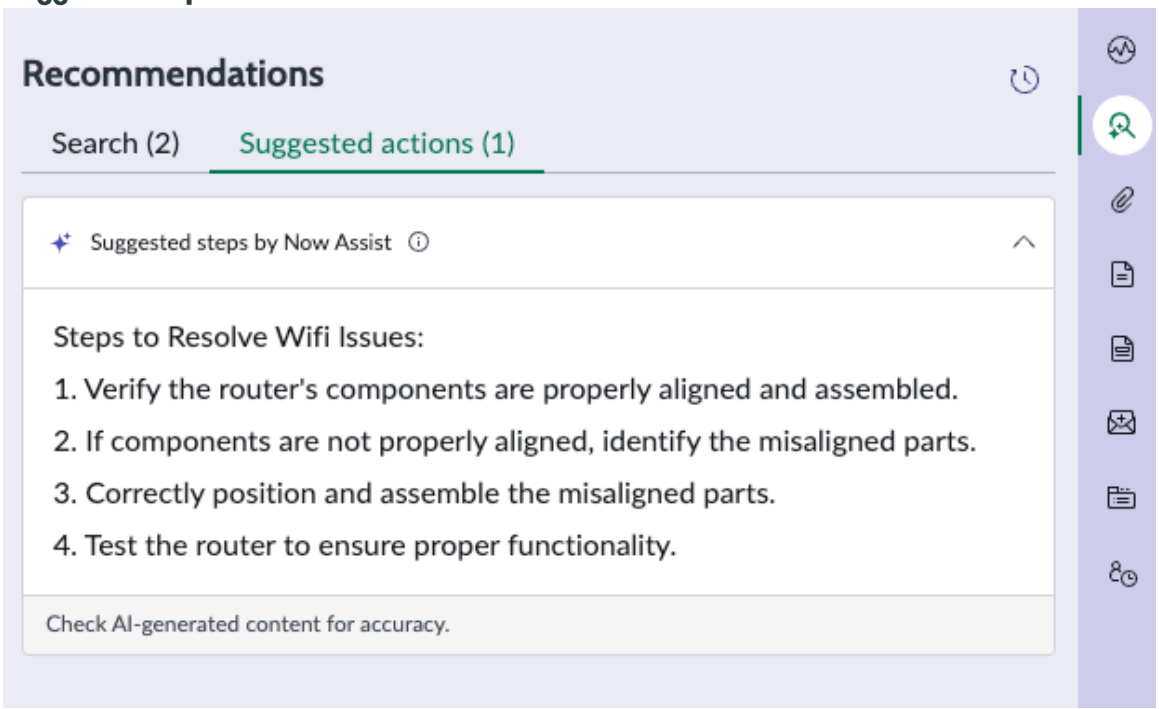
Suggested steps

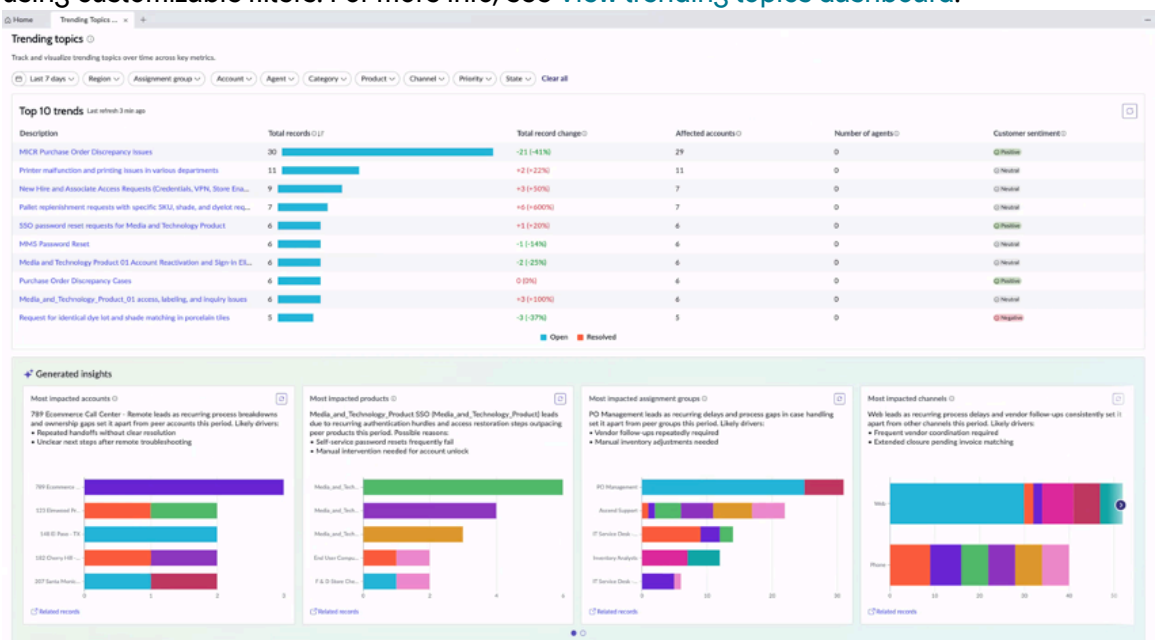


Activity response generation

Use the activity response generation skill to automatically generate recommendations for resolution notes, work notes, and comments. This feature helps agents add meaningful updates to case records, improving efficiency, and interaction. For more info, see Generate activity stream responses.

Trending topics dashboard

Get a comprehensive view of trending topics across cases along with insights and visualizations to facilitate deeper analysis. This feature helps support teams track trend progression, regional impact, and drill down into specific trends using customizable filters. For more info, see View trending topics dashboard.



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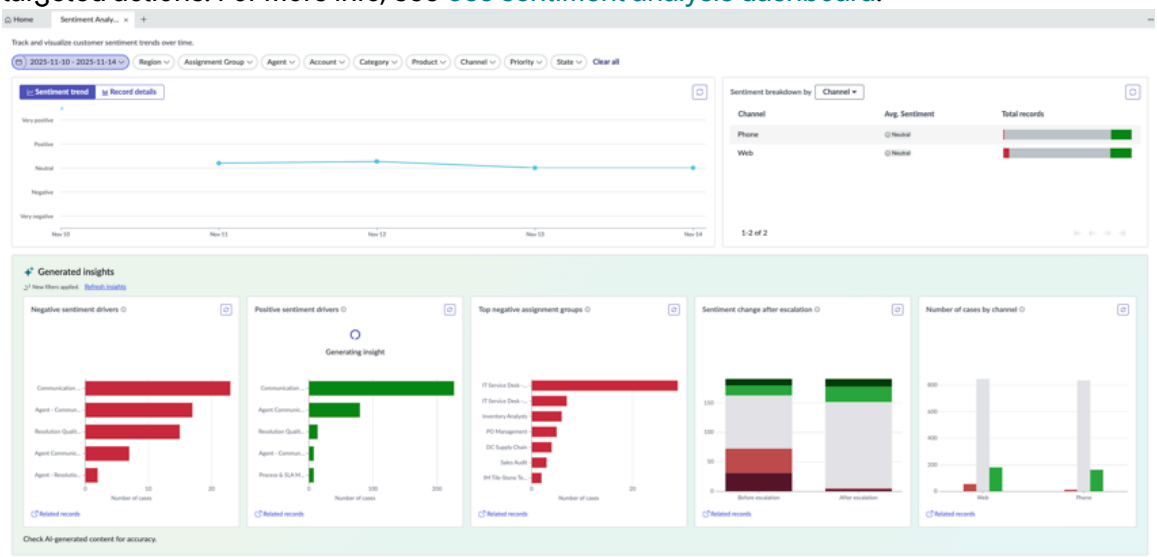
Sentiment analysis dashboard

Get a comprehensive view of customer sentiment across cases and accounts. The dashboard uses Now LLM Service insights to explain sentiment changes and lets you drill down to find root causes—helping teams take targeted actions. For more info, see Use sentiment analysis dashboard.



Now Assist in AI Search

The Now Assist in AI Search application uses Now LLM Service to extract actionable Q&A Genius Result answers from the knowledge articles that are found in Service Portal, Virtual Agent, Employee Center, and global searches. By using this application, an agent can improve the customer's experience by retrieving the relevant content from the knowledge base and generating concise answers. For more information, see Now Assist in AI Search.

Now Assist in Virtual Agent

Now Assist in the Virtual Agent guided setup can reduce the time and effort needed to deploy Now Assist within Virtual Agent. Your administrators can configure features and skills as well as sources of information such as knowledge bases and catalogs. For more information, see Configure Now Assist in Virtual Agent.

With the Now Assist Multi-Turn Catalog Requests skill, your customers can engage with Virtual Agent in a conversational manner to request catalog items. A customer can request an item and then refine their search by providing additional information. For more information, see Multi-turn catalog ordering.

Sensitive data handling

Personally identifiable information and other sensitive data can be masked so that it does not appear in generative AI prompts. Placeholder text is sent with the prompt instead, and that placeholder text is replaced with the original text after the response has been received. This two-way masking ensures that your users see the correct values, but the Now LLM Service is not exposed to any sensitive information. For more information, see Multi-turn catalog ordering.

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Supporting information for Now Assist for Customer Service Management (CSM)

Get a quick overview of the important information that is related to the Now Assist for Customer Service Management (CSM) application.

Supported versions

Now Assist for CSM is supported starting with Vancouver Patch 4.

Supported language models

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), 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®.

Supported user interfaces

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

Now Assist for CSM supported interfaces

Interface	Skill
CSM Configurable Workspace	• Chat summarization • Case summarization • Resolution notes generation • Knowledge article generation • Call summarization • Sidebar discussion • Chat recommendation • Email response • Sentiment analysis • Suggested steps generation • Sentiment analysis dashboard • Trending topics dashboard • Activity response generation
Core UI	• Case summarization • Resolution notes generation • Knowledge article generation • Sentiment analysis • Activity response generation

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Languages supported

Now Assist for CSM supports the following languages across all skills:

- German
- French
- Japanese
- Dutch
- French Canadian
- Spanish
- Brazilian Portuguese
- Italian

For more info, see Configure multilingual service for Now Assist applications

Role masking for Now Assist for CSM agentic workflows, AI agents, and skills

Role masking is used to restrict user access to agentic workflows, standalone AI agents, and skills. This ensures that users only receive the permissions necessary for their tasks, enhancing security and reducing the risk of unauthorized access.

How Role Masking Works

Imagine a user assigned roles A, B, and C, where each role grants access to a specific set of data. Normally, only if using Access Control Lists (ACLs), the user could access any data or functions available to roles A, B, and C. With role masking applied, the user can only access data tied to the active role, limiting exposure to unnecessary information.

Role Masking Considerations for Now Assist in CSM Skills

When a CSM skill runs, its features are initially controlled by ACL permissions, ensuring users only access authorized data and functions. If the skill uses a Large Language Model (LLM) to perform its task, role masking adds an extra layer of control by filtering the LLM-generated output according to the user's active role.

Consider a user with roles A, B, and C, each granting different privileges. If the ACLs defined in the Case Summarization are roles A, B, and C and the masking role defined is role A, If the user activates the Case Summarization skill, and selects Summarize, the process occurs in two steps:

1. **Data Retrieval**

   ACL permissions for role A are applied to fetch relevant case data. This ensures the user only sees data they are authorized to view.

2. **Data Summarization**

   After data retrieval, an LLM summarizes the case. Role masking is then applied to the output, tailoring the summary to the access privileges defined for role A.

By applying both ACL permissions and role masking, the system ensures a secure and granular access control mechanism for CSM skills, protecting sensitive information while providing users with the insights they need to perform their tasks effectively. For information on role masking, see.

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Application information

Activate the Now Assist for CSM store app (sn_csm_gen_ai) to use the chat and case summarization skills and to generate case resolution notes.

This store app has the following dependencies:

- Customer Service (com.sn_customerservice)
- UXC Generative AI (sn_uxc_gen_ai)

Activate the applications in the following order:

1. Customer Service
2. UXC Generative AI
3. Now Assist for CSM

For more information, see Configuring Now Assist for Customer Service Management (CSM).

Configuring Now Assist for Customer Service Management (CSM)

If you have the admin role, you can configure the Now Assist for Customer Service Management (CSM) application so that your agents can use the generative AI skills in CSM Configurable Workspace and in Core UI.

Use the Now Assist Admin console to configure Now Assist for CSM. This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Now Assist Admin console.

The following table lists the features and skills that you can access from the Now Assist Admin console.

CSM features and skills in the Now Assist Admin console

CSM features	Skills
Chat	• Chat summarization • Chat recommendation • Sidebar recommendation
Case	• Case summarization • Resolution notes generation • Email recommendation • Suggested steps generation • Sentiment analysis case • Trending topics dashboard • Activity response generation • Sentiment analysis dashboard
Knowledge	KB generation
Call	Call summarization

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Note:

- Now LLM Service is currently the only provider for this Now Assist application's skills.
- The minimum version of the workspace required to support Now Assist for CSM features:
  - CSM and FSM Configurable Workspace Foundation (sn_cwf_wrkspc): 24.2.1.
  - CSM Configurable Workspace (sn_csm_wrkspc): 24.2.0.

For earlier versions, go to Application Manager to upgrade it to a later version.

Related topics

Now Assist Admin console

Configuring Now Assist settings and features

Using agentic workflows in Now Assist for Customer Service Management (CSM)

Customer Service Management AI agent collection triage cases agentic workflow

Install Now Assist for Customer Service Management (CSM)

Install required plugins and enable Now Assist for Customer Service Management (CSM) to configure and use generative AI skills in Configurable Workspace and Core UI.

Before you begin

Role required: Admin

About this task

To get started with Now Assist, you must install at least one Now Assist application on your instance. The Now Assist Admin console can guide your implementation, starting with installation.

For information about the plugin dependencies and plugin activation order, see Supporting information for Now Assist for Customer Service Management (CSM).

For information about CSM Configurable Workspace, see Set up CSM Configurable Workspace. For information about Now Assist AI agents, see Install Now Assist AI Agents.

To access AI agents in the Now Assist panel, you need to turn on the Now Assist panel and ensure that the case summarization is active on the instance.

To install the Now Assist for CSM plugin (sn_csm_gen_ai), follow the procedure below.

Procedure

1. Navigate to **Admin > Now Assist Admin > Settings**.
2. On the **Settings** page, select**Plugins**.
3. Select **Get plugins** on the card for the plugin that you want to install.
4. In the confirmation window, select Install Plugin to open the ServiceNow Store page for the plugin in a new browser tab.
5. Install the plugin from the ServiceNow Store page.
6. Return to the Now Assist Admin console.
7. In the dialog box, select **Refresh**.

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8. Either close the dialog box to review all of your plugins or select **View all <Plugin> Assists and Skills** to review the features of your new plugin.

   For more detailed information about the installation process, see Install Now Assist plugins.

Activate Now Assist Skills

Enable Now Assist generative AI skills to provide AI-driven capabilities such as summarization, response suggestions, and sentiment analysis.

This video provides an overview of how you can set up skills and monitor and analyze usage via the Now Assist Admin console.

https://url.us.m.mimecastprotect.com/s/j3ebC5yz70hgOm7YWfzfZikEhy0?domain=player.vimeo.com

Each skill is configured separately, and tailored to support agents across various platforms. The following Now Assist skills are available to be configured for use within CSM.

Now Assist skill overviews

Skill	Description
Chat Summarization	Generate condensed summaries of conversations between agents or Virtual Agents and highlight key points for quick reference. For more information, see Configure chat summarization.
Call Summarization	Generate summaries of agent-customer calls within the Active Chat window to capture key call details for better agent follow-up and record keeping. For more information, see Configure call summarization.
Resolution Notes	Create summaries of case resolutions to help agents quickly understand resolution details and reference notes in future similar interactions. For more information, see Configure resolution notes generation.
Knowledge Generation	Draft knowledge articles based on resolving case tasks for agents to review and edit before publishing. For more information, see Configure knowledge generation.
Chat Recommendation	Help agents generate replies for chat messages based on conversation context. For more information, see Configure chat recommendation.
Email Recommendation	Generate and refine efficient email responses based on conversation context. For more information, see Configure email recommendation.
Sentiment Analysis	Analyze case sentiment, trends, and reasoning from case inputs, helping agents resolve cases more efficiently. For more information, see Configure sentiment analysis case.
Suggested steps	Generate suggested steps automatically by analyzing clusters of closed cases with similar case resolution. For more info, see Configure Suggested Steps Generation.
Sidebar summarization	Generate a summary of Sidebar discussions between agents, requesters, and subject matter experts quickly. For more info, see Configure Sidebar Summarization.
Case summarization	Summarize the case details and display this information on the case record, helping the agents to come to speed quickly on cases. For more info, see Configure Case Summarization.

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Now Assist skill overviews (continued)

Skill	Description
Activity response generation	Automatically generate recommendations for resolution notes, work notes and comments, helping agents add informative updates to case records For more info, seeConfigure activity response generation.
Trending topics dashboard	View trending topics across cases with insights and visualizations, helping track trend progression, regional impact, and drill down into specific trends using customizable filters. For more info see, Configure trending topics dashboard.
Sentiment analysis dashboard	Gain a complete picture of customer sentiment across all cases. This dashboard leverages LLM-powered analysis to explain sentiment trends and their underlying drivers. Drill down into specific patterns to identify root causes and access real-time insights that enable managers to take precise, informed action. For more info, see Use sentiment analysis dashboard

General Configuration Steps

Each skill has it's own configuration process. However, skill activation follows the same guided setup. What configuring steps are required varies depending on the skill.

Common Configuration components:

- **Trigger:** Allows you to configure the circumstances in which a skill is generated. For example, chat summarizations can be configured to generate when the chat handoff is done from a live agent to a live agent.
- **Input:** Configure the data used to create the information generated by the skill. For example, resolution notes information is generated from the description, short description, work notes, and the additional comments fields of existing case notes.
- **Availability:** customize how and when the skill capability is active and accessible. For example, email reply recommendations can be configured to be always available, or defined using the condition builder to determine whether or not a user can activate the skill.
- **Access:**determine who can access this skill. By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.
- **Display:** determine where the skill appears. For example, the call summarization skill can be configured to display on forms and workspaces or in the Now Assist panel.

Saving and activating the configuration setup process is the same across all Now Assist skills.
Finalize and Activate Setup

1. After selecting **Review and Activate** to examine changes, select **Done** to close the skill configuration settings.
2. Select **Skill** to turn on the skill for agents and complete the configuration.

Configure chat summarization

Configure Chat Summarization to generate condensed summaries of conversations between agents or with a Virtual Agent, highlighting key points for quick reference.

https://player.vimeo.com/video/1102593484?h=b893388394&badge=0&autopause=0&player_id=0&app_id=58479

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Before you begin

Role required: Admin

Chat summarizations are generated when:

- The conversation ends.
- The agent uses the summarize quick action in Agent Chat.
- The user selects chat summarization or enters summarize chat in the Ask Now Assist field on the Now Assist panel.
- A live agent transfers an interaction to a different live agent.

  When an interaction is transferred from a Virtual Agent to a live agent and is at least six lines long, the chat summarization displays in a summary card in the conversation and populates the interaction's summarization and short description fields.

Procedure

1. Navigate to **Admin > Now Assist Admin > Now Assist Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Chat Summarization** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Define Triggers** and switch the toggles to choose how and when the summarization is configured.

   Triggers for the chat summarization skill

Trigger	Description
Virtual Agent to Live Agent handoff	Chat summary that is generated when the chat handoff is done from Virtual Agent to a live agent.
Live Agent to Live Agent handoff	Chat summary that is generated when the chat handoff is done from a live agent to a live agent.
Quick action	Chat summary that is generated when the live agent performs the `/summarize` quick action.
Chat wrap-up	Chat summary that is generated when the live agent ends the chat. The **Chat Summary** field is updated for the interaction.
Short description	**Short description** field that is updated for the interaction when the live agent ends the chat.
Task creation	**Short description** and **Description** fields that are auto-populated on the task record when a task is created from an interaction.

   You can also toggle the bulleted list property to display the chat summary as an unordered list.
5. Select **View Input** and review the portal and channel selections that determines where data is pulled from.

> **Note:**
> You cannot modify or deselect the default product portal data source. Additionally, portals that are already in use by other products cannot be selected.

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Table 2: Inputs for the chat recommendation generation skill

Input	Description
Input fields	○ CSM (Default portal for CSM) ○ CSP (Default portal for CSM) ○ AIS_ADMIN_TOOLS ○ APM ○ APM_PLANNER ○ ARC ○ ASC ○ ASC_OLD ○ ASP ○ ASSIGN_INSIGHTS_OWNER ○ BENCHMARKS ○ BLANK ○ BLSP ○ BUSINESS_PORTAL ○ CAB ○ CEM ○ CLAROTY_CTD_VR ○ CLOUD_ADMIN_PORTAL ○ CLOUD_PORTAL ○ COMMUNITY ○ COMMUNITY_CXS ○ CONTENT_DELIVERY_DEMO ○ CSM_OUTLOOK ○ CSM_WALKUP ○ DB_BUILDER ○ DEMO_BUILDER ○ DH_TOOLS ○ DHAPP ○ DHAPP_DSP ○ DHBE ○ DHEXECON ○ ECDEMO_KIOSK ○ ECK ○ EESP ○ ELP ○ EMEXP

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Input	Description
	○ ESG_REPORTING ○ FSMCP ○ IDEA ○ INDEMO ○ INDUSTRY ○ INDUSTRYDEMO ○ KB ○ KIOSK ○ LEGAL ○ LEGAL_OUTLOOK ○ LMP ○ MEB ○ MESP ○ MOA ○ MY_WORK_HUB ○ NEW_HIRE ○ PC ○ PERF ○ PPSRP ○ PPSWORKBENCH ○ PPT ○ PROGRAM_STATUS ○ PROJECT_STATUS ○ RC ○ SNCOUTLOOK ○ SP ○ SP_CONFIG ○ SUPPLIER ○ SVDP ○ SWP ○ TCP ○ WALKUP ○ WS ○ WSDDEMO ○ ECDEMO ○ ECKDEMO

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Input	Description
	○ ESC ○ ESCP

6. Select **Define Availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
7. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:
   - If no changes are made, the default role sn_esm_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they'll be updated automatically by a script.
   - If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

   Note:
   In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.
8. Select **Display** to determine where the resolution notes appear.
   - Select **In-product desktop** to display Now Assist skills on forms and workspaces.
   - Select **Now Assist panel** to display Now Assist skills in the Now Assist panel.
9. After selecting **Review and Activate** to examine changes, select **Done** to close the Chat Summarization generation settings.
10. Select **Skill** to turn on the skill for agents and complete the configuration.

Configure call summarization

Configure Call Summarization to automatically generate summaries of agent-customer calls within the Active Chat window to capture key details for better agent follow-up and record keeping.

Before you begin

Role required: admin

Call summarization is generated from the information that you enter in the following fields:

- Conversation Transcript
- Short Description (automatically populated at the end of call)
- Chat Summary (automatically populated at the end of call)

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- Integration setup:

> **Note:**
> Ensure that your telephony or call center system is integrated with ServiceNow if call data needs to be captured directly. Additionally, set your status as **Available** in CSM Configurable Workspace to be able to receive call requests from customers.

Any modifications to the names or labels of these fields can result in issues with summarization generation.

> **Note:**
> You cannot modify a skill's input data source.

Procedure

1. Navigate to **Admin > Now Assist Admin > Now Assist Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Call Summarization** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Define Triggers** and switch the toggles to choose how and when the summarization is configured.

Table 1: Triggers for the call summarization skill

Trigger	Description
Live Agent to Live Agent handoff	Call summary that is generated when the call handoff is done from a live agent to a live agent.
Call wrap-up	Call summary that is generated when the live agent or the user ends the chat. The **Chat summary** field is updated for the interaction.
Short description	**Short description** field that is updated for the interaction when the live agent or the user ends the call.
Task creation	**Short description** and **Description** fields that are auto-populated on the task record when a task is created from an interaction.

You can also select toggle a property that controls how a call summary is displayed.

Table 2: Property for the call summarization skill

Property	Description
Bulleted list	Call summary as an unordered list.

5. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

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- If no changes are made, the default role sn_esm_agent will automatically appear in **Define Access** and **Select Display**.
- If custom roles were added before the upgrade, they'll be updated automatically by a script.
- If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

> **Note:**
> In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

6. Select **Display** to determine where the resolution notes appear.
   - Select In-product desktop to display Now Assist skills on forms and workspaces.
   - Select Now Assist panel to display Now Assist skills in the Now Assist panel.
7. After selecting **Review and Activate** to examine changes, select **Done** to close the Call Summarization generation settings.
8. Select **Activate** to turn on the skill for agents and complete the configuration.

Configure resolution notes generation

Configure the Resolution Notes skill to create concise summaries of case resolutions, helping agents to quickly understand resolution details and support future similar interactions using notes generated by Now Assist.

https://player.vimeo.com/video/1102610959?h=a8ec16d88d&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Role required: admin

Case resolution notes are generated from the information that you enter in the following fields:

- Short Description
- Description
- Work Notes
- Additional Comments

Any modifications to the names or labels of these fields can result in issues with notes generation.

> **Note:**
> It is recommended to revert to the default field name and field label for the affected fields. To remove incompatible fields from summarization, ensure a copy of the skill has been created, as not all fields are removable/configurable.

Procedure

1. Navigate to **Admin > Now Assist Admin > Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Resolution Notes Generation** skill.

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Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.

4. Select **Choose Input** and review the tables and fields to create prompts that determines where data is pulled from.

   Note:
   You cannot modify the input data source.

   Inputs for the resolution notes generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	○ Description ○ Short description ○ Work notes ○ Additional comments ○ Email

5. Select **Define Triggers** and switch the toggle to require user input before resolution notes are created.
6. Select **Define Availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
7. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:
   - If no changes are made, the default role sn_esm_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they'll be updated automatically by a script.
   - If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

     Note:
     In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

8. Select **Display** to determine where the resolution notes appear.
   - Select In-product desktop to display Now Assist skills on forms and workspaces.
   - Select Now Assist panel to display Now Assist skills in the Now Assist panel.
9. After selecting **Review and Activate** to examine changes, select **Done** to close the Resolution Notes Generation settings.

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10. Select **Activate** to turn on the skill for agents and complete the configuration.
    Skill is activated for agents and a success modal shows up with the option to **Return to CSM** and to **Go to Now Assist content menu**.
11. Select **Go to Now Assist context menu** to configure the activity response generation skill's Now Assist Context Menu in Now Assist Experience.

Related topics

Generate the resolution notes for a case by using Now Assist for Customer Service Management (CSM)

Configure knowledge generation

Configure the Knowledge Generation skill to draft knowledge articles on resolving case tasks for agents to review and edit before publishing.

Before you begin

Ensure that the following is set up before you activate the skill:

1. Install the Required Plugin- Now Assist for CSM plugin.
2. Enable KCS system properties: The visibility of the **Create Knowledge** action in CSM Configurable Workspace depends on specific system properties and differs from its implementation in the Core UI UI.
   - In Core UI, the action is implemented as a UI Action.
   - In CSM Configurable Workspace, it is implemented as a Declarative Action.

   The visibility and behavior of the **Create Knowledge** button in the CSM Configurable Workspace depends on two system properties:
   - sn_customerservice.enable_knowledge_kcs: If this property is true, the button appears in the CSM Configurable Workspace.
   - sn_customerservice.kcs.enable_template_on_case_workspace
     - If this property is false, the button is a UI Action and clicking it does not open a template selector.
     - If this property is true, the button is a Declarative Action and clicking it opens a template selector modal.

   If either property is disabled, the action will not appear in CSM Configurable Workspace—even if it is visible in Core UI.
3. Activate the KCS template.
   a. Navigate to **All** > **Knowledge** > **Administration** > **Article Template**.
   b. Locate the **KCS Article**.
   c. Set its status to **Active**.

Important:

- For Now Assist panel, if property sn_customerservice.enable_knowledge_kcs and KCS Article Template is not enabled then it will create article using standard template for cases.
- For Core UI / Workspace, if sn_customerservice.enable_knowledge_kcs and KCS Article Template is not enabled then it will not show **Create Knowledge** button on case form.

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Role required: admin

The knowledge generation skill incorporates information that you enter in the following fields:

- Short Description
- Description
- Resolution Notes
- Work Notes
- Comments

Any modifications to the names or labels of these fields can quality the generation and quality of knowledge generation articles.

Note:
It is recommended to revert to the default field name and field label for the affected fields. To remove incompatible fields from generation, ensure a copy of the skill has been created, as not all fields are removable/configurable. Additionally, ensure that the Knowledge Management advanced installer plugin is enabled and the following system properties are set to TRUE:

- sn_customerservice.enable_knowledge_kcs
- kcs.enable_template_on_case_workspace

Procedure

1. Navigate to **Admin > Now Assist Admin >Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **KB Generation** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Choose Input** and review the tables and fields to create prompts that determines where data is pulled from.

   Note:
   You cannot modify the input data source.

   Table 1: Inputs for the knowledge article generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	○ Short description ○ Description ○ Resolution notes (for cases and incidents) ○ Work notes ○ Comments

5. Select **Define Availability** to customize how and when the skill capability is active and accessible.

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- Select **Skill is always available** so no restrictions are placed on when a skill is available.
- Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.

6. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default role sn_esm_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they'll be updated automatically by a script.
   - If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

   > **Note:**
   > In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

7. Select **Display** to determine where the KB generation appears.
   - Select In-product desktop to display Now Assist skills on forms and workspaces.
   - Select Now Assist panel to display Now Assist skills in the Now Assist panel.
8. After selecting **Review and Activate** to examine changes, select **Done** to close the KB generation settings.
9. Select **Activate** to turn on the skill for agents and complete the configuration.

Trouble?

To check if KB generation skill is working:

1. Ensure **Knowledge content recommendation** is active under **Now Assist Skills** > **Platform**.
2. Verify that **Knowledge content recommendation** status is **Active** under**Now Assist Experiences** > **Configurations**.

Configure chat recommendation

Use the guided setup in the Now Assist Admin console to configure chat recommendation by defining triggers, specifying inputs, setting the display location, and activating the feature.

https://player.vimeo.com/video/1102629744?h=8ef1126c0e&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Role required: admin

Using the chat recommendation skill, you have the options to:

- Generate a recommended reply based on the context of the conversation.
- Refine the recommendation by elaborating or shortening the response.

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Procedure

1. Navigate to **All > Now Assist Admin > Skills**.

   If you're already in the Now Assist Admin, select the Now Assist Skills tab.

2. On the navigation panel, select **Customer**.
   Each workflow contains feature sets.
3. Select **CSM** as the product.
4. Select **Activate Skill** for the Chat Recommendation skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
5. Go to **Define Triggers**, the first step in the guided setup.

   By default, many of the options in the setup are configured for the most common use cases. You might need to select the step in the guided setup navigation to go back and change the configurations in previous steps. You can also use Back to navigate through the steps.

6. Using the toggles, select the actions trigger for the Chat Recommendation skill.
7. Select **Choose Input** and review the portal and channel selections that determines where data is pulled from.

   Note:
   You cannot modify or deselect default skill input data sources.

8. Select any additional data sources that you want the Large Language Model (LLM) to take into account when generating a recommendation.
9. Select a portal for the data source to allow chat recommendation to be generated for the conversation occurring on that portal.

   This is a mandatory step. The admin must specify a portal and enable a specific channel on the Choose Input page to enable the skill for chats sent in the selected portal or channel. Otherwise, the agent will receive an error message: "Chat summaries won't appear until your IT administrator completes all the required steps involved in the setup".

10. Select **Define Availability** to customize how and when the skill capability will exist and be available.
    - Select **Skill is always available** so no restrictions are placed on when a skill is available.
    - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
11. Select **Define access** to determine who can access this skill.

    By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

    Default and Custom Roles:

    - If no changes are made, the default role sn_esm_agent will automatically appear in **Define Access** and **Select Display**.
    - If custom roles were added before the upgrade, they'll be updated automatically by a script.

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- If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

  Note:
  In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

12. Go to **Select display**, the last step, and select where you would like to display the skill.

    You can select both in-product, Now Assist panel, or both.

    Note:
    Chat recommendation is not available in the Now Assist panel.

    - **In-product desktop**: When selected, Now Assist skills are displayed on forms and workspaces.
    - **Now Assist panel**: When selected, Now Assist skills are available in the Now Assist panel. Select the down arrow to identify the roles that can use the skill. Select the arrow next to toggle, to select roles who can access the skill. You can add roles by entering the name of the role in the **User roles** field. You can remove existing roles by selecting the X icon in the role bubble. You must have at least one role specified, but you can add as many roles as you like.

13. Review your choices and complete the configuration by selecting **Activate**.

Result
Chat recommendation for the workflow is active on the instance.

Configure email recommendation

Configure email reply recommendation to help agents generate and refine efficient email responses based on conversation context.

https://player.vimeo.com/video/1102601949?h=60957c119c&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Role required: admin

Email reply recommendations are generated from the information that you enter in the following fields:

- Short description
- Description
- All journal fields
- Emails

Procedure

1. Navigate to **Admin > Now Assist Admin > Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Email Recommendation** skill.

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Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.

4. Select **Choose Input** and review the tables and fields to create prompts that determines where data is pulled from.

   Note:
   You cannot modify the input data source.

   Table 1: Inputs for the Email Recommendation generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	○ Short description ○ Description ○ Emails ○ Additional Comments ○ Work Notes ○ Activity

5. Select **Define Availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
6. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:
   - If no changes are made, the default role sn_esm_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they'll be updated automatically by a script.
   - If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

     Note:
     In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

7. Toggle **Display** to determine if email recommendation appears in In-product desktop, displaying Now Assist skills on forms and workspaces.
8. After selecting **Review and Activate** to examine changes, select **Done** to close the Email Reply generation settings.
9. Select **Activate** to turn on the skill for agents and complete configuration.

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Configure sentiment analysis case

Configure Sentiment Analysis to evaluate case sentiment, trends, and reasoning from case inputs, helping agents resolve cases more efficiently.

Before you begin

Role required: admin

Sentiment analysis is generated from the information that you enter in the following fields:

- Description
- Short Description
- State
- Priority
- Additional Comments

Any modifications to the names or labels of these fields can result in issues with sentiment analysis.

The Sentiment Reasoning field in the record provides details on which factors were considered for reasoning. This includes:

- Exact tone in the given inputs.
- Feedback in recent comment.
- Task priority.
- SLA consideration.

Procedure

1. Navigate to **Admin > Now Assist Admin > Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Sentiment Analysis Case** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Define Trigger** and edit the job schedule period to configure how often the skill will be implemented.
5. Select **General details** and edit name and description of the skill.
   Additional information regarding details of the skill are displayed, but cannot be edited.
6. Select **Choose Input** and review the tables and fields to create prompts that determines where data is pulled from.

> **Note:**
> You cannot modify the input data source.

Table 1: Inputs for the sentiment analysis skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	○ Description ○ Short Description

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Input	Description
	○ State ○ Priority ○ Additional Comments

7. Select **Role attribution**

Note:
You cannot modify the input data source.

Table 2: Inputs for the sentiment analysis skill

Input	Description
Input table	Case [sn_customerservice_case]
Requestor fields	○ Consumer ○ Contact ○ Created by ○ Opened by

8. Select **Define Availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
9. Select **Enable dashboard** to see sentiment analysis across cases.
10. Select **Define access** to determine who can access this skill.

    By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

    Default and Custom Roles:
    - If no changes are made, the default role sn_esm_agent will automatically appear in **Define Access** and **Select Display**.
    - If custom roles were added before the upgrade, they'll be updated automatically by a script.
    - If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

    Note:
    In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

11. Toggle **Display** to determine if chat recommendation appears in In-product desktop, displaying Now Assist skills on forms and workspaces.
12. After selecting **Review and Activate** to examine changes, select **Done** to close the Sentiment Analysis generation settings.
13. Select **Activate** to turn on the skill for agents and complete the configuration.

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Change an insight to use a different field for sentiment analysis

Change a sentiment analysis insight to display sentiment data from a different field, such as changing from channel to consumer, requiring updates to both the UI Builder component and Now Assist Skill Kit.

Before you begin

Role required: admin or maint

General ServiceNow platform knowledge is required for this procedure.

About this task

For sentiment analysis insights, changing the field requires modifications to both the UI Builder component and the associated Now Assist Skill Kit skill. It involves cloning components, creating new skills, and modifying scripts. This procedure ensures proper configuration of the sentiment analysis insight with a different field.

The different UI Builder Component names for Sentiment analysis dashboard are OOB Sentiment Analysis Dashboard, Sentiment Over Time Visualization, Sentiment Breakdown Visualization, Sentiment Top Drivers Insight (Negative sentiment and Positive sentiment drivers), Sentiment by Assignment Group Insight, Sentiment After Escalation Insight, Sentiment by Channel Insight.

Procedure

1. Navigate to **All** > **UI Builder**.
2. Under **Components** tab search for the corresponding component.

   For example, open **Sentiment by Channel Insight**. Make a clone if needed.
3. Duplicate **Sentiment by Channel Insight**
4. Rename all components to your desired field (for example, Consumer) or create a generalized component name.

   Update the following:
   - UIB component name (in Settings) and **Save**
   - Stylized text title (in Editor)
5. In the **Get Sentiment by Field Data resource**, change the **Field(s)** value to your desired field ID.
   For example, consumer.
6. In a new tab or window, navigate to **All** > **Now Assist Skill Kit**.
7. Under **ServiceNow skills**, search for **Sentiment by Channel Insight**.
8. Select **Clone** to clone the skill under your desired field name.
9. Under the **Tool editor**, select **SentimentChannelScript** and open the tool.
10. Replace every instance of the existing field (contact_type) with your desired field (consumer).
11. Select **Continue** till the **Edit script tool** guided set up reaches summary page.
12. Select **Save changes**.
13. In the **Prompt editor** tab, replace every instance of "channel" except the very last occurrence in {{SentimentChannelScript.output}}.
14. Select **Finalize prompt**.
15. **Publish** the prompt.

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16. Navigate to the sys_one_extend_capability table and find the record corresponding to the Now Assist Skill Kit skill you just created.
    Right click to copy the sys_id.
17. Return to the UI Builder page and in the **Get Sentiment Insight by Capability ID** data resource, paste the copied sys_id from previous step into the **Capability ID** field.
18. Select **Save**.
    Now add the newly created component to any base system dashboard page or your own custom page, using other nearby insights as reference for the correct event handler and optimization setup.
    The sentiment analysis insight now uses the specified field to display data and the associated Now Assist skill has been properly configured.

Related topics

Add a new filter

Change graph visualization

Configure Suggested Steps Generation

Configure suggested steps generation to analyze clusters of similar cases and suggest next steps for case resolution for accelerated and consistent agent case troubleshooting.

Before you begin

Role required: admin

Suggested steps are generated from the records identified based on the information that you enter in the following fields:

- Short Description
- Edited Conditions

Procedure

1. Navigate to **Admin > Now Assist Admin > Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Suggested Steps Generation** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Choose Inputs** and review the tables and fields to create prompts that determines where data is pulled from.

Note:
You cannot modify the input data source.

Inputs for the suggested steps generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	○ Short description ○ Edited Conditions: Edit the conditions to update the filter and ensure that only relevant and up-to-date records are used.

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5. Select **Record Clustering** to group records by similarity based on the adjusted inputs in the previous step.

   Note:
   Record clustering allows you to add the job in the queue, providing you with the ability to leave the page while the task is running in the background. You will be notified when the task is complete.

6. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default role sn_esm_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they'll be updated automatically by a script.
   - If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

     Note:
     In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

   - For customizing access control, see Customize access control for suggested steps

7. Toggle **Display** to determine if suggested step recommendations appear in In-product desktop, displaying Now Assist skills on forms and workspaces.
8. After selecting **Review and Activate** to examine changes, select **Done** to close the Suggested Steps Generation settings.
9. Select **Activate** to turn on the skill for agents and complete the configuration.

Make suggested steps available on CSM Workspace

Learn how to enable the suggested steps generation in the CSM Workspace after skill activation.

Before you begin

Role required: admin

After activating the Suggested steps generation feature in the Now Assist Admin console, follow the steps outlined to make the skill available in CSM Configurable Workspace.

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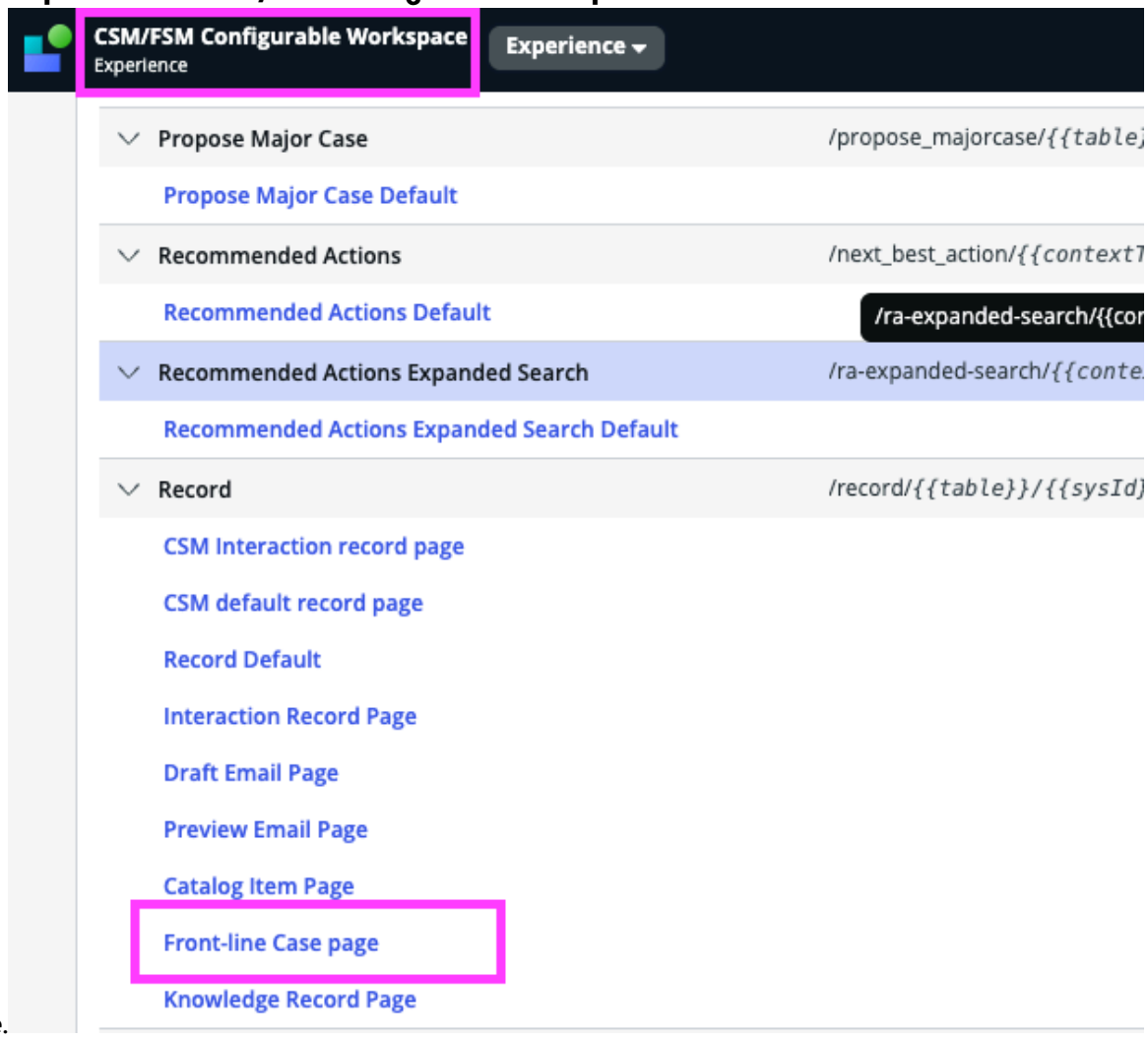
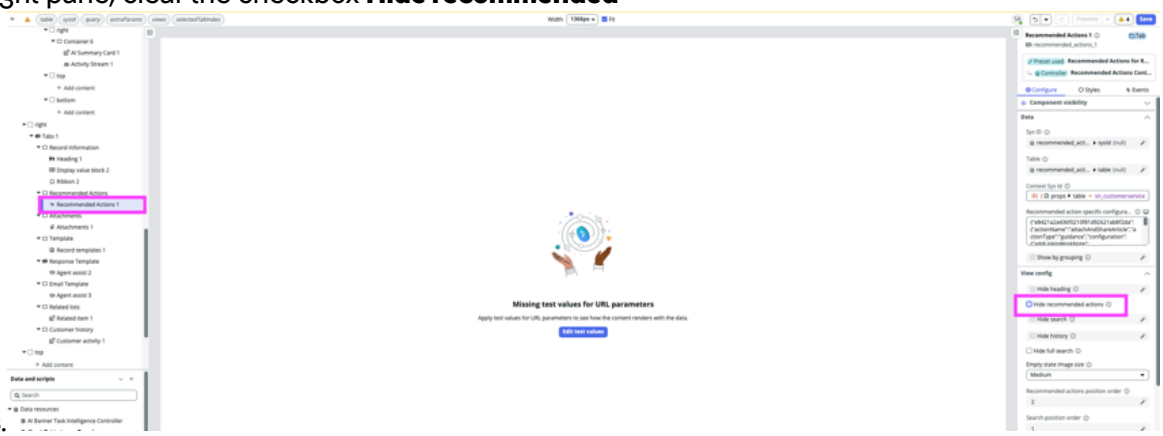
Procedure

1. Navigate to **All** > **UI Builder**.
2. Go to **Experiences** > **CSM/FSM Configurable Workspace** > **Record** > **Front-line Case Page**.



3. In the left content navigation pane, scroll down and select **Recommended Action 1**.
4. In the right pane, clear the checkbox **Hide recommended actions**.



5. Select **Save** to apply the changes.

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Result
Recommended Actions will be displayed in the CSM/FSM Configurable Workspace and you can see the Suggested steps generation skill under it.

Customize access control for suggested steps

Replace the default sn_esm_agent role with a custom role.

Before you begin
Role required: admin

Procedure

1. Update role permissions
   In the sys_user_role table, open your custom role and add sn_gaf.data_writer to the Contains Role related list.
2. Update ACLs
   In the sys_security_acl table, filter for ACL names starting with gaf_suggested_steps_csm. Add your custom role to each of the four matching records.
3. Configure skill access
   In Now Assist Admin, complete the setup for the CSM Suggested Steps Generation skill:
   - Add your custom role in the **Define Access** step.
   - Add the same role in the **Select Display** step.

Result
By default, the sn_esm_agent role is used. These steps allow you to configure a custom role if needed.

Configure Sidebar Summarization

Configure sidebar summarization to generate summaries of sidebar discussions for quick agent understanding, allowing for faster collaboration.

Before you begin
Role required: admin

Sidebar summarization is generated from the information within selected tables containing specific case, incident, or interaction information.

Procedure

1. Navigate to **Admin > Now Assist Admin > Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Sidebar Summarization** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Define triggers** and switch the toggles to choose how and when the summarization is configured.

Table 1: Triggers for the sidebar summarization skill

Trigger	Description
Quick action	Sidebar summary that is generated when the live agent performs the `/summarize` quick action.

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You can also select toggle a property that controls how a sidebar summary is displayed.

Table 2: Property for the sidebar summarization skill

Property	Description
Bulleted list	Sidebar summary as an unordered list.

5. Select **Choose tables** to select the tables from which summaries for Sidebar discussions are generated.

Table 3: Tables for the sidebar summarization skill

Label	Name
Change Phase	change_phase
Change Request	change_request
IMAC	change_request_imac
Change Task	change_task
Chat Queue Entry	chat_queue_entry
Incident	incident
Incident Task	incident_task
Interaction	interaction
Knowledge Feedback Task	kb_feedback_task
Problem	problem
Problem Task	problem_task
Request	sc_request
Requested Item	sc_req_item
Catalog Task	sc_task
Standard Change Proposal	std_change_proposal

6. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default role sn_esm_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they'll be updated automatically by a script.
   - If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

   Note:
   In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

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7. Toggle **Select display** to determine if sidebar summarization appears in In-product desktop, displaying Now Assist skills on forms and workspaces.
8. After selecting **Review and Activate** to examine changes, select **Done** to close the sidebar summarization generation settings.
9. Select **Activate** to turn on the skill for agents and complete the configuration.

Configure Case Summarization

Configure case summarization to generate and display case summaries for agents and control who can access them in production.

Before you begin

Role required: admin

Case summarization relies on a base input table and its associated field inputs with descriptions to provide the context for a generated summary. Choose your base table, and view the associated base input fields within the provided input templates. Record state determines which input template is used when generating a summary.

Provided input templates:

- Case new
- Case work in progress
- Case resolved

Any modifications to the names or labels of the fields within these templates can result in issues with notes generation.

Procedure

1. Navigate to **Admin > Now Assist Admin > Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate skill for the **Case summarization** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **General details** and edit name and description of the skill.
   Additional information regarding details of the skill are displayed, but can't be edited.
5. Select **Choose Input** and review the tables and fields to define the prompts that determine where data is pulled from.

   You can modify the rule conditions to determine when the input template is used. Additional data sources can be added via related tables as well.

Table 1: Inputs for the case summarization generation skill

Input template data	Base input field
Base input fields	○ Description ○ Short description ○ State

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Input template data	Base input field
	○ Work notes ○ Additional comments
Listed rule conditions to the input table	Default is determined by record state.
#1 Additional data source: Related table	○ Task SLA -> Task ○ SLA definition ○ Stage ○ Breach time
#2 Additional data source: Related table	○ Case -> Parent ○ Number ○ Short description ○ State ○ Assigned to ○ Additional comments ○ Work notes
#3 Additional data sources	Activity is listed as 'Email.'

6. Select **Customize prompt** to evaluate the generated outputs of case summaries.
   Evaluate the prompt used for each of the input templates by selecting an existing record to test the output. The review and modify the prompt after evaluating the output results, edit it within the Now Assist Skill Kit.
7. Select **Define availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
8. Select **Define triggers** to determine how the skill will be triggered.
   - Select **Automatic** to see the case summary of a record automatically generated when the user lands on a record page.
   - Select **User trigger** to create a case summary of a record when the user opens a record page and selects the **Summarize** button.
9. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you are controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:
   - If no changes are made, the default role sn_esm_agentautomatically appear in **Define access** and **Select display**.
   - If custom roles were added before the upgrade, they’re updated automatically by a script.

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- If new roles are created after the upgrade, you can manually add them in both the **Define access** and **Select display**.

  Note:
  In the **Select display** step, you can only choose roles that were added in the **Define access** step. If you add a role in **Define access**, you still must manually select it in **Select display** to make it active.

10. Select **Display** to determine where the skill appears.
    - Select **In-product desktop** to display Now Assist skills on forms and workspaces. Then, select the roles for whom the skill will be displayed.
    - Select **Now Assist panel** to display Now Assist skills in the Now Assist panel.
11. After selecting **Review and activate** to examine changes, select **Done** to close the case summarization generation settings.
12. Select **Activate** to turn on the skill for agents and complete the configuration.

Related topics

Summarize a call by using Now Assist for Customer Service Management (CSM)

Configure activity response generation

Set up the activity response generation skill in the Now Assist Admin console to enable automated responses in comments and work notes.

Before you begin
Role required: admin

About this task
Use the Now Assist Admin console for configuring the activity response generation skill by selecting inputs, defining access, and activating the skill.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills**.
   Access the skills configuration page.
   Verify you have admin role.
2. Select the **Customer** workflow and choose **CSM**
   This determines the product context for the skill.
   Workflow and product must match your configuration requirements.
3. Activate skill for the activity response generation skill.
   Each skill has a guided setup with multiple steps.
   A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **General details** and edit name and description of the skill.
   Additional information regarding details of the skill are displayed, but can't be edited.
5. Select **Choose Input** and review the tables and fields to create prompts that determine where data is pulled from.

   Note:
   You can't modify the input data source.

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Inputs for the Activity response generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	Description, Short Description, Additional comments, Work notes, State, Priority.#

6. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default role sn_esm_agent automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they're updated automatically by a script.
   - If new roles are created after the upgrade, you can manually add them in both the **Define Access** and **Select Display**.

   Note:
   In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.

7. Toggle **Select display** to determine if activity response generation skill appears in In-product desktop, displaying Now Assist skills on forms and workspaces.
8. After selecting **Review and Activate** to examine changes, select **Done** to close the activity response generation settings.
9. Select **Activate** to turn on the skill for agents and complete the configuration.
   Skill is activated for agents and a success modal shows up with the option to **Return to CSM** and to **Go to Now Assist content menu**.
10. Select **Go to Now Assist context menu** to configure the activity response generation skill's Now Assist Context Menu in Now Assist Experience.

Related topics

Generate activity stream responses

Configure trending topics dashboard

Configure the trending topic dashboard to identify clusters of related records, visualize their volume and sentiment over time, and leverage AI-generated insights to proactively resolve issues and improve operational efficiency.

Before you begin

Role required: admin

Trending topics dashboard is generated from the information that you enter in the short description field.

Note:
Any modifications to the names or labels of these fields can result in issues with trending topics in the dashboard.

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Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate skill for the **Trending topics dashboard** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **General details** and edit name and description of the skill.
   Additional information regarding details of the skill are displayed, but can't be edited.
5. Select **Cluster Input** and review the tables and fields to create prompts that determine the source from which the data is pulled.
   You can't modify the input data source.

   Inputs for the trending topics dashboard skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	Short description

6. Select **Record clustering** to group records by similarity based on the adjusted inputs in the previous step.
   Record clustering enables you to add the job in the queue, providing you with the ability to leave the page while the task is running in the background. You are notified when the task is complete.
7. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default role sn_customerservice_manager automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they're updated automatically by a script.
   - If new roles are created after the upgrade, you can manually add them in both the **Define Access** and **Select Display**.

   Note:
   In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.

8. Toggle **Select display** to determine if trending topics dashboard skill appears in In-product desktop, displaying Now Assist skills on forms and workspaces.
9. Select roles for whom trending topics dashboard are displayed.
   The user roles added in the **Define access** step for each ACL(access control list) can be selected in this step.
10. After selecting **Review and Activate** to examine changes, select **Done** to close the activity response generation settings.

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11. Select **Activate** to turn on the skill for agents and complete the configuration.
    Skill is activated for agents.

Related topics

View trending topics dashboard

Add a new filter

Add a new filter to a UI Builder dashboard to enable users to refine data views based on additional fields such as consumer, product, or other custom fields.

Before you begin

Role required: admin or maint

If the Components tab in UI Builder is not available, run provided background script to enable the component view for maint users.

```
var gr = new GlideRecord('sys_properties');
gr.setValue("sys_scope", "e9b68250cdffe4e1c64e494026ec6e9a");
gr.setValue("name", "sn_cb_experiences.uib.enable.cb");
gr.setValue("write_roles", 'maint');
gr.setValue("value", "true");
gr.insert();
```

About this task

Filters allow users to refine dashboard data by specific fields. This procedure demonstrates how to add a new filter to any base system dashboard such as trending topics dashboard or sentiment analysis dashboard by duplicating and configuring an existing filter carousel item.

Procedure

1. Navigate to **All** > **UI Builder** and select a UIB component.
2. Under **Components** tab search for the corresponding component.

   The different UI Builder Component names:

   - Trending topics dashboard: OOB Trending Topics Dashboard, Top Trends, Trending topics by Field Insight (accounts, products, assignment group, channels), OOB Topic Details Dashboard, Topic Over Time Visualization, Topic Breakdown Visualization, Topic Affected Regions Visualization.
   - Sentiment analysis dashboard: OOB Sentiment Analysis Dashboard, Sentiment Over Time Visualization, Sentiment Breakdown Visualization, Sentiment Top Drivers Insight (Negative sentiment and Positive sentiment drivers), Sentiment by Assignment Group Insight, Sentiment After Escalation Insight, Sentiment by Channel Insight.

   If working with the base system component, create a clone before making modifications.
3. Select a **Filter Carousel Item 2** in the component tree.
4. Duplicate the component from the context menu.
   Drag the duplicated filter to reorder it as needed within the carousel.
5. Select the newly created filter in the left panel.
   The configuration panel displays on the right side.
6. Under **Filter source**, change the **Table** name to **Trending topic record**.
7. Change the **Field** to your desired field.
   For example, enter **Consumer**.

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8. Select **Apply**.
9. Under **UI element**, change the **Filter label** field to match your desired field name.
   For example, enter **Consumer**.
10. Rename the component ID to match the field using lowercase and dashes.
    For example, enter **filter_consumer**
11. Copy this ID to the clipboard for use in subsequent steps.
12. Select **Apply**.
13. Select **Save**.
14. In the top left of the screen, open the hamburger menu and select **Open component record**.
15. In the **Composition** section, search for your component ID.
16. Open the search function using Cmd+F (Mac) or Ctrl+F (Windows).
17. Paste the component ID from step 10 using Cmd+V (Mac) or Ctrl+V (Windows).
18. Press Return (Mac) or Enter (Windows) to search.
19. Open the search function again using Cmd+F (Mac) or Ctrl+F (Windows).
20. Enter **filterId** in the search box.
21. Press Return (Mac) or Enter (Windows) to perform the search.
22. Locate the **value** field under the filterId property.
23. Change the final value to the filterId from step 10.

    For example, enter **filter_consumer**. The filterId can be any unique value.
24. Select **Update** to save.
    The new filter is now configured and ready to use on the dashboard.

Result

The new filter appears in the dashboard filter carousel and enables users to filter data by the specified field.

> **Important:**
> If you plan to make additional changes to the original component, refresh the UI Builder component page to prevent losing the changes made in steps 6-10.

Related topics

Change graph visualization

Change an insight to use a different field for trending topics

Change graph visualization

Change a graph visualization to a different type within the same graph group, such as converting a horizontal bar chart to a vertical bar chart or an area chart to a line chart.

Before you begin

Role required: admin or maint

About this task

This procedure allows you to change a graph to a different visualization type within the same group. The following are similar groups of graphs:

- Scores: Single score, Dial, Gauge
- Time series: Area, Column, Line, Scatter, Spline, Step

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- Bars: Horizontal bar, Vertical bar, Pareto
- Pies and donuts: Donut, Pie, Semi Donut
- Multidimensional charts: Pivot table, Heatmap, Bubble

Tip:
Changing between graphs in the same group is very easy. For example, an area chart can be converted to any other time series chart such as spline, column, or line.

Procedure

1. Navigate to **All** > **UI Builder**
2. Under **Components** tab select the corresponding component that contains the graph you want to change.

   For example, open **Topic Over Time Visualization**.

   If needed, create a clone of the component before making changes.
3. Select the graph on the left panel that you want to change.
4. Locate the **Data visualization type** field.
5. Change the graph type to a different visualization within the same graph group.

   Important:
   Ensure the new graph type is within the same group as the original graph type. Converting across different graph groups is very difficult and may require significant programming changes.

6. Select **Save**.
   The graph visualization type is updated and displays data in the new format.

Related topics

Configure trending topics dashboard

Add a new filter

Change an insight to use a different field for trending topics

Change an insight to use a different field for trending topics

Change the field used in a trending topics insight to display data from a different field, such as changing from Assignment Group to Consumer or Product.

Before you begin
Role required: admin or maint

About this task
For trending topics insights, it is simple to change the field being analyzed. This procedure allows you to duplicate an existing insight and modify it to use a different field while preserving optimization and formatting.

The different UI Builder Component names for Trending topics dashboard are OOB Trending Topics Dashboard, Top Trends, Trending topics by Field Insight (accounts, products, assignment group, channels), OOB Topic Details Dashboard, Topic Over Time Visualization, Topic Breakdown Visualization, Topic Affected Regions Visualization.

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Procedure

1. Navigate to **All** > **UI Builder**.
2. Under **Components** tab search for the corresponding component.

   For example, open **OOB Trending Topics Dashboard**. Make a clone if needed.
3. Select **Insight Carousel Item 1** and duplicate it.
   Drag the newly duplicated component to reorder as needed.
4. Select the component within the carousel item and on the right-hand panel, change the field to your desired field ID.
5. Select **Save**.
   The insight now displays trending topics data based on the newly specified field.

Related topics

Configure trending topics dashboard

Change graph visualization

Add a new filter

Additional skill input and trigger information

Enable remaining Generative AI Skills within Now Assist CSM, and reference summarized details to complete setup.

Overview of skills and triggers

Depending on the selected skill, you can configure inputs or triggers. These settings determine how and when 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 case summary. A trigger initiates an action, such as when the system generates a chat summary.

Sidebar discussion summarization skill

For the sidebar discussion summarization skill, select the triggers that determine when a sidebar discussion summary is generated.

The following table lists the triggers that determine when a sidebar discussion summary is generated.

Triggers for the sidebar discussion summarization skill

Trigger	Description
User triggered	Sidebar discussion summarization that is generated when the agent manually triggers the skill.

Case sentiment analysis skill

The case sentiment analysis skill includes the inputs and outputs that identify the table and fields that are used when a case sentiment is generated.

The following table lists the inputs for the case sentiment analysis skill.

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Inputs for the case sentiment analysis skill

Input	Description
Input table	Case [Case]
Input fields	• Short description • Description • Priority • State • Task creation date • Activities • Task SLA

The following table lists the outputs for the case sentiment analysis skill.

Outputs for the sentiment analysis skill

Output	Description
Sentiment values	• Very positive • Positive • Neutral • Negative • Very negative
Sentiment trend	• Improving • Declining • Stable
Sentiment reasoning	Reasons for provide the sentiment value.

The following table lists the scheduled job for the sentiment analysis skill

Scheduled job for the sentiment analysis skill

Scheduled job name	Default value	Description
Sentiment analysis scheduled job (case)	True	Refreshes sentiments on the Trigger frequency screen for the Sentiment analysis skill.
Update sentiment historical records	False	When active, calculates sentiment and sentiment trends for historical records.

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Suggested steps generation skill

The following table lists the suggested steps generation skill

Inputs for suggested steps generation skill

Input	Description
Input table	sn_customerservice_case
Input field	Short description The skill uses this field to cluster cases based on similar cases closed in the past.
Conditions	Filter conditions to generate the suggested steps. Similar cases closed or resolved within the last 6 months are used by default to create the case clusters.

Banners in Now Assist for Customer Service Management (CSM)

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

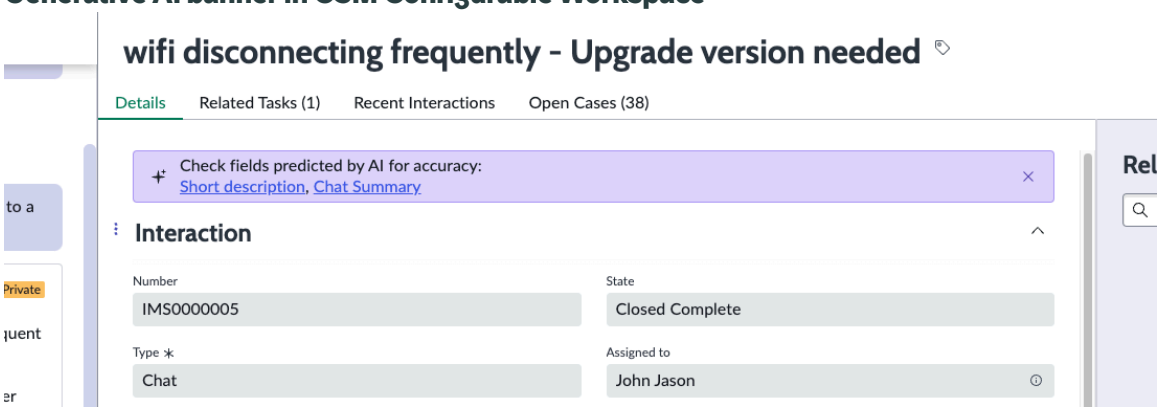
Overview of banners

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 CSM. Messages that appear in the banner:

- 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 CSM.

Generative AI banner in CSM Configurable Workspace



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Links to generated or predicted fields

Messages displayed in the generative AI banner can include links to the fields that are generated or predicted by AI. For case records, this includes fields such as the case description and short description. For interaction records, this includes fields such as the short description and chat summary.

When an agent selects a link in the message, that field is highlighted on the form. If an agent modifies the field and saves the record, the link to that field is removed from the message. Restoring the field to the original value returns the link to the message.

Setting default record pages

A record page provides the base structure for how a record is displayed in CSM Configurable Workspace. When the system displays information in CSM Configurable Workspace, such as case records and interactions, it uses the pages that have been set as the default record pages.

Set the following pages as the default record pages in UI Builder:

- **CSM default record page**: Includes specific features for case management.
- **CSM Interaction record page**: Includes CSM-specific features for interaction management.

These pages support the Now Assist for Customer Service Management (CSM) functionality in CSM Configurable Workspace, including the display of the generative AI icon and banner. For more information, see Set record page order.

Configure the Propose Solution UI action and declarative action

Add generative AI-specific functionality to the Case form by configuring the Propose Solution UI action and declarative action that are included with the Now Assist for Customer Service Management (CSM) application.

Before you begin

Role required: admin

About this task

The Customer Service Management application includes a Propose Solution UI action that agents can use to propose a solution for a customer service case.

The Now Assist for Customer Service Management (CSM) application includes the following actions that provide generative AI-specific functionality. Agents can use these actions to propose solutions that include AI-generated resolution notes:

- Propose Solution declarative action: Generates resolution notes in CSM Configurable Workspace.
- Propose Solution UI action: Generates resolution notes in Core UI.

Note:
These actions are inactive by default.

To use the generative AI functionality, you must deactivate the Propose Solution UI action for Customer Service Management and then activate the Propose Solution UI action and declarative action for Now Assist for CSM. After being activated, these actions are available to customer service agents for assigned cases that are in the Open state.

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Procedure

1. Deactivate the Propose Solution UI action for the Customer Service Management application.
   a. Navigate to **All** > **System Definition** > **UI Actions** to display the UI Actions list.
   b. Configure the list to show the Application column.
   For more information on how to configure a list, see Configure the list layout.
   c. Filter the list to display **Propose Solution** in the **Name** field.
   d. Select the Propose Solution UI action for the Customer Service application.
   e. Clear the **Active** check box.
   f. Select **Save**.
   The system returns you to the UI Actions list.
2. Activate the Propose Solution UI action for the Now Assist for CSM application to use this functionality in Core UI.
   a. From the UI Actions list, select the Propose Solution UI action for the Now Assist for CSM application.
   b. Select the **Active** check box.
   c. Select **Save**.
   The system returns you to the UI Actions list.
3. Enable the Propose Solution declarative action for the Now Assist for CSM application to use this functionality in CSM Configurable Workspace.
   a. Navigate to the **sys_declarative_action_assignment.list** to display the Action Assignments list.
   b. In the Action label column, select **Propose Solution**.
   c. Enable the **Active** check box.
   d. Select **Save**.
   The system returns you to the Action Assignments list.

Customize a case summarization skill in Now Assist for Customer Service Management (CSM)

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

Before you begin

Role required: admin

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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 case summarization skill, 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, view the skills for the Now Assist for CSM features.
3. Activate and copy the Now Assist for CSM 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 that you would like to activate and select **Activate skill**.

   Note:
   Only one version of a skill can be active at a time for each table. If you create and activate a copy of the skill, any previously activated version of the skill is deactivated. The copied skill can be activated with the parent skill.

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

   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 Activate Now Assist Skills.
   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 (Case new, Case work in progress, or Case resolved states).

   You can change the base input table and add case extension tables for the copied skill. To create an extended table, select **New** on the Tables list page, and select the table to extend from the **Extends table** search field. This option is only available when you're creating a table, because it incorporates all of the fields of the original table and creates system fields for the new table.

   Configure the base input table fields and related lists for the different input templates (Case new, Case work in progress, or Case resolved states) 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.

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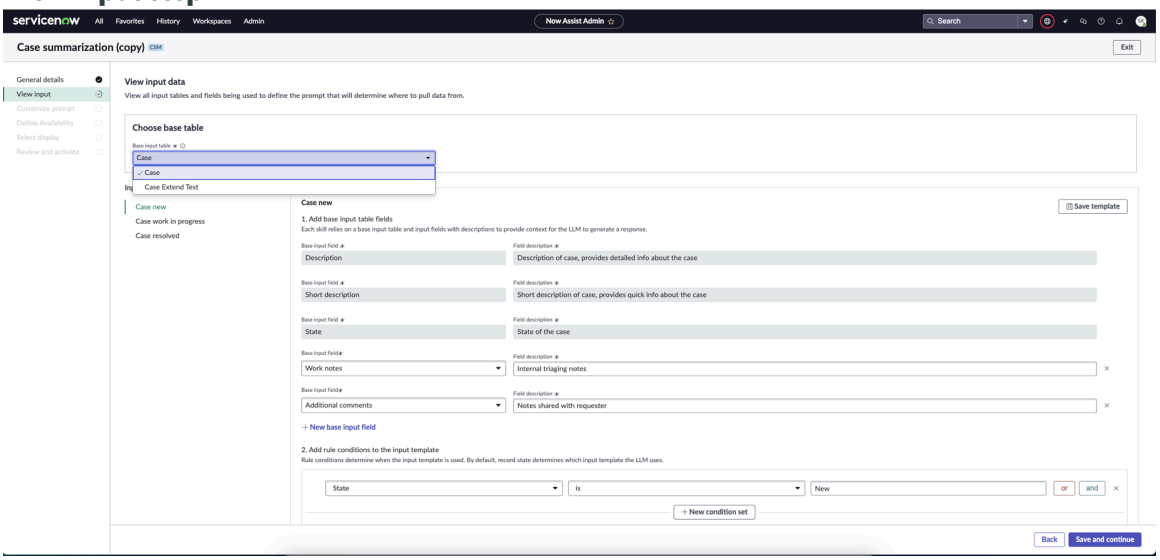
Select only those related tables that are offered as the base system as part of the input data.

a. For each input template state (New, Work in progress, or Resolved), select **+New base input field** and configure the base input table fields.

Add multiple base input fields, as necessary.

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 state (New, Work in progress, or Resolved), 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.

The following table lists the input template states.

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Input template states

State	Description
New	State is New.
Work in progress	State is Work in Progress.
Resolved	State is Resolved.

c. For each input template state (New, Work in progress, or Resolved), select **+New data source** to configure the additional related table and activity stream data, as needed.

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.

The selection of the related table fields may have a direct impact on the quality of the corresponding prompt header. For example, if a prompt header requires a specific field from the related table, but that field isn't selected as input, the summary for that prompt header will contain missing information. For example, as a base case, you see one related table, such as a Service level agreement (SLA), that includes all the required fields and filtering conditions for the prompt header. The SLA prompt header is preselected to help you understand how the related table, its fields, and the prompt header work together to produce a summary. You can use the SLA as a reference to configure the other related tables to determine which fields to select and which description adds the requirements of their respective prompt headers. Apply any additional conditions to filter the data further.

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 state (New, Work in progress, or Resolved), 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.

The available prompt sections that you can select:

- **Issue**
- **Key Actions Taken**
- **Resolution**

The following table lists the mandatory prompt headers.

Mandatory prompt headers

Input template state	Mandatory prompt header
New	Issue
Work in progress	▪ Issue ▪ Key Actions Taken

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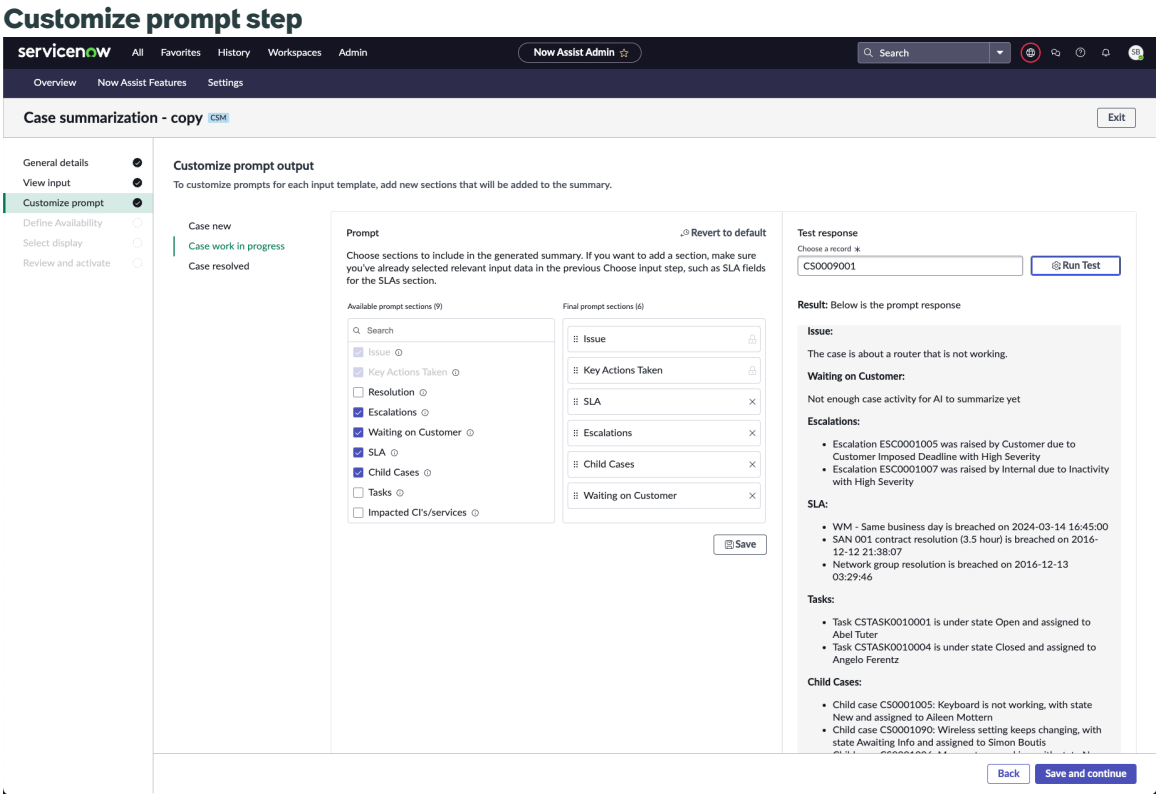
Input template state	Mandatory prompt header
Resolved	▪ Issue ▪ Key Actions Taken ▪ Resolution

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**.



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

7. 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.

8. Configure where to display the case summarization.

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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 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.

9. 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.

Domain separation in Now Assist for Customer Service Management (CSM)

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.

Setting up domain separation for Now Assist for CSM involves requesting activation of a plugin, setting options, and assigning users and records to domains.

Domain separation is possible at the skill level and at the individual configuration level. When using the guided setup in the Now Assist Admin console, each configuration option has its own record that you can separate by domain. To create a record in a different domain, you must set up the skill in the scope of your preferred domain.

Global domain is the default domain, and all new domains are created under it. New domains inherit the settings from the global domain if users don’t override the settings in the new domain.

Do the following task to set up domain separation:

1. Request domain separation. For more information, see Request domain separation.
2. Create a domain by creating an account for CSM
3. Configure skills in the domain for Now Assist for CSM.

More information

- Domain separation setup and administration. See Domain separation setup and administration.
- Benefits of domain separation. See Benefits of domain separation.
- Domain separation and Customer Service Management (CSM). See Domain separation and Customer Service Management.

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Create a domain by creating an account for Now Assist for Customer Service Management (CSM)

Create a domain by creating an account in the account table in the Customer Service Management (CSM) application. By creating an account, you also create a domain. If you have the admin role, you can create multiple domains by creating different accounts as needed.

Before you begin

Role required: admin

About this task

Enable the *csm_auto_account_domain_generation* system property. This system property is installed with the CSM application and is available only after the domain separation plugin is active. When this property is enabled (the value is set to True), the CSM application automatically creates a domain of the same name when a new account is created.

Note:
Enabling this property doesn't add domains for existing accounts. It only creates the domains for new accounts. Adding domains for existing accounts requires a migration script.

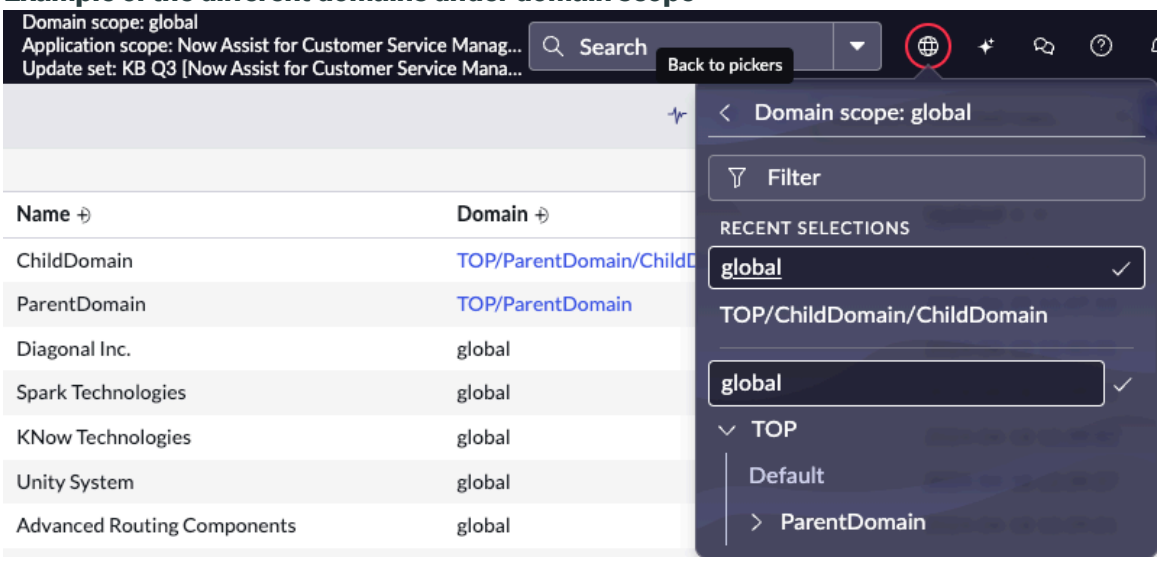
When creating a domain, follow these general guidelines:

- Only one domain can be the default domain.
- Only one domain can be the primary domain.

Procedure

1. Change the current domain to the domain that you want by selecting the domain under the domain scope.
   For example, if you want to create a domain under the global scope that would inherit its settings by default, select the global domain in the domain scope. If you want to create a child domain under a specific parent domain, change the domain scope to that parent domain.

Example of the different domains under domain scope



2. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** or **All** > **customer_account.list**.
3. In the Accounts table, create an account by selecting **New**.
4. Create a domain with the same name as the account by selecting **Save**.

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Different domain names

Number	Name	Domain
ACCT0010002	ChildDomain	TOP/ParentDomain/ChildDomain
ACCT0010001	ParentDomain	TOP/ParentDomain

For example, when you create an account named ParentDomain under the global scope, you also create a domain with the same name. All the domains that are created under the global scope will be under the TOP (top level) domain. If you create an account called ChildDomain within the ParentDomain domain, the domain with the same name is also created under the ParentDomain domain.

5. Navigate to **All** > **Domain Admin** > **Domains**.
   The domains can be viewed in the Domain table, or you can directly create a domain in the Domain table.

Domain form

Field	Description
Name	Unique name for the domain.
Type	Domain type that describes the domain. By default, the domain types are Vendor, Customer, and MSP. You can also add your own choices.
Primary	Option to select if this domain is to be the top-level domain in the hierarchy. The top-level domain only has child domains and no parent domains.
Default	Domain that is to be the default domain for your hierarchy.
Parent	Name of the domain that is higher in the hierarchy. This field must have a value for the domain to appear in the domain map.
Active	Option to make the domain available for use. You must select this option for this domain to appear in the domain map.
Description	Description for the domain.

Each domain record can also have several related records:

- Companies
- Contains Domains
- Contained By

6. Create a domain in the Domain table by selecting **New**.
7. Add the field values and select **Submit**.
   The domain has been created.
8. Create users in the Users table under each domain.
9. After adding the field values, select **Submit**.
10. Assign the appropriate roles and groups to the users.

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For example, if you create an Agent user in the ParentDomain, they have access to both the ParentDomain and ChildDomain. However, an Agent user that you create in the ChildDomain only has access to the ChildDomain.

11. Select **Save**.

What to do next

To change the domain hierarchy, go to the Contains Domains related list. Select the domain records that are the child (contained) domains of the contained relationship.

Configure skills in a domain for Now Assist for Customer Service Management (CSM)

Activate the skills with different skill configurations in each domain in the Now Assist for Customer Service Management (CSM) application.

Before you begin

Role required: admin

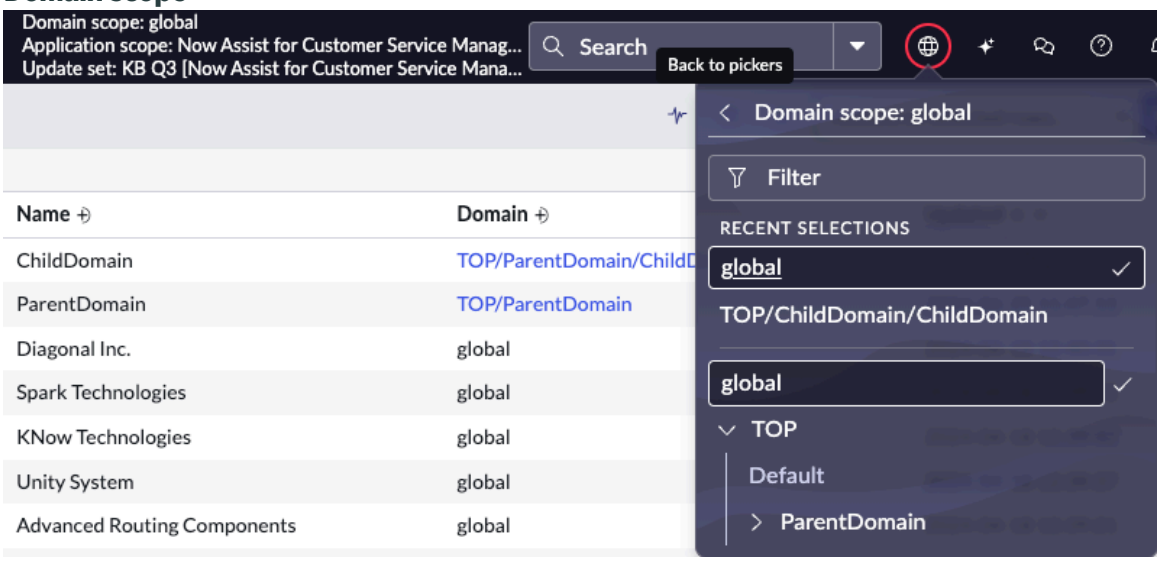
About this task

By default, the skill configurations in the domains inherit the settings from the global domain unless they're overridden by the new configurations in that domain.

Procedure

1. Change the current domain to the domain that you want to activate the skills in by selecting the new domain.

Domain scope



For example, if you want to configure the skill in ParentDomain, change the domain scope to ParentDomain.

2. Navigate to **All** > **Now Assist Admin Console** > **Features** > **Features**.
3. In the Now Assist Admin console, select the global skill configuration to activate it within the current domain and to set up its own unique skill configuration.
   As shown in the following example, a modal pop-up window confirms that the skill configuration is being edited in the current domain. This action creates a skill configuration that overrides the existing global configuration. The active skill configuration in use is derived from the global domain and shares the same name as the global skill configuration.

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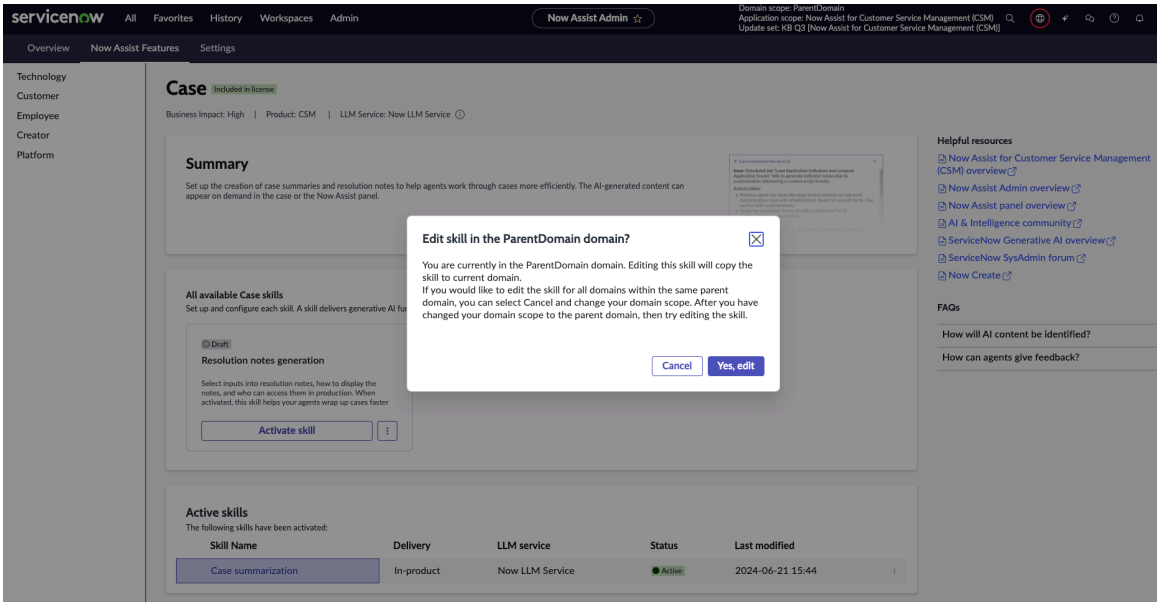
Edit skill in a domain



4. Proceed to the guided setup by selecting **Yes, edit**.
   The configuration setup applies to the current domain and is inherited by its child domain. The name of the skill changes to <Skill Name> for <Domain Name>. For example, if the skill configuration - Case summarization for ParentDomain is activated, it overrides the global setting and applies to both the ParentDomain and ChildDomain. However, if the skill configuration Case summarization for ChildDomain is activated in ChildDomain, it only applies to ChildDomain.

   Note:
   The activation order must follow Global > Parent domain > Child domain to ensure a proper inheritance and overrides. If the child skill configuration in the child domain is activated before the parent domain, the parent skill configuration can't override the existing skill configuration in the child domain. Consequently, both the parent skill and the child skill remain active in the child domain and the result is a misconfiguration.

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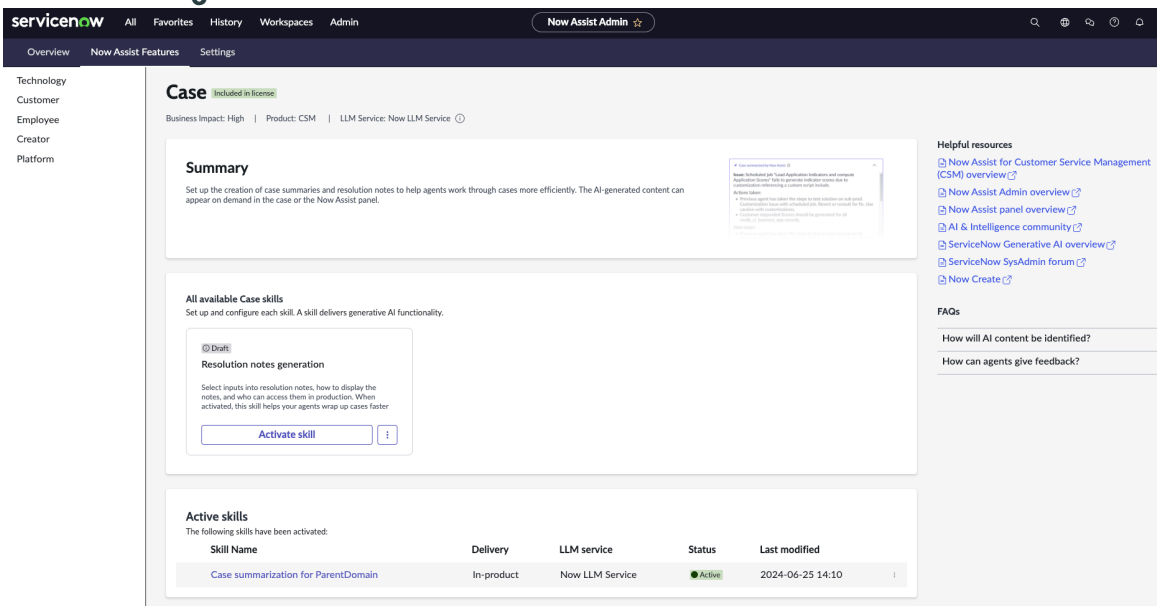
New skill configuration name



More information about domain separation for CSM can be found in Domain separation and Customer Service Management

Configure Now Assist for Customer Service Management (CSM) in Virtual Agent

Use Now Assist for CSM in Virtual Agent to provide users a content-driven generative AI experience.

Before you begin

Role required: admin

To ensure LLM-based appointment booking works in Customer Service Management, the following apps are required:

About this task

There are 6 main steps to configure Now Assist for CSM in Virtual Agent:

1. Activate Virtual Agent for Customer Service Management (CSM)
2. Configure Now Assist in Virtual Agent.
3. Install Conversational Appointment Booking.
4. Enable Walk-up Experience Appointment Booking.
5. Configure API credentials for OpenAI.
6. Enable Schedule a Walk-up Appointment topic in the Virtual Agent.

Procedure

1. Navigate to **All** > **Conversational interfaces** > **Virtual Agent** > **Designer.**.
2. Locate and select **Schedule a Walk-up Appointment** topic under Now LLM
3. Select the **Properties** tab.
4. Locate the check box labeled Now Assist for Virtual Agent under Select LLM assistant to make topic available.

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5. Select **Save**.
6. Select **Publish**.

Result
The topic is available and active in the chat window.

Customize access control for conversational flows

You must define an access control list (ACL) for conversational flows. An ACL enables you to restrict who is able to access and execute a skill to only users with the correct role.

Before you begin
Role required: admin

The following flows include default ACLs for the sn_esm_agent role:

- Add Comment to Task
- Add Work Note to Task
- Create Task for Case
- Reassign Case

Note:
An Access Control List (ACL) is already configured for these flows. The steps outlined below are only required if the customer intends to use these flows with a custom role.

To assign a custom role, follow the procedure:

Procedure

1. Navigate to **sys_security_acl** table.
2. Filter by these ACL names:
3. Add your custom role to each ACL record.

Clone the Now Assist for CSM skills

The clone feature enables you to create a copy of a Now Assist skill so that you can experiment with skill settings and configure the skill to fit your business needs.

Role required: admin

The skills that come with the Now Assist applications have default configurations that are optimized to serve the most common use cases. If you want to change the skill settings, you can edit a skill with the Now Assist Admin console or Now Assist Skill Kit and you can create a copy of the skill. Creating a copy leaves the original skill configuration intact in case you want to use it later or want to create another copy from the original. You can activate and configure the copies of the skills by using the same guided setup as the default skills.

Use Now Assist Skill Kit to create and publish custom prompts and skills for Now Assist for CSM, including the cloned skills from Now Assist Admin console.

Unified Admin Experience for GenAI Skills:

- Previously, skills cloned in Now Assist Admin console could not be edited in Now Assist Skill Kit, creating a fragmented setup process. With the new unified admin experience, users can manage GenAI skills seamlessly in Now Assist Skill Kit. This includes adding necessary

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headers as input, configuring or editing prompts, and maintaining all settings in a single location.

- The unification migrates the Now Assist Admin console setup experience to Now Assist Skill Kit for all Now Assist for CSM cloned skills.

There are 2 ways to clone Now Assist for CSM skills:

1. Make a copy of a Now Assist skill from Now Assist Admin console.

   https://player.vimeo.com/video/996395898?h=e609c55303&badge=0&autopause=0&player_id=0&app_id=58479

2. Now Assist Skill Kit Clone from Now Assist Skill Kit.

   https://player.vimeo.com/video/985874233?h=2ccc18794b&badge=0&autopause=0&app_id=58479

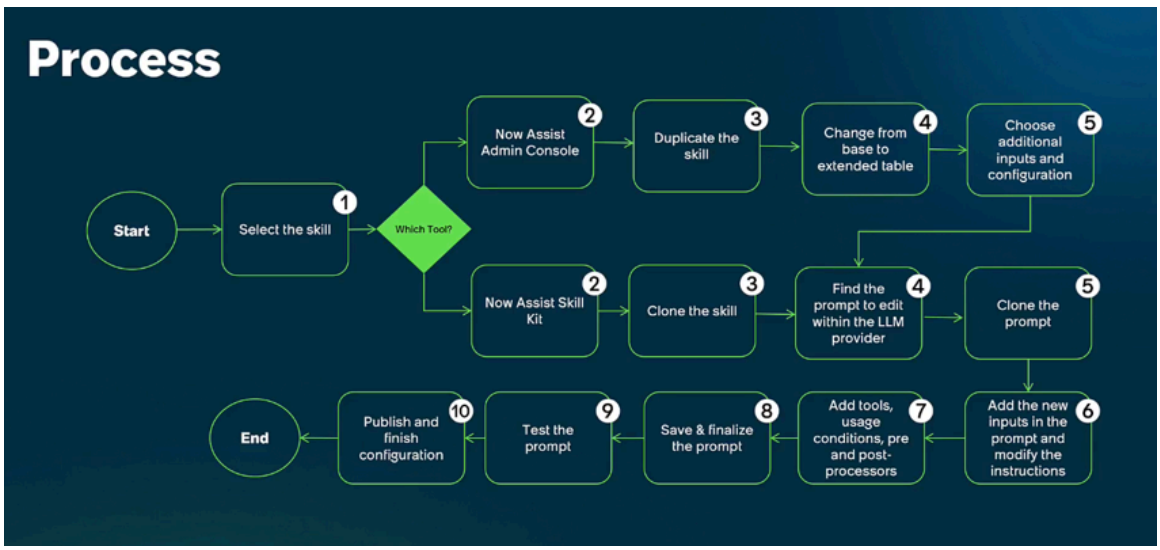
Customizing a Now Assist for CSM skill

Learn how to access, activate, and customize a Now Assist for CSM skill using the Now Assist Admin console and Now Assist Skill Kit.

Role required: admin

Now Assist for CSM provides base system skills that can be tailored to meet specific business requirements. Customization ensures that skills align with your organization's workflows, data sources, and user roles. There are two main ways to customize:

- Using Now Assist Admin console: Modify base system skills, input configurations, and display settings.
- Using Now Assist Skill Kit: Build and publish custom skills for advanced use cases by customizing inputs and prompts, and then publish it. You can also use the Now Assist Skill Kit to clone base system skills, as long as they are the latest versions created after the release of the Now Assist Skill Kit.



Access and activate a skill in Now Assist Admin console

1. Navigate to **All** > **Now Assist Admin console** > **Skills**.
2. Select the Now Assist Skills tab.
3. Select **Customer** > **CSM**

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4. Choose the skill you want to configure.
5. Select **Activate Skill**.
6. Go through the guided set up steps and activate the skill.
7. To customize the base system skills:
   a. Make a copy of the skill as you cannot directly modify the base system skill.
   b. Edit the copied skill's name so it is more descriptive for the LLM.
   c. Adjust input configurations by adding fields or creating a new data source.
   d. Test the skill with a sample record.

      Tip:

      - ISelect **Edit prompt in Now Assist Skill Kit** to edit the prompt in Now Assist Skill Kit.
      - You need the sn_skill_builder.admin role to edit the prompt in the Now Assist Skill Kit (NASK).
      - To edit a prompt, locate the prompt for the specified provider, clone it, apply the necessary changes, add pre or post processors and conditions as needed, finalize and publish the updated prompt, and then return to test changes on Now Assist Admin console.

   e. Customize how and when the skill capability will exist and be available.
   f. Choose how the skill will be triggered.
   g. Define who has access to this skill. Roles selected here will be available in the **Select display** step.
   h. Select where to display the skill- **In-product**, or in Now Assist panel.
   i. Under each display type, open the chevron and specify user roles by entering role names in the User roles field.
   j. Review your choices and select **Activate** to complete the skill customization.

      Note:
      For more information, see Customize a case summarization skill in Now Assist for Customer Service Management (CSM).

Access and clone base system skills with the Now Assist Skill Kit

1. Navigate to **All** > **Now Assist Skill KIt**.
2. Under the **ServiceNow skills** tab, select the prompt you want to edit in Now Assist Skill Kit.

   Note:
   You need the sn_skill_builder.admin role to activate and customize the prompt in the Now Assist Skill Kit (NASK).

3. Create a clone for the selected skill by selecting the overflow icon ⋮
4. Enter a name, description and provider to clone the skill.
5. In the **Skill contents** pane, select the**Inputs** edit icon and add any inputs that you like to add to the prompt.
6. In the **Prompt** screen, select the edit icon and add the desired inputs to the prompt or Create a new prompt.

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7. Test the prompt.
8. Evaluate the prompt.
9. Finalize and publish the skill from the Now Assist Skill Kit.

> **Warning:**
> Once finalized, you won't be able to edit this version of the prompt. You can always update and create a new version, or clone and create a new prompt.

10. Test the changes on associated records.
11. Activate it in the Now Assist Admin console and set display options.

> **Note:**
> This is not required for all skills.

Customize Now Assist context menu for skills

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

Before you begin

Role required: admin

> **Note:**
>
> The Now Assist context menu configuration is accessible through the Now Assist Experiences in Now Assist Admin console. After activating the relevant skills, users are prompted to visit the Case NACM Config however, in the base system , configuration is already active. By default, it is configured to utilize extended tables for the resolution notes and activity response generation skill that is provided in the base system.
>
> Case NACM Config is currently only available for resolution notes and activity response generation skill.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Experiences**.
2. Select Now Assist context menu.
3. Open the **Configuration** tab to view all the existing configurations.
4. Find the configuration name **Case NACM Config**.
5. Under Action, select the icon
6. Select **Edit configuration**.
7. In the guided setup, go to **General details** and customize the table name.
8. Select the **Record form fields** for table form use cases.
   The form fields are active for close notes, additional comment and work notes.
9. Select **Save and continue**.
10. Select **Configure Experience**, to configure the actions for the context menu trigger button and dialog.

    There are separate configurations for close notes, additional comment and work notes. Default action configured is **Generate resolution notes**.

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a. Configure the **Actions** to **Generate resolution notes**, **Shorten** and **Elaborate**.

b. Configure the **Refinement actions** to **Shorten** and **Elaborate**.

c. Configure the **Actions for generated content** to **Insert**.
In the preview you can see how the Now Assist context menu button will look like after configuration.

By default, the **Enable support for extended tables** toggle is turned on and this configuration is shipped as active in the base system. This is to support sparkle on extended table on same field. Once the skill is active, this experience is available.

11. Select **Define access** to determine who can access this skill.

    By selecting specific roles, you are controlling who can use it. The roles you choose will also be available in the next step **Select display**.

    Default and Custom Roles:

    - If no changes are made, the default role sn_esm_agent automatically appear in **Define Access** and **Select Display**.
    - If custom roles were added before the upgrade, they are updated automatically by a script.
    - If new roles are created after the upgrade, you can manually add them in both the **Define Access** and **Select Display**.

    Note:
    In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

12. **Select Display** to determine where to display the Case NACM Config.
    - Select In-product desktop to show Case NACM Config in all customer products on forms and workspaces.
    - Select roles for whom NACM config will be displayed.
13. After selecting **Review and Activate** to examine changes, select **Done** to close the Case NACM Config settings.

Set up Now Assist in the portal case form

Configure the Now Assist in portal case form to minimize case creation when a resolution already exists in the current knowledge base or external sources.

https://player.vimeo.com/video/1143919831?h=e548d4951c&badge=0&autopause=0&%E2%80%A6

Before you begin
Role required: admin

About this task
This configuration involves setting up the record producer, configuring related lists and variables, testing the configuration, and relating the catalog to the portal.

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Record Producers**.
2. Search and open the record producer **Create case for a product (Now Assist)**.

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The base system configuration details display.

3. Select **Copy** to duplicate the record producer.
   This creates a new version you can customize for your use case.
4. Enter a **Name**.
   This is the title the customers see in the portal.
5. Set the **Table name** to a specific case type.
6. Modify the **Short description** and **Description** to match your use case.
7. Scroll to review the variables list and update as required.
   For example, update the client scripts, change variables, add user criteria UI policies, and virtual agent topics and catalogs. You will find variables called **AI Search Assist** and **AI Genius Results** options in your configuration. Do not delete **Start**, **AI Search Assist**, **AI Genius Results Options**, and **Continue with Record Creation** to maintain the experience. These variables leverage the AI Search genius result widget found under AI Search Assist record producer configurations.
8. Select **Save** after completing all changes in the record producer configuration.
9. Select **Try It** to preview the record producer.
10. Navigate to **All** > **AI Search** > **AI Search Assist** > **Record Producer Configuration** to edit the record producer configuration that we previously duplicated.
11. Select **New**.
12. On the **Record Producer Configuration** form, fill in the following fields.

13. Select **Submit**.
14. Navigate to **Service Portal** > **Portal** to connect the record producer to a catalog and Portal.
15. Search for the portal configuration and select it.
16. Scroll down to note the **Catalog** and **Taxonomy** topics.
17. Select the **Taxonomy** value.
18. Select a topic under **Child Topics**.
19. Select the **Enable AI Search** check box.
20. Select a pre-configured **Search Application** – CSM Portal Default Search Application.
21. Select **Update**.
22. Return to the record producer.
23. Edit the **Catalog** field to include the catalog we noted from the Portal settings.
24. Select **Assigned Topics** and add the relevant topic to ensure the record producer appears in the correct location of the portal.
25. Select **Save**.
26. Navigate to the Portal and under **Catalogs** verify that the record producer appears under the specified topic.

    Note:
    Ensure the catalog you related to the record producer is also related to the portal and fully published.

27. Navigate to the **Service Portals**.
28. Open the catalog and go to the record producer you created.

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Result
The Now Assist Case in form portal is now configured and available for use.

Related topics
Using Now Assist in portal case form

Configure AI Search to use with the Troubleshooting steps identification AI agent

Configure AI Search with the Troubleshooting steps identification AI agent to fetch the relevant cases and knowledge articles that could help solve your issue.

Before you begin
Role required: admin

About this task
This AI agent relies on AI Search for fetching the relevant cases and knowledge articles that could help solve your issue. For more information on configuring AI Search, see Using AI Search with CSM Configurable Workspace and Semantic index configuration for indexed sources.

Procedure
1. Navigate to **All** > **AI Search** > **Indexed Sources** > **[CSM AIS] Case**.
2. In the Semantic Index Configuration related list, select **Body**.
3. Select **Active**.
4. Select **Save**.

Configure the Troubleshooting steps identification AI agent to use the Search retrieval tool

Configure the Troubleshooting steps identification AI agent to use the Search retrieval tool to fetch relevant cases and knowledge articles, including their attachments, to help solve your issue.

Before you begin
Role required: admin

About this task
The Search retrieval tool is configured to use the [CSM AIS] Configurable Workspace Search Config AI search profile. By default, this profile is linked to the Case and Knowledge search sources, which are defined in the [CSM AIS] Case and Knowledge Table indexed sources. For more information, see Indexed sources in AI Search.

Procedure
1. Navigate to **All** > **AI Search** > **Indexed Sources** > **New**.
2. On the form, fill in the **Name**, **Source**, and **Retention Policy** fields and select **Submit**.
   For a description of the field values, see Indexed Source form.
3. In the Semantic Index Configuration related list, select **New** and fill in the details as needed.
   For a description of the field values, see Semantic Index Configuration form.
4. In the Semantic Index Fields related list, select **New** and add the fields of the table that you want included in your search.
   For a description of the field values, see Semantic Index Field form.
5. Navigate to **All** > **AI Search Sources** > **New**.

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6. On the form, fill in the **Name**, **Indexed Source**, and **Conditions** fields.
   For a description of the field values, see Search Source form.
7. Navigate to **All** > **AI Search** > **Search Profile** > **[CSM AIS] Configurable Workspace Search Config**.
8. In the Search Sources related list, select **Link Existing** and then link the previously created search source.
9. Activate the [CSM AIS] Configurable Workspace Search Config AI search profile by selecting **Publish**.
10. Navigate to **All** > **AI Agent Studio** > **Overview** > **Explore All**.
11. On the **AI agents** tab, navigate to **Troubleshooting steps identification AI agent** > **Add tools and information** > **Search retrievals** and select **Get Similar cases and Relevant knowledge articles**.
12. In the Edit search retrieval window, add the previously created indexed source into **Search sources** and then specify what to search for in the **Fields returned** and **Semantic index fields**.
    For a description of the field values, see Add a search retrieval to an AI agent.
13. Select **Save**.

Result

The Troubleshooting steps identification AI agent can now use the Search retrieval tool to fetch the relevant information from additional sources.

Using Now Assist for Customer Service Management (CSM)

If you have an agent role, you can summarize the customer chat conversations, summarize the case details, and generate the case resolution notes with the Now Assist for Customer Service Management (CSM) application.

Skills reuse

By default, all skills exist in the global domain. When you use Now Assist in a domain-separated environment, users are only able to access data within their domain. For example, if a user uses the summarization skill, Now Assist only uses material that exists within the user's domain when generating that summary. Additionally, there is no co-mingling of data for domain-separated instances when using generative AI skills. The data resides only on the instance, and the shared services used for generative AI do not persist any requests (prompts) and responses. For more information, see Domain separation in the Now Assist Admin console. (Note that global domain is not the same as global scope. For more information, see Exploring Next Experience pickers.)

Summarize your chat conversations to understand the chat context quicker:

- Summarize the chat between the Virtual Agent and the customer when the chat is handed off to a live agent.
- Summarize the chat between a live agent and a customer when a chat is handed off to another live agent or when an agent wraps up the conversation and ends the interaction.
- Summarize the chat at any point during the conversation using the `/summarize` quick action.

Summarize the case details to understand the case context quicker. These summaries are useful for long-running or complex cases that include multiple conversations between agents and customers.

Generate the case resolution notes to wrap up cases faster. When you're ready to propose a solution to a customer, this feature can generate resolution notes and add them to the Case form.

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The resolution notes also provide the context about the case resolution to other agents who might encounter similar issues.

Summarize a chat conversation by using Now Assist for Customer Service Management (CSM)

Generate a summary of the Virtual Agent chat history and the chat conversation between a live agent and a customer by using the chat summarization skill in the Now Assist for Customer Service Management (CSM) application.

Summarize a chat with Now Assist for Customer Service Management

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

The chat summarization skill enables you to do the following actions:

- Summarize the Virtual Agent chat history and provide a summary of the actions taken by the customer before the customer engages with a live agent.
- Summarize the live agent and customer chat history, including the actions taken by the customer before the live agent hands off the call to another live agent and the customer engages with the new agent.
- Summarize the chat at any point during the conversation using the `/summarize` quick action.
- Summarize the chat between a live agent and a customer when a chat is handed off to another live agent or when an agent wraps up the conversation and ends the interaction.

Note:
You can also generate a chat summary on demand from the Now Assist panel. For more information, see .

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In CSM Configurable Workspace, open a chat from your inbox.
   The chat summarization skill creates an inline summary in the Active Chat window. This summary includes the customer's issue and the actions that the customer has taken before the customer engaged with a live agent. The summary appears in the Active Chat window and is identified by the Now Assist icon (✦) and the **AI chat summary** label.

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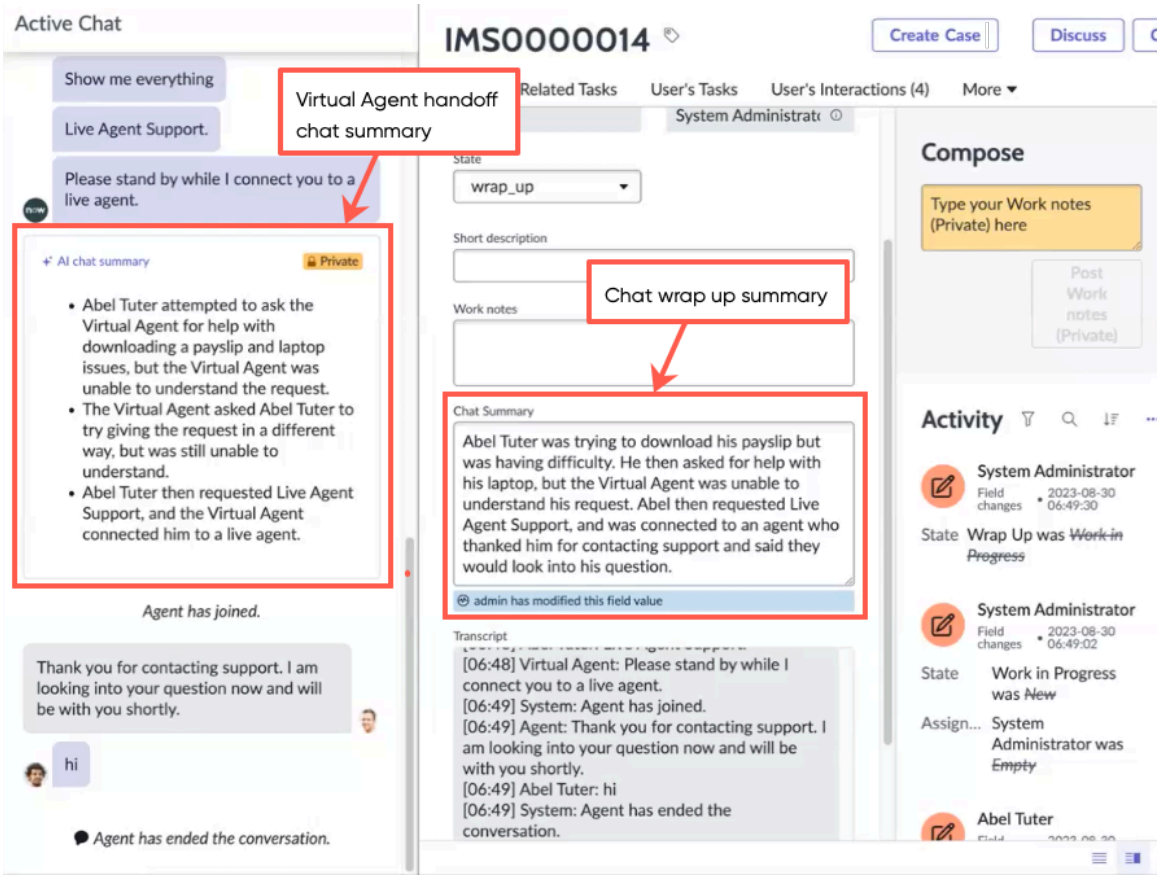
Interaction record with chat summaries



3. **Optional:** Provide feedback for the chat summary by selecting the helpful icon ( ) or not helpful icon ( ) on the summary card.
   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).
4. Chat with the customer to get any additional details about their question or issue.
   For example, if the customer is having an issue with the hardware, you may need the hardware model number and serial number.
5. In the Active Chat window, use the `/summarize` quick action to summarize the chat during the conversation with the customer.
   The chat summarization skill creates an additional inline summary in the Active Chat window. This quick action is helpful if you want to summarize long or detailed customer conversations.
6. **Optional:** If Live Agent to Live Agent handoff is enabled, transfer a chat to another agent after accepting an incoming chat with the following steps:

   a. Select the Transfer to Agent icon to transfer the interaction to another agent.

   b. Select the name of another live agent.

   c. The second live agent selects **Accept** to join the chat.
   Another summary of the chat is created when the conversation moves from one live agent to another live agent.

7. End the chat conversation by selecting **End Chat**.

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The chat summarization skill updates the **Short description** and **Chat Summary** fields on the interaction record when you end the chat.

> **Note:**
> If a chat summary isn't available for the interaction, the **Chat Summary** field doesn't appear on the interaction record.

8. Review the text in the **Short description** and **Chat Summary** fields and make any necessary corrections.
   Because the information in these fields is automatically generated, it's a good idea to review the text and make sure it's accurate.
9. Select **Save**.

What to do next

If necessary, you can create a case from an interaction record. The system uses the information from the **Short description** and **Chat Summary** fields on the interaction record to populate the **Short description** and **Description** fields on the case record.

The system displays the Now Assist icon (✨) next to these fields and removes the icon if the agent makes changes to the fields and saves the record.

Summarize a Sidebar discussion by using Now Assist for Customer Service Management (CSM)

Generate a summary of the Sidebar discussions between agents, requesters, and subject matter experts by using the chat summarization skill in the Now Assist for Customer Service Management (CSM) application.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

You can do these actions by using Sidebar discussion summarization:

- Summarize the Sidebar discussion at any point during the discussion using the `/Summarize` quick action.
- Share the Sidebar discussion to the work notes.
- Provide feedback for the summary.

> **Note:**
> The Sidebar discussion summarization skill is on the chat skill card in the Customer group. For more information, see Sidebar discussion summarization.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and open a customer service case that supports Sidebar discussion and summarization.
2. Choose an existing discussion, or start a new discussion.

   Start a new discussion by doing these actions:

   a. Select **Discuss**.

   b. In the Start a Sidebar discussion modal, add participants.

   c. Select **Start Discussion**.

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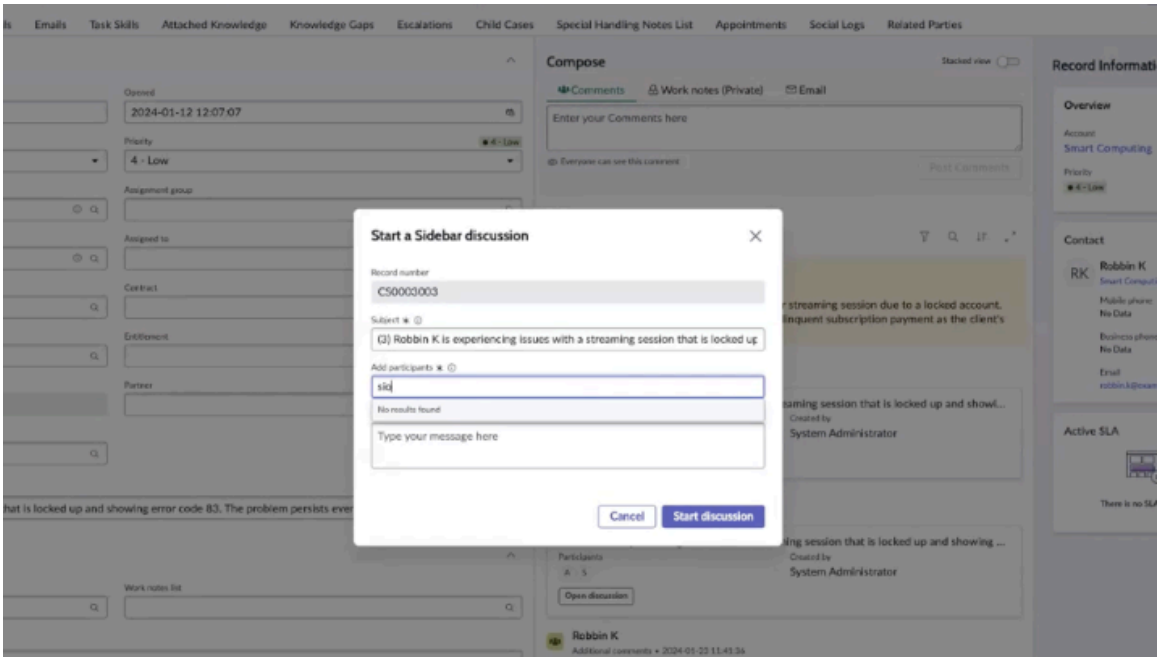
Sidebar discussion modal



3. Generate a summary of the Sidebar discussion during the conversation either by using the Summarize quick action (enter `/Summarize` in the Active sidebar discussion window), or by selecting the quick action icon .
4. After summarizing the Sidebar discussion, you can add it to the case work notes, and provide feedback about it.

Generate a chat reply recommendation by using Now Assist for Customer Service Management (CSM)

Generate a reply based on the context of the chat conversation using Now Assist icon. Chat reply recommendations can help provide agents with quick replies to common questions.

Before you begin

Role required: admin

About this task

You can do these actions by using the Now Assist icon:

- Generate a recommended reply that is based on the context of the conversation.
- Refine the recommendation by elaborating or shortening the response.

Note:
The Chat reply recommendation skill is on the Chat skill card in the Customer group. For more info, see Chat reply recommendation.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Open the inbox and accept the chat interaction.
   In the Active Chat section of the interaction, a summary of the Virtual Agent conversation is generated. The summary includes the actions that were taken before the requester engaged

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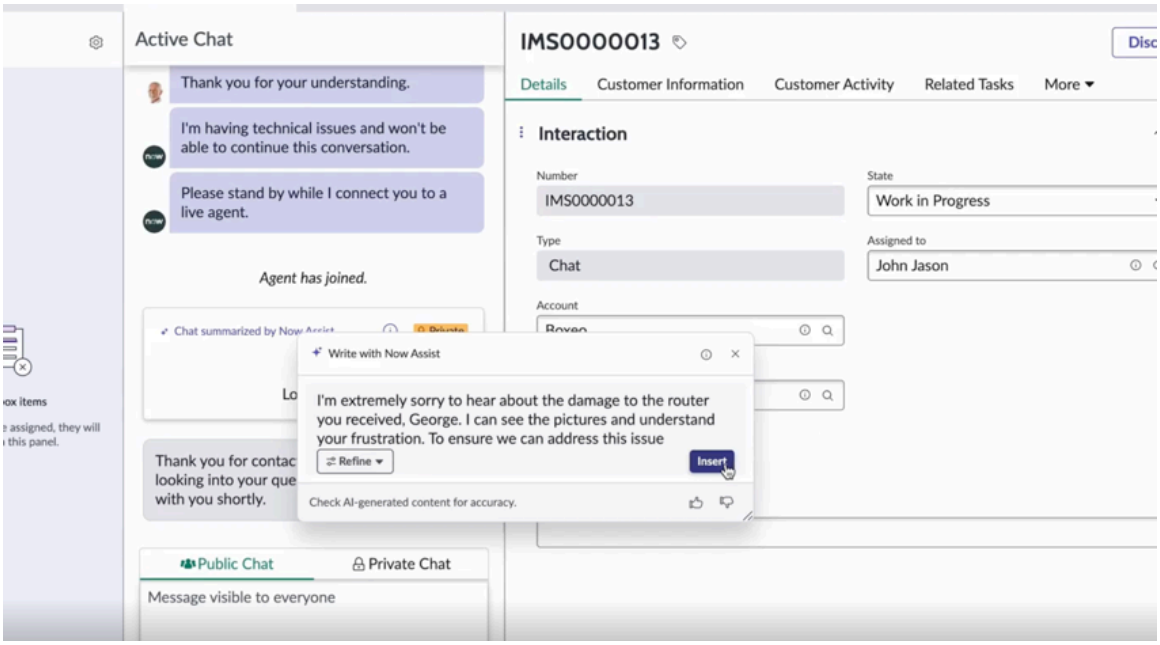
with the live agent. With this information, you can get an overview of what the requester has already mentioned in the Virtual Agent conversation and troubleshoot the issue.

3. Chat with the requester to get any additional details about their question or issue, if needed. For example, if the requester is having an issue with hardware, you may need the hardware model number and serial number.
4. In the chat message window, either type a response, or leave blank, and then select the Now Assist icon

Now Assist icon Modal



The reply response appears in the Now Assist icon modal.

5. Review the generated reply and select **Refine** to modify the response, or select **Insert** to paste the response into the chat message window.
   If the reply response was refined, you can toggle between versions.
6. In the chat message window, select **Send**.
7. End the chat by selecting **End Chat**.

Related topics

https://www.youtube.com/watch?v=6A5jwZFOPR4

Summarize a case by using Now Assist for Customer Service Management (CSM)

Generate a summary from the fields that you selected on the case record and quickly understand the case context by using the case summarization skill in the Now Assist for Customer Service Management (CSM) application.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

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

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

The case summarization skill is available in CSM Configurable Workspace and in Core UI.

- In CSM Configurable Workspace, you use the Case summary by Now Assist component to generate a summary. This component appears above the activity stream.

  Note:
  You can also generate a case summary on demand from the Now Assist panel. For more information, see .

- In Core UI, you select the **Summarize** button on the case record to generate a summary.

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

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

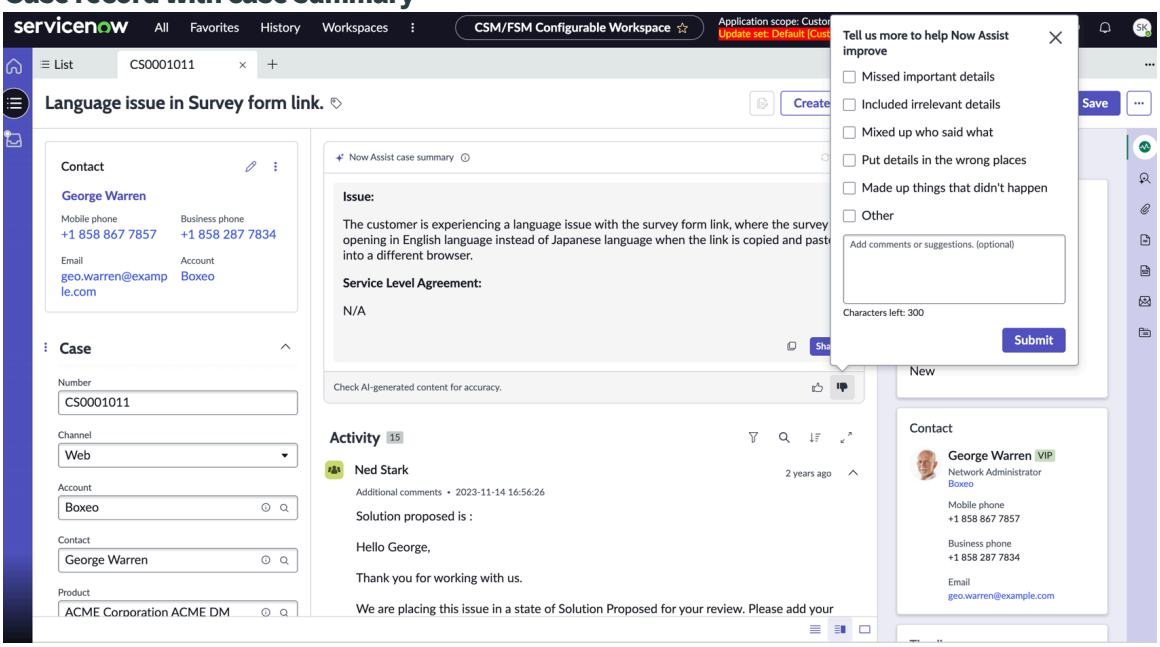
If there is enough data, the Case summary component displays the **Summarize** button. If there is not enough data, the component displays a message in place of the button.

Procedure

1. Navigate to **Workspaces** > *`CSM Configurable Workspace`* and open a customer service case.
2. In the Case summary by Now Assist component, select **Summarize**.
   The Case summary by Now Assist component appears above the activity stream. 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.

Case record with case summary



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3. **Optional:** When you're finished summarizing a case, you can add it to the case work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Generate an email response by using Now Assist for Customer Service Management (CSM)

Generate an email response that is based on the case and email context by using the Now Assist icon. With email responses, agents can create quick emails or responses, helping minimize errors and ramp up productivity.

Before you begin

Role required: admin

About this task

An agent can do these actions by using the Now Assist icon:

- Generate a recommended email reply that is based on the case and email context.
- Generate recommended email for new, forwarded, and finishing draft emails.
- Refine the recommendation by elaborating or shortening the response.
- Availability of email template recommendations while composing an email.

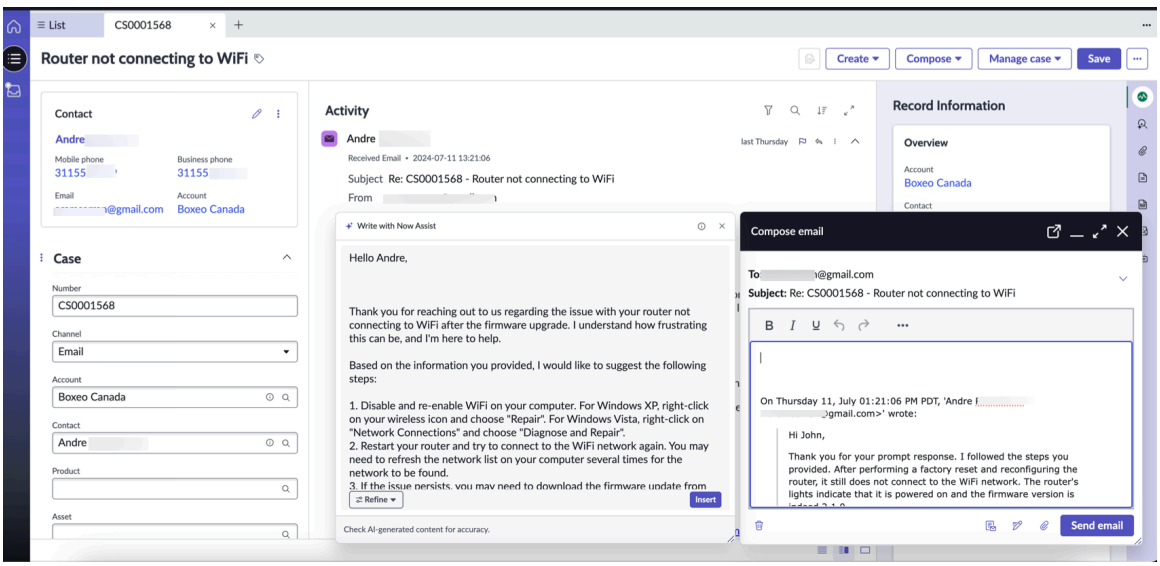
Note:
The email response skill is on the Case skill card in the Customer group. For more info, see email response.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and open a customer service case that supports the email response.
2. Choose how to compose an email.

3. In the email message window, either type a response, or leave blank, and then select the Now Assist ✦.

Now Assist icon modal



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4. Update the selected text with refined text by selecting **Replace**.
5. Review the generated email reply and select **Refine** to modify the response, or select **Insert** to paste the response into the chat message window.
6. Select **Send Email** or discard the draft if you don't like the recommendation.

Generate resolution notes in case form

Use the Now Assist context menu in the resolution notes field of the case form in both Core UI (UI16) and Workspace to create resolution note.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

In both the CSM Configurable Workspace and Core UI, you can generate resolution notes for a case by using the Now Assist context menu within the resolution notes field in the case form.

An agent can do these actions by using the Now Assist icon ✨:

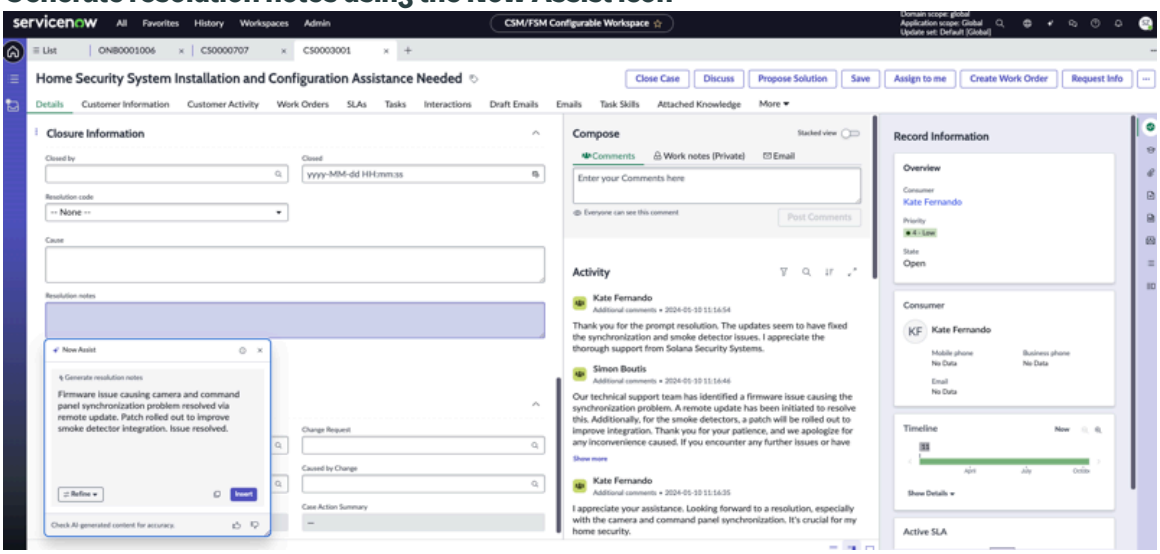
- Generate resolution notes based on the case context.
- Refine the recommendation by elaborating or shortening the content.

Note:
The case must be in the open state.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and open a customer service case that is in an open state.
2. Navigate to the Resolution notes field in the case form.
3. Select the Now Assist icon ✨.
   Now Assist icon ✨ generates a recommended text that is based on the context of the case.

Generate resolution notes using the Now Assist icon



4. Select **Insert** to add the generated content into the resolution notes field.
5. **Optional:** Review the generated content and select **Refine** to modify the content.

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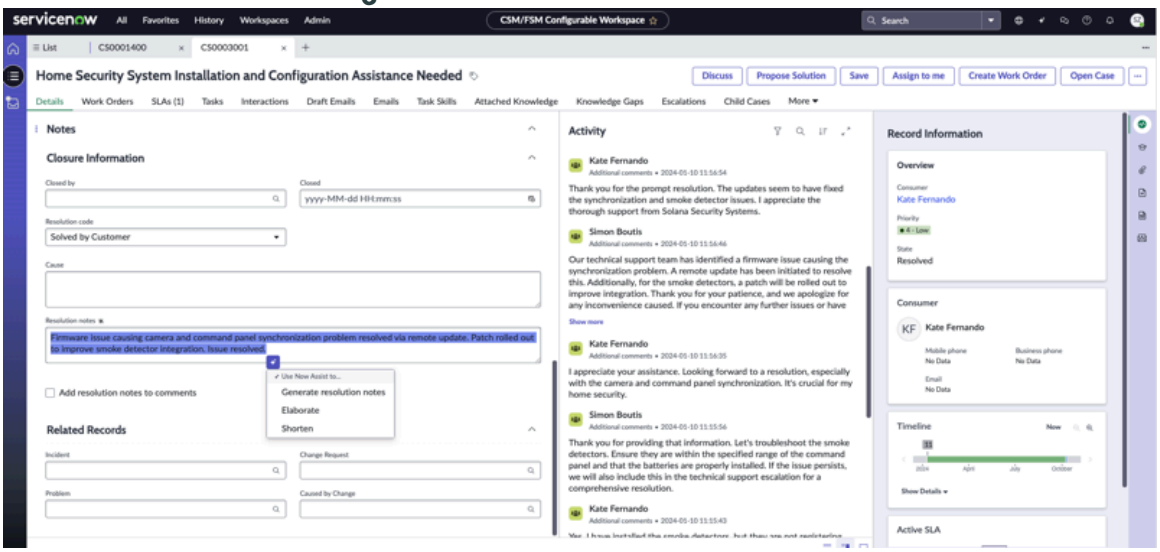
You get the option to either elaborate or shorten the content as needed.

Refine resolution notes using the Now Assist icon



Generate the resolution notes for a case by using Now Assist for Customer Service Management (CSM)

Generate the resolution notes for a case, propose the resolution to the customer, and add the resolution information to the case record by using the resolution notes generation skill in the Now Assist for Customer Service Management (CSM) application. By generating the resolution notes, you can wrap up cases faster and provide information about the case resolution to other agents who might encounter similar issues.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

In CSM Configurable Workspace and Core UI, you can generate the resolution information for a case by selecting **Propose Solution** on the case record. This UI action displays the Propose Solution modal. Using this modal, you can select a resolution code, add information about the cause of the issue, and review and edit the resolution notes text.

Note:
The Propose Solution UI action is available to the customer service agents who have assigned cases in the Open state.

You can also generate resolution information on demand from the Now Assist panel. For more information, see .

Note:
The resolution notes generation skill requires a minimum of 50 words in the case record to generate the resolution notes. If the resolution notes cannot be generated, the system displays a message below the **Resolution notes** field.

Note:
You can skip this if you are using the Now Assist Content menu experience for Resolution Notes Generation skill.

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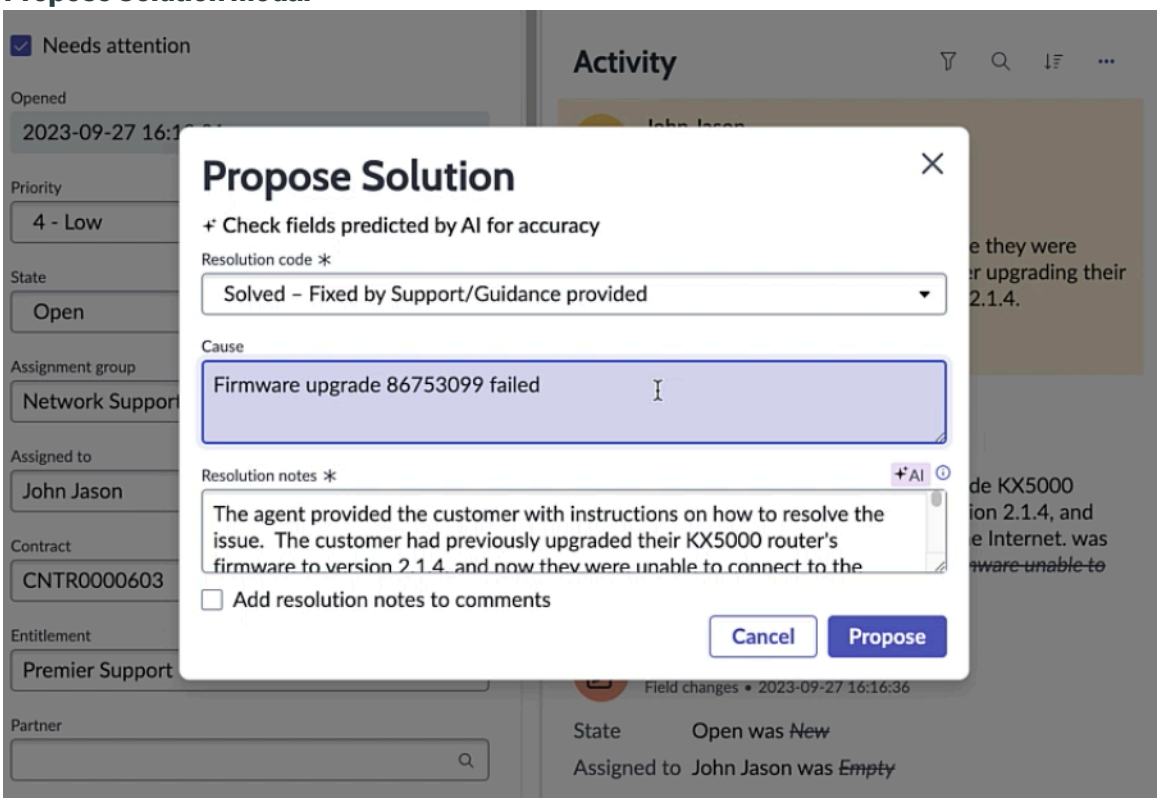
Procedure

1. In CSM Configurable Workspace, open a customer service case.
2. Select **Propose Solution**.
   The system generates a resolution summary and displays the information in the Propose Solution modal, which includes the following fields:
   - **Resolution code**
   - **Cause**
   - **Resolution notes**

   If the **Resolution notes** field on the case record is empty, the resolution notes generation skill adds the information to this field in the modal.

Propose Solution modal



3. Select a **Resolution code** for the case.
   A resolution code describes how the case was resolved. For example, common resolution codes include:
   - Solved: Fixed by Support/Guidance provided
   - Solved: Fixed by closing related PRB
   - Solved by customer
4. **Optional:** If you know the cause of the customer's issue, add it to the **Cause** field.
   For example, a customer's issue may be the result of a software upgrade.
5. In the **Resolution notes** field, review the resolution summary and make any necessary corrections.
   Because the information in this field is automatically generated, it's a good idea to review the text and make sure it's accurate. Any changes that you make are saved when you save the case record.

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6. **Optional:** If you want to add the resolution information to the 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 case activity stream.
7. Select **Propose**.
   - The system populates the fields in the Closure Information section of the case record with the information from the Propose Solution modal.
   - The case moves to the Resolved state.
   - The resolution is proposed to the customer.

Generate a knowledge article from the CSM Configurable Workspace and classic environment with Now Assist

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. Although the **Create Knowledge** button appears in other states, it won't trigger the skill. In those cases, clicking the button just opens the KB article form for manual entry.

Ensure that Configure knowledge generation is set up.

Important:

- For Now Assist panel, if property sn_customerservice.enable_knowledge_kcs and KCS Article Template is not enabled then it will create article using standard template for cases.
- For Core UI / Workspace, if sn_customerservice.enable_knowledge_kcs and KCS Article Template is not enabled then it will not show **Create Knowledge** button on case form.

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 KB generation skill is activated.
- In the Now Assist Admin console, ensure that the following criteria are in place:
  - 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.
- To manage who can access knowledge bases and knowledge articles, you can set permissions to define which users or user groups have the ability to read or contribute to the content. For more info, see Managing access to knowledge bases and knowledge articles

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.

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Note:

The Create Knowledge UI action is available to the customer service agents who have assigned cases in the Resolve or Close state. You can also generate knowledge article information on demand from the Now Assist panel. For more information, see Knowledge article generation.

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.

Alternative way to trigger the skill Request the generative AI capabilities in Customer Service Management by using the Now Assist panel.

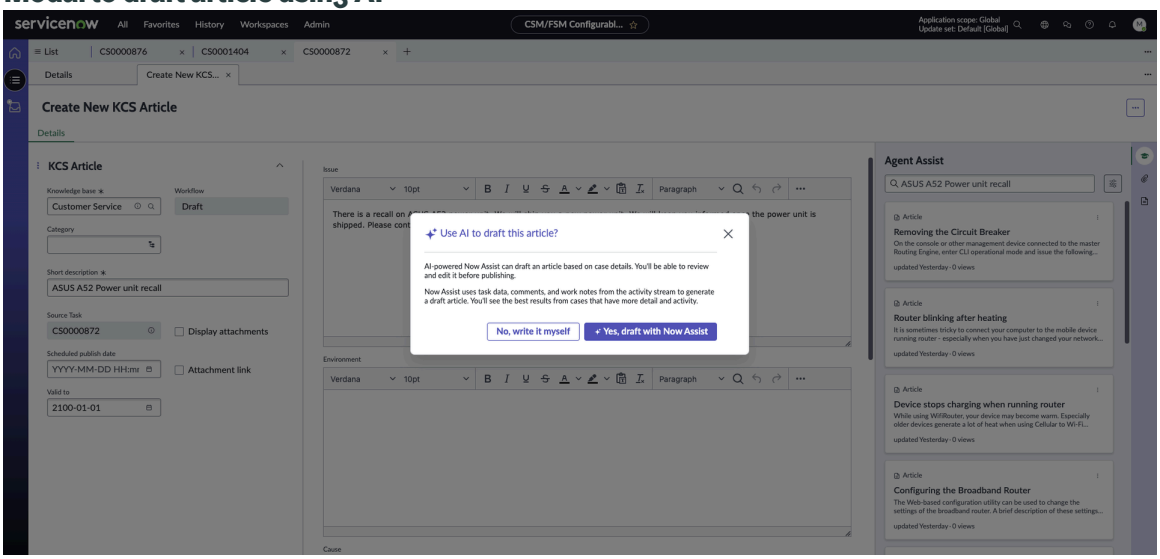
4. In the Create article modal, select a knowledge base and an Article template, if displayed.

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



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

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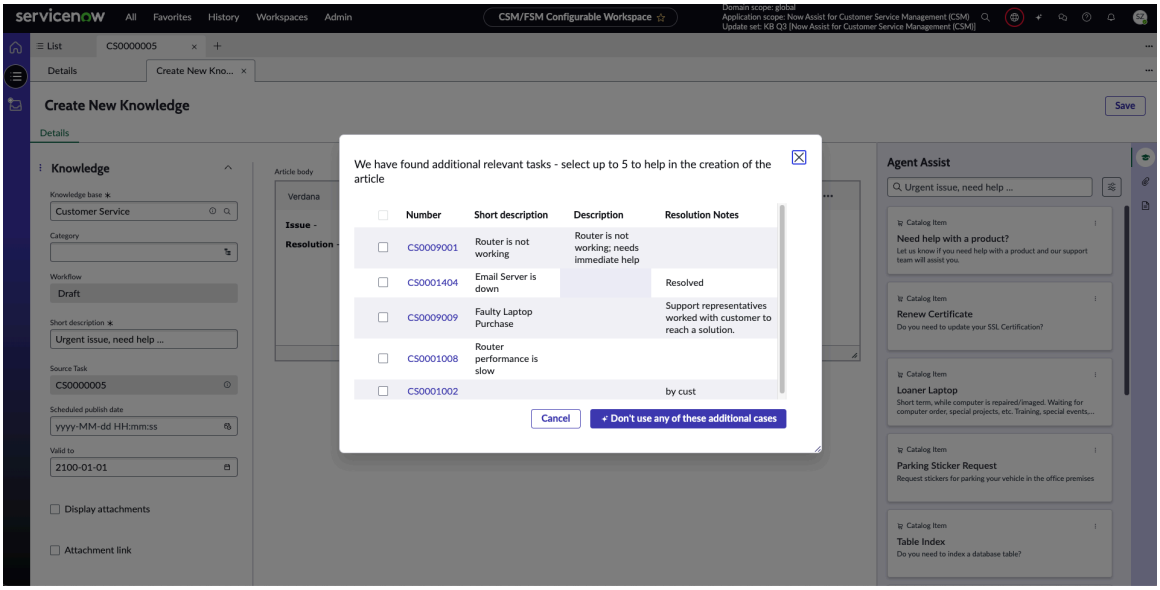
Additional relevant tasks



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. Similar cases are populated by the AI Search profile titled [KM] Multi-task Article Generation.
- 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 some text in the KB article and then select the Now Assist icon.
    Now Assist icon generates a recommended text that is based on the context of the selected content in the article up to that point. You can refine your response by selecting to elaborate or shorten the selected text.
11. Select **Insert** to paste the generated response.
12. Review the Now Assist generated article and select **Save** or **Publish**.

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The Now Assist success message disappears which means that it's no longer a Now LLM Service generated article.

Note:
Now Assist icon is also available for the published KB articles.

Related topics

Now Assist in Knowledge Management

Summarize a call by using Now Assist for Customer Service Management (CSM)

Generate a summary of the call conversation between a live agent and a customer by using the call summarization skill in the Now Assist for Customer Service Management (CSM) application.

Before you begin

To make the skill available in the Now Assist Admin console, install Install ServiceNow Voice applications.

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_csm_agent

About this task

The call summarization skill enables you to do the following actions:

- Summarize the call between a live agent and a caller when either the caller or the agent wraps up the conversation and ends the interaction.
- Generate a call summary on demand from the Now Assist panel. For more information, see Request the generative AI capabilities in Customer Service Management by using the Now Assist panel.
- When real-time transcription is enabled, agents can see a transcript of the voice calls while interacting with the customers. With real-time transcription, an agent gets a better understanding of the customer issues, and a manager gains insights into the customer trends and agent training gaps.
- When real-time transcription is disabled, agents don't see the conversation panel. Once the transcripts are ready, agents can see a Now Assist banner showing field predictions being generated. Then, another banner shows up with the predicted fields.
- A call summary is available for both outbound and inbound calls. For more information, see Real time transcriptions for ServiceNow Voice for Customer Service Management.
- Dynamic translation is supported for call summarization.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Set your status as Available in CSM Configurable Workspace so that you can receive a call request when a customer calls in and requests to speak to an agent.
   The call summarization skill creates an inline summary in the Active Chat window. This summary includes the transcript of the conversation between the agent and the customer.
3. Chat with the customer to get any additional details about their question or issue.
   In the Active Chat window, a transcript of the call conversation with the customer is created. For example, if the customer is having an issue with the hardware, you may need the hardware model number and serial number.
4. **Optional:** If enabled, transfer a call to another agent after accepting an incoming call and do the following actions:

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You need to have Advanced Work Assignment set up for an agent-to-agent transfer. For more information, see advanced work assignment setup.

a. From the keypad, select **Quick connects** while you're still connected to the customer.

b. Select the name of another live agent.

c. Select **Call**.

- If the second agent selects **Join**, the second agent joins the conversation with both the first agent and the customer. The customer can have a conversation with both agents.
- If the second agent selects **Swap**, the second agent joins the conversation while the first agent is put on hold. The customer is in a conversation with the second agent only.
- The **Assigned to** field is updated with the new agent's name and a summary card of the call is created in the conversation thread when the call is transferred from one live agent to another.

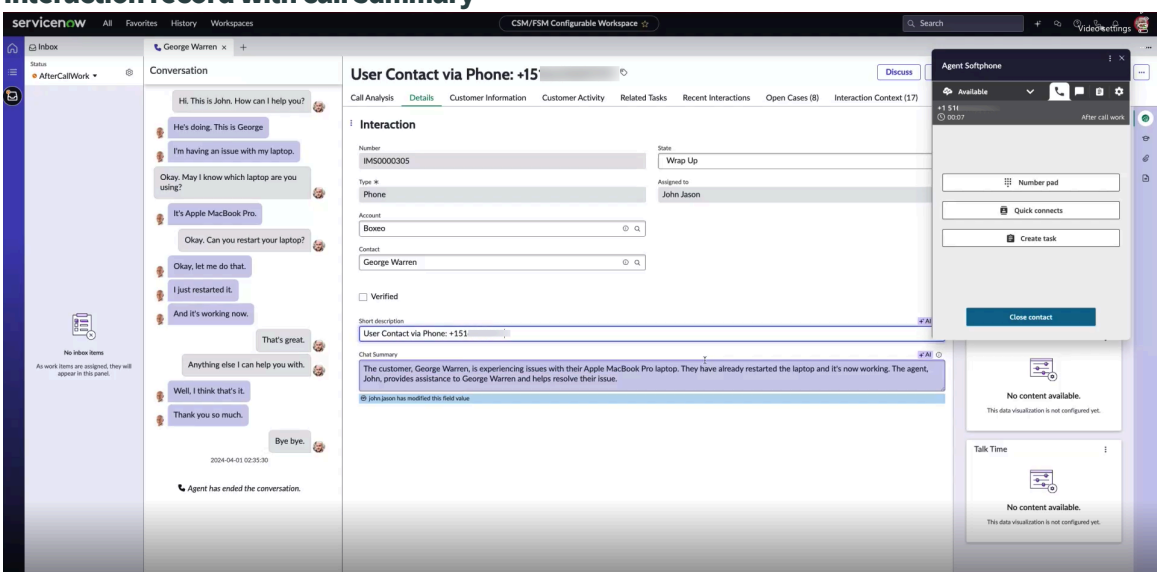
5. End the conversation by selecting **End call**.
   The call summarization skill updates the **Short description** and **Chat Summary** fields on the interaction record when you end the call.

Note:

If a call summary isn't available for the interaction, the **Chat Summary** field doesn't appear on the interaction record.

6. Review the text in the **Short description** and **Chat Summary** fields and make any necessary corrections.
   Because the information in these fields is automatically generated, human review of the text is necessary to ensure its accuracy.
7. Select **Save**.

Interaction record with call summary



What to do next

If necessary, you can create a case from an interaction record. The system uses the information from the **Short description** and **Chat Summary** fields in the interaction record to populate the **Short description** and **Description** fields in the case record.

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The system displays the Now Assist icon ( ) next to these fields and removes the icon if the agent changes the fields and saves the record.

Using conversational search in Now Assist panel

Get common case-related information from the KBs within the case record by asking questions in the Now Assist panel.

Agent Interaction with Now Assist panel and Knowledge Bases (KBs): As an agent, you should be able to ask questions within the Now Assist panel (NAP) to find any relevant information. If the answer to your question is available in the KBs, it is displayed within the Now Assist panel. Additionally, the sources from where the information is derived is also shown. If the answer is not available within the KB search, you are redirected to the global search experience.

Benefits

- Efficiency: Agents can quickly find answers without leaving the Now Assist panel.
- Transparency: Sources of information are clearly indicated, enhancing trust.
- Comprehensive Search: If the answer isn't found in the KBs, agents are redirected to a global search to ensure no information is missed.
- Customer Support: Agents can quickly resolve customer issues by accessing detailed and accurate information and enhancing the customer experience.

To use the feature, do the following:

1. In Core UI or CSM Workspace, open a case that is assigned to you.
2. From the header menu, select the Now Assist icon to open the Now Assist panel.
3. In the Now Assist panel, type in a question related to a case.

To get started with configuring the Now Assist Q&A Skill, see the step-by step the instructions.

Using scheduling assistant via GenAI in Virtual Agent

Book, reschedule, and cancel appointments with Virtual Agent conversations using Now Assist. Set up a new appointment, modify an existing one, or cancel an appointment with a streamlined and user-friendly flow.

Virtual Agent conversations supported by Now Assist uses Large Language Model (LLM) to communicate with customers.

Booking Appointments

To book a new appointment:

1. Initiate the Conversation: The logged-in user contacts your business via your portal. User starts a chat with the Virtual Agent through the Now Assist panel. The user enters the appointment booking request into the chat, and the Virtual Agent uses Large Language Model (LLM)to understand the request.
2. Provide Details: The Virtual Agent asks the user to share the necessary details such as the date, time, location and purpose of the appointment. The user chooses the purpose, a location and a date and time slot for the appointment.

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Note:
If the time provided by the user has a conflict with the location's calendar, the Virtual Assistant opens the calendar for the requester to choose a new time.

3. Confirm the Appointment: The Virtual Agent confirms the details and books the appointment in the user's calendar.

Rescheduling Appointments

To reschedule an existing appointment:

1. Start the Chat: The logged-in user contacts your business via your portal. The user enters the appointment booking request into the chat, and the Virtual Agent uses Large Language Model (LLM)to understand the request.
2. Specify the Appointment: The user chooses an appointment to reschedule.
3. New Details: The Virtual Agent shares the new dates and times for the rescheduled appointment. User chooses a date and time for the rescheduled appointment.
4. Confirmation: The Virtual Agent updates the calendar and confirms the new appointment details.

Canceling Appointments

To cancel an appointment:

1. Begin the Conversation: The logged-in user contacts your business via your portal. The user enters the appointment booking request into the chat, and the Virtual Agent uses Large Language Model (LLM) to understand the request.
2. Identify the Appointment: User chooses the date and time of the appointment they wish to cancel.
3. Confirm Cancellation: The Virtual Agent removes the appointment from the user's calendar and confirm the cancellation.

Now LLM Service ensures that these interactions are smooth and efficient, allowing you to manage your schedule with ease.

Suggested steps generation in Now Assist for Customer Service Management (CSM)

Generate suggested steps automatically by analyzing clusters of closed cases with similar case resolution in the Now Assist for Customer Service Management (CSM) application.

Before you begin

Role required: sn_esm_agent

About this task

The system uses data from the Short description field and the filter conditions set in the case input table to generate the suggested actions based on similar past resolved cases. These steps outline the next best actions that agents can take as part of resolving cases.

If suggested steps are enabled for an open case, you can generate and display these steps in a card at the top of the Recommended Actions tab in the contextual side panel.

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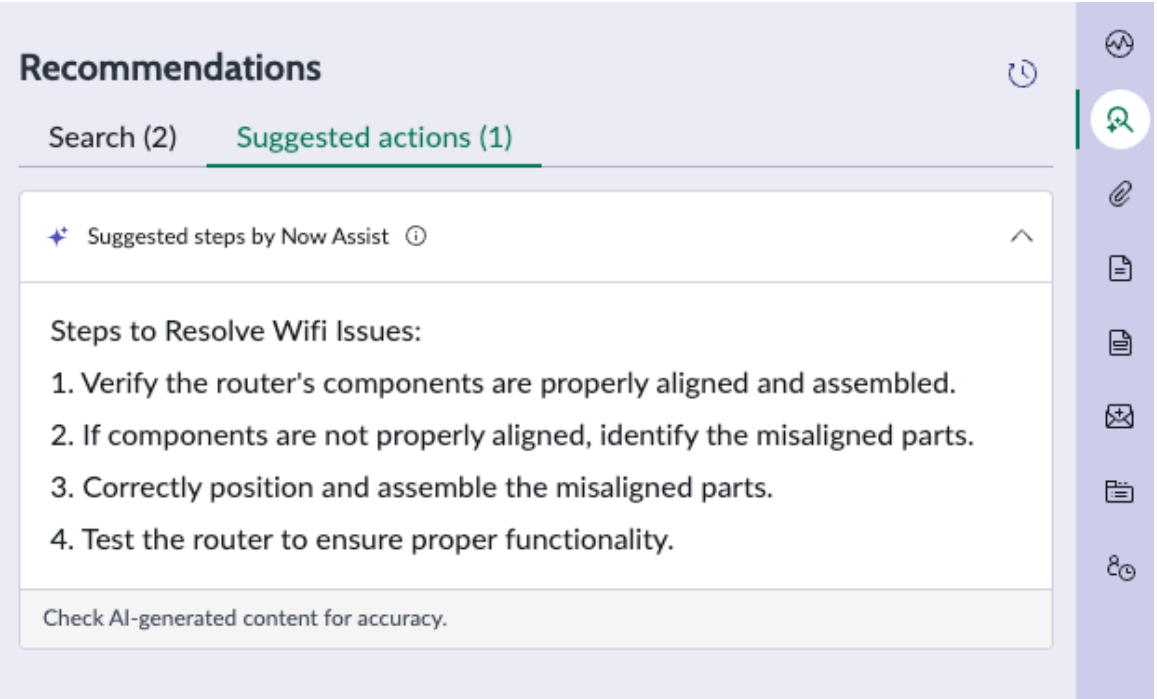
Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Using the List icon , open a case that is not in **Closed** or **Complete** state.
3. Select the Recommendations icon in the contextual side panel to display the Recommended Actions tab.The system displays the **Suggested steps by** *Now Assist* card at the top of the tab.
4. In the **Suggested steps by** *Now Assist* card, select **Generate**.
   The steps to resolve the case appears in the **Recommendations** window in the case record. This action may take a few minutes.

Suggested steps by Now Assist



Analyze sentiments in Now Assist for Customer Service Management (CSM)

Make informed decisions on cases based on requester's sentiment and the reasoning behind it in the Now Assist for Customer Service Management (CSM) application.

Before you begin

Role required: sn_esm_agent role

Procedure

1. Navigate to the case or case form in the Core UI or in CSM Configurable Workspace.

To	Do this
Navigate in Core UI	**a.** Go to **All** > **Cases** The case list view appears.

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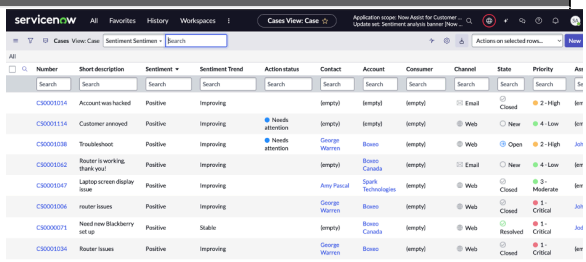
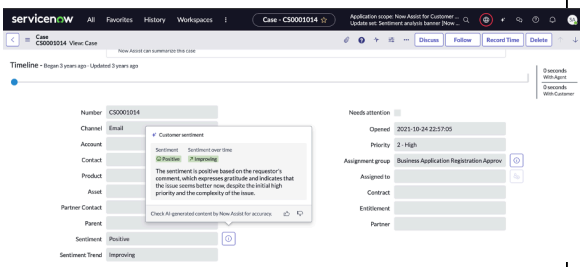
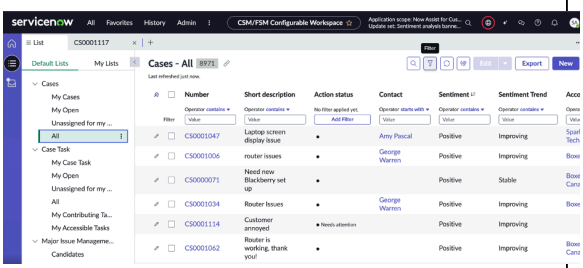
To	Do this
	 You can analyze the Sentiment and Sentiment trend for the case list. **b.** Select a case. The case form view appears.  **c.** In the Sentiment field, select the information icon ⓘ to see the reasons for the sentiment.
Navigate in CSM Configurable Workspace	**a.** Go to **Workspaces** > **CSM Configurable Workspace** **b.** Select the List icon ☰. **c.** Go to **Cases** > **Open** The CSM Configurable Workspace list view appears.  **d.** Select a case. The CSM Configurable Workspace form view appears.

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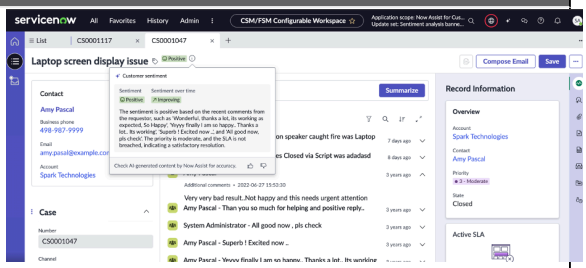
To	Do this
	 **e.** Select the information icon ⓘ to see the reasons for the sentiment.

2. **Optional:** In Core UI or CSM Configurable Workspace list view, you can sort the cases based on the sentiment scale (Very Positive, Positive, Neutral, Negative, or Very Negative) and the sentiment trend.
3. **Optional:** Manually refresh a sentiment.
   a. In the Core UI or in CSM Configurable Workspace, enter a comment in the Additional Comments field.
   b. In the CSM Configurable Workspace interface, a red dot appears on the information icon ⓘ next to the sentiment.
   c. Select the information icon ⓘ and then select the refresh icon ↻ to see the updated sentiment scale (Very Positive, Positive, Neutral, Negative, or Very Negative)and sentiment trend.

Request the generative AI capabilities in Customer Service Management by using the Now Assist panel

Request the contextual generative AI capabilities, such as a chat summary, case summary, case resolution notes, call summary, or knowledge article generation in the CSMCustomer Service Management application by using the conversational interface in the Now Assist panel.

Before you begin

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

Make sure that AI search and Now Assist in Virtual Agent are enabled in the instance for the conversational subflows and actions to work.

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

You can use the Now Assist panel in CSM Configurable Workspace to request a chat, call or case summary, generate case resolution notes and knowledge article, ask a question about a case, Use AI agents to complete cases and use conversational subflows and actions.

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

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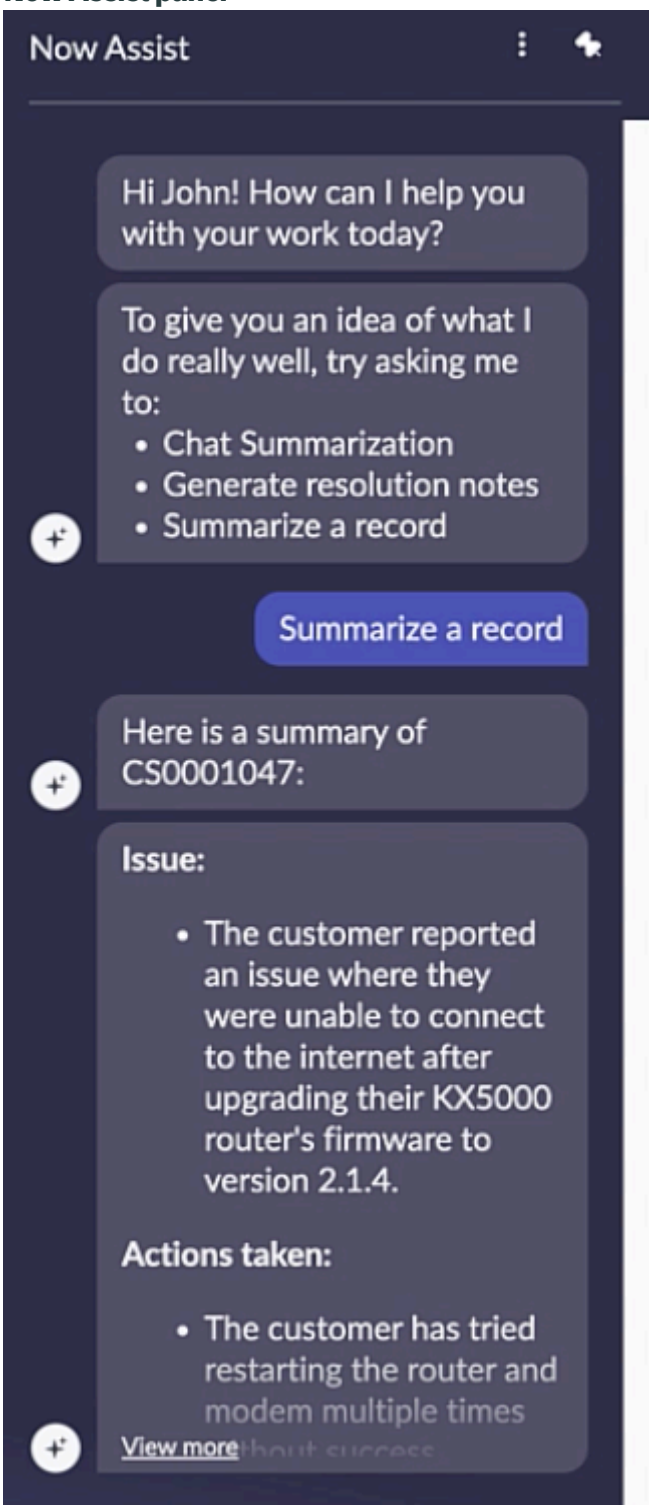
Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Log in to an instance where the Now Assist for CSM application is installed.
3. Request the generative AI capabilities in CSM for an interaction or case by selecting the Now Assist icon ✦.

Now Assist panel



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4. After you request the generative AI capabilities, you can summarize a chat for an interaction, summarize a chat for a case created from an interaction, summarize a case, generate the resolution notes for a case, summarize a call, generate a knowledge article, ask questions about a case, use AI agents to complete cases, and complete tasks with conversational subflows and actions.

5. You can also use the Now Assist panel to type in a question related to a case and complete tasks with conversational subflows and actions.
   Information requested about the case is shown. Conversational subflows and actions capture users' intents when requesting to run specific subflows and actions, along with all necessary details for those subflows and actions. This streamlines the user experience by enabling them to accomplish everything in one place within the Now Assist panel.

Use sentiment analysis dashboard

Visualize and interpret customer sentiment across cases using the sentiment analysis dashboard and GenAI insight cards.

The sentiment analysis dashboard provides a comprehensive view of customer sentiment across cases and accounts. It includes visualizations, filters, and GenAI-generated insights to help identify sentiment trends, root causes, and performance across channels and assignment groups.

Entry Point Widget

The sentiment snapshot widget can be accessed from the CSM/FSM configurable workspace home page. It displays a preview of the dashboard of the sentiment trend over time, using the average sentiment score per day. You can access more detailed information by selecting **View dashboard** and navigate to the details page.

Note:

- The sentiment analysis dashboard can only be managed by customer service managers. The sentiment analysis case skill must be activated so that future cases can pick up sentiment.
- The entry point in Core UI to access the sentiment analysis dashboard is **Customer Service** > **Now Assist Dashboards** > **Sentiment Analysis Dashboard**.

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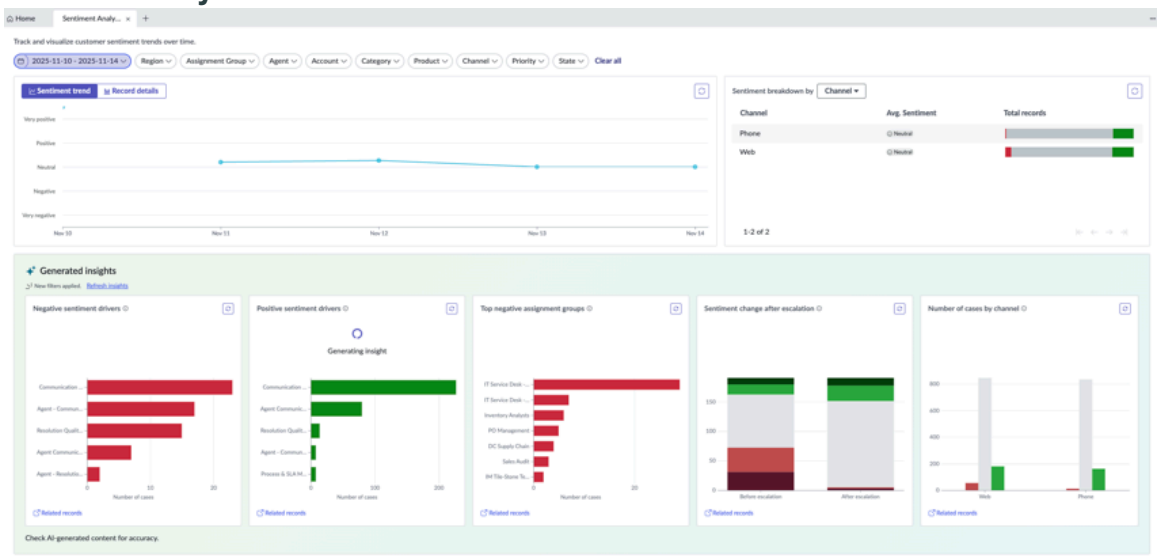
Sentiment analysis dashboard



In-depth View Page – Data Visualizations

Function	Description
Sentiment trend	Displays the average sentiment score per day over time.
Record details	Displays the distribution of cases from very positive up to very negative.
Sentiment breakdown	Displays sentiment breakdown by Region, Assignment Group, Account, Agent, Category, Product, Channel, Priority, State, and also includes average sentiment and total records data.
Bar Chart	Displays sentiment split across categories in **Record details**.
Chart Toggle	Switches between line and bar chart views in **Sentiment trend** and **Record details**.
Time Filters	Supports Last 7 days, Last 30 days, Last 3 months, Last 6 months, and custom range filtering options.

GenAI generated Insight Cards

GenAI insights provide explanations for sentiment trends and root causes in different cases. These include:

- **Negative sentiment drivers**: Displays factors that most frequently influence negative customer sentiment. The insight is across the date range and displays a reason why cases in these categories were showing that sentiment.
- **Positive sentiment drivers**: Displays factors that most frequently influence positive customer sentiment. The insight is across the date range and displays a reason why cases in these categories were showing that sentiment.
- **Top negative assignment groups**: Displays agent assignment groups with the highest levels of negative customer sentiment.

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- **Sentiment change after escalation**: Displays the comparison of customer sentiment before and after a case escalation.
- **Number of cases by channel**: Displays the distribution of customer sentiment across different communication channels.

Note:

All five of these insights look into each case's short description and the last 10 days of comments and work notes to generate these insights.

You can select **Related records** to open a new page with a list that shows the corresponding cases referenced in the graph. You can select the refresh icon to see the latest update.

Related topics

Exploring Now Assist for Customer Service Management (CSM)

View trending topics dashboard

Identify clusters of related records and visualize their volumes and sentiment trends over time using the trending topics dashboard and GenAI-generated insights.

The trending topics dashboard provides visibility into emerging issues across cases. It includes interactive widgets, filters, and GenAI-generated insights to help identify trends, understand root causes, and improve efficiency.

Widget Overview

Function	Description
Trending Topics Widget	The trending topics widget can be accessed from the CSM/FSM configurable workspace home page and provides an overview of current trends. You can access more detailed information by selecting **View dashboard** and navigate to the details page.
Data Scope	The widget displays topics that have at least one open case and a minimum of two total records.
Interactivity	When you select on a topic, the dashboard opens pre-filtered topic details for that specific topic.
Refresh button	Selecting the **Refresh** icon updates the data for the top 10 trends, ensuring you have the most current information at your fingertips.

In-depth View Page Structure

The in-depth view page is divided into two sections: **Data Visualizations** and **GenAI Insight Cards**.

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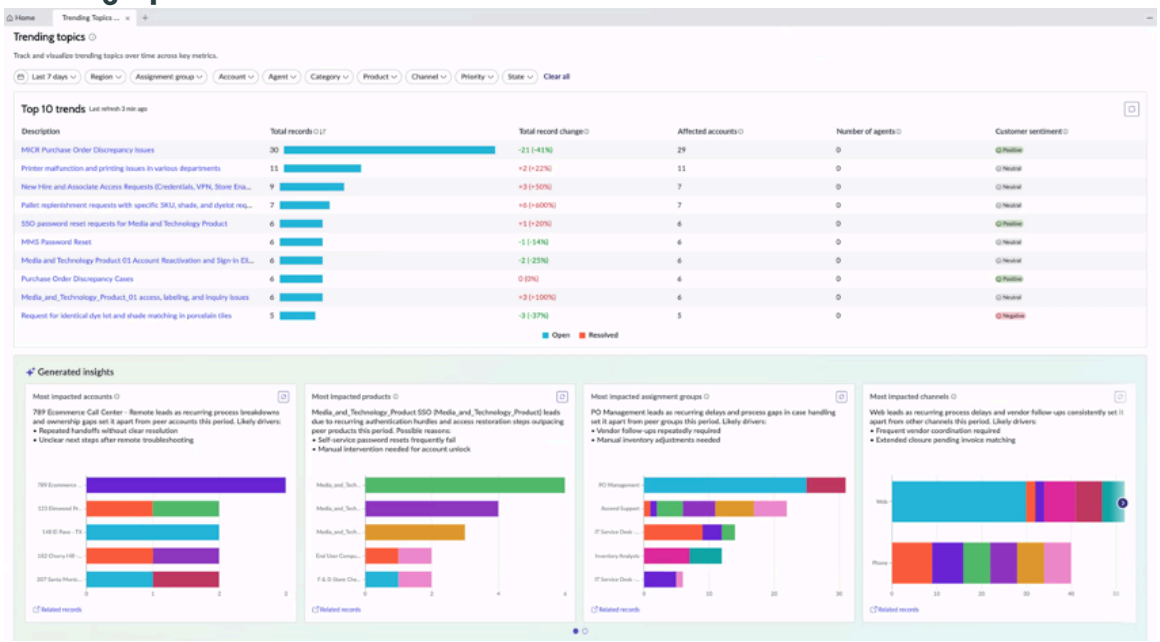
Trending topics dashboard



Data Visualizations – List View

Displays the top 10 trending topics with the following attributes:

- Topic description
- Total records
- Total record change
- Affected accounts
- Number of agents
- Customer sentiment

Filters include:

- Region, Assignment Group, Account, Agent, Category, Product, Channel, Priority, State
- Time period: Last 7 days, Last 6 months, Last 30 days, Last 3 months, Last 12 months, and Custom range

You can select a topic description link to further in-depth view into the trends over time based on the following filters:

- Region, Assignment Group, Account, Agent, Category, Product, Channel, Priority, State.
- Time period: Last 7 days, Last 6 months, Last 30 days, Last 3 months, Last 12 months, and Custom range

The dashboard provides several key features to analyze and understand record trends and case status.

Trend over time:

- Record Trend Chart: Visualize the total records on a specific date.
- Record Details Chart: Examine the case status of various cases on a particular date.

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Trend Breakdown: Trend analysis can be segmented by multiple categories, including, Region, Assignment Group Account Agent Category Product Channel Priority State.

Affected regions trend insights: For each region, you can view:

- Average trend score
- Record count by trend bucket

This breakdown provides a detailed understanding of trends across different dimensions and regions.

GenAI generated Insight Cards

Automatically generated insights give you information about general trends and include:

- **Most impacted accounts** - Accounts impacted by the highest volume of records among the top 10 trends. Top insight for the top account with the highest number of cases are displayed.
- **Most impacted products**- Products impacted by the highest volume of records among the top 10 trends. Top insight for the top product with the highest number of cases are displayed.
- **Most impacted assignment groups** - Assignment groups impacted by the highest volume of records among the top 10 trend. Top insight for the top assignment group with the highest number of cases are displayed.
- **Most impacted channels** - Channels impacted by the highest volume of records among the top 10 trends. Top insight for the top channel with the highest number of cases are displayed.

You can select **Related record** to open a new page with a list that shows the corresponding cases referenced in the graph and select the refresh icon to see the most recent update.

Related topics

Configure trending topics dashboard

Generate activity stream responses

Generate recommendations for work notes or comments in a case record using Now Assist and add them to enhance the quality of your interactions with the user.

Before you begin

These skills are inactive by default. Your administrator must enable the skills that you want to use.

Role required: sn_esm_agent

Procedure

1. Navigate to a case record in the CSM/FSM Configurable Workspace or Core UI where you want to generate work notes or comments using Now Assist.
2. Select **Compose**, then select **Compose Comments** or **Compose Work Notes** from the drop down in front line case page.
   If you haven't switched to the front line case page, you can also do the same actions in **Work notes** or **Comments** tabs.

   a. Select the Sparkle icon .

      The following four options appear:

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- **Acknowledge task**: Confirm receipt and understanding of the customer's request or issue.
- **Follow up**: Reconnect with the customer to check progress or ensure resolution.
- **Post response**: Provide a clear, timely reply to the customer's query or concern.
- **Summarize actions taken**: Create a summary of all steps taken to resolve the case.

Note:
The options display based on the configurations by your admin. Under work notes only 3 options are available – Post response, Summarize actions taken and Follow up.

b. Select one of the options based on the type of response you want Now Assist to generate. The response appears in the Now Assist Context Menu (NACM).

c. You can select the **Refine** menu and elaborate, shorten, or change the tone of the response.

3. Select **Insert**.

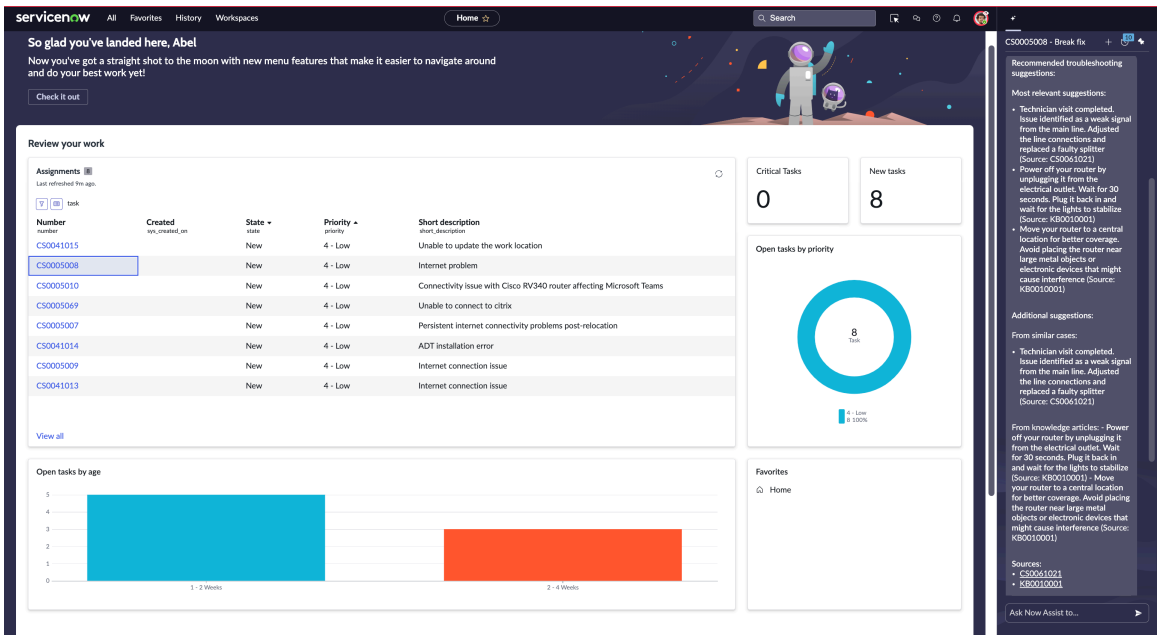
Related topics

Configure activity response generation

Using Troubleshooting steps identification AI agent

The Troubleshooting steps identification AI agent fetches the context from a case, identifies the missing context by comparing it with knowledge articles, similar cases, and standard operating documents, and then proposes additional troubleshooting steps.

Troubleshooting steps identification AI agent overview



This agent is typically used in standalone mode. Any agentic workflow that interacts with Customer Service Management (CSM) cases can use it.

This AI agent does the following actions:

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- Gathers the context from the case, including the attempted steps.
- Identifies the missing context by analyzing the similar cases, knowledge base articles, and Standard Operating Procedure (SOP) documents that are attached to knowledge base articles.
- Proposes additional troubleshooting steps.

Agentic workflows can access this AI agent in Core UI or CSM/FSM workspace.

Configure AI Search for the Troubleshooting steps identification AI agent

You must configure AI Search so that this AI agent can fetch similar cases and relevant knowledge articles For more information, see Configure AI Search to use with the Troubleshooting steps identification AI agent and Configure the Troubleshooting steps identification AI agent to use the Search retrieval tool.

Limitations

The document types supported for AI Search and document processing are:

- Microsoft Word (.docx)
- Plain Text (.txt)
- Portable Document Format (.pdf)

When fetching text from knowledge articles, this AI agent can fetch only the **article_body** field from the kb_knowledge table.

Related topics

AI Agent Studio

Find AI agents

Now Assist AI agents

Install Now Assist AI agents

Using agentic workflows in Now Assist for Customer Service Management (CSM)

The Customer Service Management (CSM) AI Agent Collection provides a set of prebuilt, fully configured AI agents and agentic workflows designed to address common Customer Service Management scenarios.

These model examples combine autonomous and supervised flows to perform multi-step actions using advanced reasoning, triggered by customer cases, conversations, or detected intents. Built on the ServiceNow AI Platform, the agents leverage capabilities such as Knowledge Graph, Flow Designer, scripting, Topics, Catalog Items, Retrieval-Augmented Generation (RAG), record operations, web search, and generative inputs. Powered by AI Agent Fabric and Workflow Data Fabric, the collection operates seamlessly across systems without dependency on data location, while Guardian enforces guardrails for security and compliance. By offering ready-to-use building blocks, it helps guide and automate complex processes, reduce agent friction, and free human agents to focus on higher-value work—ultimately accelerating resolution times and enhancing customer experience.

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Available agentic workflows for Customer Service Management agent collection

agentic workflow	Description	Available AI agents
Triage cases	Handles end-to-end case or case type validation, creation, verification, and escalation. It can also retrieve relevant context and details from the provided case or interaction to address customer inquiries directly and avoid unnecessary case creation.	• Triage cases WrapUp • Context validator • Informational queries • Case creation • Entity extraction • Document verification • Email response
Provide customer 360 insights	Provides agents with real-time, context aware responses to queries on customer data, case details, product information, catalog entries, and interaction history, using multi-turn Q&A to maintain conversational context and accuracy.	• Customer insight AI Agent • Case action AI Agent

Supported Large Language Models

Note:

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), 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®.

Security implementation considerations

Enable security implementation to execute AI agents and agentic workflows through Access Control Lists (ACLs) and user identities. For more information, see Implement access control in Now Assist AI agents

Considerations for running the autonomous 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.

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For information about Triage cases, see Customer Service Management AI agent collection triage cases agentic workflow.

Standalone AI agents

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 Management AI agent collection triage cases agentic workflow

Use CSM AI agents agentic workflow to process all routine cases coming in through email and other offline channels and increase agent productivity through faster resolution.

Triage cases overview

Using the Triage cases agentic workflow, handle end-to-end validation, creation, verification, and escalation of cases or case types. Get the correct information from the case or interaction to answer customer questions directly and reduce the number of cases that must be created.

Refer to the information provided here on agents, tools, and triggers that are related to the Triage cases agentic workflow in AI agents for Customer Service Management.

To modify the Triage cases agentic workflow duplicate it, and adjust the settings according to your requirements. You can activate the agentic workflow template by making triggers active and setting the display settings to include the Now Assist panel.

Important:
When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

Triage cases agentic workflow

Triage and provide faster resolution for all the routine cases coming in through email and other offline channels.

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage.**
2. Select **Triage cases**.

Access control lists (ACLs)

Access Control Lists (ACLs) are preconfigured to support the Triage use case, including AI agents and their associated flows and actions, such as the Document Verification Agent. By default, ACLs are configured for the sn_esm_agent role. Customers can modify these ACLs to align with their specific business requirements and security policies. For more information, .

When updating the agent role for the Triage Cases Agentic Workflow, it's important to also update the corresponding Access Control Lists (ACLs) to ensure proper permissions. To manually update ACLs for custom roles:

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1. Go to the **sys_security_acl** table.
2. Use filters to locate ACLs related to your use case, AI agent, and internal flows or actions.
3. Add your custom role to each relevant ACL record.

Triage cases AI agents

The following tables list the agents that are used in the Triage cases agentic workflow.

Important:
In the **Define availability** screen for the AI agent, make sure that the **Status** field is enabled to activate the AI agent.

AI agents and their roles in the Triage cases agentic workflow

AI agent	AI agent role
Triage cases WrapUp	Wrap up the case triage process using the Triage Cases Wrapup AI Agent. It synthesizes the execution details and posts the summary to the work notes of the source record to ensure traceability and closure.
Context validator	Validate the content of a record using the Context Validator AI Agent. It analyzes sentiment and identifies a list of intents from the input record. Invoke this agent whenever record content requires validation and intent classification.
Informational queries	Create a summary of all answers related to informational intent using the Informational Queries AI Agent. It retrieves a list of all intents, then processes each informational intent individually before generating the final summary. Invoke this agent whenever a consolidated response to informational queries is required.
Case creation	Automate and manage the end-to-end process of case creation using the Case creation AI agent. Invoke this agent whenever a case needs to be created.
Entity extraction	Extract entities from emails and documents using the Entity Extraction AI Agent. It matches the extracted entities against a predefined allowlist of fields to ensure relevance and accuracy. Invoke this agent whenever entity-level information needs to be identified and structured from unstructured content.
Document verification	Verify documents on a record using the Document Verification AI Agent to determine whether they match the required list for the case type. It identifies any missing documents or verification failures. Invoke this agent whenever document validation is needed.

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AI agents and their roles in the Triage cases agentic workflow (continued)

AI agent	AI agent role
Email response	Generate and send email responses using the Email Response AI Agent. It acts as a response assistant to draft, display, and deliver email replies. Invoke this agent whenever an automated email response is required.

Role masking

Required role: B2B agents (sn_customerservice_agent) and B2C agents (sn_customerservice.consumer_agent)

Important:
To access data in the agentic workflow, the admin role must include the specified roles under **Contains roles**.

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.

In the data access settings, you must also add the necessary roles to access the cases that need triaging. For example, you can add the csm role to the agentic workflow's list of approved roles so that it can access case records.

Triaging the case

In the triaging the case agentic workflow, perform the following steps:

1. In **Define key requirements** the workflow's purpose is clearly described and its steps with specific actions and criteria for each is outlined.
2. In the **Define security controls** screen, you can set the access at user and data level.

   a. **Define user access**: Specify which users can access and interact with the agentic workflow. Once you save your selections, the system automatically generates an Access Control List (ACL).

   b. **Define data access**: Choose the user identity under which the Provide customer 360 insights agentic workflow will run. This determines the roles and associated data access permissions.

      Note:
      Choose the user identity this agentic workflow should run as to determine the roles and the data access permissions derived from them. Remember, when agentic workflows can access data, they can also share that data with the human user who interacts with them. Agent level role mask are: B2B agents (sn_customerservice_agent) and B2C agents (sn_customerservice.consumer_agent).

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a. In **Add triggers** you can set up optional triggers to launch the agentic workflow automatically without a user request. Triggers can be based on conditions or schedules you define and initiate agentic AI experiences.

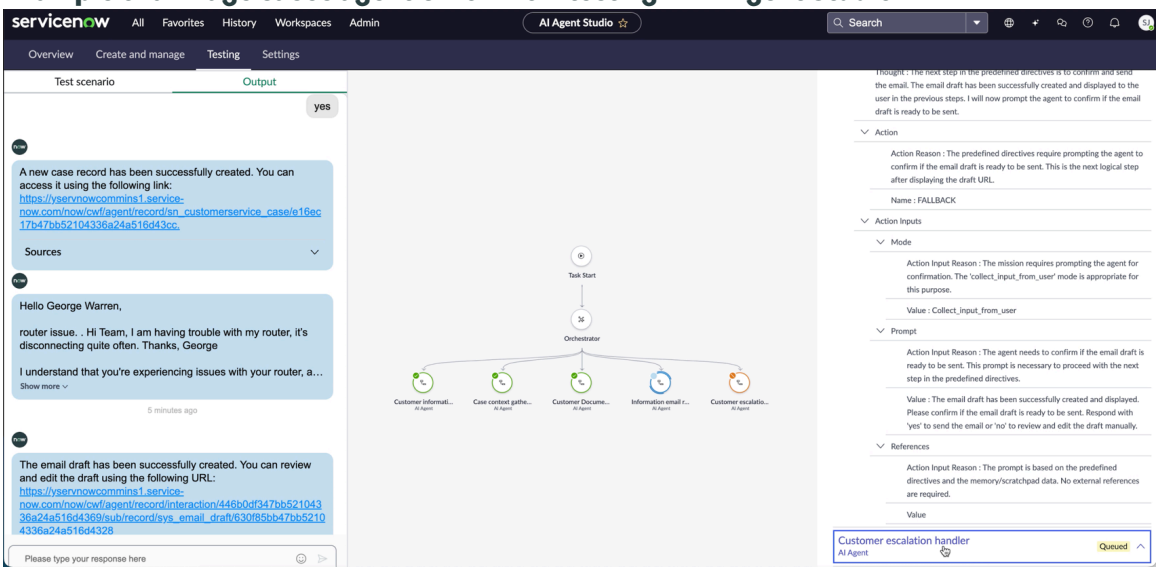
b. In **Select channels and status**, you can choose the channels where this agentic workflow will be available to engage with users who initiate interactions. Toggle the display for **Engage via the Now Assist panel** to see the agentic flow in Now Assist panel.

> **Note:**
> To turn off the agentic workflow, toggle off **Engage via the** *Now Assist* **panel**.

c. Select **Save and test**.

The agent executes the **testing** in AI Agent Studio for the agentic workflow.

Example of a Triage cases agentic workflow testing in AI Agent Studio



In the Now Assist panel, the agent receives a notification as soon as the interaction is generated, which enables them to follow the on-screen instructions and complete the task. For more information, see Request the generative AI capabilities in Customer Service Management by using the Now Assist panel.

Customer Service Management AI agent collection provide customer 360 insights

Provide Customer 360 insights agentic workflow is a GenAI-powered assistant that helps agents answer natural language questions about customers, cases, products, catalogs, and past interactions with a seamless multi-turn Q & A experience.

This workflow enables agents to retrieve case details, customer information, and perform actions such as case creation, modification, escalation, and closure using natural language queries. It supports real-time context-aware responses and respects role-based access controls.

Provide customer 360 insights agentic workflow overview

The Provide Customer 360 insights agentic workflow is a GenAI-powered assistant that helps agents to resolve cases more efficiently and effectively. By answering natural language questions about customers, cases, products, catalogs and past interactions, it provides contextual insights

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that enable agents to make informed decisions and solve issues faster. It provides a seamless, multi-turn Q&A experience, helping agents to:

- Ask follow-up questions and get context-aware responses in real time.
- Access critical customer details and history to make informed decisions.

This feature consolidates scattered user and case data, providing agents with timely, accurate insights to make informed decisions, reducing Mean Time To Resolve (MTTR) and helping to solve issues. If something isn't found, the GenAI responds clearly. For example, "I couldn't find any recent catalog interactions for this customer". If the question is outside its scope, it redirects.

Provide Customer 360 insights agentic workflow

Customer 360 insights agentic workflow is set up as a promoted asset in the Now Assist panel.

This workflow manages all case-related queries and actions, including retrieval of case details, history, timelines, assignments, status, customer information, sentiment analysis, related cases, knowledge articles, and case updates. It supports natural language requests for specific case numbers, aggregates comprehensive case and customer data, analyzes historical patterns and sentiment, and executes case management operations such as creation, modification, escalation, and closure.

Role masking

Required role: B2B agents (sn_customerservice_agent) and B2C agents (sn_customerservice.consumer_agent)

Important:
To access data in the agentic workflow, the admin role must include the specified roles under **Contains roles**.

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.

In the data access settings, you must also add the necessary roles to helps agents to resolve cases more efficiently and effectively. For example, you can add the csm role to the agentic workflow's list of approved roles so that it can access case records.

Setup Provide customer 360 insights Agentic Workflow

To configure the Provide customer 360 insights agentic workflow, perform the following steps:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Provide Customer 360 insights**.
3. In **Define key requirements** the workflow's purpose is clearly described and its steps with specific actions and criteria for each is outlined.
4. In **Define security controls** you can set the access at user and data level.

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a. **Define user access**: Specify which users can access and interact with the agentic workflow. Once you save your selections, the system automatically generates an Access Control List (ACL).

b. **Define data access**: Choose the user identity under which the Provide customer 360 insights agentic workflow will run. This determines the roles and associated data access permissions.

> **Note:**
> Choose the user identity this agentic workflow should run as to determine the roles and the data access permissions derived from them. Remember, when agentic workflows can access data, they can also share that data with the human user who interacts with them. Agent level role mask are: B2B agents (sn_customerservice_agent) and B2C agents (sn_customerservice.consumer_agent).

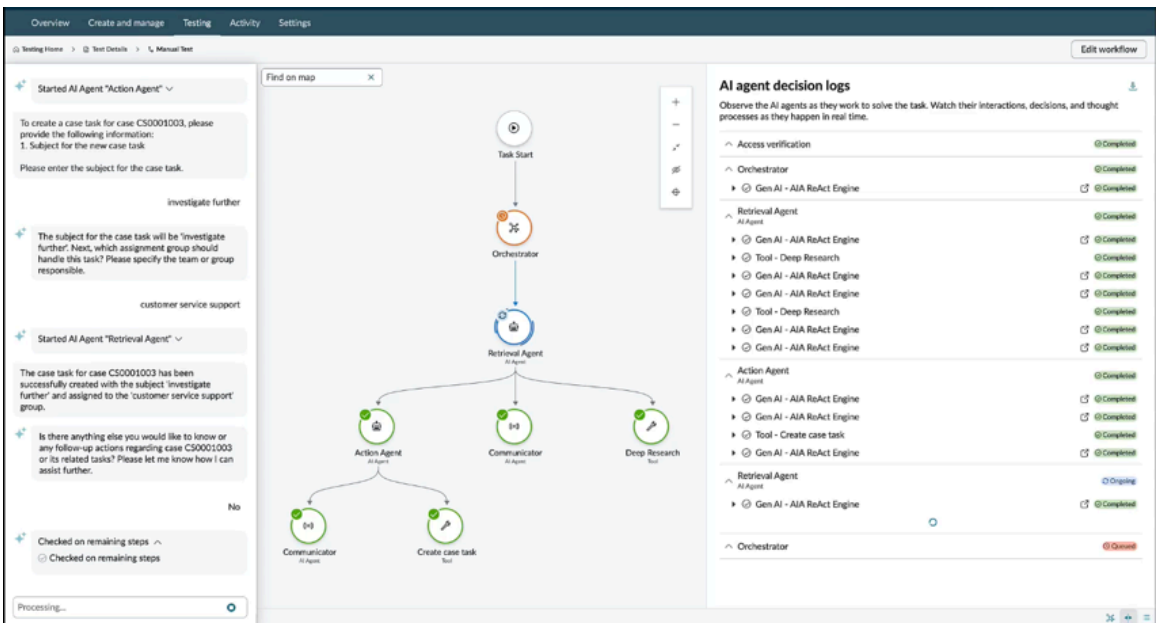
5. In **Add triggers** you can set up optional triggers to launch the agentic workflow automatically without a user request. Triggers can be based on conditions or schedules you define and initiate agentic AI experiences.
6. In **Select channels and status**, you can choose the channels where this agentic workflow will be available to engage with users who initiate interactions. Toggle the display for **Engage via the Now Assist panel** to see the agentic flow in the Now Assist panel.

> **Note:**
> To turn off the agentic workflow, toggle off **Engage via the *Now Assist* panel**.

7. Select **Save and test**.

The agent executes the **testing** in AI Agent Studio for the agentic workflow.

Example of Provide customer 360 insight agentic workflow testing in AI Agent Studio



In the Now Assist panel, the agent receives a notification as soon as the interaction is generated, which enables them to follow the on-screen instructions and complete the task. For more information, see Request the generative AI capabilities in Customer Service Management by using the Now Assist panel.

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Access Control lists (ACLs)

Access Control Lists (ACLs) are preconfigured to support the Provide customer 360 insights use case, including AI agents and their associated flows and actions, such as the Customer insights Agent. By default, ACLs are configured for the sn_esm_agent role. Customers can modify these ACLs to align with their specific business requirements and security policies. For more information, .

When updating the agent role for the Provide customer 360 insights Agentic Workflow, it is important to also update the corresponding Access Control Lists (ACLs) to ensure proper permissions. To manually update ACLs for custom roles:

1. Go to the **sys_security_acl** table.
2. Use filters to locate ACLs related to your use case, AI agent, and internal flows or actions.
3. Add your custom role to each relevant ACL record.

AI agents used in Provide customer 360 insights agentic workflow

The following tables list the agents that are used in the Provide customer 360 insights agentic workflow.

AI agents and their roles in the Provide customer 360 insights agentic workflow

AI agent	Actions
Case action AI Agent	Perform customer-related actions, including case operations such as creating case tasks and updating work notes.
Customer insight AI Agent	Answer questions related to the record by retrieving comprehensive information, including customer details (name, contact info, location, history, cases, orders) and case data (next steps, actions, assigned agent, notes, documents, tasks, resolutions), along with other relevant attributes.

Use Provide customer 360 insights Agentic Workflow

The Provide customer 360 insights agentic workflow in Now Assist for Customer Service Management (CSM) gives agents contextual, GenAI-driven insights about customers directly within a case. By selecting the Now Assist icon in a case record, agents can access the Now Assist panel that delivers real-time insights based on customer data.

Agents can ask natural language questions, such as "What products is this customer currently using?" The AI agent responds with accurate, contextually relevant answers and maintains conversational context across multiple questions.

Key features

Feature	Details
Contextual Insights	AI retrieves and summarizes information from multiple sources, including:

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Key features (continued)

Feature	Details
	• Case details (status, priority, age, assignees, notes). • Customer info (account details, recent activity). • Products and services they own. • Catalog items they interacted with. • Past interactions (calls, chats, emails). • Actions taken (resolution steps, escalations, KBs shared).
Handling	If data is unavailable or ambiguous, AI communicates clearly, for example, I couldn't find any recent catalog interactions for this customer. For out-of-scope questions GenAI declines and redirects.
Security	GenAI respects role-based access controls and does not surface restricted information.
Feedback Loop	Agents can give thumbs up or thumbs down or flag inaccurate responses for retraining.

Communities

With the ServiceNow® Communities application, connect, engage, and collaborate with your employees, customers, partners, and prospects. Your users get quick responses to their issues by posting questions, reviewing blogs or videos, and searching for previous discussions. It is an essential component of your self-service strategy along with Knowledge Base and Service Catalog.

Explore

- Communities roles
- Community content types
- Configure community forums
- Forum and user permissions management
- Community subscriptions
- Gamification
- Domain separation and Communities

Set up

- Activate Communities plugins
- Properties installed with Communities
- Community setup guide for admins

Administer

- Create a forum
- Create a forum user
- Create a forum permission
- Invite users to become members of a forum
- Configure the community profile
- Enable users to self-register to a community
- Enable knowledge harvesting

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(continued)

		• View the Communities performance dashboard • Make an announcement to community members • Moderate a community • Administer gamification

Use	Develop	Troubleshoot and get help
• Community homepage features for logged in users • Request membership to a forum • Search the community • Subscribe to content • Ask a question in the community • Post a blog in the community • Post a video in the community • Post a document in the community • Post a community event • Bookmark community content • Provide feedback on community content • Report inappropriate community content • Manage your community profile • Follow a community user • Harvest knowledge from a community • View a list of questions and create a case • Moderate gamification	• Developer training • Developer documentation	• Search the Known Error Portal for known error articles • Contact Customer Service and Support • Ask or answer questions in the ServiceNow Community.

Activate Communities plugins

Activate the Customer Communities plugin to use the Communities application.

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Before you begin
Role required: sn_communities.admin

About this task
Communities is available for customers who are:

- Licensed for the Customer Service Management application.
- Licensed for HR Service Delivery.

To activate Communities, activate the Customer Communities plugin (com.sn_customer_communities). This plugin is not active by default.

When you activate the Customer Communities plugin, the following plugins automatically activate:

- External User Registration plugin (com.sn_external_user_register)
- Communities plugin (com.sn_communities)
- Gamification plugin (com.snc.gamification)
- Subscriptions and Activity Feed Framework plugin (com.snc.activity_subscriptions)

To activate Communities demo data, activate the Communities Demo Data plugin (com.sn_communities_demo).

To activate the Communities dashboard, activate the Performance Analytics — Content Pack — Communities plugin (com.snc.pa.communities).

Procedure
1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.sn_communities.
3. Click **Install**.
4. Click **Activate** on the Activate Plugin pop-up window.

Properties installed with Communities

Community administrators can use properties to configure Communities behavior.

The following properties are available for further configuration. To list the properties, enter `sys_properties.list` in the filter navigator and search for the property to configure.

Note:
You can also view **Community Properties** and **Forum Properties** from the application navigator. These modules contain a list of the most frequently used properties that you can configure for your community.

Communities properties

Property	Description
sn_communities.adminNoReplyEmail	Email address for community-related notificatior • Type: string • Default value: communityadmin@servicenow.c
sn_communities.additional_search_sources	List of additional search sources to be included

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Communities properties (continued)

Property	Description
	• Type: string • Default value: "community-forums, community
sn_communities.scheduling.allow_authors	Allow or restrict authors to schedule the content • Type: boolean • Default value: Yes
sn_communities.attachments.max_allowed_size	Maximum file size of an attachment in the comm "sn_communities.attachments.max_file_size". • Type: string • Default value: 5 MB
sn_communities.attachments.document.max_allowed_size	Maximum file size of a community document. It v "sn_communities.attachments.document.max_s • Type: string • Default value: 25 MB
sn_communities.blog_count	Number of blogs that a user can post per day. • Type: integer • Default value: 20
sn_communities.content.meta_description	When generating SEO data for an entity, the nun to generate a portion of the SEO <description> t Typically, the SEO <description> tag for a Comm actual record in the following format: “<forum> - • Type: integer • Default value: 100
sn_communities.content.views.count.limit	Number of views for content pages that are allow sn_communities.content.views.time.limit. • Type: integer • Default value: 50
sn_communities.content.views.time.limit	Duration, in seconds, during which a specific nu sn_communities.content.views.count.limit param • Type: integer • Default value: 3600

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Communities properties (continued)

Property	Description
sn_communities.disable_terms_conditions_role	Comma-separated list of roles that bypass the te
sn_communities.edit_content_explicit_role	Comma-separated list of roles with permission t • Type: string • Default value: n_communities.community_mo
sn_communities.enable_session_cache	Enables or disables session caching. True: The permissions of any non-admin users c access to the various forums and community co community permissions do not take effect until t False: The permissions of any non-admin users • Type: boolean • Default value: false **Note:** Setting this system property to true increase
sn_communities.enable_topics	Enables or disables topics within a community. If the property is set to false and gamification is • Type: true|false • Default value: true
sn_communities.enable_user_mentions	Enables or disables the user-mentions functiona
sn_communities.glide.script.block.client.globals	Set the value to true to re-enable most of the ina • Type: boolean • Default value: false
sn_communities.implicit_access_mapping	Assign access implicitly to users based on the p • If a user is given forum_admin access, they ca • If a user is given forum moderation rights, they • Type: string • Default value: {"forum_admin": ["forum_read", "forum_write", ["forum_read", "forum_write", "forum_moderato
sn_communities.instance_base_url	Vanity URL for your instance to be used in email the URL to be different to the instance name.

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Communities properties (continued)

Property	Description
	• Type: string • Default value: none
sn_communities.is_content_write_allowed_for_guest_user	Determines whether Content_write access is all False: Content_write access is not given to a pul True: Content_write access is given to a public o • Type: boolean • Default value: false
sn_communities.knowledge_base_id	All questions created in Communities are entere • Type: string • Default value: a4c9fb2e6703220071b89a6617
sn_communities.logging.destination	Location of the log messages. • Type: string • Default value: db
sn_communities.log.verbosity	Code Search log verbosity for the community. Se • 0: Show information that may be useful while d warning, and error messages. • 1: Show progress messages as the Code Sear • 2: Show warning which indicates possible une • 3: Show only critical errors which may prevent • Type: choice list • Default value: 1
sn_communities.logging.verbosity	Category for writing log messages: Debug (0), In • Type: choice list • Default value: 1
sn_communities.max_topic_limit	Maximum number of topics that can be associat five. • Type: integer • Default value: 5
sn_communities.minimum_activity	Minimum number of activities required to make

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Communities properties (continued)

Property	Description
	• Type: integer • Default value: 5
sn_communities.portal_default_config	Community portal default configuration. Used in • Type: string • Default value: [{"uiPageMapping":[{"contentTy question-circle","internalName":"question","cor {"contentTypeId":"57f785863b2b220085f76b4 camera","internalName":"video","contentArticle {"contentTypeId":"cc3fcaa0dbd26600b1f6f78 left","internalName":"blog","contentArticle":"a"," {"contentTypeId":"0764c981dbde6600b1f6f78 {"contentTypeId":"8f0a215c6707220071b89a6 circle","internalName":"answer","contentArticle {"contentTypeId":"3f86a8db971232007a97a23 text","internalName":"document","contentArticl {"contentTypeId":"4c3a995ac302320012e45c calendar","internalName":"event","contentArtic
sn_communities.public_forum_user	*sys_id* of the public forum user. Used to calcul • Type: string • Default value: 88ef2155931322005b963511e5
sn_communities.registered_forum_user	*sys_id* of the registered forum user. This value • Type: string • Default value: 5dce996993232200dd773511e
sn_communities.video_count	Number of videos a user can post per day. • Type: integer • Default value: 20
sn_communities.default_permission_for_forum_memberships	Sets the default permission for forum membersh • Type: string • Default value: ff73ee9893223200a8223511e5
sn_communities.forumListBatchSize	Default number of forums to show on the topics • Type: integer • Default value: 12
sn_communities.topicListBatchSize	Default number of topics to show on the topics li

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Communities properties (continued)

Property	Description
	• Type: integer • Default value: 12
sn_communities.disableForumInvitesForExternalEmails	Determines if forum invites from the forum page **Note:** Do not change this value manually because • Type: boolean • Default value: true
sn_communities.attachments.document.max_size	Maximum attachment file size in MB. (1 MB = 102 • string • Default value: 5
sn_communities.attachments.file_extensions	Supported file extensions for community attachr • Type: string • Default value: PPT,PPTX,XLS,XLSX,DOC,DOCX
sn_communities.attachments.max_attachment_count	Maximum number of attachments that can be at • Type: string • Default value: 3
sn_communities.attachments.max_file_size	Maximum attachment file size in MB. The maxim • Type: string • Default value: 2
sn_communities.attachments.max_invalid_attempts	Maximum number of invalid attempts a user can • Type: string • Default value: 3
sn_communities.attachments.max_total_size	Maximum total size (in GB) of attachments. (1 GB • Type: string • Default value: 500
sn_communities.attachments.total_size	Total size (in KB) of attachments in the communi • Type: string • Default value: 3680.04

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Communities properties (continued)

Property	Description
sn_communities.attachments.user.day_limit	Maximum number of attachments that can be at • Type: string • Default value: 20
sn_communities.days_to_keep_search_logs	Sets the number of days to keep the search log • Type: integer • Default value: 180
sn_communities.minimum_characters_to_search	Number of characters before a search engine st • Type: integer • Default value: 3
sn_communities.search.blog.enable_acl	Sets how permissions are evaluated for blog typ True: Permission is evaluated for that specific co False: Permission is evaluated at the forum and • Type: boolean • Default value: false
sn_communities.search.discussion.enable_acl	Sets how permissions are evaluated for questio True: Permission is evaluated for that specific co False: Permission is evaluated at forum and con • Type: boolean • Default value: false
sn_communities.search.document.enable_acl	Sets how permissions are evaluated for docume True: Permission is evaluated for that specific co False: Permission is evaluated at the forum and • Type: boolean • Default value: false
sn_communities.search.event.enable_acl	Sets how permissions are evaluated for event ty True: Permission is evaluated for that specific co False: Permission is evaluated at the forum and

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Communities properties (continued)

Property	Description
	• Type: boolean • Default value: false
sn_communities.search.video.enable_acl	Sets how permissions are evaluated for video ty True: Permission is evaluated for that specific co False: Permission is evaluated at the forum and • Type: boolean • Default value: false
sn_communities.user.document_count	Number of documents a user can post per day. • Type: integer • Default value: 20
sn_communities.video_count	Number of videos a user can post per day. • Type: integer • Default value: 20
sn_communities.view_log_sources	JSON string that provides a mapping of view log Log [sn_communities_view_log] table. • Type: string • Default value: {"searchResult": "search_result", "contentFeed
sn_communities.knowledge.enable_harvesting	Enables knowledge harvesting from communitie • Type: string • Default value: true

Activity Subscription properties

Property	Description
com.snc.actsub.activities.api.fetch.limit	Number of activities in the activity feed. • Type: integer • Default value: 10
com.snc.actsub.activity.rate.count.limit	Number of activities that can be created within a certain time frame.

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Activity Subscription properties (continued)

Property	Description
	• Type: integer • Default value: 100
com.snc.actsub.activity.rate.time.limit	Duration, in seconds, during which activities can be created. Activities are no longer created after the limit. • Type: integer • Default value: 3600
com.snc.actsub.activity.stream.user.limit	Enter the limit on number of activities stored for a user in the activity feed. The oldest activities are deleted when the limit is reached. • Type: integer • Default value: 2000
com.snc.actsub.core.disable_plugin	Enable (true) or disable (false) the plugin functionality. • Type: boolean • Default value: false
com.snc.actsub.activity.stream.inactive.disabled	Enable pull model for activity feed so that the activity fanouts are disabled and not pushed to the inactive user streams. • Type: boolean • Default value: false **Note:** When disabled, run the Manage Activity fanouts scheduled job for the changes to take immediate effect.
com.snc.actsub.activity.stream.inactive.duration	The duration after which fanouts will be disabled for inactive user streams. • Type: integer • Default value: 30
com.snc.actsub.activity.stream.inactive.streams	Enter comma separated stream names which can be considered inactive when not accessed for a certain duration.

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Activity Subscription properties (continued)

Property	Description
	• Type: string • Default value: default
com.snc.actsub.activity.enable_fanout_config	Enable the property to trigger **Activity Fanouts** based on the configuration at **Activity Type**. Confirm if they are properly configured and then enable the flag. • Type: boolean • Default value: false **Note:** For zboot, this property is enabled by default. You must create this property for upgrade scenarios.

External User Registration properties

Property	Description
sn_ext_usr_reg.allowed_email_domains	Comma-separated list of email domains that can be used to register. By default, the value is empty, indicating that all email domains are allowed. • Type: string • Default value: none
sn_ext_usr_reg.captchaEnabled	Enables Google re-CAPTCHA on the self-registration page. • Type: boolean • Default value: true
sn_ext_usr_reg.eur_user_role	Adds a role when a sys_user record is created through self-registration. • Type: string • Default value: sn_communities.community_user
sn_ext_usr_reg.Reg_link_expiration_days	Number of days that the registration link remains active. Links which are older than the specified number of days are deactivated and cannot be used for completing the registration process.

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External User Registration properties (continued)

Property	Description
	• Type: integer • Default value: 3
sn_ext_usr_reg.request_count	Maximum number of times a registration link can be requested. • Type: integer • Default value: 3
sn_ext_usr_reg.Temp_user_record_purge_days	Number of days that a registration record is maintained in the User Registration Request [user_registration_request] table. Records older than the specified number of days are deleted. • Type: integer • Default value: 30

Gamification properties

Property	Description
sn_communities.enable_gamification	Enables or disables the gamification feature for the community and controls the appearance of gamification-related widgets on the Community portal. When set to false, no gamification components are displayed. User point totals and badge assignments are not affected. • Type: boolean • Default value: true
sn_communities.content.show_gamification_level	Controls the gamification level that is displayed next to the Community user's name on the Content pages. • Type: choice list • Choices:

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Gamification properties (continued)

Property	Description
	○ **none**: Do not display the user's level ○ **sn_gamification_modules**: Show the user's level in the Community ○ **sn_communities_forum**: Show the user's level for the forum to which the content belongs • Default value: sn_gamification_modules
sn_gamification.days_to_keep_activity_records	Number of days to keep the gamification activity records in the database. Records created or updated prior to the specified number of days are purged. • Type: integer • Default value: 180
sn_gamification.enable_debug_logs	Enables the debug logs for the gamification feature. • Type: boolean • Default value: false
sn_gamification.levels_limit	Maximum number of levels that can be defined for the gamification feature. • Type: integer • Default value: 10

Questions to case properties

Property	Description
sn.communities.enable_csm_case_creation_from_question	This property provides access to the “Create Case” option on the Community Question widget and the “Question to Case” option on the Community header list menu. • Type: true | false • Default value: true

Social Q&A properties

sn_kb_social_qa.max_answers_per_user_daily	Enter the maximum number of times a user can post answers to the Social Q&A questions per day.

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Social Q&A properties (continued)

	• Type: Integer • Default value: 500 • Location: System Properties
Maximum number of Social Q&A comments that can be posted per user per day. sn_kb_social_qa.max_comments_per_user_daily	Enter the maximum number of times a user can post comments to the Social Q&A questions or answers per day. • Type: Integer • Default value: 500 • Location: System Properties
Maximum number of Social Q&A questions that can be posted per user per day. sn_kb_social_qa.max_questions_per_user_daily	Enter the maximum number of times a user can post Social Q&A questions per day. • Type: Integer • Default value: 500 • Location: System Properties

Communities roles

Ensure that users can perform all necessary actions by assigning roles.

Roles

Role	Description	Access via
Community administrator [sn_communities.admin]	Administer and manage all sections in the community.	Platform UI
Community moderator [sn_communities.community_moderator]	Moderate content associated with the community.	Platform UI
Forum administrator [sn_communities.forum_admin]	Administer and manage forum permissions content types, and topics associated to the forum.	Platform UI
Forum moderator [sn_communities.forum_moderator]	Moderate content within specified forums.	Platform UI
Moderation administrator [sn_communities.moderation_admin]	Administer moderation settings and moderate content associated forums.	Platform UI
Gamification administrator	Administer gamification settings and configure	Platform UI

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Roles (continued)

Role	Description	Access via
[sn_gamification.admin]	gamification rules. Contains the sn_gamification.moderator role.	
Gamification moderator [sn_gamification.moderator]	Review and edit the gamification points earned by community users.	Platform UI
Community user [sn_communities.community_user]	Any user who has signed up and accepted the community Terms & Conditions. Their access to forums depends on the permissions set up for each specific forum.	Communities Portal
Knowledge harvester [sn_communities.knowledge_harvester]	A community user who can harvest knowledge articles from a community. Community administrators, and community moderators inherit this role by default. The knowledge harvester role must be granted to other users.	Communities Portal
Proxy case creator [sn_customerservice.proxy_case_creator]	A community user who can create a customer service case from a community discussion.	Communities Portal

Community setup guide for admins

Define your requirements with community and forum stakeholders and set up your forums for community users to start creating content.

Requirements

The roles required to define requirements and set up forums include sn_communities.admin or sn_communities.forum_admin.

Before you begin

Meet with the stakeholders

Stakeholder and responsibility

Stakeholder	Responsibilities
Forum administrators	Define and oversee the forum processes for day-to-day operations related to topic creation, user management, and moderation.
Community administrators	Configure advanced settings for Communities features.

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Stakeholder and responsibility (continued)

Stakeholder	Responsibilities
Community users	Contribute content in the form of questions, answers, blogs, and comments.

With stakeholders, determine your community requirements

- Who are the consumers of the community content?
- Which content types can users contribute?
- Who can contribute content and who should have read-only access?
- What should the names of the initial forums be?
- Within these forums, what should the names of the initial topics be?
- Which keywords should be banned?
- How should the system moderate content and users?
- What should the default notifications that users receive for various community activities be?

What to do

Use the following steps as guidance to setting up your community.

1. **Create a forum user**: Create a forum user to use to define memberships to a forum.
2. **Create a permission**: Create a permission to use to define a user's access to a forum and its content types.
3. **Add access and content types to your permission**: Add access types to a permission to determine the access that users have to certain forums and content.
4. **Create a forum**: Create a forum to provide a place for users to share content and configure the forum to allow registered users to request access to join.
5. **Configure content types for a forum**: Configure content types for a forum to define which types of content to use in a particular forum.
6. **Create a forum permission**: Create a forum permission by adding a forum user and a permission to a forum.

If required, perform the following actions:

Invite users to join the forum

Invite users to become members of a forum to encourage greater community involvement.

Create permission exceptions

Create a permission exception for users who require specific permissions for a forum.

Copy permissions

- Copy permissions from a forum to copy all permissions and content types from one forum to another.
- Copy permissions from a parent forum.

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Debug user permissions

Debug user permissions to investigate and diagnose problems with user access to forums.

Next steps

Create a topic for users to create and share content.

Add a topic to a forum so that users can associate content to that topic.

Moderate a community to set up how the system moderates content and users.

Using guided setup to implement Communities

Communities guided setup provides a sequence of tasks that help you configure Communities on your ServiceNow instance. To open Communities guided setup, navigate to **Community** > **Administration** > **Guided Setup**.

For more information about using the guided setup interface, see Using guided setup.

Domain separation and Communities

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

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see Application support for domain separation.

Related topics

Domain separation for service providers

Quick start tests for Communities

Validate that Communities still work after you make any configuration change, such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Communities quick start tests require activating the Customer Communities plugin (com.sn_customer_communities) and the Communities Demo Data plugin (com.sn_communities_demo).

Communities: Community test suite

Test	Description	Release version
Post question and validate feed	Verify that a question is posted in the community and validate whether it appears in the content feed.	Madrid
Post video	Verify that a video is posted in the community.	Madrid

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Communities: Community test suite (continued)

Test	Description	Release version
Forum membership approval	Verify that a membership request to a forum is approved.	Madrid
Forum membership reject	Verify that a membership request to a forum is rejected.	Madrid
Approve a moderation task	Verify that a moderation task is approved.	Madrid
Reject a moderation task	Verify that a moderation task is rejected.	Madrid
Topic subscription and activity feed validation	Verify that a topic is subscribed to and the topic activities appear in the activity feed.	New York
Approve content approval workflow task on question	Verify the content approval workflow of a question.	New York
Question auto-subscription and activity feed validation	Verify that the author is automatically subscribed to the question and the question activities appear in the activity feed.	New York
Follow a user	Verify that a community user is able to follow another community user.	New York
Reject content approval workflow task on question	Verify the content approval workflow of a question when content is rejected.	New York
Gamification on video posting	Verify the gamification points gained when posting a video.	New York
Forum subscription and activity feed validation	Verify that a forum is subscribed to and the forum activities appear in the activity feed.	New York
Question subscription and activity feed validation	Verify that a question is subscribed to and the question activities appear in the activity feed.	New York
Post a video with 'Disable comment' option	Verify a video is posted with *`Disable comments`* option as selected.	Orlando
Pin a video as Featured	Verify that a video is marked as featured by community administrator in the forum and community home page.	Orlando

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Related topics

Quick start tests

Configure a community

You can configure various aspects of Communities based on the specific requirements of your organization.

Before you begin

Role required: sn_communities.admin or sn_communities.forum_admin

About this task

Access the Community menus and use the modules to configure your community.

Procedure

1. Navigate to **Community** and choose the menu and module you require.
2. Configure one or more of the following aspects for your community.

Community content types

There are seven supported content types: Answer, Blog, Comment, Document, Event, Question, and Video.

Community administrators and forum administrators can configure content types at the community and forum levels.

User access to content is based on the permissions that users have. Community users can add content to the different content types and provide feedback on the content.

Content types

Content type	Description
Question	Post a question about an issue or a challenge and get answers from other users. You can submit your question on the Community homepage and choose a forum or a topic to post it in. A question can be tagged to more than one topic.
Answer	Reply to a user question or another answer with a possible solution or statement.
Blog	Post a blog on a topic of interest to share with other users. You can include images and videos.
Comment	Enter a comment to express an opinion or to react to a video or a blog.
Video	Upload a video on a topic of interest for other users. Videos appear as web URLs that link to the most popular video sites. Communities supports playback from: • YouTube – youtube.com • Vimeo – vimeo.com

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Content types (continued)

Content type	Description
	• DailyMotion – dailymotion.com • Facebook – facebook.com **Note:** Videos can be included in other types of content, including questions, answers, blogs, and comments.
Document	Post a document to share with other community members. You can post your document from within a forum, choose a topic to post it in, and tag it to more than one topic.
Event	Create an event that other community users can register for and attend.

Configure community content types

Configure content types, such as videos and blogs, for the community.

Before you begin

Role required: sn_communities.admin

About this task

You can configure content types at both the community and forum level. At the community level, content types are active by default. Based on your requirements, you can deactivate content types.

Procedure

1. To configure content types at the community level, navigate to **Community** > **Administration** > **Content Types**.
2. Click a content type.
3. To deactivate a content type, clear the Active check box.
4. Click **Update**.
   The content type is no longer visible to the community.
5. To configure content types at the forum level, navigate to **Community** > **Administration** > **Forums**.
6. Click a forum.
7. Click the **Content Types** related list.
8. In the Active column, double-click a row.
9. To activate a content type, select **True**.
10. To deactivate a content type, select **False**.

Configure blog publish schedule

Configure the publishing interval to ensure blogs are published closer to the scheduled time.

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Before you begin
Role required: sn_communities.admin

About this task
The default interval for publishing blogs is 30 minutes. You can configure a shorter time so that the blog is published approximately around the scheduled time.

Procedure
1. Navigate to **All** > **System definition** > **Scheduled Jobs**.
2. Search and select `Publish scheduled content` in the name column.
3. Set the required time in the **Repeat interval** field.
   Keep the time short (for example, 5 minutes) to reduce the delay in publishing blogs from the scheduled time.
4. Click **Update**.

Community feedback types

There are two supported feedback types: Upvote and Helpful.

Community users can provide feedback on the content they have access to in the community.

Feedback types

Feedback type	Description
Helpful	Helpful feedback is associated to the following content types when a community users marks content as helpful: Blog, Video, Documents, Answer, Comment.
Upvote	Upvote feedback is associated to the Question content type when a community user marks a question as helpful.

Community access types

Access types are used to control access to a forum or a content type.

You can define the access types for a forum and a content type in a permission. There are four access types available by default.

Access types

Access type	Description
Forum Admin	Applies to forums.
Forum Moderator	Applies to forums.
Content Read	Applies to all content types.
Content Write	Applies to all content types. Content Read access is automatically included in Content Write.

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Note:
It is not recommended that you create your own access types. Advanced knowledge of Communities architecture and scripting code to support and interpret the new access type is required.

Contact Customer Service and Support for further information.

To see all available access types, navigate to **Community** > **Administration** > **Access Types**.

Configure video sources for a community

Configure additional sources that can be used for uploading a video to the community.

Before you begin

Role required: sn_communities.admin

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Video Configuration**.
2. Click **New**.
3. On the form, fill in the fields.

Video Configurations form

Field	Description
Host	A video source website, for example, youtube.com.
Domain	The domain is set to **global** by default.
Application	The application for the video source. It is recommended that you enter `Community`.
Widget	A widget to render the videos from the source. Enter `Communities render video`.

4. Click **Submit**.

Configure community forums

A forum is a place for users to share content, exchange notes, ask and answer questions, and so on. Before community users can contribute content, configure a forum with content types and permissions, and create and add topics to one or more forums.

Before you begin

Role required: sn_communities.admin or sn_communities.forum

_admin

About this task

A forum is the container for user-created content. A forum must be configured with content types and permissions before becoming available for users to contribute content. Forums can be organized hierarchically using the **Parent** field. Once forums are set up, they are visible on the Community homepage based on user permissions.

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A topic is an area of interest that users can discuss. Topics are visible from the Community homepage and also appear within forums. They can be organized hierarchically using the **Parent** field.

- The community admin creates topics and can associate a topic with one or many forums.
- Forum admins can associate topics with their own forums.
- If a user has access to a particular forum, they also have access to all its topics.

Procedure

Configure one or more of the following for community forums and topics.

Create a forum

Create a forum to provide a place for users to share content. You can configure forums for membership that registered community users request access to join. You can also configure forums to convert unstructured conversations to structured knowledge articles.

Before you begin

Role required: sn_communities.admin

About this task

A forum can be configured in the following ways.

Options included in the forum configuration

Public	Visible to all users, including non-logged in users. All users have **content_read** access to questions and answers in public forums. Configure public forms by adding a forum user of the type public.
Private	Visible only to users who have been assigned the required permissions in the forum. Configure private forums by adding a forum user of the type custom and adding specific users or user groups to that forum user.
Membership	The forum title is visible to registered community users. Community users must request membership to get full access to the content in the forum. Configure membership forums by selecting the **Enable Membership for this Forum** check box.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. In the Forums list, click **New**.
3. Fill in the fields on the form as appropriate.

Forum form

Field	Description
Name	Name of the forum.
Description	A short description that defines the forum.
Image	An image that provides a visual reference to describe the forum.

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Field	Description
Order	The order that forums are displayed in. By default, the display is alphabetical. Enter a numerical value to set the order that forums are displayed in. You can combine both options.
Parent	The parent forum, if required. This lists the forum as a sub forum of the parent forum.
Enable Membership for this Forum	Check box to make the forum membership only, and enable registered forum users to request to join the forum. If you select this check box, the forum title is visible to all registered community users. Community users must request access to join the forum to see the content. **Note:** The **Approval Workflow for Membership** field appears when you select this check box.
Approval Workflow for Membership	The workflow for approving new members of a forum.
Knowledge Base used for harvesting	The knowledge base used for harvesting community discussions to knowledge articles.

4. To allow registered forum users to view and request to join a forum, select the **Enable Membership for this Forum** check box and complete the following steps.

   a. Right-click the form header and click **Save**.
   Two default permissions are added to the forum in the **Forum Permissions** related list.
   - **Default Permission for Memberships**: Read and write access to questions and answers for users who are forum members.
   - **Forum Visible**: Read access to the name and description of the forum for registered users. To access content, users must request forum membership.

   b. If required, you can add a new forum permission and set it as the default using the sn_communities.default_permission_for_forum_memberships property.

   Example
   If you want public users to view content in the forum to attract them to become members, create a forum permission as follows:
   - **Forum User**: **Public**.
   - **Permission**: **Question & Answer Read**.

   c. In the **Approval Workflow for Membership** field, perform one of the following options.

Option	Description
Leave the Approval Workflow for Member ship field blank.	Membership requests to the forum are auto matically approved.
Select the preconfigured approval work flow Forum Membership Approval.	A task is created and sent to the community or forum administrator for approval.

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Option	Description
Select a workflow that you have created.	A task is created and sent to the users de fined in your workflow for approval.

5. Click **Update**.

Related topics

Add a topic to a forum

Configure community content types

Create a forum permission

Configure content types for a forum

Define which types of content to use in a particular forum and associate a workflow so that content is reviewed before becoming visible to other community users.

Before you begin
Role required: sn_communities.forum_admin

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click a forum.
3. In the **Content Types** related list, click **New**.
4. In the Content Types list, select a **Content Type**.
5. Select an **Approval Workflow**.
   You can select the **Community - Content Approval** workflow or a workflow that you have created.
6. Click **Submit**.

Result
The selected content type is added to the **Content Types** related list in the forum. The following secondary content types are automatically added when creating a primary content type.

Content types included in a forum

Primary content type	Secondary content type
Question	Answer
Blog, Document, Event, Video	Comment

Invite users to become members of a forum

Invite users to become members of a particular forum to encourage greater community involvement.

Before you begin
Role required: sn_communities.admin or sn_communities.forum_admin

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Procedure

1. Navigate to **All** > **Community** > **Forums**.
2. Choose a forum from the list that has been configured for membership.
3. Select the **Invite Users to Join this Forum** related link.
4. Complete the following steps to invite internal and external users.

   a. If the users to send the email invitation to are internal, click **Edit Users**.

   b. If external user registration is enabled, the **Enter email address** field is shown.

      Enter the email addresses of the external users to send the email invitation to.

   You can enter both internal and external users to your email invitation.
5. Enter **Comments** to personalize the text in the email invitation.
6. Click **Submit**.
   An email is generated and sent to the users in the list. The approval workflow set in the forum determines the approval of membership from an email invitation. You can view all email invitations in the forum on the **Forum Email Invites** related list.

Approve forum memberships

Manage forum membership approvals when registered community users request membership to a forum.

Before you begin
Role required: sn_communities.admin or sn_communities.forum_admin

About this task
There are two ways of approving forum memberships.

Procedure

1. Perform one of the following actions.
   - Navigate to **Community** > **Forums**.

     a. Choose a forum from the list that has been configured for membership.

     b. Click the **Membership Approvals** related list.
   - Navigate to **Self-Service** > **My Approvals.**
2. Accept or reject the membership requests.
   Only one approval is required for each task.
   Once the task has been approved or rejected, an email notification is sent to the user.

Create a topic

Create a topic for users to create and share content.

Before you begin
Role required: sn_communities.admin

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Topics**.
2. Click **New**.

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3. On the form, fill in the fields.

Topic form

Field	Description
Name	Name of the topic.
Description	A short description to define what the topic is.
Parent	The parent topic, if required. If you enter a parent topic, the topic is listed as a subtopic of the parent topic.
Image	An image that provides a visual reference that describes the topic.
Knowledge category used for harvesting	The knowledge category used to categorize community discussions harvested to knowledge articles.

4. Click **Submit**.
   The topic is created and added to the list of topics.

What to do next
Add a topic to a forum.

Add a topic to a forum

Add a topic to a forum so that users can associate content to that topic.

Before you begin
Role required: sn_communities.forum_admin

About this task
A topic can belong to more than one forum.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. In the list, click the forum name.
3. Click the **Forum Topics** related list.
4. Click **New**.
5. From the **Topic** list, select a topic.
6. Click **Submit**.
   The selected topic is added to the Forum Topics list in the forum. The topic is available to users in this forum.

Disable topics in a community

Disable the topics feature so that no topic information is visible in your community.

Before you begin
Role required: sn_communities.admin

About this task
The administrator can change the *sn_communities.enable_topics* property so that all topic information is hidden in the community. The data is not deleted.

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Procedure

1. Enter `sys_properties.list` in the filter navigator and search for the *`sn_communities.enable_topics`* property.
2. In the **Value** field, enter `false`.
3. Click **Update**.
   - No topic information is displayed in the **Activity Feed** or **Notifications and Subscriptions**.
   - No topic information is displayed on the **Forums** or **Topics** landing pages.
   - No topic information is displayed on Gamification pages and widgets.
   - Topic fields do not appear when creating, editing, or viewing content.
   - Topics do not appear in the search results page.

Create a sub forum

Create a sub forum and map it to a parent forum to establish a forum hierarchy.

Before you begin
Role required: sn_communities.forum_admin

About this task
There are two ways of creating a sub forum in Communities.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forums**.
   - On the Forums list page, click **New**.
   - Locate the forum to create a sub forum in, click its name, and then click the **Sub Forums** related list.
2. Fill in the fields on the form as appropriate.

Forum form

Field	Description
Name	Name of the sub forum.
Description	A short description that defines the sub forum.
Image	An image that provides a visual reference to describe the sub forum.
Order	The order that sub forums are displayed in. By default, the display is alphabetical. Enter a numerical value to set the order that forums are displayed in. You can combine both options.
Parent	The parent forum. This lists the forum as a sub forum of the parent forum.
Enable Membership for this Forum	Check box to make the forum membership only, and enable registered forum users to request to join the forum. If you select this check box, the forum title is visible to all registered community users. Community users must request access to join the forum to see the content. **Note:** The **Approval Workflow for Membership** field appears when you select this check box.

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Field	Description
Approval Workflow for Membership	The workflow for approving new members of a forum.
Knowledge Base used for harvesting	The knowledge base used for harvesting community discussions to knowledge articles.

Result
The forum hierarchy of forums and sub forums is displayed on the community home page, forum landing page, when creating questions, blogs, or events, and in the search filters.

Move forum content

Move community content posts from one forum to another.

Before you begin
Role required: sn_communities.admin, sn_communities.community_moderator, sn_communities.forum_admin, sn_communities.forum_moderator

About this task
Access to content is based on permissions to a specific forum. If content is moved, the author of the content and other community users might lose access to it, depending on their forum permissions.

Note:
Draft content cannot be moved. If the content type is not supported in the new forum, it cannot be moved.

Procedure

1. Navigate to the community homepage.
2. Click the content you want to move.
3. Click **...** and **Edit**.
4. Select the forum you want to move the content to.
5. Click **Save**.
   An email notification is sent to the author of the content, subscribers to the content, and subscribers to the forum.

Forum and user permissions management

Community and forum administrators can give users and groups of users different levels of access to forums and forum content.

Note:
By default, community content is not publicly accessible. A community administrator must enable public access by configuring the appropriate permissions.

There are three components that make up the security settings for forums: forum users, permissions, and forums.

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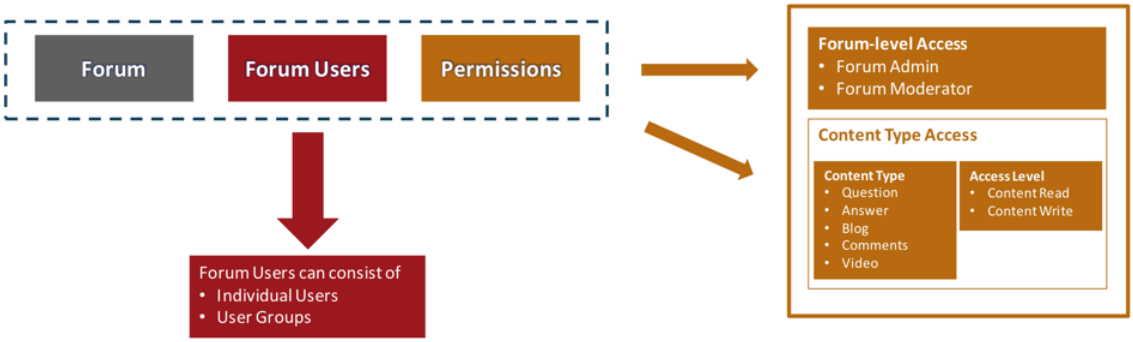

Forum users

A forum user is a logical group of users, user groups, or both. This group is used to define memberships to a forum.

Permissions

A permission is a combination of:

- access types for a forum
- access types for a given content type

Forums

A forum is the container for user-created content. A forum must be configured with content types and permissions before becoming available for users to contribute content.

You can create your own permission or use one of the default permissions that the Communities application delivers.

Default permissions

Permission	Description
Blog Read	Read access to blogs.
Blog Read and Comment Write	Read access to blogs and write access to comments.
Blog Write	Write access to blogs.
Blog Write and Comment Write	Write access to blogs and comments.
Default Permission for Memberships	Default permissions for forums that are marked as **Enable Membership for this Forum**.
Default permissions for public user	Public access to forums.
Default permissions for registered user	Permissions for registered and logged in users.
Document Read and Comment Write	Read access to documents and write access to comments.
Document Write and Comment Write	Write access to documents and comments.
Event Read and Comment Write	Read access to events and write access to comments.

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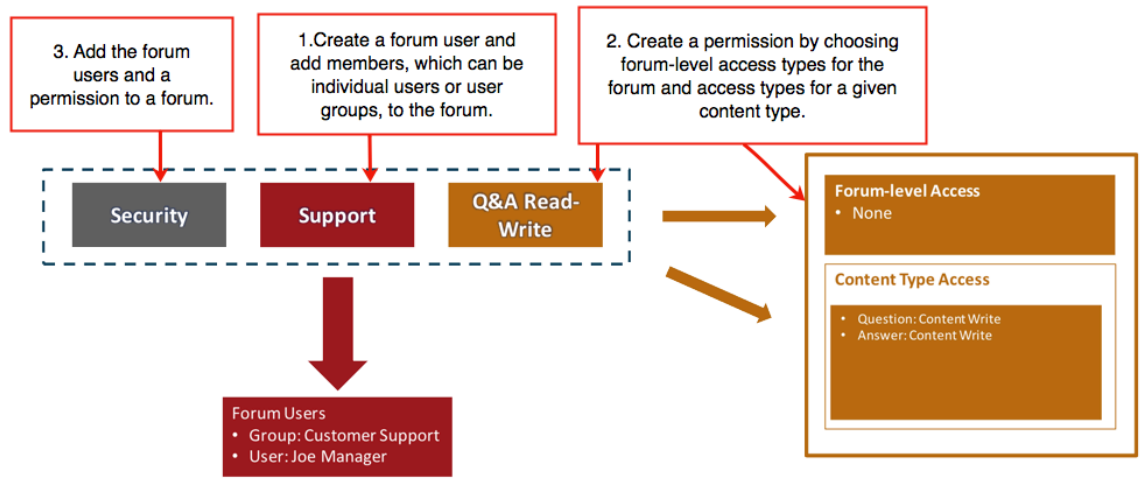
Default permissions (continued)

Permission	Description
Event Write and Comment Write	Write access to events and comments.
Forum Admin	Full access to a forum.
Forum Moderator	Moderation access to a forum.
Forum Name and Description Read	Read access to the name and description of a forum. To access content or topics, other permissions are required.
Full Access	Write and read access to all content types.
Question and Answer Read	Read access to questions and answers.
Question and Answer Write	Write access to questions and answers.
Question Write	Write access to questions.
Video Read and Comment Write	Read access to videos and write access to comments.
Video Write and Comment Write	Write access to videos and comments.

To assign permissions to users and user groups, create associations between forum users and permissions for a specific forum.



Note:
Forum permissions are not inherited in the forum hierarchy. Each subforum must be configured with its own set of permissions and content types.

- You can use forum users and permissions in multiple forums.
- You can add multiple forum users and permissions to one forum.
- You can copy permissions from a parent forum to a child forum or from another forum altogether.
- You can also define user-specific permission exceptions and debug user permissions.

Create a forum user

You can create forum users, which you then use to define memberships to a forum.

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Before you begin
Role required: sn_communities.forum_admin

About this task
A forum user is a set of users and user groups. Forum users are reusable. Multiple forum users can be used in any given forum.

Note:
Before creating a forum user, check whether an existing forum user matches your requirements.

Types of forum user

Public	Public users can view the community without logging in. By default, public users have **content_read** access to questions and answers in public forums.
Registered	Users who have signed up to the community and accepted the Terms & Conditions. Once logged in, their access to forum content depends on the permissions set up for each specific forum.
Custom	Specific users and user groups that are added as members to the current forum user.
Membership	A group of members who have joined a specific forum. Once logged in, their access to forums depends on the permissions set up for each specific forum.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Forum Users**.
2. Click **New**.
3. On the form, fill in the fields.

Forum User form

Field	Description
Name	Name of the user.
Description	Description of the user.
User type	Type of user.

4. Click **Submit**.
   The forum user is created and added to the Forum Users list.

Add members to a forum user

Add members to a forum user. Members can be individual users or user groups.

Before you begin
Role required: sn_communities.forum_admin

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Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forum Users**.
2. Click the forum user to add members to.
3. In the Members related list, click **New**.
4. On the form, fill in the fields.

Members form

Field	Description
Forum User	Forum user name. The name is automatically filled.
Membership Type	Membership type. Choose either **User** or **Group**.
Member	User or user group to add to the forum user. If you selected **Membership Type** > **User**, the **Table name** is automatically filled with *sys_user*. If you selected **Membership Type** > **Group**, the **Table name** is automatically filled with *sys_user_group*. Enter your user or user group in the**Document** field.

5. Click **Submit**.

Create a permission

Create a permission to use to define a user's access to a forum and the content in the forum.

Before you begin
Role required: sn_communities.admin

About this task
Permissions are reusable. Before creating a permission, check if any existing permissions match your requirements.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Permissions**.
2. Click **New**.
3. On the form, fill in the fields.

Permission form

Field	Description
Name	Name for the permission.

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Field	Description
Description	Description of the permission.

4. Click **Submit**.

Add access types to a permission

Access types for a permission determine the access that users have to certain forums.

Before you begin

Role required: sn_communities.forum_admin

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Permissions**.
2. In the **Permissions** list, click the permission you created.
3. Click the **Forum Access** related list.
4. Click **New**.
5. Select an access type.
6. Click **Submit**.

What to do next

Create a forum permission.

Related topics

Community content types

Community access types

Add content types to a permission

Content types for a permission determine the access that users have to certain content in a forum.

Before you begin

Role required: sn_communities.forum_admin

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Permissions**.
2. In the **Permissions** list, click the permission you created.
3. Click the **Content Type Access** related list.
4. Click **New**.
5. Select a content type and an access type.
6. Click **Submit**.

Create a permission exception

Create a permission exception for users who require specific permissions for a forum.

Before you begin

Role required: sn_communities.forum_admin

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About this task
Permission exception records are created for users who require specific permissions for a particular forum, for example, a forum manager. Any other permissions that the user has are no longer valid once an exception is created.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click a forum.
3. Click the **Permission Exceptions** related list.
   The list of users who have extra permissions for this forum is displayed.
4. Click **New**.
5. In the **User** field, enter the name of the user to create a permission exception for.
6. In the **Permission** field, enter a permission.
7. Click **Submit**.
   A permission exception is created and added to the list of **Permission Exceptions** on the forum.

Clone a permission

Clone a permission if an existing permission record cannot be modified and you require a permission record with similar settings.

Before you begin
Role required: sn_communities.forum_admin

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Permissions**.
2. Click the permission you want to clone.
3. Click the **Clone** related link.
   A new permission with the same access types as the source permission is created. The permission record name starts with **Clone of**.

Create a forum permission

Add a forum user and a permission to a forum to create a forum permission.

Before you begin
Role required: sn_communities.forum_admin

About this task
Forum permissions are a combination of a forum, forum users, and permissions. Associate forum users and permissions within a specific forum. You can add multiple combinations of forum users and permissions to a forum.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click a forum.
3. In the **Forum Permissions** related list, click **New**.
4. On the form, fill in the fields.

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Forum Permissions

Field	Description
Forum	Name of the forum.
Forum Users	User or group of users to give access to the forum.
Permission	Permission to give to the forum users in the forum.

5. Click **Submit**.

Copy permissions from a parent forum

You can copy permissions from a parent forum to a child forum.

Before you begin
Role required: sn_communities.forum_admin

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click a forum.
3. Click the **Copy Permissions from Parent Forum** related link.
   All permissions and content types are copied from the parent to the child forum. A summary of the results is displayed at the top of the form.

What to do next
Configure the forum users and permissions as required.

Copy permissions from a forum

You can copy all permissions and content types from one forum to another.

Before you begin
Role required: sn_communities.forum_admin

About this task
You can copy permissions from one source forum to multiple target forums.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click the name of the forum that you want to copy permissions from.
3. Click the **Copy Permissions to Forum(s)** related link.
4. On the form, fill in the fields.

Copy Permissions

Field	Description
Copy Permissions From	Name of the forum you want to copy permissions from. The name is automatically filled.

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Field	Description
Copy Permissions To	Name of the forum you want to copy the permissions to. You can enter more than one forum.

5. Click **Save**.

Debug user permissions

Investigate and diagnose problems with user access to forums.

Before you begin
Role required: sn_communities.forum_admin

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click the name of the forum to investigate.
3. Click the **Debug Forum Permissions** related link.
4. Enter the name of the user you want to check the permissions for.
   The forum user permissions information indicates which content and access types the user has for a particular forum.

Configure the community profile

Set up the community profile by configuring profile fields and deciding which fields to display in the personal information section of the community profile.

Before you begin
Role required: sn_communities.admin

Procedure

Configure one or more of the following for the community profile.

Create a persona for the community profile

Create a persona and associate it to a role to manage which data users can modify.

Before you begin
Role required: sn_communities.admin

About this task
A persona is associated to a user role and can be mapped to specific fields for display on the community profile. The base system contains a default persona, which is not associated to a role and is used for all community users. You can create a new persona or add a role to the default persona.

Procedure

1. Navigate to **All** > **Community** > **User Profile** > **Persona**.
2. Click **New** and then complete the Persona form.

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Persona configuration form

Field	Description
Name	A name for the persona.
Order	The order, in numerical value, in which the system should evaluate the roles for the persona.
Associated Role	The role to associate the persona to.

3. Click **Submit**.

Create a community profile field

Create a field to display on the community profile.

Before you begin

Role required: sn_communities.admin

Procedure

1. Navigate to **All** > **Community** > **User Profile** > **Profile Fields**.
2. Click **New**and then complete the Profile Fields form.

Profile field configuration form

Field Label	A label for the field.
Field Name	A name for the field.

3. Click **Submit**.

Configure persona field mapping for the community profile

Configure which fields appear in the community profile and manage the settings associated with those fields.

Before you begin

Role required: sn_communities.admin

Procedure

1. Navigate to **All** > **Community** > **User Profile** > **Persona Field Mapping**.
2. Click **New**and then complete the Persona Field Mapping form.

Persona Field Mapping form

Field	Description
Persona	Name of the persona.
Source Value Table	Source table of the field to be added to the persona. Any table that is used as the **Source Value Table** should have a reference to the sys_user table.

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Field	Description
Source User Field	Field from the source value table.
Privacy Read Only	Select the check box to allow the community user to change the display settings for this field in their community profile.
Profile Field	Display name of the community profile field.
Source Value Field	Name of the field from the source table.
Read Only	Select the check box to not allow the community user to edit the value of this field.
Privacy Default	Privacy default setting for the field. It shows the field for the selected group of users. The available options are: ○ Everyone ○ Everyone after logging in ○ Only me ○ Followers

3. Click **Submit**.

Enable users to self-register to a community

Once users have accessed public forums and decided they want to join the community, they can self-register to the community. External user registration provides a way of validating users and requires them to accept the community Terms and Conditions.

Community administrators perform the following tasks to configure external user registration.

- Configure the external user registration properties.
- Configure moderation filters to enter banned words for the user name.
- Configure the required strength for passwords.
- Create an email template and content. The email template that you can change is **communities.ext.regn.confirm**.
- If not already configured, create community terms and conditions that each community user must review and accept. Communities delivers preconfigured Terms and Conditions that you can modify according to your needs.
- To enable external users to update their time zone when registering, add ACLs to external users in the User table [sys_user].

Create community Terms and Conditions

Community members must follow the community rules of conduct. Create community Terms and Conditions and them share to build a successful community. Every community user must review and accept the Terms and Conditions before contributing to a community.

Before you begin

Role required: sn_communities.admin

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About this task
The Communities application includes preconfigured Terms and Conditions that you can modify according to your needs.

You can disable Terms and Conditions using the *sn_communities.disable_terms_conditions_role* property. The community profile isn't created.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Communities Terms and Conditions**, click **New**, and then fill in the fields.

Terms and Conditions form

Field	Description
Number	An automatically generated number for your Terms and Conditions. If required, you can change the number.
Short Description	A short description for your Terms and Conditions.
Content	The content of your Terms and Conditions.

2. Complete one of the following actions to save the Terms and Conditions.
   You can view which community users have accepted the Terms and Conditions and when. Navigate to **Community** > **User Profile** > **Community Profiles**. View or add, if necessary, the **Accepted TC**, **Accepted TC Date**, and **Accepted TC Number** fields.

Community Service Portal
The Community Service Portal is a web interface that is based on the ServiceNow Service Portal application.

The Community Service Portal is designed to allow you to have control over the behavior of your portal and help create an attractive and engaging user experience.

To customize this portal, navigate to **Service Portal** > **Portals** and click **Community**.

Configure Community Service Portal header menus
Configure Community Service Portal header menus to create a consistent user experience across all your end-user facing service portals using a modern interface and a unified navigation menu structure.

Before you begin
Role required: The admin role for your service portal, for example, sn_communities.admin.

About this task
Add a theme and header menu to your service portal to define its look and behavior.

Procedure
1. Navigate to **All** > **Service Portals** > **Portals** and click the module for the portal you want to modify.
2. In the information message on the Page form indicating that you have to change the current application to edit the record, select **here**.

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You have to be in the **Communities** application to edit.

3. In the **Theme** field, enter `CSM Default`.
4. In the **Main Menu** field, enter `CSM Unified Portal Header Menu`.
5. Click the information icon next to the **Main menu** field and click **Open Record**.
6. Click the Settings icon and **System Settings** > **Developer**.
7. Change the **Application** to **Customer Service Management Unified Theme** and click the Refresh icon.
   You only have to change this setting once.
   The **New** button is displayed next to **Menu Item**.
8. To display the names of the menu items, personalize the Menu Items related list and add **Display name**.
9. Click **New** from the Menu Items related list.
10. Fill in the fields on the form.

Menu Item form

Field	Description
Label	Name that appears for the item in the menu.
Parent Menu	This field should already contain the name of the menu you are adding items to. You can change the value as required to other menus.
Parent Menu Item	Use this field to nest menu items within other menu items.
Order	Value that determines where the item appears in the menu in relation to other menu items.
Type	The kind of page the item links to. For example, you can link to another page in the portal, or an external URL. Form fields vary depending on the option you select from this list.
Page	Name of the portal page the item links to.
Condition	Determines what conditions are required for menu items to show in the header.
Glyph	Icon that appears beside the menu item

11. Select **Submit**.

Make an announcement to community members

Global announcements appear in the banner and broadcast messages to all community members. Forum announcements appear in the Announcements section on the forum page. You can also send the announcement by email.

Before you begin

Role required:

- sn_communities.admin can manage Global announcements and Forum announcements
- sn_communities.forum_admin can manage Forum announcements for own forums only. The announcement appears only in the forum that the admin owns.

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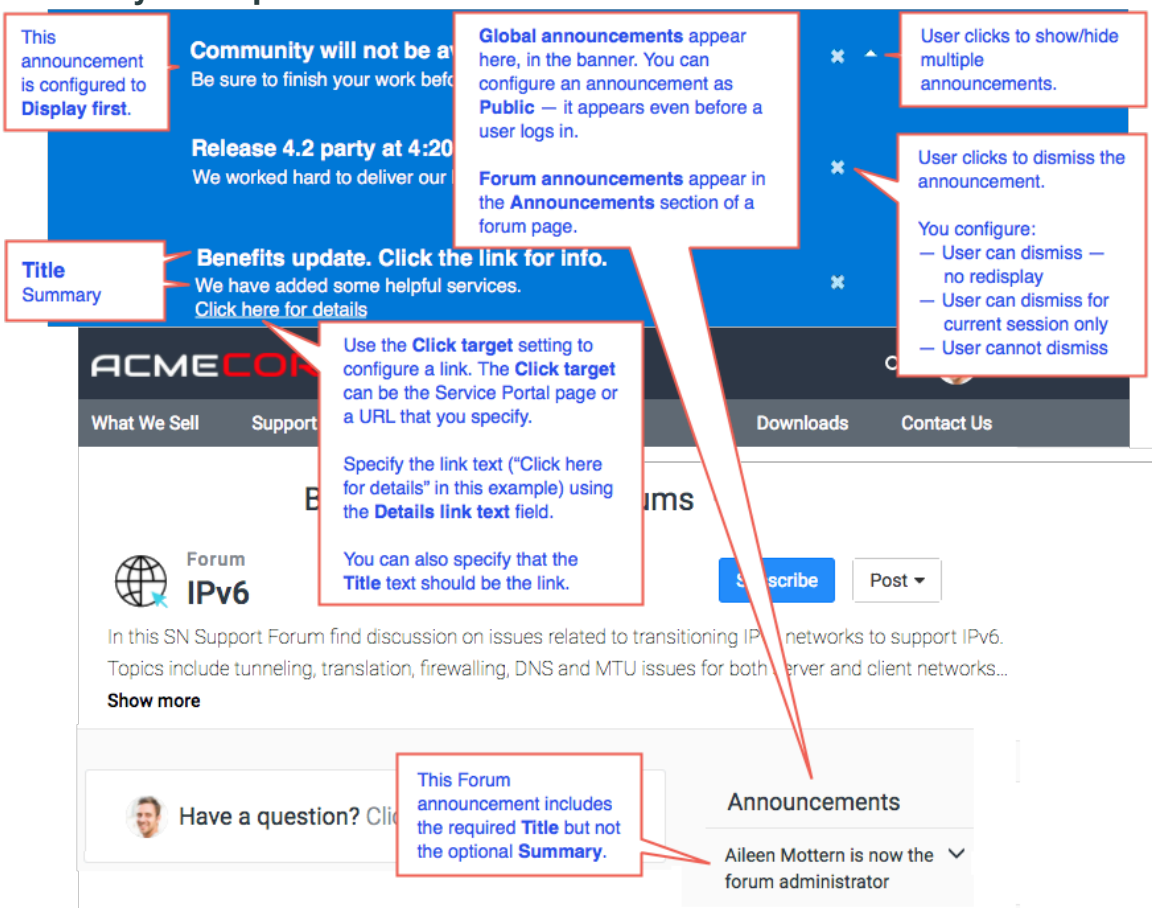
About this task

This example shows how a community user experiences announcements and how you can configure the appearance and operation of announcements.

Community User Experience Announcements



Procedure

Navigate to **All** > **Community** > **Administration** > **Global Announcements** or **Forum Announcements**, click **New**, and then fill in the form.

Announcement configuration form

Announcement type	Read-only. Set to **Global Announcement** or **Forum Announcement**, depending on what you are working on.
Active	Select the check box to publish the announcement to members. Clear the check box to cancel the announcement.
Title	Display title of the announcement. • The text appears above the **Summary** text. • In email, the text is the subject of the message.

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Summary	Content of the announcement. • The text appears below the **Title** text. • In email, the text is the body of the message.
From / To	• **From**: Date and time that the announcement should appear. • **To**: Date and time that the announcement should no longer appear.
Send email notification	Select the check box to send the announcement to members as an email message in addition to broadcasting the announcement.
Display first	Select the check box to display the announcement as the first announcement in the list.
Public	Select the check box to enable forum members that are not logged in to view the announcement.
Portals	Portals that display the announcement. Default: **Community**. **Note:** If no value is specified, the announcement does not appear in any portal.
Click target	The **Click target** setting creates a link for the announcement. • **None**: No link. • **Page**: Opens a Service Portal page in the current browser tab. • **URL in current browser tab**: Opens the specified URL in the current browser tab. • **URL in new browser tab**: Opens the specified URL in a new browser tab.
Details URL	If you select a URL option for **Click target**, then enter the URL in the **Details URL** field.
Details link text	Appears only if **Click target** is not **None**.

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	• To display a link under the **Summary** text, enter the text of the link in the **Details link text** field. • To use the **Title** text of the announcement as the link, leave **Details link text** blank.
Forums	This setting appears for Forum announcements only. Slushbucket of forums that you are admin for. Move a forum into the **Selected** list to display the announcement on the forum.
Dismiss options	This setting appears for Global announcements only. Determines how the user can dismiss the announcement.

What to do next

- To update an announcement, update any setting as needed and then click **Update**. If you specified **Send email notification**, then you are prompted to send the updated email message.
- To cancel an announcement, clear the **Active** check box.

Add featured content in a community

Add or edit featured content in a community to appear in the Featured Content section on the community homepage, forum homepage, or both.

Before you begin

Set the following properties as required.

Featured content properties

Property name	Description
sn_communities.default_featured_days	Default number of days for content to be featured. End date is calculated from the date the content is featured on.
sn_communities.max_featured_limit	Maximum amount of featured content at forum or at global level.
sn_communities.featured_global_notify_user	Send notifications to community users when content is featured on the community homepage. This property is inactive by default. **Note:** Notifications are always sent to community administrators and moderators.

To send out email notifications when featured content expires, set the Featured Content Expire scheduled job to **Active**.

Role required: sn_communities.admin, sn_communities.community_moderator, sn_communities.forum_admin, or sn_communities.forum_moderator

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Procedure

1. Navigate to the community homepage.
2. Click the content you want to feature.

> **Note:**
> Question and Answer content types are not enabled for featuring by default. To enable Question or Answer content types for featuring, navigate to **Community** > **Administration** > **Content Types**. Click the content type you want to enable and select the **Allow Featuring** check box. In the same way, you can also disable content types for featuring.

3. Click **...** and **Mark as featured**.
4. On the Feature Content pop-up window, select whether to feature the content on the community homepage or in a specific forum.
   A notification that content has been featured is sent out to the author of the content, community users who commented on the post, and community users who are subscribed to the post. If featured content has expired or is removed from the featured content list by another user, community and forum administrators are notified.

Email a community user

Send a private message to a community user directly from the community.

Before you begin

Role required: sn_communities.admin, sn_communities.community_moderator, sn_communities.forum_admin, or sn_communities.forum_moderator

An email client must be configured.

About this task

Uses for private messaging can include warning a user about use of a banned word, welcoming a new user, or informing users about incorrectly placed content in a forum. You can privately message a user from any community content, a comment, the Leaderboard, or the Community Profile page.

Procedure

1. Navigate to the community homepage.
2. Point to the community user name.
3. Click **Email User**.

> **Note:**
> The email opens in your local email client.

Community pages that support SEO data

To improve search results for community members using external search engines, the Communities application generates SEO meta tags and injects the tags into questions, topics, forums, and other page types.

> **Note:**
> If the auto-generated SEO tags in a page does not meet your needs, you can change the SEO tags. See Modify SEO in community pages.

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Pages that include auto-generated SEO data

The Communities application auto-generates SEO meta tags for the following pages in the Community service portal. The table provides details on the data that is generated.

- community_question
- community_blog
- community_document
- community_video
- community_event
- community_forum
- community_topic

Auto-generated SEO tags

Searchable page type	Auto-generated tags in the page
Question, Blog, Document, Video, and Event	• The *title* meta tag is populated with the text "<forum name> - <content short description>" • The *description* meta tag is populated with the text "<forum name> - <topic names> - <first 100 characters of the body of the content>"
Forum	• The *title* meta tag is populated with the text "<forum name>" • The *description* meta tag is populated with the text "<forum description>"
Topic	• The *title* meta tag is populated with the text "<topic name>" • The *description* meta tag is populated with the text "<topic description>"
Leaderboard page	The Title meta tag is populated with the text "<community name>"

Modify SEO in community pages

If an auto-generated SEO meta tag does not meet your needs, you can modify or replace the tag.

Before you begin

Role required: sn_communities.admin

About this task

The source code for this example question page (ID *community_question*) shows the *description* meta tag (highlighted in yellow) that the Communities application injected into the page.

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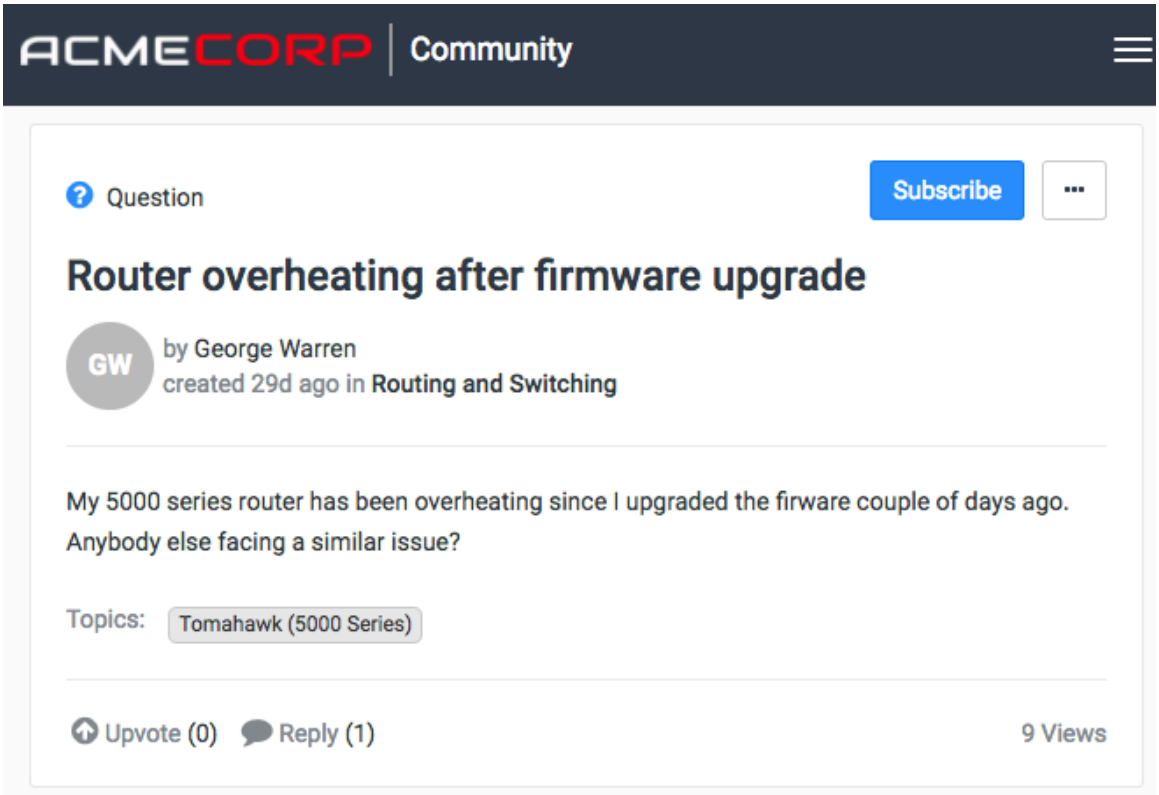


```
<!DOCTYPE html><html lang="en" ng-app="sn.$sp"
 ng-init="portal_id =
'5b49418bdb4aa200b1f6f78eaf96195f'" style="height: 100%"
 class="page-
{{page.sys_id}} v{{page.sys_id}}"
 data-page-id="{{page.sys_id}}"><head sp-
metatags=""><title>Routing and Switching - Router overheating
 after firmware
upgrade - Community</title><meta http-equiv="X-UA-Compatible"
 content="IE=edge;
IE=10"></meta><meta name="viewport" content="width=device-width,
 initial-
scale=1.0, maximum-scale=1.0, user-scalable=no"></meta><meta
 name="apple-
mobile-web-app-capable" content="yes"></meta><meta
 http-equiv="cache-control"
content="public"></meta><meta http-equiv="cache-control"
 content="no-cache">
</meta><meta http-equiv="cache-control"
 content="max-age=0"></meta><meta http-
equiv="pragma" content="no-cache"</meta><meta name="description"
content=Routing and Switching - Tomahawk (5000 Series) - My 5000
 series router
has been overheating since I upgraded the firmware couple of
 days ago. Anybody"
custom-tag=""></meta><link href="favicon.ico?v=4" rel="shortcut
 icon"></link>
<link href="images/mobile/apple_touch_snc.png?v=09-26-2017_1830"
 rel="apple-
touch-icon"></link><link type="text/css" rel="stylesheet"
```

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```
href="/styles/css_includes_$sp.cssx?v=09-26-2017_1830"></link><l
ink
href="styles/scss/sp-bootstrap.scss?
portal_id=5b49418bdb4aa200b1f6f78eaf96195f&amp;v=21989c86db6dc30
0b14a75921f9619
d9" rel="stylesheet" type="text/css"></link><link
 rel="stylesheet"
type="text/css"
 href="styles/sp-patch.css?v=21989c86db6dc300b14a75921f9619d9">
</link><link href="/styles/scss/csm-styles.scss?
portal_id=5b49418bdb4aa200b1f6f78eaf96195f&amp;v=7d88d886db6dc30
0b14a75921f9619
71" type="text/css" rel="stylesheet"></link><link
 type="text/css"
rel="stylesheet"
 href="/scripts/icon-fonts/font-awesome/css/font-awesome.cssx?
v=09-26-2017_1830"></link><script data-description=NOW session,
 user_name,
etc">window.NOW = window.NOW || {};
      //record watch / presence
      window.NOW.session_id =
 '302E95AADBA14700B14A75921F9619A0' ;
      window.NOW.user_name = xxxxxxx
      window.NOW.user_id = '6816f79cc0a8016401c5a33be04be441' ;
```

The *description* meta tag text is made up of three data fields that are taken from the *communitiy_question* record. In the tag, the values are separated by a hyphen character.

- The first portion of the *description* meta tag is the value of the `forum name` field in the question record. In the example, the forum name is `Routing and Switching`.
- The second portion of the tag is the value of the `topic` field in the record — `Tomahawk (5000 Series)` in the example.
- The third portion of the tag is generated from the first 100 characters of the `body` field in the record — `My 5000 series router has been overheating since I upgraded the firware couple of days ago. Anybody`.

In addition to the *description* meta tag for a question page, the Communities application injects a *title* tag (highlighted in blue). The title is generated dynamically using two values from the *communitiy_question* record:

- Forum name (`Routing and Switching` in the example)
- Short description (`Router overheating after firmware upgrade` in the example)

Procedure

1. Navigate to **All** > **Service Portal** > **Pages**.
2. In the list of portal pages, click the **ID** of the page to update (in the example, *community_question*).

   See the list of pages in Communities that support SEO data.

3. On the Page form:

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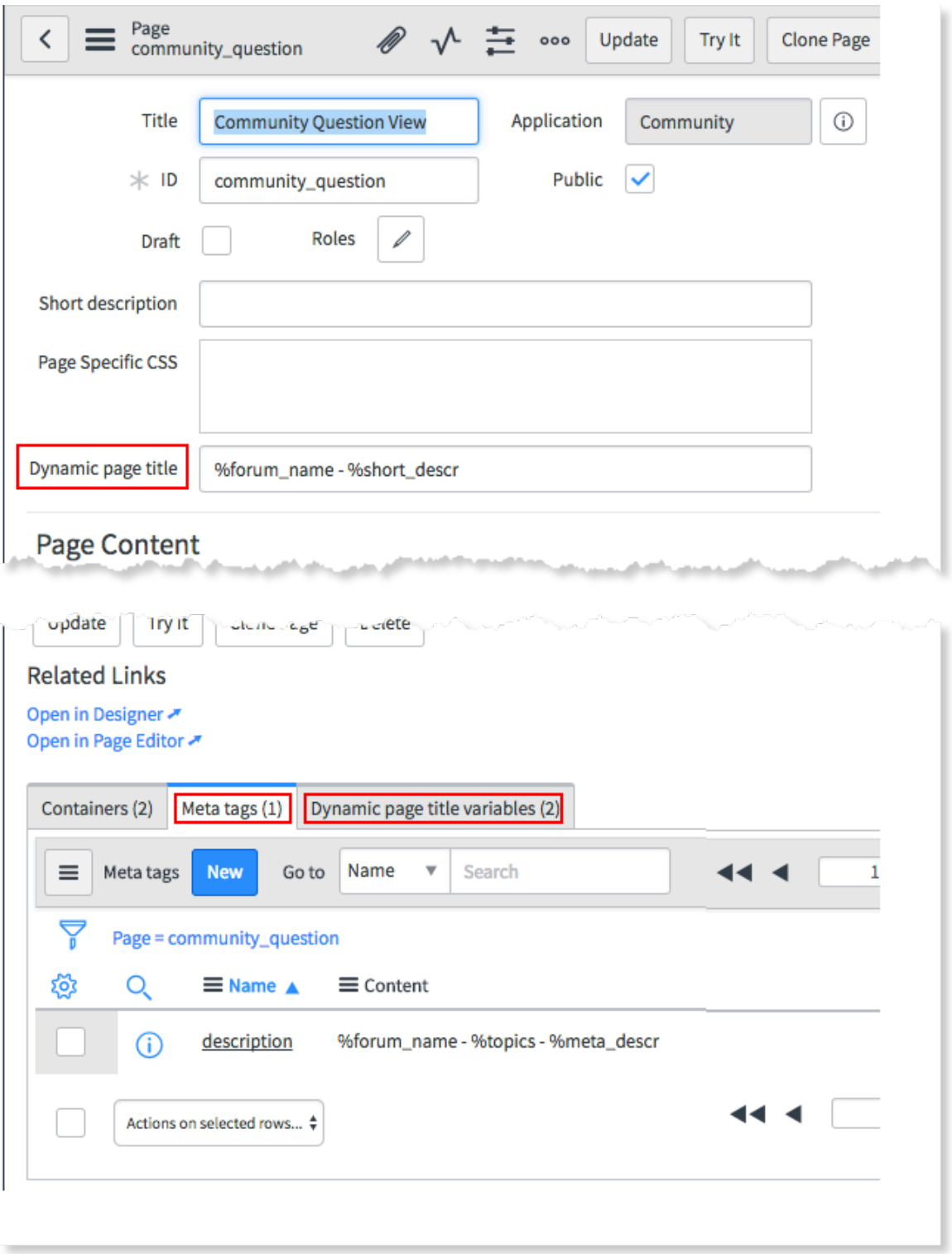
- Modify or add meta tags in the **Meta tags** related list.
- Modify the **Dynamic page title** by modifying the structure of the title text or by modifying or replacing the variables that generate the text. The variable definitions appear in the **Dynamic page variables** related list.



Platform Analytics Solutions for Communities

This Platform Analytics Solution contains preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.

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Use the Performance Analytics widgets on the dashboard to visualize data over time, analyze your business processes, and identify areas of improvement. With solutions, you can get value from Performance Analytics for your application with minimal setup.

Note:
Solutions include some dashboards that are inactive by default. You can activate these dashboards to make them visible to end users according to your business needs.

For unlimited access to all features of this Platform Analytics Solution, purchase a Performance Analytics subscription. For more information, see Activating your Performance Analytics subscription.

To enable the solution for Communities, an admin navigates to **System Definitions** > **Plugins** and activates the Performance Analytics - Content Pack - Communities plugin.

Related topics

Platform Analytics Solutions

Activate your Performance Analytics subscription

View the Communities performance dashboard

The Communities dashboard displays up-to-date status on community usage, membership, content type and activity, and trends by forum and by topic.

Before you begin

Role required: pa_admin

Procedure

1. Navigate to **All** > **Performance Analytics** > **Dashboards**.
2. In the list, select **Community** > **Communities Dashboard**.
   On dashboard tabs:
   - Content types are question, answer, comment, blog, video, or document.
   - "Social activity" is any response (answer, comment, blog, video, or document) to a topic that is added by a user other than the originator.
   - Content score data is for content created during the last 30 days.
   - Click a scorecard to view detailed data or a trend chart.

Tabs shown in the Performance dashboard

Overview tab	Scorecards In each scorecard, the percentage change in the current period appears under the total over the lifetime of the community. ○ Number of current members and total number of questions. ○ Percentage of questions that have been marked as **Solved** by the user who asked the question. ○ Percentage of questions that have not been answered. ○ Total number of attachments (blogs, videos, and documents). Charts

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	○ **Community Activity**: new community members and total sessions for the month. ○ **New content** of any type. ○ **Top 3 Forums and Topics by Social Activity**: Topics and forums that have received responses from other members. Hold the cursor over an area to view the count of activity.
Content Analytics tab	For any chart, you can focus on the most popular content types, forums, or topics by selecting a **Breakdown**. ○ **New content** and count of active members who contributed content for the most recent months for the selected breakdown. ○ The top 10 items with the highest number of views for the selected breakdown.
Forum Analytics tab	○ Heat maps display data for **Content** (total current content volume), **Views** (total unique user views), and **Social Activity**. Forums are listed on the vertical axis and content types appear on the horizontal axis. ○ **Additional KPIs**: key performance indicator data for forums.
Topic Analytics tab	○ Heat maps display data for **Content** (total current content volume), **Views** (total unique user views), and **Social Activity**. Topics are listed on the vertical axis and content types appear on the horizontal axis. ○ **Additional KPIs**: key performance indicator data for topics.
Admin Analytics tab	Heat maps display data for **Number of Posts Moved** and **Featured Content**.

Related topics

Performance Analytics scorecards

Performance Analytics widgets

Communities dashboard

The Communities dashboard displays up-to-date status on community usage, membership, content type and activity, and trends by forum, topic, and admin.

Access the dashboard by navigating to **All** > **Platform Analytics** > **Dashboards**. On the dashboard page, search Communities Dashboard.

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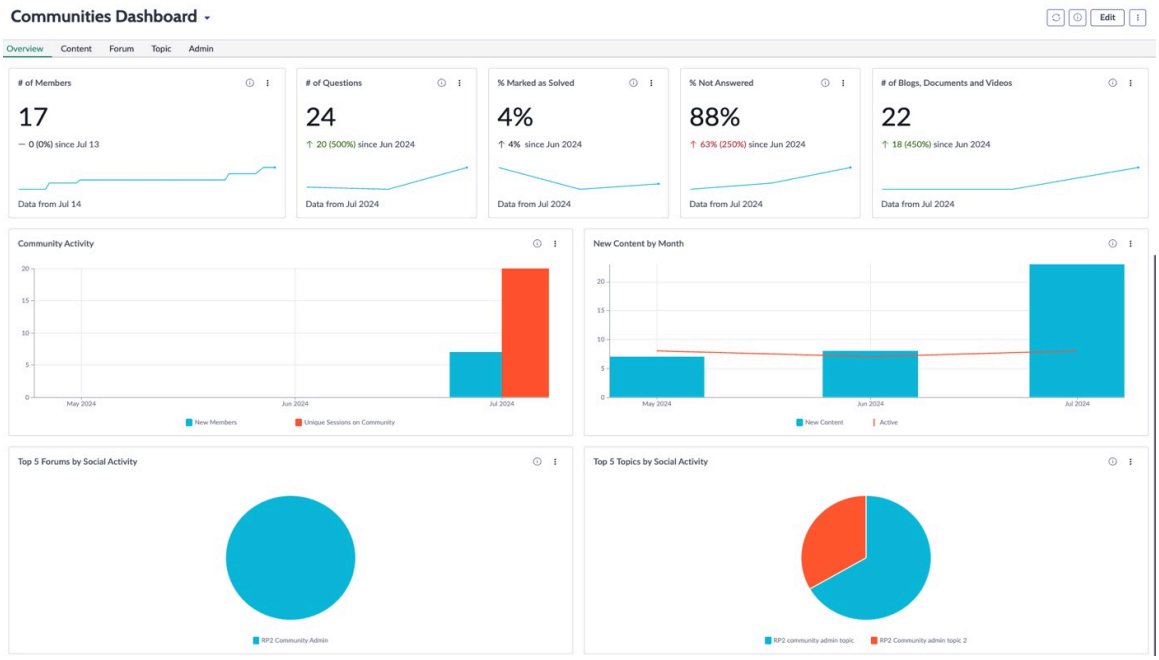
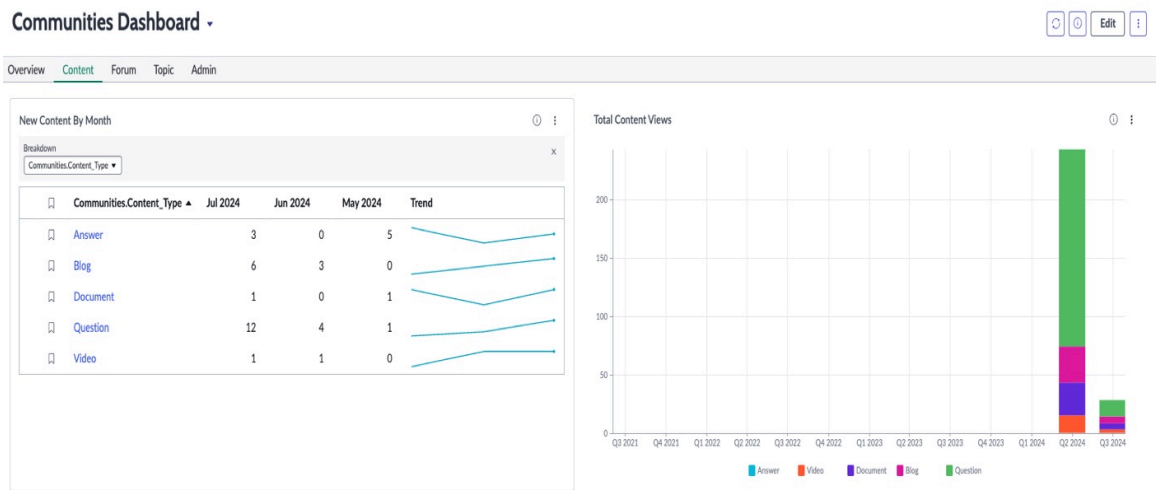
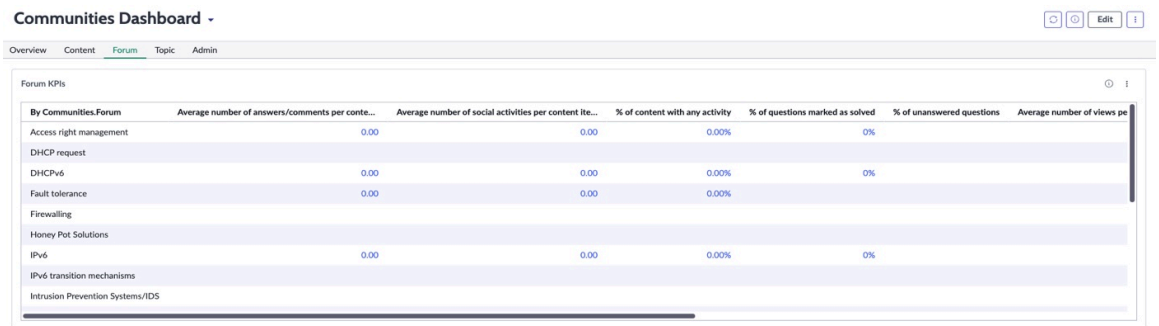
Overview tab



Content tab



Forum tab



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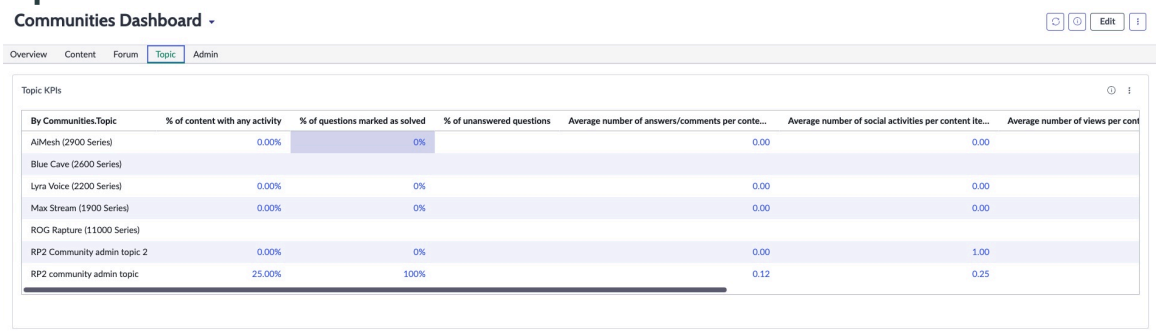
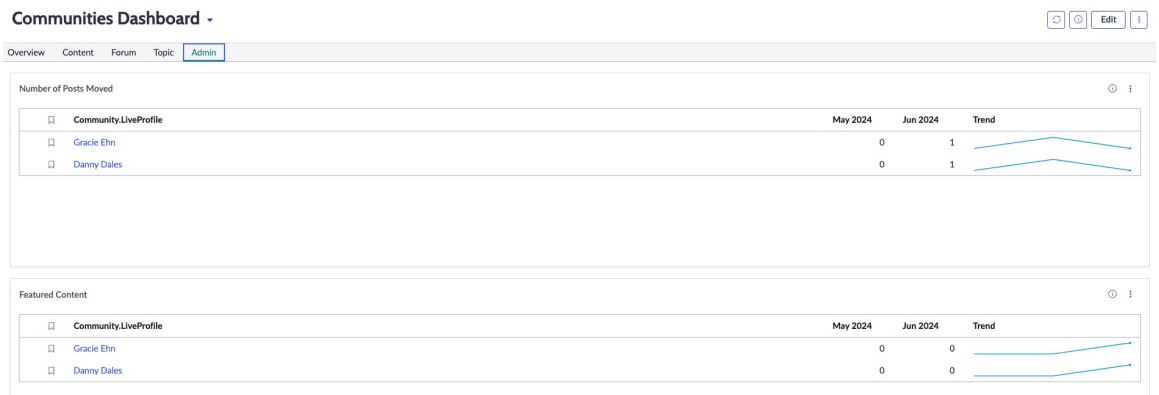
Topic tab



By Communities.Topic	% of content with any activity	% of questions marked as solved	% of unanswered questions	Average number of answers/comments per conte...	Average number of social activities per content ite...	Average number of views per cont
AiMesh (2900 Series)	0.00%	0%		0.00	0.00	
Blue Cave (2600 Series)						
Lyra Voice (2200 Series)	0.00%	0%		0.00	0.00	
Max Stream (1900 Series)	0.00%	0%		0.00	0.00	
ROG Rapture (11000 Series)						
RP2 Community admin topic 2	0.00%	0%		0.00	1.00	
RP2 community admin topic	25.00%	100%		0.12	0.25	

Admin tab



End user and roles

End user	Required role
Community moderator	sn_communities.community_moderator
Moderation administrator	sn_communities.moderation_admin
Community administrator	sn_communities.admin
Forum administrator	sn_communities.forum_admin
Forum moderator	sn_communities.forum_moderator
Content creator	pa_viewer, pa_admin

Indicators

The Communities dashboard presents the following key performance indicators:

# of members

Total number of members.

# of Questions

Number of questions created in the last 30 days.

% Marked as Solved

Number of questions created in the last 30 days, which are marked as solved.

% Not Answered

Number of questions created in the last 30 days, which were not answered.

# of Blogs, Documents, and Video

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Number of blogs, documents, and videos created in the last 30 days.

Non-question content

Number of blogs, videos, and documents posted.

% With activity

Percentage of primary or secondary community content with at least one response or feedback.

Avg. # of social activities per content

Average number of activities (mark as helpful, upvote, comments, and replies) on any active primary or secondary community content.

# of contributors

Number of contributors.

New content this month

Number of new content posts in the last 30 days.

Avg. # of views per content

Average number of views of the content.

Avg. # of comments per content

Average number of comments of the content.

# of featured content

Number of content posts that have been featured.

# of Content moved from activities

Number of content posts moved from activities.

# of Content moved to activities

Number of content posts moved to activities.

Breakdowns

The following breakdowns apply to the indicators on the dashboard:

- Communities Content Type
- Communities Forum
- Communities Topic

Data visualizations

The dashboards include the following visualizations:

Title	Type	Description
Community Activity	Column	View the number of new community members and total of sessions on the community per month.
New Content by Month	Column	View the number of new content posts per month.
Top 3 Forums by Social Activity	Pie	View forums that have received responses from other members. Social activity

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Title	Type	Description
		is any response (answer, comment, blog, video, or document) to a topic added by a user other than the user that originally posted the content.
Top 3 Topics by Social Activity	Pie	View topics that have received responses from other members.
New Content by Month	Single Score	View the amount of new content, forums, or topics created per month. For any chart, you can focus on the most popular content types, forums, or topics by selecting a **Breakdown**.
Total Content Views	Column	View the number of views for each content type per month.
Forum KPIs	Single Score	View different indicators for the forums.
Topic KPIs	Single Score	View different indicators for the topics.
Number of Contents Moved	Single Score	View the number of content posts that have been moved by community administrators and community moderators per month.
Featured Content	Single Score	View the number of posts featured by different users per month.

Migrate Social Q&A data to Communities

If you want to migrate existing Social Q&A content to Communities, you can use a script to migrate the data.

Before you begin

Role required: sn_communities.admin
The Customer Communities plugin (com.sn_customer_communities) must be activated.

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Search for the script *`Migrate Social QA to Community`* and open it.
3. To enable the script, select the **Active** check box and click **Update**.
   The script is deactivated by default.
4. Click **Run Fix Script**.
   The **Run Fix Script** popup appears.
5. Click **Proceed in Background**.

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Always use this option for long-running scripts, or if you do not know the expected execution time.

6. Check the status of the fix script and review the results from the Show Progress Workers related list.

What to do next

Verify the following information.

- A new forum is created for every knowledge base that has Social Q&A content.
- All questions, answers, comments, helpful votes, and upvotes are migrated.
- All view counts, answer counts, and comment counts are migrated.
- The accepted solution to a question in Social Q&A is **Marked as Correct Answer** in Communities.
- Social Q&A is deactivated for every knowledge base that contained Social Q&A data. Social Q&A content is no longer visible for these knowledge bases.

View community logs

Community logs display information about who has viewed or searched for content in a community. The list view displays all log entries, unless filtered.

Before you begin

Role required: sn_communities.admin

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Search Logs** or **View Logs**.
2. View the logs.

Community logs

Log	Description
Search Log	View who has searched for what and where in the community.
View Log	View who has viewed what and where in the community.

View community feedback and bookmarks tables

View feedback and bookmarks tables to view which community content was given feedback or was bookmarked.

Before you begin

Role required: sn_communities.admin, sn_communities.community_moderator, sn_communities.moderation_admin, sn_communities.forum_admin, or sn_communities.forum_moderator

Note:
Communities users (sn_communities.community_user) have read access to the bookmarks table and the feedback table. Users can only view another user's bookmark and feedback records for content they themselves can access. Bookmark and feedback record visibility is constrained by the viewer's access to the underlying content.

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Procedure

1. Navigate to **All** > **Community** > **Feedback**.
2. Choose one of the following options.
   - Click **Feedback** to view the content feedback was given for, the type of the feedback, and who provided it.
   - Click **Bookmarks** to view the content that was bookmarked and who added it.

Create a case from a discussion

In order to engage your internal experts to reply to discussion threads, you can create cases directly from community questions.

Creating cases from community questions requires activation of the Customer Service Management (com.sn_customerservice) plugin.

This feature is available for questions that have been posted by community users who are also contacts or consumers in the Customer Service Management application. Questions can be either answered or unanswered.

Note:
Cases can be created only from questions.

Two sets of users can create cases from questions:

- Customer service agents, consumer service agents, and customer service managers.
- Users with the sn_customerservice.proxy_case_creator role. Community administrators and community moderators inherit this role.

Administer create case from discussion

Configure parameters for the case generated from the community discussion so that it can be routed accordingly.

Creating a case from a discussion requires a configuration that maps information from the question in the community to fields on the Case form. The **Create Case** configuration is included with the feature. This configuration defines the source and destination tables and maps source fields to destination fields. This configuration is stored in the CSM Table Map table [csm_table_map]. The system administrator can modify this configuration as needed.

The **Create Case** configuration uses the Social Q&A Question table [kb_social_qa_question] as the source table and the Case table [sn_customerservice_case] as the destination table. It includes the following mapping information.

Mapping information configuration form

Question information	Case information
Question	Short description
Question author	Contact or consumer
Question author's account	Account
Opened by	Logged in community user
Priority	Low (priority = 4)
Channel	Community

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To create additional mapping between these tables, add the additional fields to the **Create Case** configuration in the CSM Table Map table. Include these fields as needed on the **Create case from question** record producer.

Enable knowledge harvesting

Configure knowledge harvesting from a community to convert unstructured conversations to structured knowledge articles and make the information more accessible.

Community administrators perform the following tasks to configure knowledge harvesting.

- Enable the Knowledge Management Service Portal plugin (com.snc.knowledge_serviceportal).
- Add a knowledge base to a forum to store the knowledge article in a specific knowledge base.

  Note:
  You can only add one knowledge base to a forum. The same knowledge base can be used for multiple forums.

- Add a knowledge category to a forum topic to categorize the harvested content.

Moderate a community

Community moderators can manage content quality by reducing the inappropriate content that is posted on the community.

Before you begin
Role required: sn_communities.community_moderator, sn_communities.forum_moderator, or sn_communities.moderation_admin

Procedure

1. Define your requirements for Community moderation.
   - Should first-time posters receive automatic moderation?
   - Which words should be banned from user content?
   - Should the system prevent content containing banned words from being posted?
   - Should users be able to report inappropriate content?
   - How many offenses can a user commit before the system bans them automatically?
2. Navigate to **Community** and choose the **Moderation** or **Moderation Tasks** menu and the module you require.
3. Configure one or more of the following aspects for your community.

Configure general moderation settings

Configure when to moderate content for users and user groups.

Before you begin
Role required: sn_communities.admin, or sn_communities.moderation_admin

Procedure

1. Navigate to **All** > **Community** > **Moderation** > **Moderation Settings**.
2. On the form, fill in the fields.

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Moderation Settings form

Field	Description
Users Never Moderated	Content is never moderated for these users.
Users Always Moderated	Content is always moderated for these users.
User Groups Never Moderated	Content is never moderated for these user groups.
User Groups Always Moderated	Content is always moderated for these user groups.
Hide content if user violates settings	Check box to hide content written by a user until a moderator approves it.

3. Click **Update**.

Configure moderation settings for a new user

Configure the system to prevent inappropriate user contributions.

Before you begin

Role required: sn_communities.admin or sn_communities.moderation_admin

Procedure

1. Navigate to **All** > **Community** > **Moderation** > **Moderation Settings**.
2. Click the **New User** related list.
3. On the form, fill in the fields.

Moderation Settings form

Field	Description
New User Content Threshold	Number of user posts to be moderated.
User Exception List	New users that are not included in the new user content threshold for moderation.
User Group Exception List	User groups that are not included in the new user content threshold for moderation.

4. Click **Update**.

Assign a moderation task to your assignment group

Change the assignment group to assign a moderation task to your assignment group.

Before you begin

Role required: assignment_rule_admin

About this task

A moderation task is generated when a community user reports inappropriate content or community profiles. By default, the system assigns the task to the community moderator group. You can also configure your system to always require content moderation for a particular user or group.

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Procedure

1. Navigate to **All** > **Routing and Assignment** > **Assignment Rules**.
2. On the Assignment Rules page, search and select `sn_communities_moderation_task` in the **Table** column.
3. On the Moderation Task Assignment Group page, enter the User and Group details in the **Assign To** tab.
4. Select **Update**.

Configure abuse reporting

Configure whether users can report content and profile abuse, set an abuse reporting threshold, and define reasons for abuse reporting.

Before you begin

Role required: sn_communities.admin or sn_communities.moderation_admin

Procedure

1. Navigate to **All** > **Community** > **Moderation** > **Moderation Settings**.
2. Click the **Abuse** related list.
3. On the form, fill in the fields.

Moderation Settings form

Field	Description
Enable Content Abuse Reporting	Check box to enable users to report inappropriate content.
Enable Profile Abuse Reporting	Check box to enable users to report inappropriate profiles.
Abuse Reporting Threshold	Number of abuse reports on a specific content (question, blog, video, answer, comment) that lead to the content being hidden from other users.
Content Abuse Reporting Reasons List	Phrases that are possible reasons for the user to report inappropriate content contributions. Separate each phrase using the pipe symbol|. For example, This content is abusive|This content used an offensive word|Spam|Inappropriate media.
Profile Abuse Reporting Reasons List	Phrases that are possible reasons for the user to report an inappropriate user profile. Separate each phrase using the pipe symbol|.

4. Click **Update**.

Configure user banning

Set the number of offenses a user can make before they are banned from creating or editing content.

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Before you begin
Role required: sn_communities.admin or sn_communities.moderation_admin

Procedure
1. Navigate to **All** > **Community** > **Moderation** > **Moderation Settings**.
2. Click the **User Banning** related list.
3. On the form, fill in the fields.

Moderation Settings form

Field	Description
Enable Banning Users	Check box to enable the banning of users.
Offense Threshold	Number of offenses a user can make before being automatically banned.

4. Click **Update**.

Configure moderation filters

Create moderation filters to manage how content is moderated.

Before you begin
Role required: sn_communities.admin or sn_communities.moderation_admin

Procedure
1. Navigate to **All** > **Community** > **Moderation** > **Moderation Filters**.
2. Click **New**.
3. Click **Banned Keyword Filter**.
4. On the form, fill in the fields.

Moderation Banned Keyword Filter form

Field	Description
Filter Name	Name of the filter.
Active	Check box to make the filter active.
Synchronous	Check box to automatically moderate content when it is submitted. Any content that includes the banned words defined in the filter is not posted. If the check box is cleared, the system creates a moderation task when banned words are used. The content is visible until it is moderated.

5. Click **Submit**.
6. From the Moderation Filters list, click the name of your filter.
7. Add a banned keyword word to the list:

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a. In the **Keywords**list, click **New**.

b. In the Keyword field, enter your keyword.

c. Click **Submit**.

d. If required, repeat to add more keywords to the list.

8. Click **Update**.

Ban a user

You can ban a user from creating or editing content, for example, a user can be banned for posting inappropriate content.

Before you begin

Role required: sn_communities.admin, sn_communities.moderation_admin, or sn_communities.community_moderator

Procedure

1. Navigate to **All** > **Community** > **User Profile** > **Community Profiles**.
2. On the Community Profile, search the user in the **Live Profile** column.
3. Hover on the user and select the Preview icon (ⓘ).
4. On the Community Profile window, select **Open Record**.
5. On the Community Profile page, select **Ban User**.
   The user is banned. In the Community Profiles list, the value in the **Banned** column is set to **true**.

Revoke a user ban

Revoke a user ban to allow a user to create and edit content again.

Before you begin

Role required: sn_communities.admin, sn_communities.moderation_admin, or sn_communities.community_moderator

Procedure

1. Perform either of the following actions.
   - Navigate to **Community** > **User Profile** > **Community Profiles**.
   - Navigate to **Community** > **Moderation** > **Users Banned by Moderation**.
2. Click the Preview icon next to the user and then select **Revoke User Ban**.
   The user ban is revoked. In the Community Profiles list, the value in the **Banned** column is set to **false**.

Approve or reject content

Approve or reject content that a user reported as inappropriate or that is associated with a particular community profile.

Before you begin

Role required: sn_communities.community_moderator, sn_communities.moderation_admin

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About this task

A moderation task is generated when a community user reports inappropriate content or community profiles. By default, the system assigns the task to the community moderator group. You can also configure your system to always require content moderation for a particular user or group.

Each task requires the moderator to approve or reject the reported item. If the moderator rejects content, it is counted as an offense against the community user who contributed the content.

Procedure

1. Navigate to **All** > **Community** > **Moderation Tasks** > **Assigned to me**.
2. Click a moderation task.
3. On the form, fill in the fields.

Moderation Task form

Field	Description
Assigned to	Person assigned to the task.
Moderation Notes	Notes entered by the user when reporting the content.
Resolution Notes	Your comment as you moderate the content.
Work Notes	Work notes entered by users working on the task.
Approve Content	Approve content that conforms to community rules. The content state changes to Closed Complete.
Reject Content	Reject content or a profile. The content state changes to Closed Complete and the content is hidden in the community.

Note:
You can review the outcome of existing and past moderation tasks by navigating to **Community** > **Moderation** > **Moderation Outcomes**. Click a task to view the details of the moderation task.

Disable comments

Disable comments on a blog, document, video, event, or question to avoid users from posting comments.

Before you begin

Role required: sn_communities.forum_moderator, sn_communities.community_moderator, sn_communities.moderation_admin, or sn_communities.forum_admin

About this task

There are two ways of disabling comments on the community content. You can disable comments while posting new content or restrict users from posting comments on existing content.

Note:
You can disable replies on an existing question to restrict users from posting further comments. You can't post a new question when replies are disabled.

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Procedure

Navigate to the community home page.

- To disable comments on new community content:
  a. Choose the content type that you want to post.
  b. Fill the details.

  > **Note:**
  > Disable Comments check box is visible only after filling details on the form.

  c. Select the **Disable Comments** check box.
  d. Select **Publish**.
- To disable comments on existing community content:
  a. Choose the content that you want to disable the comments for.
  b. Select the more options icon (•••) and then select**Edit**.
  c. Select the **Disable Comments** check box.
  d. Select **Save**.

A confirmation message appears stating that you have disabled comments. The comments on the existing content are displayed. You can't edit an existing comment or post a new comment. All community and forum administrators and the content author receive an email notification when you disable or enable comments.

Related topics

Post and respond to content in the community

Remove content

Remove content that does not meet community standards.

Before you begin

Role required: sn_communities.admin

Procedure

1. Navigate to **All** > **Community** > **Content** > **Contents**.
2. Click the content to remove.
3. Click **Actions on selected rows** > **Delete** and confirm that you want to delete the item.

Harvest knowledge from a community

Harvest knowledge from a community and create structured knowledge articles from unstructured discussions around a question.

Before you begin

Role required: sn_communities.knowledge_harvester, sn_communities.admin, or sn_communities.moderation_admin

Knowledge harvesting must be enabled.

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About this task
You can only harvest solved questions with accepted solutions into a knowledge article.

Procedure
1. From the Communities homepage, perform one of the following actions.
   - Go to the Content List.
   - Click a forum.
   - Search for a discussion thread (Question and Answer).
2. Click **Question State** > **Solved** to filter for all discussions that can be converted into knowledge articles.
3. Click a question.
4. Click the **...** icon and then **Harvest Knowledge**.
5. Fill in the fields on the Harvest Knowledge form.

Harvest Knowledge form

Field	Description
Short description	The original question is automatically entered in the **Short description** field. You can edit the short description, as required.
Attachments	All attachments associated with the question and accepted solution are automatically added to the knowledge article. You can add and remove attachments.
Text	The body of the original question and accepted solution is automatically entered in the **Text** field. You can edit the text, as required.
Knowledge base	The knowledge base to which the knowledge article has been added. It is added by default based on the knowledge base associated to the forum from which article was harvested. If required, you can change the knowledge base.
Category	The category of the knowledge article. It is entered by default based on the category associated to the topic from which the article was harvested. If required, you can change the category.
Number	A KB (Knowledge Base) number is automatically assigned to the article. You cannot edit the **Number** field.

6. Perform one of the following actions.

Use a community

Participate in your community by sharing content, asking and answering questions, creating events, giving feedback, and so on.

Before you begin
Role required: sn_communities.community_user

Procedure

Use a community in one or more of the following ways.

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Community homepage features for logged in users

Your community activity usually begins on the community homepage. If you are a logged in user, you see different information than non-logged in users. Your organization can customize the homepage.

Note:
The Community Service Portal header menu is not enabled by default. For more information, see Configure Community Service Portal header menus.

From the community homepage, you can access and use the following features:

Community homepage for logged in users

UI component	Description
Announcements	View announcements targeted to the entire community.
Community menu	Navigate to all forums and all topics and other quick links.
Tours	View a tour for additional guidance on how the Communities application works. Tours appear when your administrator creates them on certain pages.
Profile photo	Click your profile photo to either view your community profile or logout.
Search	Enter a search term. You can enter a keyword to use the type-ahead search or enter one or more words to view all search results.
Browse Forums	Click the + icon to view up to eight available forums. Click **View all Forums** to go to the Forums list page and search for the forum you require. If sub forums exist, they are listed on the parent forum tile along with a count of how many there are. Click the link to access a list of the sub forums.
Have a question? Click here to start typing and Post Content	Contribute to the community by posting a question. Click Question, Blog, Video, Document, or Event to add your content and assign it to a forum.
Featured Content	View featured community content.
Question filters	Filter by question to view solved, unsolved, and unreplied questions. **Note:** The content options are displayed according to the permissions you are assigned in the forum.
Content List and Activity Feed	Toggle between the Content List and Activity Feed. You can filter according to content type, forum, most recent or popular, and when the content was created.

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Community homepage for logged in users (continued)

UI component	Description
	• Content List: Lists all content added to the community. Displays when updates were made to replies, comments, and answers marked as correct and which user made the updates. **Note:** ○ Updates are not displayed for new or existing comments or replies due for moderation. ○ Updates are displayed for approved changes made to comments or replies as a result of moderation. • Activity Feed: Lists all activity in the community based on your posts and subscriptions. **Note:** ○ All activities per content item are grouped. Only the most recent activity is listed per content item. For example, an upvote to a question. ○ To view all activity associated with a content item, click the content item. All activities, regardless of your subscriptions, are displayed.

Navigating the activity feed

The activity feed provides a central place for community users to view information and interact. It lists the most recent activity in the community based on your network, posts, and subscriptions. You can reply, comment, and give feedback directly from the activity feed.

Activity feed

UI component	Description
Levels	View the most recent levels you have earned in the community as a result of points accumulated. You can also view the most recent badge you have earned for your achievements or areas of expertise within the community.
Content added by another user	View the most recent contributions by another user that you are following or content that you have subscribed to.
Content added by you	View the most recent content that you created in the community.
Feedback	Provide feedback on content that you find useful. There are four supported types of content feedback: comment, upvote, helpful, and mark as correct answer.
Reply	Reply to a question or another reply.

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Navigating the forum homepage

While in a forum, you can navigate the forum homepage and perform tasks, such as posting content.

Forum homepage

UI component	Description
Forum name and description	Displays the name and description of the forum. Click **Show more** to read more of the description.
Subscribe	Subscribe to content in the community.
Sub Forums	If sub forums exist, they are listed. Click a link to access a sub forum. If more than three sub forums exist, click **View all** to view the list of all sub forums and click the one you want to access.
Search Forum	Type a keyword and click the search icon to view the matching content within a forum.
Have a question? Click here to start typing	Contribute to the community by posting a question.
Question filter	Filter by question to view solved, unsolved, and unreplied questions.
Content List	Lists all content added to the community. Displays when updates were made to replies, comments, and answers marked as correct and which user made the updates. Filter according to content type or sort by most recent or popular, and when the content was created. **Note:** • Updates are not displayed for new or existing comments or replies due for moderation. • Updates are displayed for approved changes made to comments or replies as a result of moderation.
Post Content	Click Question, Blog, Video, Document, or Event to add your content and assign it to a forum. **Note:** The content options are displayed according to the permissions you are assigned in the forum.
Announcements	View forum-specific announcements.
Topics	Click a topic to navigate to a particular topic.
Leaderboard	View the leaderboard to find community experts for the forum.
Most viewed content	Displays the top three posts according to number of views.

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Community homepage features for non-logged in users

Your community activity usually begins on the Community homepage. If you are a non-logged in user, you see different information than logged in users. Your organization can customize the homepage.

Community homepage for non-logged in users

UI component	Description
Community announcement	View announcements targeted to the entire community.
Community menu	Navigate to all forums, all topics, and other quick links.
Sign up/Login	Sign up or log in to the community.
Search	Enter a search term. You can enter a keyword to use the type-ahead search or enter one or more words to view all search results.
Browse community forums	Click the + icon to view up to eight available forums. Click **View all Forums** to go to the Forums list page and search for the forum you require. If sub forums exist, they are listed. Click a link to access a sub forum. If more than three sub forums exist, click **View all** to view the list of all sub forums and click the one you want to access.
Question filter	Filter by question to view solved, unsolved, and unreplied questions.
Content List	View content posted in public forums in the community. Filter according to content type or sort by most recent or popular, and when the content was created.
Why Join?	View some of the advantages of joining the community.
View Leaderboard	View the leaderboard to find community experts on specific forums or topics.
Ask a Question	Click **Ask a Question** and a message appears indicating that you must be a logged-in user to perform this action. You can **Login/Sign Up** directly from here.
Topics	Click a topic to navigate to a particular topic.
Show More	View an expanded list of content available in the community.

Self-register to a community

Once you have accessed a public forum and decided to join the community, you can self-register by signing up and accepting the community Terms and Conditions.

Before you begin

Role required: none

About this task

Every community user has to have a community account. Existing users who access a community for the first time have to accept the Terms and Conditions. An account is created once the Terms

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and Conditions have been accepted. New users sign up to the community and accept the Terms and Conditions.

If the community Terms and Conditions are updated, all community users are prompted to review and accept them when they log in the next time.

Procedure

1. If you are a new user, navigate to the community homepage.

   a. Click **Sign up/Login**.
   The **Sign Up** screen opens.

   b. Fill out the fields on the **Sign Up** form.

   Sign Up form

Field	Description
Email address	The email address to send the email validation to.
Username	A user name for your account.
First Name	Your first name.
Last Name	Your last name.
Phone Number	Your phone number.
Password	A password for your account.
Confirm Password	A confirmation of your password.
I agree to the Community Terms and Conditions	A check box to agree to the community Terms and Conditions.

   c. Click **Sign Up**.
   An email is sent to the email address you entered.

   d. Open the email and click the validation link.

   e. Click the **Click here to login** message.

   f. Log in with your user name and password.
   The **Welcome** pop-up opens.

   g. Confirm your time zone.

   h. Click **User Profile** or **Notification Preferences** to edit your community profile or your notification and subscription settings.

2. If you are an existing user, but visiting the community for the first time, click any community page.

   a. If required, change your **Display Name** on the **Setting up your account** pop-up.

   b. Select the check box to agree to the community Terms and Conditions.

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The **Welcome** pop-up opens.

c. Confirm your time zone.

d. Click **User Profile** or **Notification Preferences** to edit your community profile or your notification and subscription settings.

Search the community

Enter a keyword to use the type-ahead search on the Community homepage or enter one or more words to view all search results.

Before you begin

Role required: sn_communities.community_user

Procedure

1. Navigate to the community homepage.
2. Press the space bar to use the type-ahead search and enter a keyword in the **Search Community** field.
3. Choose from the following options:
   a. Click a content item, topic, forum, or profile that matches your search.
   b. To enter your question, blog, or video if no matching content is displayed, click **Ask the Community**.
   c. To display all search results, click **View all Results**.
4. Alternatively, enter one or more keywords in the **Search Community** field and press the Enter key.
   A list of matching search results appears.

Refine your search results

Refine your search results to narrow down the content displayed.

Before you begin

Role required: sn_communities.community_user

Procedure

1. Navigate to the community homepage.
2. Enter a keyword in the **Search** field.
3. From the **Refine Results** panel, choose from the following options.
   - To filter and customize your search results, click any option under **Types**. For example, click Profile to view the profiles that matches with the search keyword. The details of the profile such as display name, gamification information-points and badges, bio, user title and company appear. To reverse this action, click the **x** icon of the corresponding item. To remove all filters, click **Clear All**.
   - Select any item from the **Forums**, **Topics**, or **Authors** fields to filter by forum, sub forum, topic, or author. You can add multiple forums, sub forums, topics, and authors and click anywhere on the screen to display the results.

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- To filter by the time period that the content was posted, click any **Last Updated** item.
- Click the **–** icon of any category to collapse the category and save space. Click the **+** icon to restore a collapsed category.

The search results page displays content based on the filter criteria.

Sort your search results

Sort your community search results to narrow down the content displayed.

Before you begin
Role required: sn_communities.community_user

About this task
The search results are sorted according to **Relevance** by default.

Procedure

1. Navigate to the community homepage.
2. Enter a keyword in the **Search** field.
3. To display the most recent results, click **Sort By: Newest**.
   The results are displayed in descending order.
4. To display the results in ascending order, click **Newest**.

Use a community profile

The community profile displays an overview of a user's personal information as well as their contributions, network, achievements, expertise, and events they are attending. You can view and edit your own profile. You can also view another user's profile and perform actions, such as following them or reporting inappropriate content.

Before you begin
Role required: sn_communities.community_user

Procedure

Perform one or more of the following tasks from the community profile.

Manage your community profile

View and edit your own community profile, which displays your contributions, network, achievements, expertise, and events you are attending.

Before you begin
Role required: sn_communities.community_user

About this task
There are two ways of accessing your community profile.

Procedure

1. From the Community homepage, perform one of the following actions.
   - Click the **Community** menu and then **Community Profile**.
   - Click your name or profile photo and then **Profile**.
2. View the sections on your community profile.

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Community profile

Section	Description
Profile header	An overview of your personal information. ○ Click **Edit Profile** to change your profile photo and edit your personal information. ○ Click **Edit Profile** to change your user preferences. Update your time zone to view when events are occurring in your selected time zone. ○ Click the **...** icon and then **Display Settings** to set your display settings and determine who can view which sections of your profile. If the gamification feature is enabled, the profile header includes your current gamification achievements, including: ○ The top three badges that you have been awarded ○ The total number of points that you have earned ○ The current level that you have achieved based on your point total (for example, Enthusiast or Champion)
Content tab	An overview of the published and draft content you have created and the content you have bookmarked. ○ **Authored**: Content you contributed. You can select the content type and the forum, and sort by state. ○ **Drafts**: Content you contributed that is in draft state. You can select the content type and the forum. Open a draft to publish it. **Note:** You can only save content in draft for blogs and events. ○ **Bookmarks**: Content that you have bookmarked. You can select the content type, the forum, and sort by recent or oldest. You can also remove bookmarks.
Activity tab	The most recent actions performed by you in the community, for example, commenting on a post or providing feedback.
Network tab	A record of your network in the community. ○ **Followers**: The users that are following you. ○ **Following**: The users that you are following.

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Section	Description
	○ Click **Follow** to start following a user, who is following you. ○ Point to **Following** and click **Unfollow** to stop following a user.
Achievements tab	An overview of your gamification achievements. ○ **Levels**: A list of the available levels that you can achieve, including the starting point value, with your current level highlighted in blue. ○ **Badges**: A list of the badges that you have been awarded as well as available badges. Awarded badges appear at the top of the list and available badges appear below. You can filter this list to view awarded badges or all badges. ○ **Points**: A history of the points that you have earned and the activities performed that earned the points. This information also includes the forum in which the activity was performed. This list includes your last 50 activities. Click **Show more** to display additional pages.
Events tab	A list of events that you created, are attending, or past events you have attended. Click an event to view the event details.
Contributions	The number of your content and feedback contributions to the community.
Forum Expertise	A display of your expertise at forum level. You can view your level within the forum and the number of points you have gained through contributing to that forum. Click the information icon to view the point ranges required to reach each forum level.
Topic Expertise	A display of your expertise at topic level. You can view your level within the topic and the number of points you have gained through contributing to that topic. Click the information icon to view the point ranges required to reach each topic level.

View another user's community profile

View another user's community profile to see their contributions, network, expertise, and so on. You can also manage your network by following and unfollowing other community users.

Before you begin

Role required: sn_communities.community_user or sn_communities.admin

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Procedure

1. Click the user's name or profile photo for the community profile that you want to view.
2. View the sections of the user's community profile.

Community profile

Section	Description
Profile header	The sections of the community profile that the user has made visible. ○ To start following the user, click **Follow**. ○ To report any inappropriate content on the user's community profile, click the **...** icon and then **Report Profile**. ○ To assign a user points for a specific contribution to the community as a community administrator, click the **...** icon and then click **Assign Points**. ○ To hide content from the community until it is corrected as a community administrator, click **Display Settings** You can also click **Ban User** to ban a user from creating or editing content.
Content	○ **Authored**: Content that the user contributed. ○ **Featured**: Content the user posted that has been featured. ○ **Drafts**: Content the user contributed that is in draft state. **Note:** Only community administrators can view draft content of another user. ○ **Bookmarks**: Content that the user has bookmarked.
Activity	The most recent actions performed by the user in the community, for example, commenting on a post or providing feedback.
Network	○ **Followers**: The users that are following the user's community profile. ○ **Following**: The users that the community profile user is following. ○ You can manage your own network from another user's profile. To start following a user, click **Follow**. To stop following a user, point to **Following** and click **Unfollow**.
Achievements	An overview of the user's gamification achievements.

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Section	Description
	○ **Levels**: A list of the available levels that the user can achieve, including the starting point value, with the user's current level highlighted in blue. ○ **Badges**: A list of the badges that have been awarded to this user. ○ **Points**: A history of the points that this user has earned and the activities performed that earned the points. If the user has earned points in a forum that you do not have access to, the name of the forum is replaced with **Private forum**.
Events	A list of events that the user has created, is attending, or past events that the user has attended. Click an event to view the event details and respond.
Forum Expertise	A display of the user's expertise at the forum level. You can view their level within the forum and the number of points they have gained through contributing to that forum. To view the point ranges required to reach each forum level, click the information icon.
Topic Expertise	A display of the user's expertise at the topic level. You can view their level within the topic and the number of points they have gained through contributing to that topic. To view the point ranges required to reach each forum level, click the information icon.
Contributions	The contributions the user has made to the community.

Follow a community user

Manage your network by following other community users and tracking their activity in the community.

Before you begin

Role required: sn_communities.community_user

About this task

There are several ways of following users in the community.

Procedure

1. From the Communities homepage, perform one of the following actions.
   - Click your profile name or photo.
   - Click your profile name or photo and then the **Network** tab.
   - Click another user's profile name or photo and then the **Network** tab.
2. Click **Follow** for every user you want to follow.

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The state changes to **Following**. Your Activity Feed is updated with the activity those users have taken in the community.

3. **Optional:** Point to **Following** and click **Unfollow** to stop following a user.

Edit your community profile photo and personal information

Change your community profile photo and edit your personal information.

Before you begin

Role required: sn_communities.community_user

You can only edit your community profile if you are logged in to the community.

Procedure

1. From the Community homepage, select your name or profile photo and then select **Profile**.
2. To change your profile picture, click **Upload Picture**.
   A file system upload is initiated. Choose an image in `.png` or `.jpg` format and click **Open**.
3. To change any field value, select the value to display a pop-up window.
4. In the field value pop-up window, select the desired value and click **Save**.

The following table includes a description of the fields on the User Profile page.

User Profile fields

Field	Description
Company	Name of your employer.
Title	Your job title.
Department	Your job department.
Location	Your address, city, and state.
Bio	A short description about yourself.
Email	Your email address. **Note:** Use the email address used in your instance profile or the reset password features cannot be used.
Business phone	The work telephone number where people can reach you.
Mobile phone	Your mobile telephone number.
Language	Your preferred language.
Time zone	The time zone in which you work or reside.
Accessibility enabled	Use this toggle button to enable accessibility features.

Edit your community profile display settings

Edit your display settings to determine who can view each profile section.

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Before you begin
Role required: sn_communities.community_user, sn_communities.admin or sn_communities.moderation_admin

About this task
You can edit your own display settings for your community profile. If a community administrator finds inappropriate content on your profile, they can edit your display settings to hide the content from the community until it is corrected.

Procedure
1. On the community homepage, click the **Community** menu and then click **Community Profile**.
2. Click the **...** icon and then click **Display Settings**.
3. Open the choice lists and select display settings for any section.
4. Choose the privacy level to apply.

Privacy levels

Privacy level	Description
Everyone	Visible to all users, including non-logged in users.
Only me	Visible to yourself and administrators. If an administrator finds inappropriate content on your profile, the administrator can change the display settings to **Only me** until the content is modified. You receive an email notification detailing the display settings that were modified for which sections. Update the content and adjust the display settings accordingly.
Everyone after logging in	Visible to all users who access the community after logging in.
Followers	Visible to users who are following your profile.

5. Click **Save Settings**.

Report a community profile

Report a community profile to alert community moderators that there is offensive or inaccurate information in the profile.

Before you begin
Role required: sn_communities.community_user

Procedure
1. Click the name or photo of the user to report.
2. Click the **...** icon and select **Report Profile**.
3. From the list, select the reason you are reporting the user and add **Additional Comments**.

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4. Click **Submit**.
   - A confirmation message indicating that the abuse report has been received and will be reviewed is displayed.
   - A moderation task is created and assigned to a moderator for resolution.

Community subscriptions

Using subscriptions, you can choose specific areas of interest. Your activity feed and notifications are personalized according to your subscriptions.

Subscription types

Subscription type	Description/Features
Subscription	• Subscribe or unsubscribe to forums, topics, and community content (questions, answers, blogs, and video). • Auto-subscribe: Whenever you post content, you are automatically subscribed to the content itself. You are also automatically subscribed when you post a reply or a comment.
Activity feed	Displays activities based on your subscriptions with the most recent at the top.
Notification settings	• Manage your subscriptions using **Notification Settings**. • For each of your subscriptions, set email notifications using **Notification Preferences**.

Subscribe to content

Subscribe to forums, topics, questions, blogs, and videos. You are automatically subscribed to content that you create.

Before you begin

Role required: sn_communities.community_user

Procedure

1. To find the content of interest, use the search field or navigation to find the content of interest, such as a forum, topic blog, or video.
2. On the content page, click **Subscribe**.
   - A confirmation message indicating that you have successfully subscribed to the content is displayed at the top of the screen.
   - You receive a notification whenever there is an update to this content, for example, an answer to a question or a comment on a blog entry.
   - You can view updates in your activity feed.
3. **Optional:** To remove a subscription, return to the content and click **Subscribed**.

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When you point to this option, it becomes **Unsubscribed**.

You can also view your subscriptions and enable or disable them from the Community homepage by clicking your photo or name and clicking **Notification Settings**. Toggle **Receive Notifications** to turn all notifications on or off.

Related topics

Set notification preferences

Community subscriptions

Set notification preferences

Set notification preferences to receive updates via email on the content that you are following.

Before you begin
Role required: sn_communities.community_user

About this task
The Communities application separates the notion of subscriptions from notifications. It is possible to subscribe to an item and disable notifications. You can also turn off all notifications.

Procedure

1. On the Community homepage, click **Community** > **Notification Settings**.
2. Click **Notification Preferences**.
3. To manage your notifications in those areas, choose your category, such as **Forums**, **Topics**, **Blogs**, or **Videos**.

   Choose the **Network** category and then choose **View Network** to view the community users, who are following you, or the community users that you are following.
4. In the **Email** column, toggle any item that should or should not send updates.
5. **Optional:** To turn all notifications on or off, toggle **Receive Notifications**.

Note:

(Optional) Activity subscription modules will not be displayed in the Navigations and Subscriptions page, when you enable the disable_notifications flag.

The isNotificationDisabled API checks the value of the disable_notifications flag. This API can also be used for blocking notification of other activity subscription modules.

Request membership to a forum

You must be a registered member of the community to request membership to a forum that is marked for membership only.

Before you begin
Role required: sn_communities.community_user

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Procedure

1. Perform either one of the following actions:
   - Navigate to **Community** > **Homepage**. Open **Browse Community Forums** and then select the forum.
   - Navigate to **Community** > **All Forums** and then select the forum in the list. If you requested membership earlier, the status of your request appears.
2. Click **Request Access**.

   If approval is required, **Status** changes to **Requested**. You receive an approval or rejection email. If approved, you are immediately subscribed to the forum and **Status** changes to **Private Member**.

   If no approval is required, the request is auto-approved and **Status** changes to **Private Member**.
3. **Optional:** To cancel a request, point to the **Requested** status and click **Cancel**.
4. **Optional:** To leave a forum, click **...** within the forum and then select **Leave Forum**. **Status** changes to **Request Access**.

Related topics

Community access types

Communities roles

Accept an invitation to join a forum

An invitation to join a forum is sent as an email message. The method that you use to accept an invitation depends on whether you are a registered community user.

Before you begin

Role required: none

Procedure

1. Open the email invitation and click **Join Forum**.
   - If you are a registered and logged-in community user, the forum opens.
   - If you are a registered community user but have not accepted the community Terms & Conditions, a message appears to accept the Terms & Conditions. The forum opens after you accept the Term & Conditions.
2. If the login page appears, take one of the following actions.

Option	Description
If you are a registered user and not logged in.	Enter your login credentials to access the fo rum.
If you are not a registered user.	**a.** Click **Sign Up** on the login page. **b.** Enter your email address, a user name, and a password to create a community account.

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Option	Description
	c. The system sends a verification email. Click the verification link in the email to confirm your credentials. **d.** Reopen the email invitation and click **Join Forum**.

Forum membership is auto-approved and you are subscribed to the forum. **Status** changes to **Leave Forum**.

Post and respond to content in the community

Post and respond to content in the community to get answers or share information.

Before you begin
Role required: sn_communities.community_user

Procedure

Perform one or more of the following tasks from the community homepage.

Ask a question in the community

Ask a question in a forum to get an answer from other community users.

Before you begin
Role required: sn_communities.community_user

You can only ask a question in a forum if you have been assigned the correct permissions.

About this task
If you ask a question, you can edit or delete it. If you created the question and reply with an answer, your answer is labeled **Author**.

There are three ways of asking questions in Communities.

Procedure

1. From the Communities homepage, perform one of the following actions.
   - Locate the forum to ask a question in, click its name, and then click **Have a question? Click here to start typing.** Type-ahead search shows related posts. Click to open a related post in another page.
   - Locate the forum to ask a question in and click **Post** > **Question**.
   - If you do not see a forum, click **Have a question? Click here to start typing.**
2. Click **Question**.
3. On the form, fill in the fields.

Ask a question form

Field	Description
Question	Your question.
Forum	Forum to add the question to.

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Field	Description
	Note: If you created the question by clicking a forum from the Communities homepage, this forum is automatically entered in this field.
Topic (s) (optional)	Topic to add the question to. **Note:** You can repeat this previous step for as many topics as you want. If you change your mind about a particular topic, click its corresponding **x**icon.
Description	Content of the question. To insert an image, click the **Insert Image** button (), navigate to the `.png` or `.jpg` file, and then click **Open**. To insert a video, click the **Insert Video** button (), enter the video URL, and then click **Upload**.
Add attachments	To attach a file, click **Add attachments** and then drag the file into the **Attach Document** box or click the box and then navigate to the file. ○ You can add up to three attachments. ○ File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP. ○ Maximum file size is 2 MB. ○ Supported file types are listed. ○ Click the X icon to delete an attached file. **Note:** Your system administrator may have set a limit on the total number of attachments allowed across the community. When you click **Add**, your attachments are added and displayed in the question. If a user attaches a file to your question, you receive an email notification. **Note:** If antivirus protection is enabled, all attachments are automatically scanned for viruses once the question is posted.

4. Click **Post**.
   - The question is added and is available to users in this forum. You are automatically subscribed to this question. When there is a reply, you receive a notification.
   - Community users who are subscribed to the forum receive a notification that content has been posted. Activity and content feeds are updated accordingly.
   - If you have added attachments to your question and your community administrator has enabled antivirus protection, a scan automatically runs in the background.

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Note:

- If the scan is successful, the attachments are available to download.
- If the scan is in process or unsuccessful, the file is unavailable for download.
- Question authors and community administrators receive a notification that an attachment is infected.

- Click **Edit** to remove the infected file and upload the attachment again. You cannot add any more attachments until the infected file is removed.
- If you are a user whose content is due to be moderated, the content is not posted until approved by a community moderator.

Related topics

Disable comments

Reply to a question in the community

Reply to a question or another reply.

Before you begin

You can only reply to a question or another reply in a forum or sub forum if you have been assigned the correct permissions.

Role required: sn_communities.community_user

Procedure

1. To find the question or a reply to respond to, use search or navigation from the community homepage.
   You can also reply to a question or a reply from the activity feed on the homepage.
2. Click **Reply**.
3. Enter your reply.
4. **Optional:** If required, you can add an image to your reply.
   a. Click the Insert image-editing control.
   b. Choose your `.png` or `.jpg` format image file.
   c. Click **Open**.
5. **Optional:** If required, you can add a video to your reply.
   a. Click the **Insert Video** button ( )
   b. Enter the video URL.
   c. Click **Upload**.
6. **Optional:** You can add attachments to your post.
   a. Click **Add Attachments**.
   b. Drag your file into the **Add Attachments** box or click **Click to Upload**.
   c. Click **Add**.

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Your attachment is added and displayed in your post. If a user attaches a file to your content, you receive an email notification.

Note:

- You can add up to three attachments per post.
- The maximum file size per attachment is 2 MB.
- Your system administrator may have set a limit on the total number of attachments allowed across the community.
- File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP
- If antivirus protection is enabled, all attachments are automatically scanned for viruses once the reply is posted.

7. Click **Reply**.
   The reply is added below the question and any other replies. The reply is available to users in this forum.

   Community users who are subscribed to the forum receive a notification that content has been posted. Activity and content feeds are updated accordingly.

   Note:
   If you are a user whose content is due to be moderated, the content is not posted until approved by a community moderator.

   If you have added attachments to your reply and your community administrator has enabled antivirus protection, a scan automatically runs in the background.

   - If the scan is successful, the attachments are available to download.
   - If the scan is in process or unsuccessful, the file is unavailable for download.
   - Reply authors and community administrators receive a notification that an attachment is infected.
   - Click **Edit** to remove the infected file and upload the attachment again. You cannot add any more attachments until the infected file is removed.
8. Click **Mark as Correct Answer** after reviewing the reply posted.

   Note:
   Author of the question, forum or community admin, and forum or community moderator review the post.

   If an accepted solution has infected attachments, an email notification is sent to the author, admins, and or moderators who must unmark the answer as the accepted solution. Author of the answer gets a notification to update the post.

Post a blog in the community

Create a blog post and publish it immediately, schedule to publish at a specified date, or save it as a draft.

Before you begin

You can only post a blog in a forum or sub forum if you have been assigned the correct permissions in the parent forum.

Role required: sn_communities.community_user

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About this task

You can post, edit, and delete a blog. If you comment on the blog that you create, your answer is labeled as **Author**.

Procedure

1. Locate the forum to create a blog in and click its name.
2. Click **Post** and then click **Blog**.
3. On the form, fill in the fields.

Post a blog form

Field	Description
Blog Title	Title for your blog.
Forum	The forum or sub forum to add the blog to. **Note:** When you create the blog by clicking a forum or sub forum from the Community homepage, the forum or sub forum name is automatically displayed in the field.
Topic (s) (optional)	Topic to add the blog to. **Note:** You can repeat this step to add as many topics as you want. To delete a particular topic, click its corresponding **x**icon.
Description	Content of the blog. To insert an image, click the **Insert Image** button ( ), navigate to the .png or .jpg file, and then click **Open**. To insert a video, click the **Insert Video** button ( ), enter the video URL, and then click **Upload**.
Add attachments	Click **Add attachments** and then drag the file into the **Attach Document** box. Alternatively, click the box and then navigate to the file. ○ You can add up to three attachments with supported file types. ○ File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP. ○ Maximum file size is 2 MB. ○ Click the X icon to delete an attached file. **Note:** Your administrator may have set a limit on the total number of attachments allowed across the community. Click **Add**. If a user attaches a file to your blog, you receive an email notification.

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Field	Description
	Note: If antivirus protection is enabled, all attachments are automatically scanned for viruses when the blog is posted.
Schedule Publish	Click the check box to publish the blog on a specified date. Select the date, time, and time zone of the blog. The scheduled blog is only visible for author and administrator until it is published. **Note:** For a blog that has approval workflow, the blog state changes to "Ready to publish" when it is approved before the scheduled time. If a blog is approved after the scheduled time, the state changes to "Published".

4. Complete one of the following actions to save your blog.

Related topics

Disable comments

Post a video in the community

Post a video in a forum or sub forum.

Before you begin

Role required: sn_communities.community_user

You can only post a video in a forum or sub forum if you have been assigned the correct permissions in the parent forum.

About this task

You can post videos on their own or add them to a question or a blog. If you are the creator of the video or a community administrator, forum administrator, forum moderator, or community moderator, you can edit the videos once posted.

Procedure

1. While in a forum, click **Post** > **Video**.
2. On the form, fill in the fields.

Post a video form

Field	Description
Click here to Insert a Video	○ URL of your video. ○ Click **Upload**. The video is added to your post. ○ To edit and replace the current video with another one, click **Select a different Video**.
Video Title	Title for the video.
Forum	Read-only. The forum or sub forum is automatically entered in this field.
Topic (s) (optional)	Topic to add the video to.

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Field	Description
	Note: You can repeat this step for as many topics as you want. If you change your mind about a particular topic, click its corresponding **x**icon.
Description (optional)	Description for your video.

3. Click **Post**.
4. **Optional:** If you have permission to edit or delete the video, click a video, click the corresponding ••• icon, and then click **Edit** or **Delete**.
   Once a video is uploaded, other community users can comment on it, give feedback, subscribe to the video, bookmark it, and report any inappropriate content in the video.

Related topics

Disable comments

Comment on a blog or a video in the community

Comment on a blog or a video or comment on another comment.

Before you begin

You can only comment in a forum or sub forum if you have been assigned the correct permissions in the parent forum.

Role required: sn_communities.community_user

About this task

If you create a comment, you can edit or delete it. If you created the blog or video and add a comment, your comments are labeled **Author**

.

Procedure

1. To find the blog or video entry to comment on, use the search field or navigation.
2. Click **Comment**, and enter your answer.
3. You can add attachments to your post.
   a. Click **Add Attachments**.
   b. Drag your file into the **Add Attachments** box or **Click to Upload**.
   c. Click **Add**.

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Your attachment is added and displayed in your post. If a user attaches a file to your comment, you receive an email notification.

Note:

- You can add up to three attachments per post.
- The maximum file size per attachment is 2 MB.
- Your system administrator may have set a limit on the total number of attachments allowed across the community.
- File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP.
- If the attachment size is large or you have a slow connection, a progress indicator is displayed.
- If antivirus protection is enabled, all attachments are automatically scanned for viruses once the reply is posted.

4. Click **Comment**.
   The comment is added below the blog or video entry and any other comments. The answer is available to users in this forum.

   Community users who are subscribed to the forum receive a notification that content has been posted. Activity and content feeds are updated accordingly.

   Note:
   If you are a user whose content is due to be moderated, the content is not posted until approved by a community moderator.

   If you have added attachments to your comment and your community administrator has enabled antivirus protection, a scan automatically runs in the background.

   - If the scan is successful, the attachments are available to download.
   - If the scan is in process or unsuccessful, the file is unavailable for download.
   - Comment authors and community administrators receive a notification that an attachment is infected.
   - Click **Edit** to remove the infected file and upload the attachment again. You cannot add any more attachments until the infected file is removed.

Post a document in the community

If you have the proper permissions in a forum, you can share a document with colleagues, experts, or other community users. You can associate the document with as many topics as needed.

Before you begin

Role required: sn_communities.community_user

Procedure

1. While in a forum, click **Post** > **Document** and then fill in the form:

Document configuration form

Document title	Enter a descriptive title for the document.

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Forum	Read-only. The current forum or sub forum is selected.
Topics	Select a topic from the list. Repeat for as many topics as needed.
Attach document	To attach a file, drag the file into the **Attach Document** box or click the box and then navigate to the file. ○ You can attach only one document. ○ Maximum file size is 5 MB. ○ File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP. ○ Click the X to delete an attached file. **Note:** Your administrator may have set a limit on the total number of attachments allowed across the community. If antivirus protection is enabled, all attachments are automatically scanned for viruses when you click **Post**.
Description	Enter a useful description for the document.

2. Click **Post**.
   - The document appears in the forum. The author of a document can edit or delete the post.
   - Community users who are subscribed to the forum receive a notification that content has been posted. Activity and content feeds are updated accordingly.

   Note: If you are a user whose content is due to be moderated, the content is not posted until approved by a community moderator.

   If your community administrator has enabled antivirus protection, a scan automatically runs in the background.

   Note:
   - You can download the attachments only when the scan is successful.
   - The user who posted the document and community administrators receive a notification that an attachment is infected.

Related topics

Disable comments

Mention a user in the community

Draw attention to your content in the community by mentioning other community users in the post.

Before you begin

Role required: sn_communities.community_user

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About this task

You can mention users in questions, blogs, events, comments, and answers.

Note:
The user mentions feature is not enabled for document or video content types.

You can mention users in Communities in the following ways.

Procedure

1. From the community, perform one of the following actions.
   - Post content to the community and place your cursor in the script editor.
   - Click the content you want to comment on or reply to.
2. Enter the @ symbol followed by the user's name.

Note:
You can mention multiple community users in the post.

An email notification is sent to the community users you selected and their followers. any community users that follow the user. The activity feed is also updated.

Note:
Followers can set their notification preferences to enable or disable notifications of user mentions.

Community events

Create, manage, and participate in events to encourage engagement across the community.

Before you begin

Role required: sn_communities.admin or sn_communities.community_user

Procedure

Perform one or more of the following tasks.

Post a community event

You can create a community event that other community users, colleagues, or experts can register for and attend.

Before you begin

You must have permission to create events (**Event Write and Comment Write**) and be a member of the forum to create the event in. The **Event** content type must be active in the forum for the event.

Role required: sn_communities.community_user

Procedure

1. While in a forum, click **Post** > **Event** and then fill in the form.

Create an event

Field	Description
Event title	A title for your event.
Forum	Read-only. The forum is automatically entered in this field.

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Field	Description
Topic(s) optional	A topic to add the event to. **Note:** You can add as many topics as needed. To remove a topic, click the **x**.
Set guest limit / Total allowed	Select the check box to specify the maximum number of guests that can attend in the **Total allowed** field. When the number of guests reaches to the limit, additional users are added to the wait list.
Display guest list to the public	Select the check box to enable forum members to view the guest list for the event.
This is an online event	For an online event, click the check box.
Name of location	For an online event, the text specified in the **Name of Location** appears as a label with a hyperlink to the specified **Web URL**. For example, enter the text as 'Click Here to Join the meeting' to facilitate your subscribers to join the meeting. For an offline event, enter the **Name of location**, **Address**, **City**,**State**, **Zip/ Postal Code**, and **Country** to mention the venue.
Web URL	Enter the Web URL of an online event for your subscribers to click and join.
Date and time	The date and time of the event. **Date** must be in the future. **Note:** If you change the **Duration**, the **End Time** is auto-updated. Click **Change time zone** to set the time zone for the event. Default: Your local time zone. The time zone changes according to the time zone of the user viewing the event.
Duration	The duration of the event. **Note:** If you change the **End Time**, the **Duration** is auto-updated. By default, the duration is 30 minutes
Send reminder to guests one day before the event	Select the check box to send an email reminder one day before the event to all users that responded **Attend**.
Description	The description of the event. To insert an image, click the **Insert Image** button ( ), navigate to the .png or .jpg file, and then click **Open**. To insert a video, click the **Insert Video** button ( ), enter the video URL, and then click **Upload**.

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Field	Description
Add attachments	Click **Add attachments** and drag the file into the **Attach Document** box or click the box and then navigate to the file. ○ You can add up to three attachments. ○ File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP. ○ Maximum file size is 2 MB. ○ Click the X icon to delete an attached file. **Note:** Your system administrator may have set a limit on the total number of attachments allowed across the community. When you click **Add**, your attachments are added and displayed in the event. If a user attaches a file to your event, you receive an email notification.
Schedule Publish	Click the check box to publish an event on a specified date. Select the date and time of the event. By default, the schedule time zone is same as event time zone. The scheduled event is only visible for author and administrator until it is published. **Note:** For an event that has approval workflow, the event state changes to "Ready to publish" when it is approved before the scheduled time. If an event is approved after the scheduled time, the state changes to "Published". You cannot schedule a published event.

2. Perform one of the following actions.

Related topics

Edit an event

Disable comments

Edit an event

Edit the details of past and upcoming events. By editing a past event, you can attach a document or share the meeting recording link with your event subscribers.

Before you begin

Role required: sn_communities.community_user, sn_communities.moderation_admin, sn_communities.community_moderator, sn_communities.forum_moderator, or sn_communities.forum_admin

Procedure

1. Search for an event that you want to modify.
2. Click the More Options icon (•••) and then click **Edit**.
3. On the form, edit the fields as required.

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Update Event form

Field	Description	Subscriber receives an email notification
Event title	Title for past and upcoming events.	Yes
Forum	Forum name in which the event is posted. You cannot modify the forum.	NA
Topic(s)	Topics that are associated with the event. Add or modify topics as needed. To remove a topic, click **x**.	No
Set guest limit	Option to increase the guest limit to confirm the participants on the waiting list for an upcoming event. You cannot modify the guest limit for a past event.	Yes - for a confirmed participant
Display guest list to users	Option to enable or disable the display of the guest list of an upcoming event for forum members.	No
This is an online event	Option to change the event type to online or offline for an upcoming event. You cannot change a past event.	Yes
Name of location	Name of the location for past and upcoming events. ○ For an online event, the text specified in the **Name of Location** field appears as a label with a hyperlink to the specified Web URL. For example, to share the meeting recording link of a past event, change the text to `Download the meeting recording`. ○ For an offline event, change the **Name of location**, **Address**, **City**,**State**, **Zip/ Postal Code**, and **Country** fields to mention the venue.	Yes
Web URL	Web URL for past and upcoming events. ○ For a past event, enter the Web URL of the meeting recording to share the link with your subscribers.	Yes

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Field	Description	Subscriber receives an email notification
	○ For an upcoming event, change the Web URL if there is a change in the system details.	
Date and time	Date and time for an event. You can change the date and time to a future date for past and upcoming events. When you change the date of a past event to a future date, the past event becomes an upcoming event. You can edit all other details as applicable for an upcoming event. Click **Change time zone** to set the time zone for the event. The default is your local time zone. The time zone changes according to the time zone of the user viewing the event. **Note:** If you change the **Duration** field, the **End Time** field is auto-updated.	Yes
Duration	Duration of the event. **Note:** If you change the **End Time**, the **Duration** is auto-updated. By default, the duration is **30 minutes**.	Yes
Send reminder to guests one day before the event	Option to send an email reminder one day before the event to all users that responded **Attend**. This check box only appears for upcoming events and not for past events.	No
Description	Description for past and upcoming events. You can insert an image or a video as required.	Yes

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Field	Description	Subscriber receives an email notification
Add attachments	Attachments for past and upcoming events. Edit an attachment if required.	Yes
Schedule Publish	Option to publish an event. This check box appears only for a scheduled event and not for a published event. ○ To reschedule, change the scheduled date and time as required. By default, the schedule time zone is the same as the event time zone. Selecting this check box publishes an event directly at the scheduled date and time. ○ To delete the schedule, clear the check box.	No

4. Perform one of the following actions.

Related topics

Post a community event

Disable comments

View and participate in a community event

You can view details for published events and perform tasks such as responding to the event or adding it to your calendar.

Before you begin

You must be a registered member of the community and have permission to read events (**Event Read and Comment Write**) to be able to respond to events.

Role required: sn_communities.community_user

Procedure

1. From the community homepage, perform one of the following actions.
   - Navigate to the Content List.
   - Navigate to the Activity Feed.
   - Navigate to a forum or topic.
   - Navigate to the community profile of another user and click the **Events** tab.
   - Click **Community** > **Events**.
2. Click an event.
   The Event details page displays the following information.

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Community event details

Event header	○ View the name of the event, who created it, and when. ○ If the event organizer chose to display the guest list to the public, you can view how many community users have responded **Attending** or **Maybe** and click the numbers to see the names. ○ If the guest list is private, you can view how many community users have responded **Attending** or **Maybe**, but you cannot see the names. ○ View the number of spots still available in the event or your position on the waitlist. ○ If the event is taking place in the same time zone as you set in your user preferences, the **Event time zone** is displayed. ○ If the event is taking place in a different time zone to the one that you set in your user preferences, both **Event time zone** and **Your time zone** are displayed.
Event overview	○ When and where the event is taking place. ○ Description of the event. ○ Topics associated with the event. ○ Comments on the event. ○ Number of times the event has been viewed.
Upcoming Events	Next five upcoming events.
Popular Past Events	Top five most popular past events and the number of community users that were interested in the event. Interested community users include users who either attended or were waitlisted for the event.

3. **Optional:** Click **Attending**, **Maybe**, or **Declined** to view or search the guest list and their responses.
4. **Optional:** Click **Subscribe** to subscribe to the event and receive notifications when the event is updated.
   If your response is **Attending** or **Maybe**, you are auto-subscribed to the event.
5. **Optional:** Click **Respond** to indicate whether you are attending or maybe attending the event, to decline, or to add yourself to the waitlist.
   - You can also respond to an event directly from the Activity Feed.
   - If the event is full, a message stating that you can join the waitlist is displayed. The **Attend** option replaces **Waitlist**. If you are waitlisted, your position on the waitlist is displayed. Once a position becomes available in the event, you move up in the list.

   Depending on your selection, the status changes to either **Attending**, **Maybe**, **Declined**, or **Waitlisted**. You can update your response as needed.
   - If an event creator or community admin deletes an event and you responded **Yes**, **Waitlist**, or **Maybe**, you receive an email notification based on your notification preferences.
   - If an event is updated, and you responded **Yes**, **Waitlist**, or **Maybe**, you receive an email notification based on your notification preferences.
6. **Optional:** Click **...** to perform one of the following actions.

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Option	Description
Add to calendar	Downloads an .ics file that you can add to your calendar. The file includes the title and description of the event, the event location, start and end dates, the event time, and any attachments. If guests have chosen not to share details, the information is not displayed in the file.
Bookmark	The event appears in your bookmarks list on your profile page. Click **Remove Bookmark** to delete a bookmark.
Report content	Click **Report content** to report inappropriate content in the event.

View the community events landing page

The Events landing page provides an overview of all events that you have access to in the community. You can filter events, view your status for the event, see how many other community users are attending an event, and so on.

Before you begin

Role required: sn_communities.community_user

Community users must have permission to view events (**Event Read**).

Procedure

1. Navigate to **All** > **Community** > **Events**.
   The Events landing page displays a list of all events that you have access to and a list of the five most popular past events.
2. Filter the list for events that you created or according to attendance status, by forum, and by date.
   The list displays the following information.
   - The event creator, last update, and location.
   - Your status, if you have already responded to the event.
   - The number of community users who are interested in the event. Interested community users include users who are attending or have been waitlisted for the event.
   - The number of community users who have viewed the event.
3. Click an event to perform tasks related to the event.

Manage a community event

View additional response information on the event, edit or delete events, and download a guest list.

Before you begin

You must be a registered member of the community and have permission to read events (**Event Read and Comment Write**) to be able to respond to events.

Role required: sn_communities.community_user who created the event or sn_communities.admin.

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About this task

You can access published events from several places within the community.

Procedure

1. From the community homepage, perform one of the following actions.
   - Navigate to the Content List.
   - Navigate to the Activity Feed.
   - Navigate to a forum or a topic.
   - Navigate to another user's community profile and click the **Events** tab.
   - Click **Community** > **Events**.
2. Click an event.
   The Event details page displays the following information.

Community event details	
Event header	○ View the name of the event, who created it, and when. ○ View how many community users are attending or maybe attending. ○ View how many community users declined the event. ○ View the number of spots still available in the event or your position on the waitlist.
Event overview	○ When and where the event is taking place. ○ The description of the event. ○ The topics associated with the event. ○ Comments on the event. ○ The number of times the event has been viewed.
Upcoming Events	Shows the next five upcoming events.
Popular Past Events	Shows the top five most popular past events and the number of community users that were interested in the event. Interested community users include users who either attended or were waitlisted for the event.

3. **Optional:** Click the **...** icon.
4. You have the following options.

Option	Description
Edit	Click **Edit**. The **Update Event** page opens. An email notification is sent to all community users who responded **Yes**, **Maybe**, or **Wait list**.
Delete	Click **Delete**. A warning message appears asking if you are sure that to delete the event. An email notification is sent to all community users who responded **Yes**, **Maybe**, or **Wait list**.

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Option	Description
Add to calendar	An `.ics` file is downloaded that you can add to your calendar. The file includes the title and description of the event, the event location, start and end dates, the event time, and any attachments. If guests have chosen not to share their details, the information is not displayed in the file download.
Bookmark	The event appears in your bookmarks list on your profile page. If you have already bookmarked the event, you can click **Remove Bookmark**.
Report content	As a community admin, click **Report content** to report inappropriate content in the event.
Download Guest List	Download a `.csv` file of the guest list. View the file to see the list of community users attending the event, their RSVP status, and email address.

Bookmark community content

You can bookmark your favorite questions, blogs, videos, documents, and events. You cannot bookmark content in draft state or replies or comments.

Before you begin

Role required: sn_communities.community_user

Procedure

1. Click the content to bookmark.
2. Click the **...** icon and then select **Bookmark**.
   The bookmarked content is added to the **Bookmarks** tab on your community profile.
3. To view your bookmarks, perform one of the following actions.
   - Navigate to your community profile and then click **Content** > **Bookmarks**.
   - Click your name or profile photo and then click **My Bookmarks**.
4. You can search for bookmarks and, if required, select a bookmark and then click **Remove Bookmark**.

Provide feedback on community content

Provide feedback on content that you find useful.

Before you begin

Role required: sn_communities.community_user

About this task

There are four supported types of content feedback: comment, upvote, helpful, and mark as correct answer. You can enter feedback directly in the Activity Feed on the Community homepage or navigate to the content you want to provide feedback on.

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Content Feedback

Content feedback	Description
Comment	Comment on blogs and videos. You can also comment on a comment. The count of comments is displayed.
Upvote	**Upvote** questions. The count of upvotes is displayed.
Helpful	Mark answers, blogs, comments, and videos as **Helpful**. The count of helpful marks is displayed.
Mark as Correct Answer	If you are a community or forum administrator, community or forum moderator, or the author of the question, you can mark one answer as **Mark as Correct Answer**. There is only one correct answer for each question. If you later mark a different answer as correct, the current answer loses this status.

Procedure

1. From the Community homepage, perform one of the following actions.
   - Click a forum and then click the content, for example, a blog or a question.
   - Use search and then click the content.
   - Navigate to the content on the homepage **Activity Feed** and provide your feedback directly from here.
2. Enter your feedback.
   The following feedback is displayed.

Feedback types included in the community content

Community homepage > **Activity Feed**	Feedback on any content that users are subscribed to.
Community homepage > **Content List**	Feedback entered by other users.
Your **Community Profile** > **Activity** tab.	Feedback entered by you.

Note:
The homepage activity feed is not automatically refreshed. If updates occur while viewing the activity feed, a **New Updates Available** message appears. You can click and view all new updates. If you are in the middle of making a comment and you click **New Updates Available**, a warning message appears asking if you want to continue.

Report inappropriate community content

Report content to alert community moderators that the content is inappropriate or spam.

Before you begin

Role required: sn_communities.community_user

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Procedure

1. Use the search field or navigation to find the content to report.
2. Click the **...** icon and then click**Report Content**.
3. From the list, select the reason you are reporting the content from the list and add **Additional Comments**.
4. Click **Submit**.
   A moderation task is created and assigned to a moderator for resolution. Depending on the moderation settings created for your community, the content may be hidden until a moderator has reviewed it.

View a list of questions and create a case

View questions that can potentially be converted to cases, the community portal provides a page with a list of questions created by contacts or consumers.

Before you begin

Role required: sn_customerservice_manager, sn_customerservice_agent, sn_customerservice.consumer_agent, sn_communities.admin, or proxy_case_creator

About this task

This page displays questions from the forums to which the user has access.

Procedure

1. From the community portal, select **Community** > **Questions to Case** to open the list of questions.
   This list includes questions that have been posted by a contact or a consumer and for which a case has not yet been created.
2. Use the filters on this page to filter the question list:
   - View questions for all forums or for the selected forum
   - View questions posted within the selected time frame: 7, 15, or 30 days
   - Sort by the most recent questions or older questions
   - Sort by the question status: all, solved, unsolved, or unreplied
3. To create a case from one of the questions in the list, select a question to open the question page.
4. Select the overflow icon (**...**) and then select **Create Case** to open a Create Case form.
   The **Create Case** action is available if a case has not yet been created from a question. Once a case has been created, this action is no longer available.

   Note:
   The **Create Case** option is available for the question posted by an external user.

   Information from the question is mapped to the fields on the case.
5. Enter any additional information in the fields on the Create Case form.
   For example, add **Description** for the case.
6. If necessary, attach a file to the case.
7. Select **Submit**.

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You are returned to the question content page. The case number appears in the question header after the case is created. The question author, the customer service agent or consumer service agent, or any user with the proxy_case_creator role can see the case number.

The contact or consumer who posted the question can also view the case by navigating to **My Cases** on the Customer Service Portal or Consumer Service Portal.

Gamification

Encourage users to participate and contribute content in the community by providing incentives in the form of points, achievement levels, and badges.

Use the gamification framework to:

- Configure point values associated with specific user activities.
- Define achievement levels based on earned points.
- Create and assign badges to recognize users.

Community administrators can:

- Create rules and configure points that users receive for activities on the community.
- Create tracks to logically separate points assigned in the communities into different areas.
- Create levels in the community where users can achieve expertise or a reputation and then configure level ranges within each level definition.
- Create badges to award to users for different achievements.

Community users can:

- Perform activities and accrue points.
- Achieve levels based on point totals.
- View leaderboards to find community experts on specific forums or topics.
- See their own standing within the community.
- See gamification achievements on their user profiles.

Gamification components

The gamification feature includes several components, such as rules, levels, and tracks, that enable users to earn points and badges for community activities.

Rules

Gamification rules allow you to configure points that users receive for activities on the community.

Gamification includes several pre-defined rules. The gamification administrator can use these rules, modify them as needed, or create new rules. These pre-defined rules include:

- Comment marked as helpful: 5 points
- Document marked as helpful: 5 points
- Video marked as helpful: 5 points
- Blog marked as helpful: 5 points
- Answer marked as helpful: 20 points
- Document bookmarked: 20 points

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- Blog bookmarked: 20 points
- Video bookmarked: 20 points
- Answer marked correct for a question: 40 points

When a user performs an activity that has a gamification rule, the user profile identified in the rule receives points. Points received through a gamification rule can be configured to accumulate toward:

- Overall points across the entire community
- Points in forums associated with the activity
- Points in topics associated with the activity
- Points in a track
- Points assigned for a combination of forums, topics, and tracks

If users revert previous activities, the points associated with these activities are removed. As an example, if a rule has been defined and a user creates a blog, they are awarded points. The points are deducted when the blog is deleted. If a rule has not been defined and a user creates a blog, no points are awarded. If the user removes it once a rule has been defined, points are deducted even though none were awarded in the first place.

Related topics

Create a gamification rule

Tracks

Tracks provide a way to logically separate points assigned in the communities into different areas.

Gamification includes two pre-configured tracks:

- Community Expertise
- Community Participation

While the application is configured to accumulate points by tracks, gamification does not currently display tracks in the community portal.

Related topics

Create a gamification track

Levels and level ranges

Points accumulated by community users can help them achieve different reputation levels.

The system is pre-configured with levels where community users can earn points and achieve expertise or a reputation:

- Global: overall points accumulated across the entire community
- Forum: points accumulated in forums associated with the activity
- Topic: points accumulated in topics associated with the activity

Gamification administrators can configure level ranges within each level. These level ranges progress from a starting point value to a higher value (point ranges do not overlap) and have unique, configurable names. For example, in the Global level, a user that has earned 100–499 points is a Newbie while a user that has earned 500–999 points is an Enthusiast.

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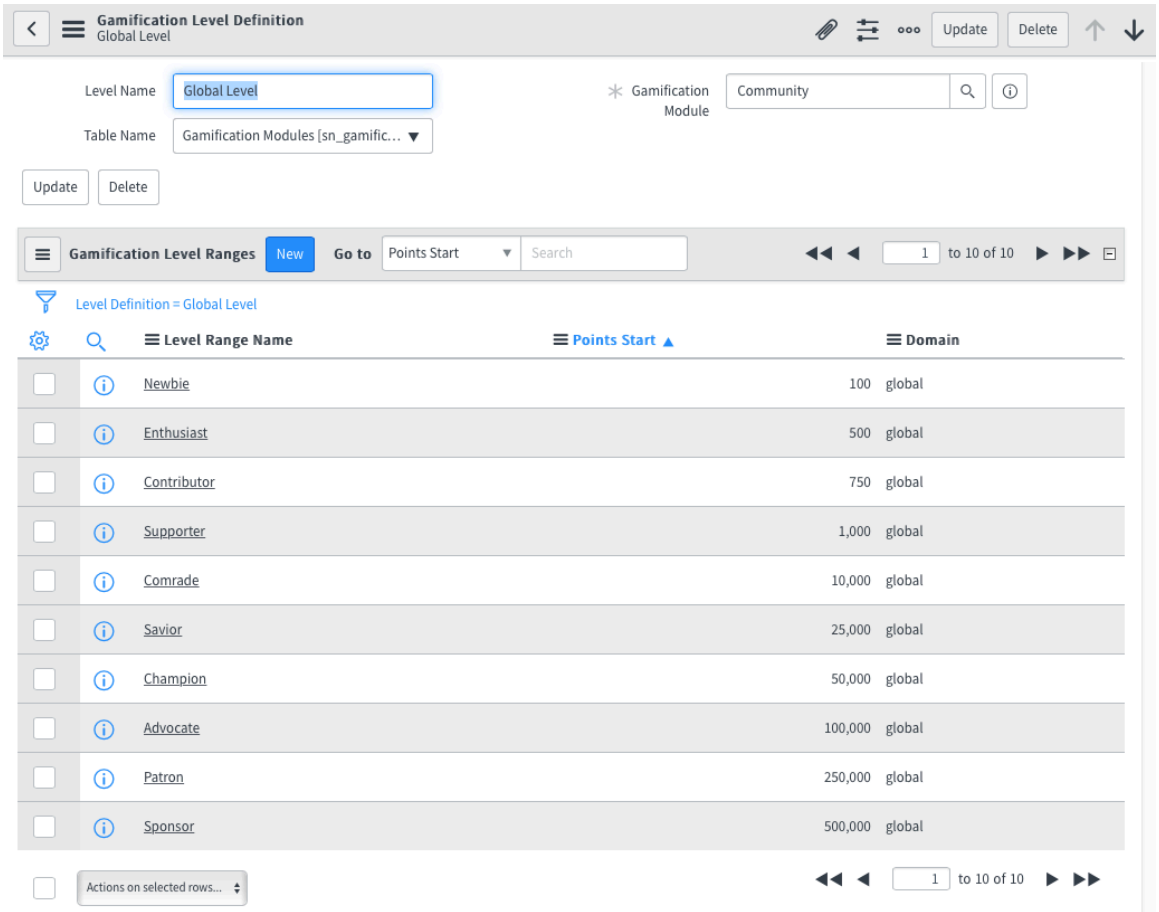
Gamification Level Definition form



In the community portal, users can see level range names and point totals in the gamification user interface components.

- On the leaderboard page and leaderboard widgets
- At the top of a user's profile below the user name and title
- On the user profile page in the Achievements tab
- On content pages

Related topics

Manage gamification levels

Manage gamification level ranges

Badges

Users can earn badges for achievements or areas of expertise within the community. Gamification moderators manually assign badges to users.

Gamification includes several predefined badges. Each badge includes:

- A name
- An icon
- A brief description

Gamification administrators and moderators can award badges to community users and also remove badges. A badge can be awarded to a user one time. If a badge is removed from a user, it can be awarded to that user again.

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Earned badges are visible in the community portal in the gamification user interface components. Community users can see earned badges and available badges on their own user profile page in the Achievements tab.

Related topics

Create a gamification badge

Points

Users earn gamification points by performing activities in the community.

Users can earn points within a community, a forum, or a topic. As users accrue points, they achieve level ranges. Point totals appear on leaderboards and on user profiles, in the profile header, and in the Achievement tab. After points are awarded to a user, an entry appears at the top of the Points list and the user's point total is updated.

The Points list has a widget instance option to **Show points for private forum**.

- When set to true, the point record displayed in the user profile does not show the forum name if the user performing the action does not have forum access. It displays "Private Forum" in place of the forum name.
- When set to false, the point record does not display in the user profile.

The Points list also has a widget instance options for the **Page size**, which determines the number of results displayed in the list. If there are more results than the number specified in this option, a button to show additional results appears at the bottom of the points page.

Gamification user interface components

Gamification information appears on leaderboards, the user profile page, and content pages.

Leaderboard page

The leaderboard page displays the top contributors in the community, in a forum, or in a topic.

Users appear on the leaderboard based on the number of earned points and are ranked in descending order. You can filter the leaderboard to display information for the current month or all-time and by a specific forum or topic.

To display the leaderboard, navigate to **Community** > **Leaderboard**. You can also click **Show Leaderboard** on the leaderboard widget. When navigating to the leaderboard from a leaderboard widget on a forum/topic landing page, the leaderboard shows the top point earners for that forum/topic.

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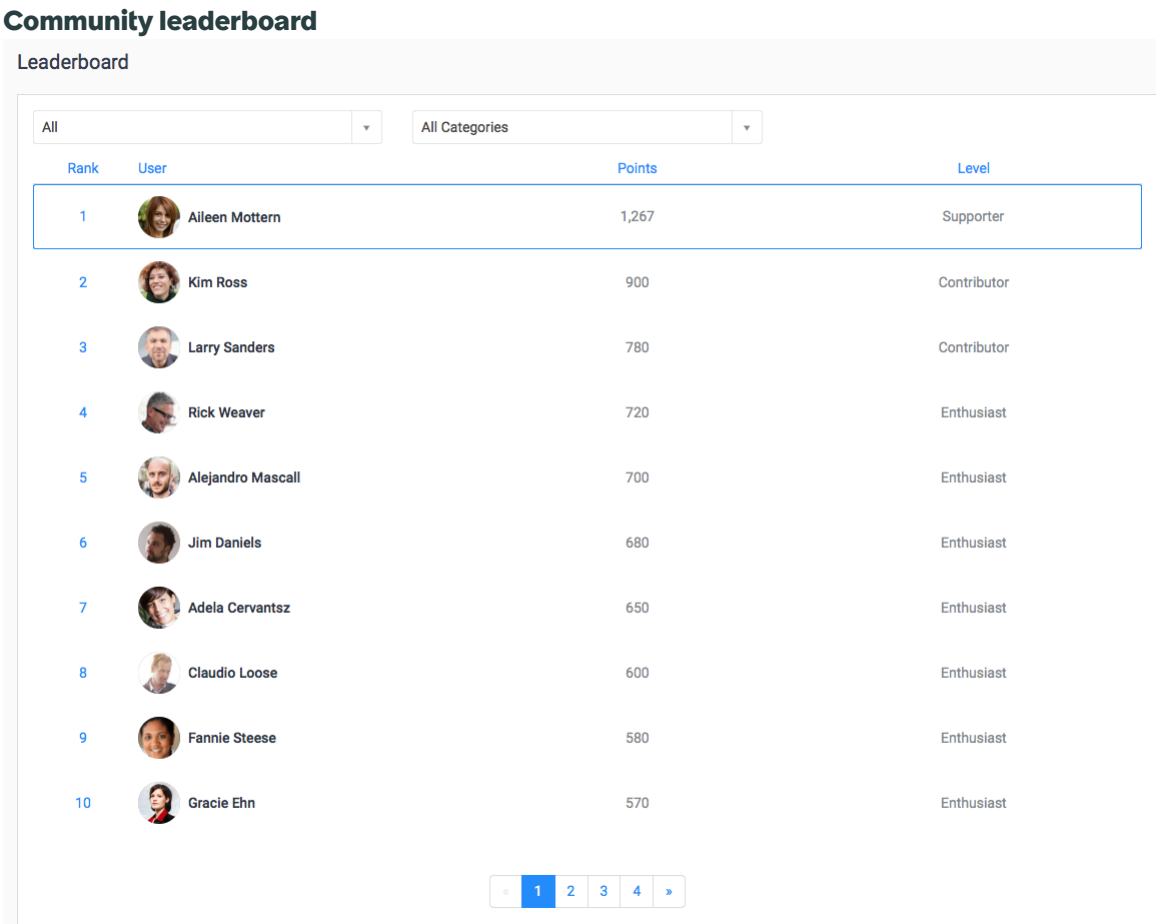

For each user, the leaderboard displays:

- Rank: shows the rank depending upon the selected filters (time, forum or topic)
- Name
- Profile photo (if available) or initials
- Current level: shows global, forum, or topic level depending upon the selected filter

By default, the leaderboard displays 10 users per page. Users can use the pagination controls to view additional pages. Pointing to a user name in the leaderboard displays a pop-up window with more information about the user.

Leaderboard widgets

Leaderboard widgets appear on the Community homepage and on forum and topic landing pages. These widgets display the users with the highest point totals within the community, forum, or topic.

The leaderboard widget shows the top five users. If there are more than five users that have earned points within the community, forum, or topic, **Show Leaderboard** appears at the bottom. Click this button to display all of the users on the leaderboard page.

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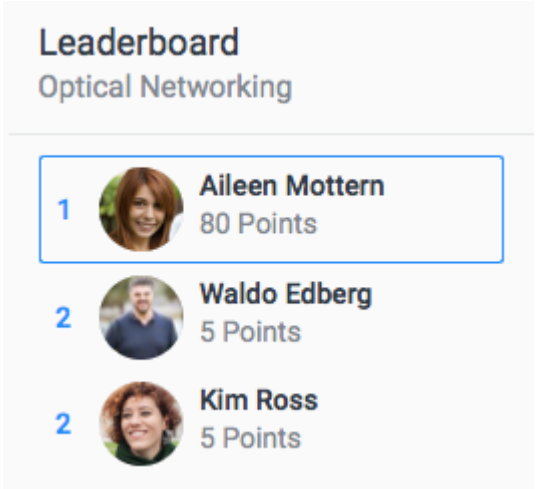
Community forum leaderboard widget



For forums and topics, the leaderboard widget header displays the forum or topic name. When navigating to the leaderboard page from a forum/topic, the leaderboard shows the top point earners for that forum/topic.

System administrators can configure settings for the leaderboard widget:

- The number of users displayed in the widget (default is 5, maximum is 10)
- The time period (overall or current month)
- The leaderboard type (community, forum, or topic)
- Anchor to a specific forum or topic (not recommended)

User profile page

The user profile page displays gamification information that showcases the user's expertise.

The gamification information is shown in three sections of the user profile page:

- In the header area
- In the Achievements tab
- In the forum and topic expertise widgets

User profile header area

When the gamification feature is enabled, the user profile header area includes the user's current gamification achievements. This information appears just below the user name and title:

- The top three badges that have been awarded to the user. Pointing to a badge displays the badge name.
- The total number of points earned by the user.
- The current global level achieved.

Achievements tab

Users can view details about gamification levels, badges, and points on the user profile page in the Achievements tab.

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Achievement tab field and description	
Levels	A list of the levels available to the user, with the current level highlighted. This tab includes a link to the Community page **How to Earn Points**.
Badges	A list of the earned badges and available badges for the user. Earned badges appear at the top of the list. Earned badges are sorted by the most recently earned. Available badges appear below earned badges. Users can filter this list to view all badges or earned badges. When viewing another user's profile, only the earned badges are displayed and are sorted by the most recently earned.
Points	A history of the points earned and the activities performed by the user. This list includes the last 10 activities. Click **Show more** to display additional pages. Gamification moderators can award and remove points for community users. This tab includes a link to the Community page **How to Earn Points**.

Forum and topic expertise widgets

The forum and topic expertise widgets on the user profile page provide a visual representation of the user's top areas of expertise.

The number within the circle and the blue highlight around the circle represent the number of levels completed. For example, 2 of 5. The number below the circle indicates the total number of points that the user has earned within the forum or topic. The widget displays up to five items and the system administrator can configure the widget to show up to a maximum number of 10 items.

Clicking the info icon displays the forum or topic levels and the point ranges.

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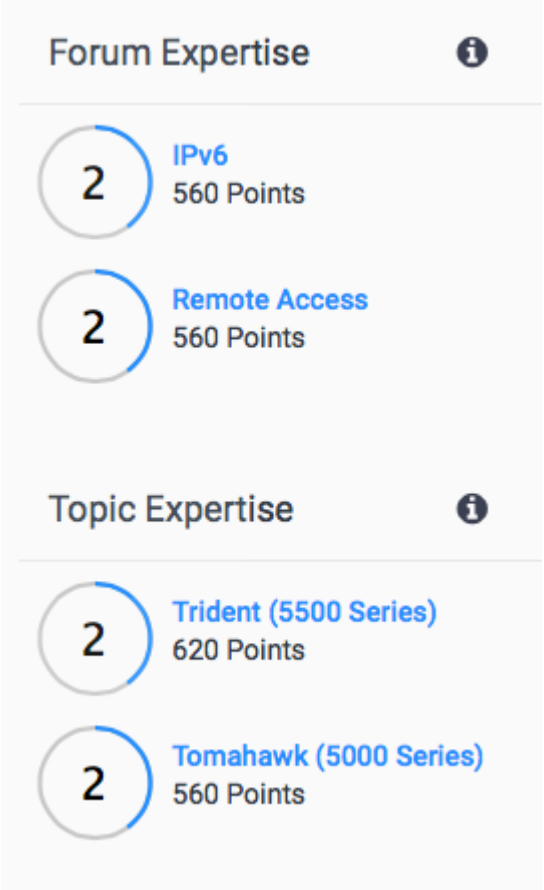
Forum and topic expertise widgets



Community content pages

The user's gamification level and badges are displayed on the content pages, so that other community users can view the reputation of the content contributor.

Pointing to a user name on content pages such as questions, blogs, and videos displays a pop-up window with gamification information including badges earned, point total, and level name. This information is available for the author or a user who has replied or commented on that content.

The community administrator can change the displayed level to show either the global level or the forum level. This display can be controlled by the sn_communities.content.show_gamification_level property.

Depending upon the information available, there can be three different versions for the pop-up:

- Profile photo and name
- Profile photo and name with global points
- Profile photo and name with global points and badges

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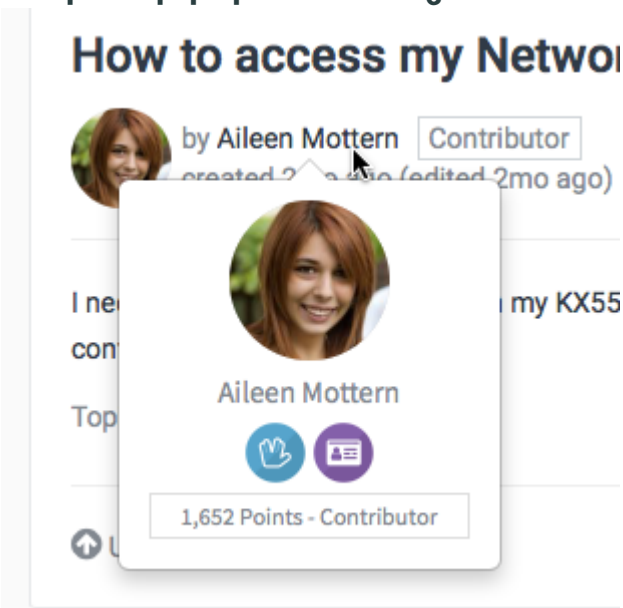
User profile pop-up window with gamification information



Gamification notifications

Community users receive notifications about badge assignments and levels achieved through the activity feed.

This includes global, forum, and topic levels achieved. A user, or any of their followers, are notified through an activity feed update in the following scenarios:

- When a user advances a level (global, forum, or topic)
- When a user earns a badge

How to earn points

In order to be transparent to your users about gamification rules, you can share the points received for community activities.

Navigate to **Community** > **How to Earn Points** for a description of the activities that users can perform to earn points. This page has links to the user's profile page. If gamification rules are modified, then this page shows the updated information.

Administer gamification

Users with the gamification administrator role can create the rules and other entities that award points to users based on their participation within the community.

Configure gamification properties

Configure gamification properties to meet your company's needs.

Before you begin

Role required: sn_gamification.admin

Procedure

1. Navigate to **All** > **Community** > **Gamification Administration** > **Gamification Properties**.
2. Enter the number of days to store the gamification activity history.
   The default is 180 days. A scheduled job purges the points history that is older than 180 days. This purge does not delete the aggregated data.

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3. Enter the maximum number of levels that can be defined.
4. Click **Save**.

Additional properties can be configured for the gamification feature. For more information, see Gamification properties.

Create a gamification rule

Create gamification rules so that users can earn points for community activities.

Before you begin

Role required: sn_gamification.admin

Procedure

1. Navigate to **All** > **Community** > **Gamification Administration** > **Rules**.
2. Click **New**.
3. Fill in the fields on the Gamification Rule form as necessary.

Gamification rule configuration form

Field	Description
Rule Name	A descriptive name for the gamification rule.
Gamification Module	The application to which this rule applies. Click the lookup icon to select a module from the Gamification Modules list. The default is **Community**.
Activity Type	The user activity for which this rule applies. Click the lookup icon to select one of the available types from the Activity Types list.
Profile Receiving Points	The type of user profile that earns points for performing the activity defined in this rule. Click the lookup icon to select a profile corresponding to the activity.
Exclude Self-Award	Check box to ensure that the activity performer is not the same as the profile receiving points.
Active	Enable this check box to activate the rule. The default is set to active.
Gamification Track	The gamification track to which this rule belongs. Click the lookup icon to select one of the available tracks from the Gamification Tracks list. By default, two tracks are available: ○ Community Expertise ○ Community Participation
Points	The number of points earned by performing the activity defined in this rule.
Points for Areas of Expertise	The points accrued can be used towards a forum or topic level expertise. Click the lock icon to expand the field and configure if the points should accrue towards a forum and/or topic.

4. Click **Submit**.
The newly created rule appears on the Gamification Rules list. This rule appears on the How to Earn Points page.

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Create a gamification track

Create tracks to provide a logical way to separate points assigned in the communities into different areas.

Before you begin
Role required: sn_gamification.admin

Procedure

1. Navigate to **All** > **Community** > **Gamification Administration** > **Tracks**.
2. Click **New**.
3. Fill in the fields on the Gamification Track form as necessary.

Gamification track configuration form

Field	Description
Track Name	A descriptive name for the gamification track.
Gamification Module	The module to which this track applies. Click the lookup icon to select a module from the Gamification Modules list. By default the module is set to Community.
Active	Enable this check box to activate the track. By default this field is set to active.
Application	The application to which this track applies. By default the module is set to Community.
Track Display Order	The order in which the track appears.

4. Click **Submit**.
   The newly created track appears on the Gamification Tracks list.

Note:
While tracks can be configured, it is not currently displayed anywhere on the Community portal.

Create a gamification badge

Create gamification badges that users can earn for achievements within the community.

Before you begin
Role required: sn_gamification.admin

About this task
The gamification feature includes several predefined badges.

Procedure

1. Navigate to **All** > **Community** > **Gamification Administration** > **Badges**.
2. Click **New**.
3. Fill in the fields on the Gamification Badge form as necessary.

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Gamification badge configuration form

Field	Description
Gamification Module	The application to which the badge applies. The default module is **Community**.
Badge Name	The name of the badge as it appears on the Community portal.
Badge Display Order	The order of the badge indicates the rank. If a community user has multiple badges assigned to them, this field determines the sequence in which the badges are displayed.
Active	Enable this check box to activate the badge.
Description	A brief description of the badge as it appears on the Community portal.
Badge Icon	The image file for the badge. Click to add the icon, choose the desired image file, and then click **OK**. **Note:** The recommended image size for ideal performance is 50 pixels by 50 pixels and less than 500KB.

4. Click **Submit**.
   The newly created badge appears on the Gamification Badges list.

Manage gamification levels

Manage the predefined levels for global, forum, and topic expertise.

Before you begin
Role required: sn_gamification.admin

About this task
Gamification includes predefined global, forum, and topic levels.

Procedure
1. Navigate to **All** > **Gamification** > **Configuration** > **Levels**.
2. View the existing definitions for global, forum, and topic levels.
3. Change the **Level Name** if required.
4. Click **Submit**.
   Adding new level definitions is not recommended unless there is a strong use case. If you need to add or modify level ranges in existing level definitions, see Manage gamification level ranges.

Manage gamification level ranges

Manage level ranges for a gamification level definition, to recognize the expertise level of your community users.

Before you begin
Role required: sn_gamification.admin

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About this task

Gamification includes predefined global, forum, and topic levels. Each level definition can have several level ranges and the system is predefined with 10 ranges for global level and five ranges each for the forum and topic levels. Each range should not overlap and must have a unique start value.

Procedure

1. Navigate to **All** > **Gamification** > **Levels**.
2. Select the desired level (global, forum, or topic).
3. Modify the **Level Range Name**.
4. Modify the **Points Start** field.
   Each range should not overlap and must have a unique start value.
5. Click **Submit**.
   Level ranges are updated on the Community portal.

Moderate gamification

Monitor points earned by users and award points and badges to users based on their participation within the community.

Award or remove points for a community user

Award points to a user to recognize their contributions to the community. Remove points for a user if you observe that they are cheating the gamification system.

Before you begin

Role required: sn_gamification.moderator

Procedure

1. Navigate to the Community homepage.
2. Go to **Community** > **Leaderboard**.
3. Click the name of the user on the leaderboard to open the user profile.
4. Click the profile overflow icon (**...**) and select **Assign Points**.
5. In the Assign Points pop-up window, enter the number of **Points**, a **Reason** for awarding the points, and select a **Track**.
   a. To assign points, the points entered should be a positive value such as 100.
   b. To remove points, the points entered should be a negative value such as 100.
   The maximum number of points that can be awarded or removed at one time is 1000.
6. Click **Assign Points**.
   An entry for the point assignment activity shows at the top of the Points list and the user's point total is updated.

Award a badge to a user

Award gamification badges to community users to recognize their community activities.

Before you begin

Role required: sn_gamification.moderator, sn_gamification.admin

About this task

A badge can be awarded to a user only once. If a badge is removed from a user, it can then be awarded to that user again.

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Procedure

1. Navigate to **All** > **Community** > **Gamification Data** > **Profile Badges**.
2. Click **New**.
3. Select a **Badge** from the Gamification Badges list.
4. In the **Live Profile** field, add the name of the user.
5. Click **Submit**.
   The badge is assigned to the user and it appears on the community portal.

Remove a badge from a user

Remove a gamification badge from a community user if it is no longer relevant for that user.

Before you begin

Role required: sn_gamification.moderator, sn_gamification.admin

Procedure

1. Navigate to **All** > **Community** > **Gamification Data** > **Profile Badges**.
2. Select the **Active** field for the desired user and badge.
3. Change the **Active** field to false.
4. Click **Update**.
   The badge is removed for that user and is no longer visible on the community portal.

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